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BBC
RADIO **1**

BBC & CREATIVE INDUSTRIES GROWTH

EXECUTIVE SUMMARY

The BBC is one of the UK's most significant economic and cultural institutions.

As the backbone of the creative industries and the largest single investor in original UK content, it plays a vital role in driving growth, supporting investment, developing skills and strengthening the UK's global competitiveness.

In 2024/25, the BBC contributed £6.7 billion to the UK economy and supported around 79,000 jobs, with two-thirds of this impact flowing to the creative industries. However, as this report shows, its impact extends well beyond these direct effects, helping to create the conditions for long-term growth by nurturing innovation, talent development, regional investment and the UK's global reputation for creative excellence.

A strategic national anchor for the creative industries

The BBC plays a unique role in supporting the growth and international competitiveness of the UK's creative economy – worth £146 billion to the UK economy, one of the government's eight priority industrial strategy sectors and a sector where the UK has a trade surplus. The BBC is the single largest investor in original UK content and provides a stable backbone of investment that reduces market volatility and enables businesses to invest with confidence.

A survey of BBC suppliers found that six out of ten respondents reported that working with the BBC had enabled them to invest in at least one of: R&D, facilities, technology, equipment, recruitment of staff, or training and skills development.

The BBC's role in the growth of the UK production sector is particularly critical. The BBC invests 50% more than Netflix and 150% more than Amazon Prime in original UK content. The BBC also invests across a broader range of genres and indies across the UK. This sustains a UK production ecosystem in a way that is unmatched.

But the BBC has also played a role in attracting inward investment to the UK. The BBC's investment in the production supply chain has enabled the UK to outperform other countries and gain a proportionally larger share of the global growth in content investment that occurred between 2015 and 2025. BBC Studios, the BBC's commercial arm, has been a magnet for this spending, with a significant share of its production business revenue coming from inward investment last year.



Amanda Searle



BBC Studios, Simon Ridgway

Producers also report experiencing a 'halo effect' from working with the BBC. This 'halo' effect helped them to reach new markets and increased business confidence, both of which have a tangible impact on business performance. Analysis of the responses to the BBC's survey of suppliers found that BBC commissions and the associated 'halo' effect led to an 8.9% increase in international exports and a 9.3% increase in investment across the independent production sector as a whole.

BBC Studios directly supports the production sector, promoting and exporting UK IP to international markets. Its distribution business was responsible for 39% of all UK TV content exported internationally, and 58% of exports to the US. Meanwhile, Britbox provides a platform for UK content to reach international audiences as well as generating revenue which can be reinvested into the UK ecosystem.

But the evidence shows that stable public funding is a critical component of this virtuous circle. An analysis of the relationship between public funding for Public Service Broadcasters (PSB) and growth across Europe shows that halving funding instability can increase growth of the broadcasting and production sector by 2.0-2.3%. In the UK that means that if the BBC had received stable public funding since 2012, the economy could have benefited by £13 billion in 2023, or £62 billion cumulatively over the period.

Developing the creative workforce

The BBC is one of the UK's most important creative industries skills and talent institutions, helping to develop the workforce that underpins the creative industries. Through a combination of formal skills investment, commissioning and partnerships, it creates entry routes into the industry, supports career progression and sustains a highly skilled workforce across the UK.

The BBC invests more than £47 million annually in skills, making it the largest single investor in industry skills. The BBC's investment in apprenticeships over the current Charter period has delivered significant economic returns – worth an estimated £393 million in increased lifetime earnings.

The BBC also intervenes at an industry wide level helping to open up employment and training opportunities across the sector. It's flexi-job scheme, which included levy transfers from Google, supported 50 apprentices and over 125 job placements were funded with indies across a range of TV programmes in 2025/26. The BBC also supported over 45 industry schemes with over 2,000 people benefitting from them across a range of interactions such as mentoring, networking and formal training placements.

The BBC's direct investment in skills is only one part of its jobs story. Its commissioning and content production activity provides large-scale, real-world experience for creative workers across a range of disciplines and regions.

Polling of creative sector workers by Public First found that, of those who had previous experience working with the BBC as a freelancer, contractor or collaborator, 49% said it has raised their profile, 42% concluded that it has provided valuable experience or skills development and 41% said that working with the BBC led to new job opportunities.

Analysis of IMDB data found evidence that the BBC acts as a career booster for on-screen and off-screen talent such as actors, directors, writers, producers and editors. The analysis finds that, compared with the period prior to working with the BBC, the number of TV and film production credits received increases and sets individuals on a higher credits per year trajectory. It also shows that, on average, people who have worked with the BBC tend to have stronger and more long-lived careers compared with those who have not. And, that the BBC intervenes relatively early in careers: half of those working on lower-cost productions received a BBC credit after one year of their career, while half of those working on higher-cost productions, received their first BBC credit after three years.

Promoting innovation and diversifying supply chains

The BBC plays a unique role as a market-shaper within the UK creative economy, driving innovation, supporting business growth and sustaining a diverse supply chain. As a PSB with a long-term focus, it can invest in creative and technological innovation in a way that the market may not otherwise provide.

The BBC takes creative risks in its commissioning and production, supporting ideas that don't have immediate obvious commercial appeal. Titles like *Peaky Blinders* and *Gavin and Stacey* were seen as "something only the BBC would commission" at the time but are now clear national and international success stories. These sit alongside titles like *Lost Boys and Fairies* and *Dinosaur* which champion UK writing talent and tell stories that resonate with

audiences across the UK. These stories wouldn't get told or reach a wide audience without the BBC. The BBC also innovates with formats, with titles like *The Traitors* and *The Great British Bake Off* inspiring the next generation of entertainment shows, while BBC Studio's *Strictly Come Dancing* is now licensed in over 50 territories and the US final of *Dancing with the Stars* had the largest share of linear viewing since the *Friends* finale in 2004.

The BBC also supports Small and Medium Sized Enterprises (SMEs) and supply chain diversification. In 2024/25 the BBC worked with over 7,000 UK suppliers (excluding independent producers), 68% of which were outside of London and almost half were SMEs. Of the SMEs surveyed in the BBC's supplier survey 84% said that BBC work had directly supported business growth and 71% reported that working with the BBC had enabled them either to recruit additional staff or retain existing employees.

The BBC's investment in Research and Development (R&D), new technologies and novel methods of content making, mean that it is a test bed for new approaches that are subsequently adopted across the wider industry. The long-run economic impact of the BBC's R&D investment over nine years is between £845 million and £1.4 billion.

Investing across the UK to support regional growth

The BBC is a unique long-term investor in places, helping to spread economic opportunity and build creative capacity across the UK. Through its commissioning, infrastructure and long-term presence in nations and regions, it supports the development of local creative ecosystems that can attract talent, investment and business growth.

The BBC's economic footprint outside of London reached £3 billion in 2024/25 and an increasing share of jobs and commissioning spend are now spread across the UK. The BBC now significantly





BBC/Naked (A Freemantle Label)/Ray Burmiston

over-indexes the wider sector in terms of the share of its economic activity which is outside of London, despite market forces moving towards ever increasing concentration in the South East of England.

An analysis of the impact of BBC moves outside of London between 2004 and 2024 found that the share of high value jobs within a creative cluster was 2.2% higher than if the BBC had not entered. This period included the BBC's moves to Pacific Quay in 2007 (Glasgow), MediaCityUK in 2011 (Greater Manchester) and BBC Roath Lock Studios in 2012 (Cardiff).

Over the current Charter the BBC has shifted more than £700 million of its spend outside of London as part of its Across the UK strategy. In 2025/26 59% of BBC network TV and 49.8% of radio spend

was in the nations and regions beyond the M25, significantly higher than any other commissioner. The BBC has also made investments in emerging creative clusters in the North East and the West Midlands. The forecast economic impact of the BBC's commitments to the West Midlands is £282 million in additional economic value by 2031.

As market pressures increase and private investment becomes more concentrated, the BBC's role as a long-term regional investor and convenor is likely to become increasingly important. This is reflected in the analysis of the BBC supplier survey which shows that suppliers based outside of London have a greater investment effect from working with the BBC than those based in London. Sustaining these benefits will require continued long-term investment and commitment across the

UK's nations and regions.

A foundational economic institution

As media markets become increasingly global and consumption becomes more fragmented, the UK will need, more than ever, institutions that drive our international competitive advantage and secure investment for the long term. The BBC wants to continue to play its role as part of the UK's national creative infrastructure by reimagining public service media through new models of production, distribution and audience engagement.

But realising that potential requires boldness and a new Charter that addresses the barriers the BBC faces in supporting growth. The BBC shares the Government's ambition for the BBC to go even further in driving growth in the future. This requires

several key policy reforms, as outlined in the BBC Green Paper response. Most notably, reforming the public funding model to deliver stable, sufficient and sustainable funding is necessary to enable additional growth across the UK creative industries. The evidence of this report is clear that this should be a top priority for the sector. The BBC must also be equipped with a regulatory framework that allows it to be agile and respond to fast changing audience and industry needs. With a modernised and proportionate regulatory framework the BBC can do more to deliver greater value for licence fee payers through its commercial business as well as driving greater IP investment and international returns for the UK production sector.

THE BBC'S ECONOMIC FOOTPRINT IN 2024/25

£6.7BN

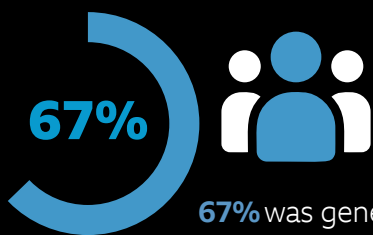
The BBC **contributed £6.7bn** to the UK economy in 24/25

£1 = £3.49

For every **£1** the BBC directly adds to the economy, **£3.49 is generated** in the UK economy as a whole, due to the economic activity it stimulates

79K

The BBC's economic activity supported **over 79,000 jobs**



67% was generated in the UK creative industries

STRATEGIC NATIONAL ANCHOR FOR UK CREATIVE INDUSTRIES GROWTH

#1

BBC is the single **largest investor in UK content**



Over 6 in 10 BBC suppliers surveyed say BBC work enables investment

>7,000

The BBC works with **over 7,000 UK suppliers** (excluding indies)

39%

BBC Studios responsible for **39% of UK TV exports**, and **58% of exports to the US**

DEVELOPING CREATIVE WORKFORCE SKILLS

£47M

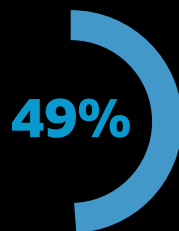
BBC invests more than **£47m annually** in skills and talent development

>2,000

Over **2,000 people** supported in the wider industry across **45 BBC schemes**

£393M

BBC apprenticeships generated **£393m in lifetime earning uplift**



49% of creative workers polled said working with the BBC raised their profile

PROMOTING INNOVATION AND DIVERSIFYING SUPPLY

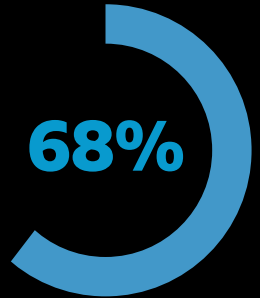
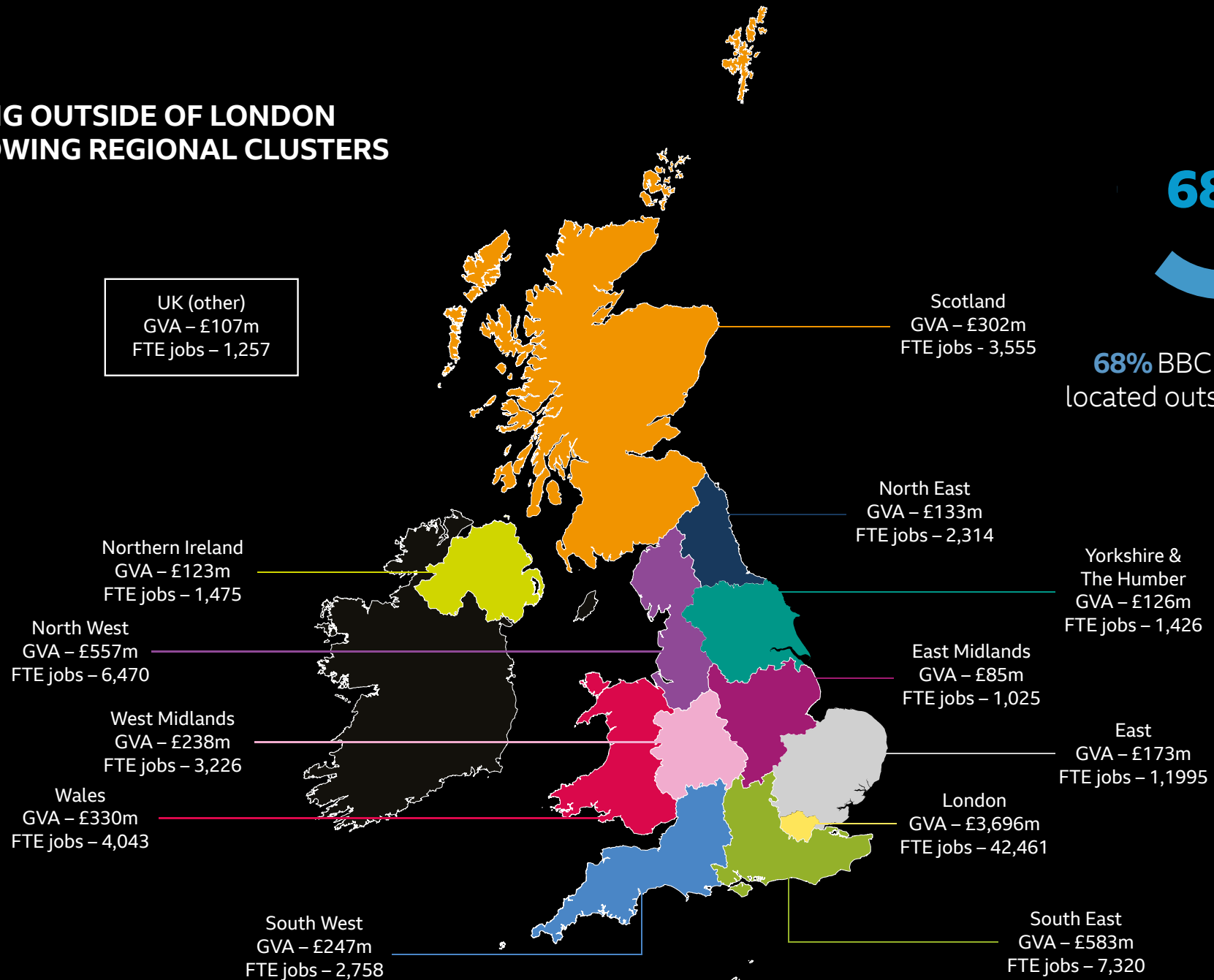


Almost half of BBC suppliers are **SMEs**

84%

84% of SME suppliers surveyed said that BBC work directly supported business growth

INVESTING OUTSIDE OF LONDON AND GROWING REGIONAL CLUSTERS



68% BBC suppliers located outside London

1 INTRODUCTION

The BBC is key to the UK's growth story. It is the cornerstone of the UK's creative industries – investing in more original British content than anyone else, spreading its operations across the UK's nations and regions, investing in skills and supporting a thriving production sector.

While not the focus of this report, as a major cultural institution and a public service used by over 90% of adults per month, the BBC also strengthens human capital, the UK's international diplomacy and reputation, trust and social cohesion – key drivers of productivity and economic growth. Evidence of these impacts include:

- Using the BBC regularly, significantly increases the likelihood that international investors intend to invest in the UK (by up to 13%).
- BBC Bitesize improves the GCSE and National 5 level grade outcomes for young people who use it – resulting in higher earnings that have an economic benefit of £80 million each year.

This distinctive contribution is rooted in the BBC's Reithian mission and public purposes, alongside its unique scale and scope, which together enable it to influence market outcomes in ways that extend beyond conventional economic activity.



1.1 Scope and analytical approach

This report examines the BBC's unique market-shaping role within the UK's creative industries, focusing on how its scale, scope and public mission underpin its economic contribution and its influence on the wider creative economy.

This report was prepared in-house by economists in the BBC Policy and Public Affairs team. The new analysis presented in this report is supported by:

- Theories of change analysis by EY and the BBC, which examines and evidences the BBC's role in driving creative industries growth.
- Supplementary data and econometric analysis that provides new evidence to demonstrate the BBC's impact that contribute to creative industries growth and talent impact.
- Survey analysis based on a survey by CBI Economics of BBC suppliers and independent production companies that had worked with the BBC in 25/26.
- Further BBC analysis on UK content investment (commissioning spend) and hours sourced from Ampere Analysis.
- Complementary desk research of information and reports published by the BBC, industry and academia.

The BBC is solely responsible for all analyses presented in this report.

1.2 Structure of this report

This report is structured as follows:

- Section 2 explains how the BBC is a strategic national anchor for the UK's creative industries.
- Section 3 sets out the ways in which the BBC invests and develops the creative industries workforce.
- Section 4 describes how the BBC promotes innovation in and across the sector.
- Section 5 examines the BBC's importance in driving regional cluster growth outside of London.
- Section 6 considers what is required under the next BBC Charter to ensure that the BBC can continue to support UK creative industries growth.
- Annexes provide more technical detail on the new analyses presented in this report. A1 summarises the 24/25 BBC economic footprint (GVA and jobs impact) analyses. A2 to A5 set out technical detail on the new original analyses presented within Sections 2 to 5.



2 STRATEGIC CREATIVE ANCHOR

Over the BBC's more than 100-year history it has seen dramatic changes in the media sector, with the introduction of television in 1936, the growth of the multichannel era in the 90s, to today's world of streaming, social media and video sharing platforms.

That change is continuing and at an increasingly rapid pace. Today audiences have access to seemingly unending choice with thousands of hours of content available across a multitude of platforms. The way audiences access content is also changing with 23.5% of total viewing time now spent with video sharing platforms, with even higher shares seen for younger viewers. Global investment and scale also now typifies the UK media ecology with increasing consolidation of major production studios and media brands. The continued development of AI is also likely to result in significant change to the sector in the years to come.

In the context of this change, the need for a national champion at scale, that can secure investment and growth in the interest of UK audiences and citizens has never been more vital. The BBC sits alongside a thriving UK media ecology and is the foundation on which that national strength is built.

2.1 BBC creates a stable backbone of investment

The BBC contributed £6.7 billion in GVA to the UK economy in 2024/25, of which 67% was within the creative industries and 58% within the subsector of audiovisual production and broadcasting (equivalent to 17.3% of this sub-sector).¹ The scale of the BBC's economic footprint means that it acts as a national anchor which catalyses wider investment and growth within the sector.

The enduring nature of the BBC's investment in the sector has provided long-term stability and scale, offering a predictable and consistent pipeline of spend with UK-based creative firms, reducing peaks and troughs that might otherwise cause inefficient firm destruction (i.e. closure of firms) and discourage investment and job creation over the long term. New evidence from a survey of BBC suppliers in 2025/26 demonstrates that the BBC increases market confidence and willingness to invest; explored in detail on page 12.

This stability is underpinned by the BBC's unique public funding model which has provided certainty to the BBC and the wider sector. Further new evidence on the relationship between the stability of Public Service Broadcaster (PSB) public funding and sector growth is provided on page 13. The BBC operates within a unique Public Service Broadcasting ecosystem, worth an estimated £8 billion in GVA per year, supporting 120,000 jobs.² Analysis produced by Public First shows that continued commitment and investment in this ecosystem would enable the media and entertainment sector to deliver 28% of the government's creative industries sector investment target by 2035.



BBC/Firebird Pictures/Ben Blackall

¹ The "audiovisual production and broadcasting" subsector refers to the sector with Standard Industrial Classification Codes of J59 and J60. These cover the following industries: 'Motion Picture, Video And TV Programme Production', 'Sound Recording And Music Publishing Activities' and 'Programming And Broadcasting Activities'.

² Public First, September 2025, The Creative Engine: How Media & Entertainment Powers the UK's Creative Economy.

<https://assets.nationbuilder.com/stonehaven/pages/2682/attachments/original/1770827849/The-Creative-Engine-v06.pdf?1770827849>

Evidence: BBC provides confidence for creative firms to invest



Firms that work with the BBC report an impact on their investment. A survey of BBC suppliers³ and independent producers by CBI Economics, commissioned by the BBC and conducted from 21 April to 8 May 2026, found that working with the BBC drives supplier investment, and consistent procurement and commissioning by the BBC is critical to maintaining business confidence:

- Over 6 in 10 respondents reported that the BBC had enabled them to invest in at least one of: R&D, facilities, technology, equipment, recruitment of staff, or training and skills development.

- A majority of respondents reported that BBC procurement or commissioning consistency or BBC relationships affect long-term investment confidence to at least some extent, rising from 64% for respondents who were independent producers (indies) to 70% for other suppliers. Of those who reported a positive impact on their investment confidence, 40% of indies and 30% of non-indies said it had a significant impact on their investment confidence.

Without the BBC, investment would be lower:

- Among survey respondents who said the BBC had enabled investment in their business, almost one in four (24%) reported that this investment would not have happened without the BBC.
- Almost two-thirds (63%) of respondents said that, without a consistent pipeline of BBC work, their level of investment would be lower – whether slightly less (<20%), less (20–50%), or significantly less (>50%).
- More than a third (37%) reported that investment would be significantly lower (more than 50% lower) without the BBC, highlighting the central role that BBC plays in supporting business investment and growth.

This indicates that investment would fall without a consistent BBC pipeline, as respondents report both lower expected investment in its absence and stronger willingness to invest when spending is predictable.

Furthermore, working with the BBC creates incentives for supplier firms to invest in people and skills, creating and sustaining jobs:

- More than seven in ten survey respondents (71%) said that work with the BBC had supported the creation or retention of roles within their business. This was even higher among indies, where 88% reported a positive employment impact.



- Among suppliers reporting that BBC work supported jobs, most said that the number of roles would have been reduced – or would not have existed at all – without BBC commissions:

- › For indies, over half (51%) said the roles would not have existed without the BBC, while a further 36% said fewer roles would have existed. In total, 88% reported that BBC work had a direct impact on employment levels.
- › The impact was lower, but still substantial, among non-indies. Nearly one in five (18%) said the roles would not have existed, while 42% said fewer roles would have existed, meaning 59% reported a direct employment impact.
- › BBC work supports a meaningful number of jobs across the supplier base. Overall, 45% of survey respondents said BBC activity supported between one and four roles, while 16% reported that it supported ten or more roles. Among indies, 50% said BBC work supported between one and four roles, and almost a quarter (24%) said it supported ten or more jobs.

The significance of these findings should be considered in the context of the supplier profile. Nearly two-thirds of survey respondents (62%) employ nine or fewer people. As a result, the roles supported by the BBC often represent a substantial share of a supplier's workforce. For many smaller suppliers, the loss of even one to four roles could significantly affect operational capacity, the retention of specialist skills, and long-term sustainability.

Section 5.3 further explores the survey results in the context of the BBC's impact on SME growth and employment.

³ A survey of BBC suppliers and independent producers by CBI Economics, commissioned by the BBC was conducted from 21 April to 8 May 2026. The survey was sent out by the BBC to 3430 UK suppliers that the BBC had spent over £5000 with in 2025/26. There was a response rate of 15%, with 530 responses that were usable after data cleaning. 41% of the respondents were independent producers, and 57% were outside of London. Sector mix is led by creative and knowledge industries including Arts, Entertainment & Recreation (22%), Information & Communication (16%) and Professional, Scientific & Technical (14%) together accounting for over half of respondents. 94% of respondents were SME's who employ less than 250 staff, however 61% employed less than nine.

Evidence: Public funding consistency and creative industries growth

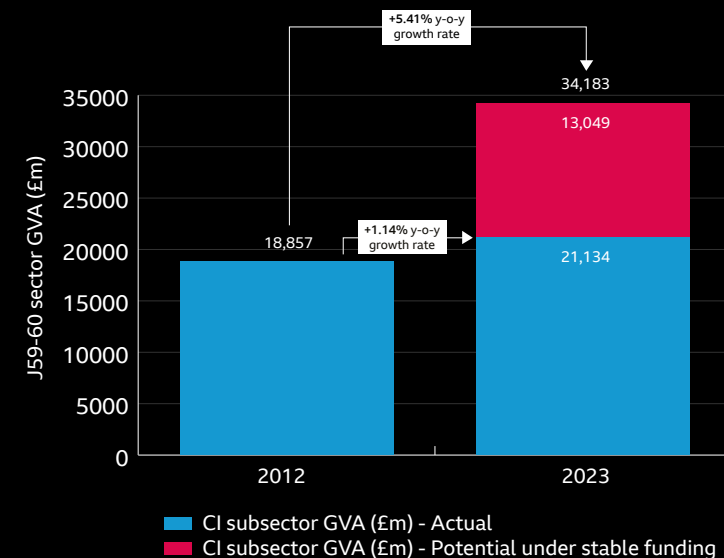
BBC funding and investment consistency matters for growth. New BBC analysis, supported by EY,⁴ shows that the audiovisual sector could have been around £13 billion larger in 2023 if the BBC's public funding had been kept at a steady level in real terms between 2012 and 2023. This equates to a cumulative loss of £62 billion GVA to the UK economy over that period.

This analysis investigates how consistency in public funding across Europe's main PSBs affects national GVA growth in the creative industries, specifically in the audiovisual production and broadcasting subsector. The analysis uses EBU data on 25 countries over a 12-year period, 2012-2023. Using an econometric regression it examines the relationship between creative industries growth over the period⁵ and the consistency of funding for the main PSB, for both public income and commercial income sources.⁶ Income sources for the main PSBs varies across EBU member countries. Most of the main PSBs, including the BBC, have a mixed model with public income topped up with commercial funding from either advertising or other commercial activities and this is reflected in the data. The analysis controls for a number of exogenous factors, including the size of the PSB in the overall market, GDP per capita growth (whether growth is attributable to the sector or the wider economy) and consumption of PSB TV content.

The results of the econometric analysis indicate that consistency in PSB public funding over a 12-year period leads to an increase in annual GVA growth in the sector. On the other hand, consistency in commercial funding does not have a statistically significant effect on growth. The results show, halving volatility in real terms public funding over a 12-year period leads to an increase in annual GVA growth in the audiovisual production and broadcasting subsector of 2.0-2.3 percentage points.⁷

To support clearer interpretation of the results, a backward-looking scenario analysis estimates how different levels of public funding could have affected GVA growth in the UK's audiovisual production and broadcasting subsector. This assumed that BBC public funding levels decreased by 1% y-o-y in real terms from 2012 to 2023, rather than the 2.95% it actually experienced over the period. The scenario analysis indicates that, had the BBC experienced a more consistent public funding profile relative to the baseline, the sector would have grown at an average annual rate of 5.41%. This is a substantial uplift compared to the actual average annual growth rate of 1.14% recorded over the period. By 2023, this results in a £12.5 billion gap in the total GVA of the sector between the scenario compared to the baseline. The cumulative impact of this lower growth rate is £62 billion.

FIGURE 1: AUDIOVISUAL PRODUCTION AND BROADCASTING SUBSECTOR GVA, ACTUAL VERSUS STABLE PUBLIC FUNDING



Source: BBC analysis, prepared with assistance from EY. Annex A2 outlines the data, econometric analysis and findings in more detail.

⁴ BBC analysis, prepared with assistance from EY. BBC solely responsible for presented analysis.

⁵ Two different measures of sector (economic) growth were tested: (1) 2012-2023 compounded annual growth rate (CAGR) of real GVA growth in the subsector, and (2) 2012-2023 average annual growth rate (AAGR) of real GVA growth in the subsector. Both econometric specifications present consistent findings that public funding consistency drives economic growth.

⁶ Consistency of funding is defined as the "inverse coefficient of variation on public income in real terms between 2012 and 2023". The coefficient of variation is a measurement to show how big the spread is compared with the average (i.e. the standard deviation over the mean).

⁷ The econometric analysis applies to all countries in the sample. Robustness tests on the econometric analysis finds that the model is a good fit for the UK, with residuals and fitted values being extremely close to zero, with the regression showing no multicollinearity or endogeneity and robust to alternative specifications.

BBC enhances UK competitiveness to attract inward investment

The analysis presented on page 13 suggests there may have been missed economic potential during the period 2012 to 2023, due to a real terms decline in public funding for the BBC that constrained BBC commissioning and expenditure within the wider market.

It is also important to recognise that this coincided with a period of rapid expansion in the global media sector over the 2010s. This was driven by technological change that enabled entirely new consumer propositions and business models. The widespread adoption of smartphones, highspeed broadband, and cloud computing dramatically lowered barriers to distribution and consumption, facilitating the rise of digital platforms – most notably video and music streaming. For example, global recorded music revenues returned to sustained growth after years of decline, driven primarily by streaming, which rose from negligible levels in 2010 to account for over 60% of industry revenues by the end of the decade.⁸

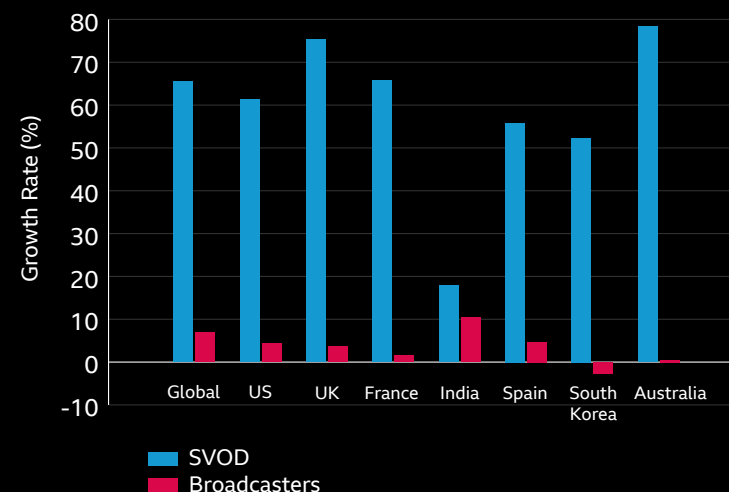
Similarly, subscription video-on-demand (SVOD) services scaled rapidly, with global subscriptions growing from tens of millions in the early 2010s to over 1.7 billion by 2021, led by platforms such as Netflix, Amazon Prime Video and later Disney+.⁹ These models shifted media consumption from ownership to access, enabling personalised, on-demand content at lower marginal cost. As a result, total global entertainment and media revenues grew steadily, reaching around \$2.9 tn by 2024, while the mix of revenues shifted decisively toward digital channels, which became the primary engine of sector growth.¹⁰

The UK was able to capitalise on the growth in global media investment due to its comparative advantages, including the reach of the English language, enhanced tax credit incentives and the international competitiveness of the UK media sector. Importantly, the long-term strength of the UK media supply chain can be attributed to the BBC and UK's PSB ecosystem. The Compound Annual Growth Rate (CAGR) of SVOD content spend in the UK between 2015 and 2021 was 75% compared to a global CAGR of 66%.¹¹



BBC Element Pictures

FIGURE 2: CAGR OF CONTENT SPEND BY PLAYER TYPE AND COUNTRY, 2015-2021



Source: Ampere Analysis, Oliver & Ohlbaum estimates and analysis

While international investment has stimulated demand-side growth there has been weaker domestic demand. PSB commissioning budgets have come under pressure, reflecting below-inflation increases in the BBC Licence Fee alongside limited growth in advertising revenues for commercially funded PSBs.

While the sector has been able to grow during this period, these headline growth figures overlook the unique role played by the BBC (and other UK PSBs) in increasing supply side capacity over the longer term.

The BBC's commissioning approach actively broadens and diversifies the market – supporting emerging talent, nurturing new independent producers, and commissioning out of London (explored in later sections of this report). In doing so, it sustains demand in parts of the supply chain that are often underserved by international streamers and commercial commissioners.

This diversification also increases supply-side capacity and resilience which also contribute to greater economic output over the longer term.

⁸ IFPI issues Global Music Report 2021, published 23 March 2021. <https://www.ifpi.org/ifpi-issues-annual-global-music-report-2021/>

⁹ Statista, Number of subscription over-the-top video service users worldwide from 2020 to 2025 (in billions), published November 2025

¹⁰ PwC, Global Entertainment & Media Outlook 2025–2029, published 24 July 2025. <https://www.pwc.com/gx/en/news-room/press-releases/2025/pwc-global-entertainment-media-outlook.html>

¹¹ Ampere Analysis, Oliver & Ohlbaum estimates and analysis

2.2 BBC drives growth in the UK production sector

The BBC is the single biggest investor in UK content. In 2025/26 the BBC invested over £2.55 billion in content across a broader range of genres and content types than any other media organisation, across video, audio and online.¹²

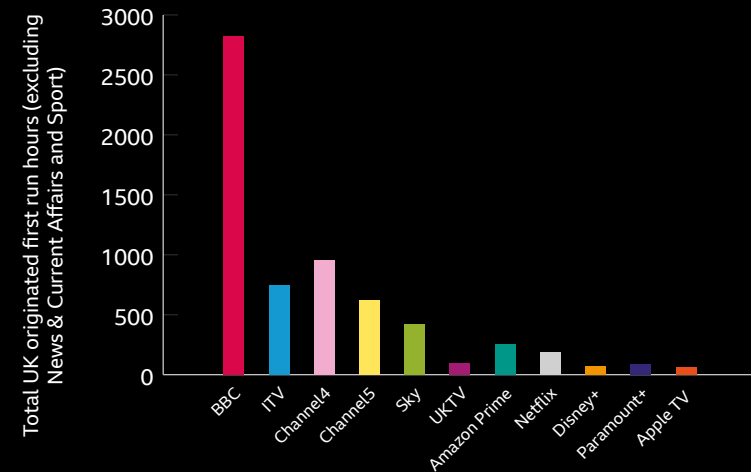
Figures 3 and 4 shows how the variety of the BBC investment provides greater content hours across a range of genres versus other market participants. Even in genres where SVOD services have proportionately more of their content hours, the BBC is still a much larger provider. For example, in factual programming (which makes up around 40% of SVOD content hours in the UK in 2025) the BBC produces more than all the SVODs combined, and over double the amount of the next largest commissioner (Channel 5).

The BBC is also the largest single investor in original UK content with 99% of its original content made in the UK. BBC analysis of Ampere Analysis data indicates that the BBC is the largest commissioner of first-run original UK TV content in 2025, in terms of both hours and spend as demonstrated in Figures 3 and 5. This comparison uses video on demand (VOD) catalogue to allow comparability across PSB and streamer VOD services, excluding News and Current Affairs content and Sports content.¹³ In 2025 the BBC's investment in UK TV originals was 50% higher than Netflix and 150% higher than Amazon Prime Video.

The breadth of BBC commissioning also ensures that audiences are able to access content that they highly value as well as supporting the production eco-system for some underfunded genres. This includes some aspects of UK comedy production as well as children's and education content and areas of factual commissioning, such as religion and ethics content. Whilst the BBC commits to provide some of this content under the current Charter and Framework Agreement, it often goes beyond its requirements in its provision for audiences. For example, in 2025/26, the BBC broadcast 289 hours of first-run hours of arts and music on TV and BBC iPlayer which exceeds the 275 hour-commitment.

It should be noted that Ampere Analysis data underestimates the BBC's original UK content spend as it does not capture Sports rights or all News and Current Affairs content across all platforms, including for the BBC. The BBC's total content spend across network and non-network TV services was £1.83 billion in 2025/26 (including non-originals and non-UK content).

FIGURE 3: 2025 FIRST-RUN UK ORIGINAL VOD CATALOGUE HOURS BY PLATFORM



Source: BBC analysis, Ampere Analysis (downloaded June 2026) VOD catalogue hours Note: Excludes original hours of News & Current Affairs and Sport content, non-UK original content and all UK/non-UK acquisitions.

FIGURE 4: 2025 UK ORIGINAL CONTENT GENRE SPEND BY PLATFORM, £M

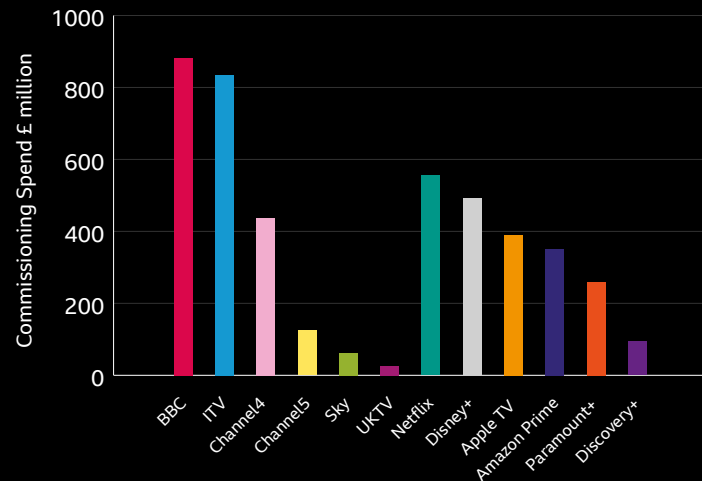


Source: BBC analysis, Ampere Analysis reflecting catalogue value (analysis provided June 2026). Note: Excludes spend on News & Current Affairs and Sport, non-UK original content and all UK/non-UK acquisitions.

¹² Figures based on total audience spend figures, to be published in 25/26 BBC Annual Report and Accounts.

¹³ It's important to note that Ofcom published figures indicate that PSB first run hours and spend on live broadcast (linear) TV content is substantially higher than the PSB VOD catalogue spend and hour figures reported by Ampere. For example, ITV's VOD hours (Ampere Analysis) appear significantly undercount Ofcom's reporting of ITV first run UK originated hours. Further reference: Ofcom Communications Report 2025: Interactive data, Television and audiovisual (slide 2 of 8). <https://www.ofcom.org.uk/phones-and-broadband/service-quality/communications-market-report-2025-interactive-data>

FIGURE 5: 2025 UK ORIGINAL COMMISSIONING SPEND BY PLATFORM, £M



Source: BBC analysis, Ampere Analysis (analysis provided June 2026).

Note: Excludes spend on News & Current Affairs and Sport, non-UK original content and all UK/non-UK acquisitions.

The BBC works with more indies than any other media organisation in the UK. In 2024/25,¹⁴ the BBC commissioned 301 independent TV producers and 245 independent radio producers including 43 TV producers and 42 Radio producers that the BBC has not worked with before. The BBC also creates targeted opportunities for different parts of the sector, with all genres having dedicated funds for TV producers to grow promising ideas into commissions, with funded idea development provided to 299 TV producers in 2024/25.

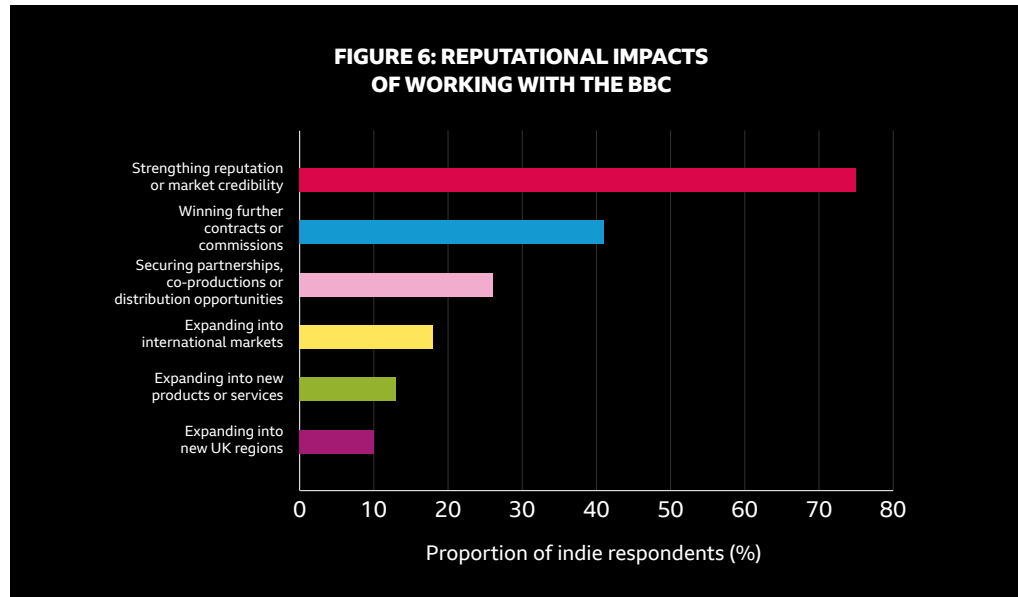
Working with the BBC can be a significant boost to independent producers, as shown by Figure 6. Securing a commission with BBC Public Service can be invaluable, as it is a globally recognised platform which can be used to demonstrate credibility and open the door to third-party funding for existing projects or new clients and future projects. 38.5% of the indie respondents to the BBC supplier survey said that working with the BBC provided them with business or commissioning opportunities that would not have occurred otherwise. This is evidence that, for certain indies, there is a reputational 'halo' effect from working with the BBC.



This halo effect helped them to reach new markets and increased business confidence, both of which have a tangible impact on business performance – contribution to international exports and increasing business investment. The aggregate halo effect on overall indie business performance is substantial. For 38.5% of indie respondents, who said that the BBC offered opportunities that would not have occurred otherwise, they had an estimated 24% increase in investment as a result of BBC commissions and 23% of their export revenue is attributable to having worked with the BBC. This means that indies working with the BBC experience, on average, an estimated 8.9% increase in exports overall and 9.3% increase in investment.¹⁵

¹⁴ BBC Commissioning Report 2024/25, published July 2025. <https://www.bbc.co.uk/commissioning/documents/bbc-commissioning-report-202425.pdf>

¹⁵ Based on CBI Economics BBC supplier survey and further analysis by BBC, supported by EY. Based on 38.5% of indie respondents who indicated a distinct BBC 'halo' effect, multiplied by the increase in exports (23.0%) and average increase in investment over the next/last 12 months (average 24.0%) reported across all indies. Sample size too small to look only at indie respondents who report distinct BBC halo effect.



Source: CBI Economics BBC supplier survey. Note: Response to question: Which wider commercial effects, if any, has working with the BBC contributed to for your organisation? (indie responses only)

“The BBC is a sort of global standard of authenticity, reliability and quality... If we can say the BBC are on-board with a project in development, then we know it opens the door to a conversation with third-party co-commissioners, though it does not guarantee they are going to production.”

Andrew Zikking, Managing Director Production at Off The Fence Productions

BBC’s commissioning approach supports market diversity

The BBC’s approach to commissioning is geared towards supporting the UK’s independent production sector. Indie commissions represent a substantial portion of BBC output: in 2025 51% of the BBC’s Network TV hours and 31% of Network radio hours in 2025/26 were made by indies.

In 2003, the Communications Act introduced a set of regulations designed to support the growth of the independent production sector in the UK. There were two parts of these regulations, both designed to support Qualifying Independent Producers (QIs), i.e. those production companies not tied to a UK broadcaster.¹⁶ First, the PSBs were required to commission 25% of their programmes from QIs (the QI quota).¹⁷ Second, the PSBs were required to offer QIs Terms of Trade that guaranteed them certainty on a range of terms, e.g. payment terms, allocation of primary and secondary rights, exclusivity, etc.¹⁸ A key feature of terms of trade is that QIs retain the IP rights to their programmes which enable them to generate a longer-term financial return via content repeats, archive rights and international exports. These regulations are widely agreed to have been an important condition for the growth of the UK independent production sector over the past 20 years.

However, the Terms of Trade regulations do not apply to non-PSB commissioners such as Sky or global streamers like Netflix and Amazon, who are able to operate on bespoke, negotiated commercial terms. In practice, the contractual terms mean non-PSB commissioners will often own the resulting IP rather than the indie supplier.

In addition, this Charter period has seen a significant increase in competition for BBC commissioning. The Agreement requires that by the end of 2027 the BBC must have competed 100% of its relevant TV hours¹⁹ on fair, reasonable, non-discriminatory, and transparent competitive terms. The BBC is on track to meet this requirement, having competed 87% of relevant programmes in 2025. The BBC also had intermediate targets such as ending the in-house guarantees for children’s, sport and non-news related current affairs by the end of 2019 and competing 40% of the previous in-house guarantee by the end of 2018. However, the BBC chose to move much faster and has been commissioning all new programmes through a fully-competitive commissioning process since 2017.



¹⁶ Examples of non-qualifying indies (NQIs) include BBC Studios, ITV Studios, and Sky Studios. Examples of QIs include Hat Trick Productions, Fremantle, Avalon, and Sony.

¹⁷ Applies to the BBC, ITV, Channel 4 and 5. Excludes news and repeats.

¹⁸ Primary licensing refers to the initial rights granted by a producer to a broadcaster or platform to exhibit a programme for its first window of transmission or availability (e.g. first broadcast on BBC One and/or initial availability on BBC iPlayer). Secondary licensing refers to subsequent rights for further use of the programme beyond the primary window, including repeat broadcasts, international sales, or distribution to other platforms or territories, typically generating additional revenue streams for the producer.

¹⁹ Excludes news, news related current affairs, repeats, and programmes for which it would not represent value for money.



BBC/Hat Trick Productions

The BBC's focus on commissioning the best possible ideas from the widest range of suppliers across the UK has demonstrable benefits, that go significantly beyond the minimum requirements of the regulations. The proportion of BBC programming made by indies has grown from 45% at the end of the last Charter period to 51% in 2025/26. In 2025/26, 23% of relevant BBC programmes were made by in-house teams (mostly BBC Sport), 26% by BBC Studios, 7% by non-qualifying independent producers and 44% by qualifying independent producers.

The only BBC network TV genre (outside of news and current affairs) in which BBC producers make the majority of programmes is Sports (64%), in all other genres qualifying and non-qualifying indies win the significant majority of hours – drama (52%), Entertainment (73%), Comedy (80%), Factual (55%), and Children's (65%). And in nearly all genres the qualifying independent producers make more hours than non-qualifying indies or BBC producers.

More generally the UK has a range of PSB and non-PSB commissioners offering a range of different contractual terms and levels of funding. PSB budgets have become increasingly constrained due to limited ad revenue growth for commercial PSBs and below inflation licence fee settlement for the BBC. This has coincided with a period of super-inflation in the UK production sector. UK production costs have risen in response to increased demand from international commissioners and higher quality expectations from UK audiences.

For these reasons, and in part because they will not own the international rights, PSB-led commissions are more likely to require higher levels of third-party funding in order to be greenlit. In setting the prices they can afford to pay, PSBs need to consider the overall budget of the programme, its value to their audience, and the level of third-party financing that can reasonably be expected from the market. This in turn drives more complex financing structures, with contributions from co-commissioners, co-producers and distributors to complete their financing. In contrast, the global streamers are more likely to fully fund commissions, but will then take global rights, ownership of the IP, and even the right to make subsequent seasons themselves.

Therefore, producers are often making a trade-off between a commissioner's upfront funding commitment and long-term ownership of the resulting IP and revenues from any secondary rights. In this analysis, the ability to retain IP as well as the reputational benefits, potential levels of viewing, and creative control over BBC commissions can often outweigh these funding challenges. In CBI Economics' survey of BBC suppliers, the most cited benefits of the BBC and PSB rights regime²⁰ was rights protection, with 23% of respondents saying that PSB terms help them retain rights and 15% saying that it helps retain creative control.

²⁰ Based on CBI Economics BBC supplier survey. Response to question: The BBC or other UK public service broadcasters have differences in rights and funding terms compared to non-PSB commissioners or platforms (such as Netflix or Apple TV+). Which of the following describe the impact or effect of those differences in rights and terms from your work with the BBC or other UK PSBs for your organisation? N=186

The independent sector is strengthened, by retaining creative ownership inside the UK, and returning IP revenues to indies that can be reinvested into developing new content and formats ideas. Moreover, one in five indie respondents²¹ say PSB terms make projects viable that might not otherwise go ahead, indicating that PSB rights and their broader approach to commissioning offers other benefits to commissions. This likely indicates the BBC and other PSBs are more likely to invest in UK-centric stories – which appeal to domestic audiences rather than needing to appeal to international audiences – and a willingness to take creative risks with new ideas and emerging talent. The BBC’s creative risk taking and approach to regional commissioning are further discussed in Sections 4.1 and 5.3.


BBC Commercial drives further growth in the production sector

BBC Studios has an unmatched ability to create British IP and drive export value on behalf of the UK. BBC Studios is a major player in both production and global distribution, combining scale in UK content creation with a powerful international commercial footprint.

BBC Studios Productions is one of the largest and the UK’s most awarded production companies, with more than 150 awards in 2024/25, including seven Emmy awards and an Oscar. A significant share of BBC Studios’ commercial income is generated from inward investment, which is then reinvested into the UK creative industries, many of which are SMEs. Much of the benefit from this investment flows outside of London, reflecting the spread of BBC Studios’ production bases in Bristol, Cardiff, Glasgow, Salford, Dundee and Birmingham.

BBC Studios also plays a key role commissioning and distributing UK content to audiences in the UK and worldwide. This includes its ad-funded UKTV channels in the UK, which commissioned 92 hours of first-run, UK originated content in 2025, as well as international services BritBox and BBC Worldwide/BBC.com.

BBC Studios distribution also operates a key role in taking UK-originated IP to global markets. It was responsible for 39% of all UK TV content exported internationally, and 58% to the US.²² BBC Studios distributed content includes independently produced shows and titles, providing global reach to the UK indie sector. BBC Studios Showcase is the BBC’s flagship annual content event, bringing together hundreds of international buyers and partners to preview and acquire new UK programming. It functions as a major global sales platform, using screenings and industry sessions to drive international deals and promote British IP worldwide.



Q

CASE STUDY

BRITBOX DRIVING INTERNATIONAL DEMAND FOR UK IP

BBC/Gallagher Films/
Two Cities Television

BritBox illustrates BBC Studios’ role in investing in, scaling and monetising UK intellectual property internationally. Now wholly owned by BBC Studios following the acquisition of ITV’s 50% stake, the platform has grown to over 4.5 million international subscribers and is generating £282 million in annual revenue and £60 million in EBITDA.

Britbox is available across key global markets including the US, Canada, Australia and the Nordics, and focuses on British programming, combining archive, returning series and new titles. In 2024/25 alone, BritBox invested around £100 million in predominantly UK content, demonstrating its role as a significant and growing source of demand for British production. Popular titles on BritBox include *The Other Bennet Sister*, *Ludwig*, *Death in Paradise*, *Shetland* and *Blue Lights*.

Crucially, BritBox drives additional value back into the UK creative economy by generating new international demand for British IP, particularly mid-tier drama and archive content, and by creating alternative sources of funding for UK producers and talent, often SMEs, that are otherwise either absent or under significant pressure. The service generated around £250 million in revenue supporting wider returns to the UK sector, while its commissioning activity (often alongside wider BBC Studios services) enables new UK productions that might not otherwise be financed. As both a distribution platform and investor, BritBox exemplifies how BBC Studios both underpins investment in new UK programming and extends the lifecycle and global reach of it, converting domestic IP into sustained international commercial returns.

²¹ Based on CBI Economics BBC supplier survey.

²² BBC, March 2026, A BBC For All: Our response to the government’s Green Paper, page 55.
<https://www.bbc.co.uk/aboutthebbc/documents/bbc-response-to-government-charter-review-green-paper.pdf>

2.3 Amplifying impact through partnerships

The BBC further reinforces its role as a strategic anchor through partnerships with creative and other organisations. The BBC has hundreds of partnerships, with organisations small and large, that range from creative and cultural institutions, industry bodies and universities, to charities, other media organisations and global tech companies. These partnerships support diverse aims – from producing innovative content and engaging communities to developing talent, advancing research and new technologies, and strengthening the creative industries.²³ This includes 182 partnerships that support the BBC's delivery of Public Purpose 4, which states that BBC should:

“reflect, represent and serve the diverse communities of all of the United Kingdom's nations and regions and, in doing so, support the creative economy across the United Kingdom”.

The BBC's scale, reach and the strength of its brand is important to partners, but it also offers critical expertise and insight, access to facilities and equipment as well as co-funding partnership projects. More importantly, partners perceive significant value in their relationship with the BBC. A survey of BBC key partners found that:²⁴

- 73% of partners rate their partnership with the BBC as extremely valuable to them.
- 9 in 10 partners rate the way the BBC works with them as excellent or good.
- 85% of partners agree they receive at least equal value back from the BBC as they give.

²³ More information available: BBC, March 2025, Partnerships at the BBC. <https://www.bbc.co.uk/aboutthebbc/documents/partnerships-at-the-bbc.pdf>

²⁴ Survey based on on BBC Partnerships survey of 33 key partners.

²⁵ Section 13 of the BBC's Charter says that “The BBC must work collaboratively and seek to enter into partnerships with other organisations, particularly in the creative economy, where to do so would be in the public interest.” This includes partnerships across the UK, with commercial and non-commercial partners and cover television, radio and online services to “encourage people to explore new subjects and participate in new activities through partnerships with educational, sporting and cultural institutions.” These partnerships must be fair and give due attribution and recognition to partners.

- 9 in 10 partners say they would be extremely likely to continue their partnership with the BBC.

The BBC has made significant commitments to regional partnerships that aim to support creative clusters outside of London. This includes the North East Screen Industries Partnership (NESIP) and the Memorandum of Understanding (MOU) with the West Midlands Combined Authority and Create Central. The BBC also has a number of strategic skills partnerships with industry skills organisation ScreenSkills, the National Film and Television School (NFTS), British Film Institute (BFI), regional screen agencies such as Screen Scotland and Screen Alliance North, as well as universities and higher education colleges. The BBC's impact on regional creative industries is discussed further in Section 5 while the BBC's impact on skills and talent development is discussed in Section 3.

The BBC's partnerships and collaborations with technology and media organisations promote knowledge spillovers, increasing sector productivity, whilst influencing broader economic and societal outcomes by embedding public service values across the media sector. The nature of these partnerships, and their objectives, are reinforced through the BBC Charter and Framework Agreement.²⁵ The impact of BBC's Public Purpose led technological RD&I activities are explored further in Section 4.2.

The BBC's Local News Partnerships, explored on page 23, is a specific market intervention that to ensure local democratic reporting and scrutiny and support a healthy local news economy.





CASE STUDY

NORTH EAST SCREEN INDUSTRIES PARTNERSHIP



Zoila Brozas

The BBC has helped form the North East Screen Industries Partnership (NESIP), working in partnership with 12 local authorities that sit under the North East Combined Authority and the Tees Valley Combined Authority to develop the creative industries in the region. This was formalised as an MOU agreement with the BBC in September 2021, in which the BBC committed to investing at least £25 million in creative investment in the region between 2022 to 2027.

The BBC's investment is directed at content development across daytime, factual, and scripted (Drama and Comedy) with the partnership supporting new and returning programmes such as *Robson Green's Weekend Escapes*, *Joanna Page's Wild Life*, *The Big Idea Works*, *Smoggie Queens*, and *The Dumping Ground*. There have been more than 15 BBC commissions in the North East since the announcement in September 2021, and has already met its commitment to spend at least £25 million on Network TV commissioning in the North East.

As part of its regional focus, the BBC has relocated its Head of Daytime and Drama Commissioning, Helen Munson to the North East. Helen grew up in the region, and has helped establish a consistent pipeline of work and support the development of local production expertise.

The BBC expanded regional production by increasing development funding, creating new commissioning opportunities with North East Screen, and supporting smaller indies through short-form and first-time commissions. It also invested in long-term skills and talent development through targeted schemes, partnerships, and industry initiatives to strengthen the North East's creative economy.

In return for the BBC's investment, regional stakeholders committed to a minimum of £11.5 million of investment alongside the establishment of a new partnership group, NESIP, to oversee delivery, and a new regional production fund to attract inward investment, overseen by a new screen agency, North East Screen. This was the first time the region had fully aligned behind a single economic opportunity and it quickly became a blueprint for regional collaboration as greater devolved powers were introduced. The NESIP partnership is now cited as best practice in terms of the creation and operation of regional creative clusters and screen investment funds.

NESIP's contribution to the partnership with the BBC has been vital in unlocking production growth, and attracting investment from other broadcasters and commissioners.

Their £11 million investment has generated an 83% increase in production spend in the region totalling £72.5 million with £88.5 million Gross Value Added and over 4 years.²⁶ This has resulted in 1,419 full-time jobs, 9,265 paid training days on set, 11 regional companies winning commissions and 357 registered supply chain companies.

The North East is now the fastest-growing production sector in the UK – production spend has tripled in the region during the past five years compared to a 56% UK-wide increase and the regional crew base has more than doubled to 874 in the past four years.

Local crew now take the lion's share of jobs on regional commissions; the majority of productions funded by the NE Screen production fund have over 70% regional crew, up from 50% in 2022.

The sector is diversifying around BBC investment, which represents only 29% regional production this year, and major recent commissions from ITV, C5/Paramount, and others. More broadly, the North East Combined Authority and Tees Valley Combined Authority are investing significant sums in new studios across the region the Northern Studios in Hartlepool, plans to expand the Production Village in Hartlepool and the first £38 million of investment in the Crown Works Studios development in Sunderland.

Due to the success of the North East partnership to date, the BBC and regional partners extended its MOU in March 2026, increasing the BBC's rate of investment with a further £15 million of commissioning spend by the end of 2027. The BBC have a longstanding relationship

²⁶ Impact and investment figures provided by North East Screen ahead of publication.



CASE STUDY

NATIONAL FILM AND TELEVISION SCHOOL



with NFTS which predominantly focuses on supporting the UK creative sector through talent development.

In October 2020, a landmark multi-year partnership was announced that brought together NFTS with BBC Studios, BBC Film, BBC Nations and Regions (Scotland and Wales) as well as the BBC Academy. Our strategic aims were to increase diversity (especially in offscreen roles) and regional skills development, and to strengthen linked between education and industry. For the BBC, it also offered a new pipeline of talent into the BBC and creative sector.

Through the partnership, up to 2024 the BBC sponsored 10 NFTS courses, including 6 MAs

and 4 diplomas, and provided students with industry access by offering masterclasses from senior BBC staff, opening up work placements and networking opportunities to NFTS students and alumni. This partnership also committed to fund up to 20 BBC Scholars per year, which focused on those from diverse and under-represented backgrounds and paired each student with a mentor from BBC commissioning or production.

The partnership also supported 100 free NFTS Short Course places. This support was primarily directed to those working in the independent sector, with NFTS Short Course training opportunities being offered first to beneficiaries of the BBC's Small Indie Fund.²⁷ Two-thirds of these indies were based outside London.

BBC Content and BBC Studios signed a new agreement with NFTS in 2025. BBC Content commissioners remain closely involved in course delivery – giving lectures, masterclasses and workshops – and Kate Phillips, BBC Chief Content Officer, sits on the NFTS board. NFTS continues to offer 100 free places for its Short Courses and also organises self-shooting courses for women to increase the number of female shooting directors.

NFTS graduates have contributed to key BBC programmes and films such as *Race Across the World*, *The Apprentice UK*, *Once Upon a Time in Northern Ireland*, as well as to the whole TV and film sector in the UK and beyond.²⁸

In January 2026, the NFTS and BBC and YouTube entered into a new Create x Content partnership.

This is a 10-week training programme that combined NFTS teaching with BBC- and YouTube-led workshops and events. The fully funded programme supports a cohort of 150 digital creators, TV producers and journalists and equips them with technical, strategic, and digital-first media skills to thrive in a rapidly evolving industry. The online learning is complemented by in-person workshops and networking events hosted at BBC regional hubs across the UK, including Glasgow, Cardiff, Belfast and Salford.²⁹ This is a first-of-its kind partnership which aims to equip creatives with skills for multi-platform storytelling, bridging gap between traditional broadcasting and creator economy platforms.

²⁷ Screen Scotland / Sgrin Alba, BBC announced partnership with NFTS to support UK creative sector, published 12 October 2020. <https://www.screen.scot/news/2020/10/bbc-announces-partnership-with-nfts-to-support-uk-creative-sector>

²⁸ NFTS graduates supporting BBC titles and their production role shown on page 4 of the: NFTS Graduate Impact 2025, https://nfts.co.uk/sites/default/files/NFTS_Graduate_Impact_Report_2025_DIGITAL.pdf

²⁹ NFTS, NFTS Launches 'Create x Connect' Training In Partnership With BBC and YouTube, published 26 January 2026. <https://nfts.co.uk/article/nfts-launches-create-x-connect-training-partnership-bbc-and-youtube>



CASE STUDY

BBC'S LOCAL NEWS PARTNERSHIPS AND THE LOCAL DEMOCRACY REPORTER SCHEME



BBC/ PressEye

The Local News Partnerships (LNP) between the BBC and the UK regional news industry aims to support public service reporting, sustaining local democracy and improve skills in journalism across the commercial sector. The LNP launched in 2017 to help address the reduction in local political coverage and consists of three core projects.

The Local Democracy Reporting Service (LDRS) is the cornerstone of the LNP. The BBC funds up to 165 journalists employed by regional news organisations. These organisations range from online media and regional newspaper groups, televisions and radio stations, with reporters based across the UK. LDRS reporting aims to ensure scrutiny and accountability across local government and public service organisations, and is available to partner organisations, including the BBC. Over the last 10 years, the LDRS has published more than 530,000 stories and supported journalism of more than 230 commercial media organisations across the UK and ensuring every local government is held to account.

The BBC's Shared Data Unit is a team that produces data-driven journalism and insights which are shared with partner organisations, both for transparency and for their own investigations. The SDU training offer is targeted at improving the scale and quality of regional data journalism across the UK journalism sector and facilitating knowledge exchange. The News Hub provides BBC video content for partner outlets to reuse online on their own websites. The BBC does not charge for News Hub content.

In 2020, a review of the LNP concluded that the partnerships had created an effective new model of collaboration between the BBC and the local news sector, providing clear benefits for both organisations as well as audiences across the UK.

3 DEVELOPING THE CREATIVE WORKFORCE

The BBC has a wide-ranging impact on creative industries skills. It's direct investment in skills through staff upskilling, apprenticeships and industry schemes are significant.

In 2025/26, the BBC invested at least £47 million in skills and training for staff, freelancers and the wider industry.³⁰ This is significantly more than any other organisation in the sector.

The BBC also acts as a training ground for talent and as a demand anchor through its commissioning. This is vital in driving job creation and on-the-job learning, particularly outside London. As a result, the full scale of the BBC's investment and its impact on the creative sector's workforce productivity is likely to be underestimated by industry.

3.1 BBC's investment in workforce upskilling and development and entry-level training opportunities

Over 2025, 98% of BBC staff completed one or more skills programmes – equalling 185,861 hours of training.³¹ The BBC skills and training offer includes courses and mentoring delivered through BBC Academy, apprenticeship schemes for entry-level and staff, and access to external training provision and expertise where appropriate to support the BBC's internal provision.

³⁰ This includes expenditure on BBC Academy (including BBC Studios), apprenticeships and industry schemes in Content, News and Nations, including BBC contributions to ScreenSkills. It does not include expenditure on individualised training for BBC staff that will be covered by divisional budgets.

³¹ BBC, March 2026, A BBC For All: Our response to the government's Green Paper, page 62.



BBC/Studio Lambert/Cody Burnidge

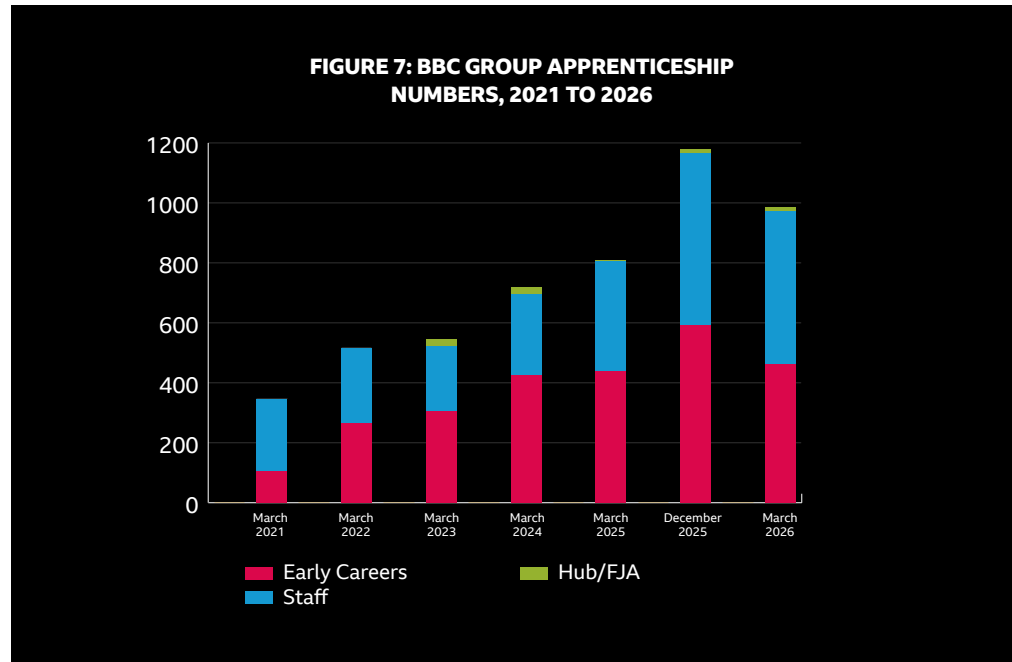
A key aspect of the BBC's skills and training offer under that last Charter has been its apprenticeship programme. The BBC is recognised as an industry leader offering a broad programme of over 25 apprenticeship schemes across journalism, production, technology and business, Levels 3 to 7. It is listed as a Top 30 apprentice employer, 5th in the Top 100 graduate employer list and the number one media employer for school leavers.³²

Moreover, 97% of BBC apprentices in 2024/5 were satisfied with their BBC experience.

The BBC supported 1,200 apprentices at its peak in December 2025, exceeding its Charter commitment to support 1,000 per annum by the end of the Charter period. This is a significant increase from the 319 apprentices supported in December 2020, almost a four-fold increase. The economic benefit of apprentices that have completed their apprenticeship since 2021 is estimated to be £293 million based on the uplift in life-time earnings.³³



Clinton Forde



Source: BBC Apprenticeship team

The BBC Group's investment in entry-level apprenticeships has grown to an even greater degree. There were 614 entry level apprentices at the BBC in September 2025, a nearly 5-fold increase from the 126 in December 2020.³⁴ In 2025, the BBC received over 47,000 applications for entry-level apprentices from people looking to enter the creative industries. 2025 was the BBC's largest ever in take, with 284 early careers placed across Public Service and BBC Studios.

The BBC's completion rate for early career apprentices was 94% in 2024/25. Early careers apprenticeships is a substantial investment by the BBC as an anchor organisation to create entry opportunities and maintain the talent pipeline for the sector overall and across the UK. 67% of the BBC's early career apprentices that started in 2025 are based outside London.



BBC/Banjay Rights, Kudos

Entry-level apprenticeships can be difficult for smaller creative firms to sustain, especially as it requires a long-term commitment to training and employing entry-level staff in a particularly volatile and uncertain sector that rapidly scales up and down in headcount in response to demand. The BBC's Flexi-Job Agency aims to de-risk these apprenticeships by supporting early-career opportunities with creative industry partners. These apprentices work with partners, often indie producers, whilst receiving top-tier training from the BBC's external learning providers. The BBC has supported over 50 apprentices through the Flexi-Job Agency working in partnership with Google who use their levy to support the scheme. The BBC have also supported over 185 apprentices through the levy transfer scheme in the last 4 years.

³³ Analysis is based on BBC data of 1,035 completed early careers and staff apprenticeships from 2021 to 2025. Using assumptions on prior education attainment levels from the [Sutton Trust](#), it is possible to calculate lifetime earnings uplift associated with increased educational attainment based on research by [BIS](#) and [the Sutton Trust](#).

³⁴ This includes new and continuing cohorts of entry level apprentices.



BBC staff apprenticeships focus on upskilling the existing workforce to ensure that they, and the BBC, have the right skills to succeed in the future. This predominantly focuses on Data, AI and leadership skills – there were 175 staff on AI related apprenticeship in Autumn 2025 alone. Staff apprenticeships have been shown to have a meaningful impact on career progression. The promotion rate for those who have completed a staff apprenticeship is double the wider BBC rate, and overall career mobility is 50% higher.

Improving diversity and representation in the BBC workforce and the wider sector, across the UK and different groups, not only helps to redistribute career and economic opportunity but is important as it influences how the BBC represents and portrays audiences on-screen and on-air. The BBC's Diversity, Inclusions and Belonging strategy applies to both its internal workforce and externally commissioned content. The strategy includes several career development schemes, such as RISE and ELEVATE, which are targeted internal mentoring and development schemes to progress internal talent from ethnic minority backgrounds and disabled staff into senior roles.

"I applied for a 12 month leadership programme... the Rise scheme was for black and ethnic minority staff, who were looking to take the next step up in their careers. The scheme focused on empowering individuals to reach their potential, advocate for themselves in the workplace, learn leadership skills and identify next steps in their development. I think that [the Rise scheme] was really useful in getting me to the position I'm currently in."

Rebecca Candy, Production Manager – Antiques Roadshow at BBC Studios Fact-Ent Productions³⁵

Furthermore, the BBC's footprint outside of London supports regional representation and sustainable careers outside of London. This is explored in detail in Section 5.

3.2 BBC as a career booster of creative industries talent across the sector

The BBC Public Service (PS) invests more in original British creativity than any other media organisation. Creating opportunities for creative talent and investing in skills provision beyond its own workforce is a significant aspect of how the BBC supports the UK's creative economy.

As the largest commissioner of UK originated content, the scale and breadth of BBC commissioning across TV, radio and digital translates directly into more opportunities for UK writers, performers, director and other on- and off-screen talent.

This is further reflected in the BBC's decision to ringfence development budgets for some genres which allows commissioners to engage with creators to develop projects by offering both financial support and creative input.

The BBC's research on the UK comedy sector identified the BBC as the only commissioner working with new talent at scale in this genre.³⁶ Other commissioners working in audiovisual and audio comedy tend to focus on established talent and are more likely to commission tried-and-tested formats. Amongst the interviewees for this research, the BBC was often referred to as the first place they would go to with new talent. The BBC's ability to take creative risk was attributed to its unique public funding model, which allows commissioners to take more risks on emerging talent rather than decisions being tied to commercial incentives such as maximising advertising or global subscription revenue, where established talent has more certain returns.

"The BBC is rare in this climate to be backing newer writers... the BBC back very, very young writers of people very early in their careers."

Nerys Evans, Creative Director, Scripted, Expectation TV.³⁷

Working with the BBC during early-career can have a halo effect in terms of career progression and stability for those working directly with BBC (e.g. BBC Studios Productions employees), staff from commissioned indies or as freelancers on projects.

Polling of creative sector workers by Public First found that, of those who had previous experience working with the BBC as a freelancer, contractor or collaborator, found that:^{38,39}

- 49% said it has raised their profile within industry
- 47% said it had strengthened their professional reputation
- 42% concluded that it has provided valuable experience or skills development.
- 41% said that working with the BBC led to new job opportunities.



This supports other analysis that the BBC (and BBC production) supports career development. BBC analysis of the IMDB database, supported by EY, indicates that individuals who work with the BBC in their early career (defined as within the first three credits listed) have more credits per year on average throughout their career. The career uplift from working with BBC is particularly notable in low and mid-range cost per hour productions, which are considered a training ground for newer on- and off-screen talent.

³⁵ As quoted in: BBC, April 2024, BBC Bristol Economic Impact Report.

³⁶ BBC, May 2025, Socioeconomic Impact of BBC Comedy. <https://www.bbc.co.uk/aboutthebbc/documents/socioeconomic-impact-of-bbc-comedy-2025.pdf>

³⁷ As quoted in: BBC, 2025, Socioeconomic Impact of BBC Comedy report.

³⁸ The BBC commissioned Public First to explore the impact of media and entertainment sector on the UK economy. The research included an online poll of 1,022 adults working in the UK's creative sector between 12-14 August 2025 quoted here.

³⁹ Response to the question "Has collaborating with the BBC led to any of the following career benefits? Select all that apply." Sample size n=1022. Reported percentages based on respondents who said they'd worked for the BBC previously (n=259).

Evidence: The impact of BBC commissioning on career progression of creative talent

This analysis measures how the BBC's approach to talent development through creative risk-taking can enable more successful careers in the sector. The analysis draws on BBC and IMDb data which, when joined together, creates a large dataset of individuals who have received credits for TV and film work both on- and off-screen (i.e. actors and production workers).⁴⁰ The data contains credits over a 37-year period, from 1990 to 2026, with a flag for whether the person worked with the BBC or not. Using this data, it is possible to assess career progression for those who have worked with the BBC versus those who have not.

The analysis defines career progression as the number of credits received per year, with a higher number of credits per year associated with greater career progression. This measure reflects the consistency of activity and continuity of an individual's career.

Individuals were assigned to a spend category based on the dominant spend profile of their first three BBC credits. They were also grouped into a scripted or unscripted genre bucket. Scripted and unscripted productions were therefore categorised into high-, medium- and low-cost categories (with different thresholds for scripted and unscripted productions).

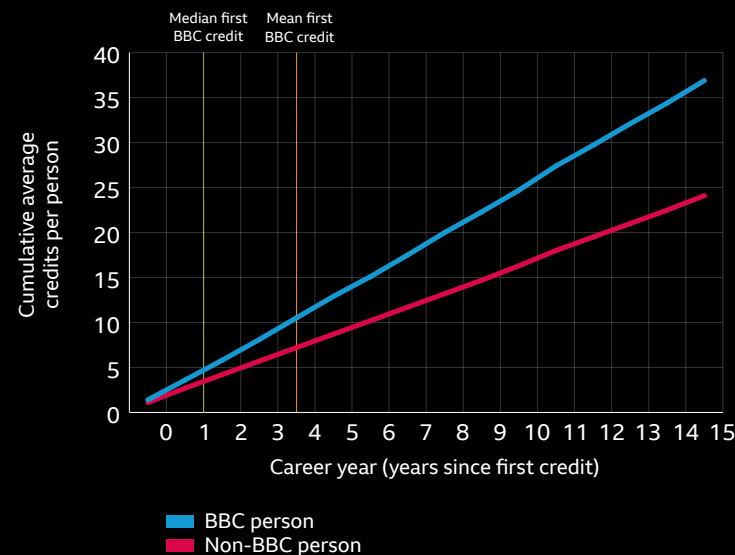
This is because those working on lower cost productions who might be expected to receive more credits per year (due to shorter filming schedules) are treated separately to those on higher cost productions.

The analysis used several methods to test the BBC's impact on talent. Across each method, the results are consistent with the idea that the BBC supports talent development.

The strongest evidence is found for the idea that the BBC acts as a career booster. This methodology considers career activity and career trends before and after working with the BBC. The analysis finds that, compared with the period prior to working with the BBC, the number of credits received increases and sets individuals on a higher credits per year trajectory. This suggests the BBC contributes to a higher baseline level of activity over time, helping individuals develop more stable careers. This effect is strongest for those working in scripted productions and on low-cost unscripted productions.

The data also allows a comparison of the career trajectories of individuals that work with the BBC to those who never worked with the BBC. The evidence shows that, on average, people who have worked with the BBC tend to have stronger and more long-lived careers compared with those who have not. Those with BBC experience average 15.8 credits over their careers, over three times more credits than those who haven't worked with the BBC (5.2 credits over their career on average). This pattern is consistent across scripted and unscripted productions.

FIGURE 8 – CAREER ACTIVITY BEFORE AND AFTER FIRST BBC PARTICIPATION



Source: BBC analysis, prepared with assistance from EY. Notes: Filters: UK-based credits only (GB region), career years 0–15, BBC person status based on whether an individual ever received a BBC credit.

Finally, further analysis of this data assesses whether the BBC kick-starts early careers by analysing when the BBC typically offered individuals their first credit and how their career developed after that credit. This analysis finds that the BBC intervenes relatively early in careers: half of those working on low-cost productions received a BBC credit after one year of their career, while for half of those working on high-cost productions, their first BBC credit was after three years.

For low- and medium-cost production types, early intervention is followed by stronger sustained career outcomes, with more credits per year following BBC intervention. Further details on this analysis can be found in Annex A3.

⁴⁰ IMDb credited roles include actors, directors, writers, producers, editors.



BBC / Duck Soup Films / Simon Ridgway

BBC commissioning is complemented by a more formalised industry-facing skills and training offer. The BBC works closely with industry partners and skills organisations as well as BBC-led initiatives to support talent recognition, early careers entry and career progression.

In 2025/26, the BBC supported over 45 skills and development schemes that were external facing (as opposed to primarily benefitting the BBC's own workforce), with over 2,200 people supported across a range of interactions such as mentoring, networking and formal training placements. In 2025, the BBC launched a unified talent portal to help the sector workforce more easily find and access its schemes.

BBC-led initiatives tend to focus on discovering new and emerging talent and providing them with industry experience and/or a platform to discover new audiences. Flagship schemes include BBC Introducing which showcases the best new and emerging music talent across different parts of the BBC, the BBC Comedy Collective aimed at new comedy talent for writers, producers, directors and editors, BBC Creator Lab in collaboration with TikTok to develop digital and social creatives and Ignite Animation to identify new children's animation talent.

One of the most established and long-running schemes is BBC Writers (formerly BBC Writersroom) which has been running for over 25 years.⁴¹ The initiative plays a vital role in discovering and championing fresh writing talent across the UK, with over 6,000 submissions received through its Open Call in 2025/26. BBC Writers supports more than 100 writers each year across its core writer development programmes, providing industry insight, craft development and professional opportunities.

Alumni from the scheme continue to achieve significant success, including BAFTA-winning and International Emmy-recognised work such as *Lost Boys and Fairies* (Daf James), *Reunion* (William Mager), *The Jetty* (Cat Jones) and *Daddy Issues* (Danielle Ward). BBC Writers alumni also go on to secure writing opportunities and credits on major BBC series including *Doctor Who*, *Boarders*, *EastEnders*, *Casualty*, *Beyond Paradise* and many more.

Offering opportunities to writers across the UK is core to BBC Writers' design, with six regional Voices groups delivered annually across the nations and regions, supporting 69 writers in 2025. This regional focus continues to expand through targeted initiatives such as Write Across which works with local partners and stakeholders to support earlycareer voices in underrepresented areas and strengthen local creative talent pipelines. BBC Writers will be working with ten emerging writers from the Bradford District in 2026 as part of the latest iteration of the programme. Previous Write Across initiatives have taken place in Liverpool (2022) and Birmingham and the Black Country (2024).

To deliver BBC skills initiatives and extend reach across the creative industries, the BBC works with a wide range of partners including the NFTS (as explored in Section 2.3), ScreenSkills, universities and other industry partners.

In 2024/25 the BBC worked with the BFI and the West Midlands Production Fund to commission the film *Retreat*, produced by The Fold and 104 Films. The film features a predominantly deaf cast, was shot in British Sign Language and is helmed by the UK's leading deaf director Ted Evans.

⁴¹ BBC Writers impact reports available online: <https://www.bbc.co.uk/writers/about/successes>



BBC/Hungry Bear

The production team were 95% local West Midlands crew, including six ScreenSkills funded trainee roles for local off-screen talent and five stepping-up roles funded by the BBC Enabler Fund for crew from the area to move into more senior positions, and in many cases gain their first film credit.

The BBC has partnered with several universities and higher-education colleges to support curriculum development and enhance students experience with specialist technical and work-ready skills. The BBC-accredited MA in Wildlife Filmmaking, co-designed and delivered by the University of West of England (UWE Bristol) and BBC Studios' NHU, has been running for almost 15 years. The course has a high rate of success with almost 94% of graduates finding employment each year.⁴²

Similarly, the Greater Manchester Institute of Technology (GMiOT) announced a new strategic partnership with the BBC in September 2025. The GMiOT partnership, led by the University of Salford, brings together a number of colleges and employers in the Greater Manchester region, with the aim of creating new routes into creative media, engineering and digital careers through high-quality vocational training and degree-level apprenticeships.⁴³

BBC-led schemes also include various outreach and industry events, that promote creative careers as well as sharing industry knowledge and best practices. For example, Production Unlocked which offers free workshops, masterclasses, and panel events for people working in or trying to enter the TV and creative industries.

The BBC has funded the design and set up of the Action for Freelancers information hub, a one-stop information hub for freelancers, encompassing guidance, resources and best practice. The BBC promotes creative and journalism careers through BBC outreach, including the BBC Verify schools and university programme which reaches approximately 25,000 16-19 year-olds each year to improve media literacy and promote journalism. The BBC has also supported more than 360 students participating in BBC 'Get In' work experience days. The BBC hosts a wide range of industry networking events, including freelancer networking and 'meet-the-commissioner' events in Glasgow, Sheffield and at The Edinburgh TV Festival.

The BBC also supports independent production companies, both to help entrepreneurs develop their businesses as well as to train staff. By supporting indies and other creative businesses, the BBC is indirectly supporting job opportunities and careers across the wider sector. Each year, the BBC Small Indie Fund offers £1 million a year to back talented small TV production companies (with a turnover less than £10 million) and the Radio Indie Development Fund, launched in 2022, commits £250k to support independent radio producers across music and speech. These schemes have supported indies such as Nice One Productions, based in Northern Ireland who have subsequently won a BBC comedy commission, Soundtruism, a Birmingham based radio indie who were funded to develop their slate of ideas and B Side Film and TV, a diverse led Film producer who subsequently went on to receive their first greenlight.

In Northern Ireland alone, the BBC has supported 20 indies through funded ideas development and strategic development including the Diverse Talent Development Fund, Small Indie Fund, the Comedy Regional Partnerships Scheme, and the Production Management Skills Fund.⁴⁴

The BBC also offers indies direct support to train staff and freelancers and funded job placement opportunities. Over 125 placements are funded across TV programmes such as *Blue Lights*, *Ru Paul's Drag Race UK*, *Highland Cops*, *Silent Witness*, *Gladiators*, *Waterloo Road* and *Masterchef*, enabling productions to ladder up and develop talent from under-represented groups in a wide variety of off-screen roles. This is in addition to the redistribution of the BBC's apprentice levy and the BBC Flexi-job agency supports entry-level apprentices placed directly with indies.

⁴² BBC, May 2024, BBC Bristol Economic Impact Report.

⁴³ GMiOT unveils the BBC as its latest industry partner, published 22 September 2025. <https://www.salford.ac.uk/news/gmiot-unveils-the-bbc-as-its-latest-industry-partner>

⁴⁴ BBC, November 2024, BBC Northern Ireland Economic Impact Report. <https://www.bbc.co.uk/aboutthebbc/documents/bbc-northern-ireland-economic-impact-report.pdf>

3.3 Knowledge spillovers through staff mobility, freelance opportunities and commissioning

A substantive part of the UK's creative workforce will work with or for the BBC at some point in their careers, and movement of professionals between roles, businesses and regions is considerably higher in the creative industries than other sectors. In combination, this amplifies knowledge spillovers across the BBC and the creative industries. Roughly a third of the UK's creative industries workforce is self-employed (including freelancers).^{45,46}

Those working for the BBC as employees or freelancers, suppliers or collaborators will often acquire new skills, ideas and ways of doing things. This can include exposure to high-quality production, editorial standards, and technical know-how. They will then take this knowledge and BBC best practice with them into other jobs, projects or businesses. Similarly, the BBC benefits from creative professionals bring new ideas and innovative approaches from their prior experience into the BBC.

Many of the UK's leading indies have been established by former BBC staff who bring the knowledge and experience from working with the BBC into new companies, that in turn deliver new ideas and their own entrepreneurial innovation to find more productive ways of working (especially with smaller teams and in a start-up environment).

For example, Bad Wolf (*Doctor Who*, *Industry*, *His Dark Materials*) co-founded by former BBC commissioners Jane Tranter and Julie Gardner; Expectation TV (*Alma's Not Normal*, *This is MY House*) founded by Peter Fincham, former Director of Television at the BBC; Silverback Films (*Wild Isles*, *The Earthshot Prize: Repairing Our Planet*), founded in 2012 by Alastair Fothergill and Keith Scholey, both formerly worked for the NHU.

The technical and workforce standards set by the BBC enable sector-wide productivity gains. Action for Freelancers, a UK TV industry initiative in partnership with the BBC and others, aims to improve the working lives of freelancers and address sector-wide challenges through collaboration between freelancers, broadcasters, and production companies. The project covers six intersection areas of work, including: mental health and wellbeing, working conditions, skills and training, and recruitment.⁴⁷



BBC/Bad Wolf Productions/HBO/Simon Ridgway

⁴⁵ BBC analysis calculates 28%, based on DCMS Economic Estimates: Employment in DCMS sectors, April 2024 to March 2025.

⁴⁶ Analysis by Creative Policy & Evidence Data on granular census-level data from the England & Wales Census 2021 identifies 31.5% of total creative occupation workforce are self-employed, compared to 16.8% across all other occupations.

⁴⁷ Screenskills, Action for Freelancers, date unknown. <https://www.screenskills.com/action-for-freelancers/about-action-for-freelancers/>

4 PROMOTING INNOVATION

The BBC is widely seen as a market shaper, an organisation that pushes creative boundaries and emerging areas, influencing activity across the wider sector.

The BBC's mission and public purposes, coupled with its unique funding model, allows the BBC to undertake activities, that would not occur in a commercially incentivised organisation. The BBC is not solely a market failure organisation tasked with providing content and services that would otherwise not be commercially sustainable.⁴⁸

BBC-led innovation across both creative and technological domains pushes frontiers of the UK creative industries - by identifying new content and services, genres and formats, and new audiences. As a national and global organisation of scale, the BBC influences quality standards and is able to diversify supply chains across the sector.



Amy Brammal

⁴⁸ The BBC's role as a market-shaping, rather than a market-failure, organisation is explored in detail by: Mazzucato et al., December 2020, Creating and measuring dynamic public value at the BBC, UCL Institute of Innovation and Public Purpose (IIPP). https://www.ucl.ac.uk/bartlett/sites/bartlett/files/final-bbc-report-8_dec.pdf

4.1 Creative Risk Taking and Experimental Content

Creative innovation is deeply embedded in the BBC's approach to commissioning. As demonstrated in Section 2.2, the BBC is the largest investor in UK originated content and commissions across a range of genres and variety of platforms.

The BBC's ability to take creative risks across a breadth of content is attributed to the BBC's unique funding model. The BBC can engage with new ideas and emerging talent rather than requiring commissioning decision to be based on commercial incentives such as advertising or international subscription revenue. For example, *Dinosaur* is an award-winning comedy series filmed in Glasgow and produced by Two Brothers Pictures in association with All3Media. The series is created by Matilda Curtis and Ashley Storrie and centres on Nina (Ashley Storrie), an autistic woman in her 30's, navigating life with fierce humour and honesty. Another example is *Lost Boys and Fairies*, which was created and written by Daf James and was originally developed as part of the BBC Writers Pilot Scheme.

"I don't think I could have made *Peaky Blinders* at all outside the BBC - especially in 2012, and even now. It falls into the category of "curious" and it was not of the time or the fashion of the time. Often, not always, it is the BBC that tends to take a chance on things like that... It was on BBC Two at first and then it found its way - because it has to work; the experiment has to work. It became popular and went to BBC One and then became global. I honestly don't think it would have been picked up elsewhere."

Steven Knight CBE, *Writer and Director*⁴⁹

Sustainable public funding also leads to greater predictability in BBC commissioning budgets and long-term investment in the sector. The BBC does not require an immediate return on its investment which means it can support certain content over multiple series.

For example, the BBC is the leading commissioner in UK TV scripted comedy. Unlike high end drama, comedy tends to build its audience over multiple series - often moving to larger BBC platforms as audience grows - and is likely to become content that audiences will rewatch. For example, Series 1 of *Gavin and Stacey* was first aired on BBC Three in 2007, with a second series airing on BBC Two. Similarly, Charlie Brooker's *Newsnight* was first aired in 2009 on BBC Four and transferred to BBC Two from 2012 as *Charlie Brooker's Weekly Wipe*.



BBC/Caryn Mandabach Productions Ltd./Robert Viglasky

⁴⁹ Quoting Stephen Knight: House of Commons, Culture, Media and Sport Committee, Oral Evidence: BBC Royal Charter Review. Tuesday 16 June 2026. <https://committees.parliament.uk/oralevidence/17733/pdf/>

Evidence: BBC Public Service ability to take creative risk in commissioning

FIGURE 9 – THE TRAITORS

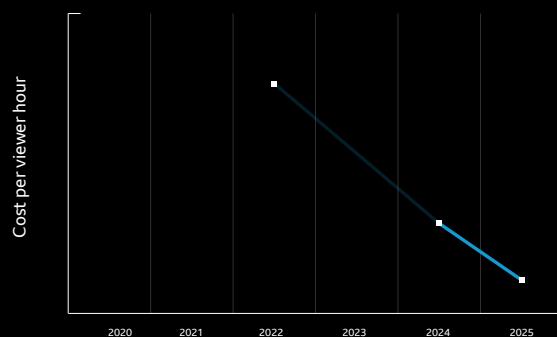


FIGURE 10 – RUPAUL'S DRAG RACE UK

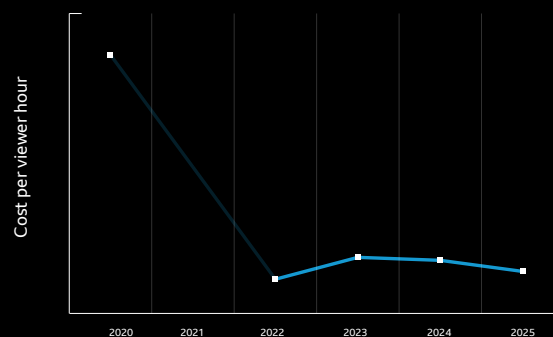
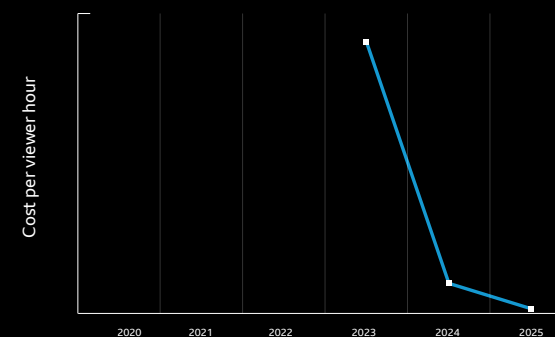


FIGURE 11 – JAMIE JOHNSON FC



The analysis demonstrates the BBC's capacity to take creative risks in commissioning by backing programmes that are not expected to deliver immediate audience returns but instead build viewership over time. Unlike commercial streamers, that often rely on rapid audience performance to justify continued investment, the BBC can recommission shows with the expectation that their popularity will grow gradually.

This ability to tolerate delayed returns reflects a distinctive strategic approach, allowing the organisation to support innovative or niche content that may take longer to reach mass audiences.

To evidence this, the analysis combines BARB viewing data (measuring total UK viewing hours by title and genre) with BBC internal "What's On" data capturing total production costs between 2020 and 2025. These datasets are merged at title level, enabling a comparison between cumulative audience viewing and commissioning costs for specific programmes over time. By calculating cost per viewer hour,⁵⁰ the analysis provides a consistent metric to track how the efficiency of BBC investments evolves as programmes mature.

The selected case studies indicate that successful BBC commissions typically move down the cost-per-viewer curve as audiences grow across successive series. This is best demonstrated by:

- *RuPaul's Drag Race UK* demonstrate clear reduction of cost per viewer hour over series, falling sharply between the first series in 2020 and remaining materially lower from Series 2 in 2022 onward.
- *The Traitors* shows a similar pattern, with cost per viewer hour declining from 2022 to 2024.
- *Jamie Johnson FC* also demonstrates a steep decline in cost per viewer hour from 2023 to 2025.

This suggests that the BBC often commits to recommissioning shows before they achieve the scale that might justify renewal in a purely commercial context. As a result, the organisation demonstrates a structural ability to absorb early-stage risk, ultimately allowing it to nurture content into widely popular successes and deliver long-term mass audience reach.

The case studies indicates that successful titles move down the cost-per-view hours curve as audiences build over time. More detail is provided in the technical annex A5.

⁵⁰ Cost per hour is based on the title's cumulative cost i.e. total production cost for current and previous series, and a real-terms inflation adjustment is applied to cover annual costs into 2025 prices.

The BBC's ability to manage its commissioning budget over a longer time horizon and at scale also means that it can direct its spending into regional commissioning which supports regional economic development, as discussed further in Section 4.3. A one-off commission is unlikely to contribute significantly to these aims and is likely to be high risk and costly to commissioners, particularly in areas where the regional screen infrastructure is less developed.

The outcome of the BBC's creative risk taking is greater diversity and originality in UK content which ultimately fuels the UK's creative industries international competitiveness. The BBC is able to champion new voices and stories to mainstream audiences, which may seem "untested" and less attractive to commercially funded commissioners. However, over time, other commissioners can be influenced to invest in specific genres and formats, as well as work with emerging talent and creative organisations, that were first invested in by the BBC.



BBC/Coby Levy

A widely cited example is the BBC's role in championing women's sport, including prominent coverage of the 2019 Women's World Cup and subsequent international football tournaments.⁵¹ Following the 2019 Women's World Cup, 42% of surveyed viewers had not watched women's football before and 16% said they were more likely to participate in football following the BBC's coverage. Other broadcasters have also responded by adding more women's sport coverage including the BBC and ITV sharing the rights to the UEFA Women's Euros 2025 and, more recently, the announcement that Sky will show up to 118 matches of the Barclays Women's Super League, with 78 fixtures exclusive to Sky and Sky Sports. Research by Sky Sports published in April 2025 found that 80% of UK sport fans are interested in at least one men's and one women's sport, with figures rising to 85% amongst under-35s. This demonstrates significant growth in audience interest of women's sport.⁵²

The Traitors is widely seen as a catalyst for an uptick in UK and global commissioning in unscripted since 2022, particularly of titles that are high-stakes reality. BBC's *The Traitors* was shortly followed by an introduction of new high-stakes reality competition formats such as Channel 4's *Rise and Fall* and *Tempting Fortune*, BBC's *Destination X*, and ITV's *Fortunate Hotel*, Netflix's reboot of *The Mole*. A similar trend was observed following the BBC's original commission of *The Great British Bake-Off*.

Another example is BBC's *Strictly Come Dancing* which first aired in 2004 and is part of a global franchise produced by BBC Studios. The first international series/format was *Dancing with the Stars* which aired in the United States in 2005, and the format has now been licensed to more than 50 territories worldwide. The latest US finale had the largest share of linear viewing since the *Friends* finale in 2004.

⁵¹ This example is explored in UCL IIPP's report: Mazzucato et al., December 2020, Dynamic Public Value of BBC report, UCL IIPP.

⁵² Sky Sport study debunks myth of women's sports fans being 'niche' and finds gender is not sole driver of interest, published 28 April 2025. <https://www.skysports.com/football/news/11095/13354282/sky-sports-study-debunks-myth-of-womens-sports-fans-being-niche-and-finds-gender-is-not-sole-driver-of-interest>

⁵³ Department for Science, Innovation & Technology, Independent Report: To what extent does public R&D leverage private capital investment? (executive summary), published 28 November 2025. <https://www.gov.uk/government/publications/to-what-extent-does-public-rd-leverage-private-capital-investment-to-what-extent-does-public-rd-leverage-private-capital-investment-executive-summary>



BBC/TwoFour

4.2 Public Purpose-Led Technological RD&I

The BBC Research & Development (R&D) team works to enable innovation within the BBC, media and wider creative industries sector. In the past, the BBC has been a substantial proportion of global innovation in this sector but, in recent years, global investment in technology has increased substantially, dwarfing the BBC's potential spend. However, the BBC's unique position is at the intersection of technology and human creativity, with a public service focus. Research, development and innovation (RD&I) that is driven by publicly funded organisations creates different outcomes compared with RD&I led by private companies. Research identifies two key differences in outcomes:

- Public R&D can "crowd-in" private R&D by funding knowledge creation (which have spillover effects) and de-risking early-stage technologies (which stems from private sector risk aversion)⁵³;
- Public RD&I can lead to benefits that private RD&I does not typically create which are primarily innovations which have positive externalities for society.

By continuing to fund public-led RD&I, the BBC is able to find new ways to serve audiences, set technical standards and create content which keeps the UK media and production ecology competitive, as well as supporting global technical innovation. These innovations have spillover effects which can support growth in other sectors. The UK will remain a place where creative ideas can be made and scaled up for global audiences, with continued investment in innovative ways to serve future audiences. This generates a virtuous circle of returns for the UK creative economy.



BBC/Silverback Films/Elitie Hilton

The BBC's role to act as public RD&I for the creative industries is outlined in the current charter. The BBC must "promote technological innovation and maintain a leading role in research and development" as well as "work in partnership with other organisations, and share, as far as is reasonable, its research and development knowledge and technologies".⁵⁴

The BBC has led the global broadcasting sector on innovation and market shaping technology. There are several audience-facing examples (such as the development of micro:bit and iPlayer products) as well as a range of innovations to enhance audience experience (such as the development of Piero for 3D sports graphics or, more recently, an AI enhanced interactive wildlife stream called *Wing Watch*).⁵⁵ These innovations have delivered cost-savings for the organisation, but have instigated innovation in broadcast markets, spurred investment and helped to develop higher standards for the creative industries.

The BBC's efforts in RD&I provides substantial value to the UK's creative industries. Previous studies have identified the value of the BBC Research and Development. Research by DotEcon found that BBC R&D returns between £5 and £9 in long term economic benefits for every £1 invested.⁵⁶ These estimates consider the economic, societal and spillover benefits associated with a selection of successful projects. The cost-benefit ratios therefore account for the entire cost base of the BBC R&D, but only a subset of the benefits, making these estimates potentially conservative. The cost-benefit ratios are broadly in line with recent Government estimates on the returns of publicly-funded R&D.⁵⁷

Based on the BBC's investment in BBC R&D during the current charter period, and the returns based on the above cost-benefit ratios, the long-run economic impact of the BBC's R&D investment over 9 years is between £845 million and £1.4 billion.⁵⁸

Public-led RD&I coordinates and de-risks technology adoption for commercial organisations, which may underinvest in RD&I without public sector intervention.⁵⁹ The BBC's position as a publicly funded, independent and trusted organisation, with a highly regarded BBC R&D department, provides strong incentives for organisations and commercial firms looking to partner with the BBC. These partnerships de-risk RD&I investment for partner organisations whilst maintaining value creation for consumers and the wider industry.

In production and broadcasting markets, the benefits of improved adoption of advanced technologies primarily accrue to audiences in the form of increased consumer surplus, or to companies in the form of cost savings. The technology adoption may also have spillover impacts for organisations or related industries. However, consumer value impacts, cost reductions and industry spillover are often difficult to measure and are therefore illustrated here through case studies.

⁵⁴ Royal Charter for the Continuance of the British Broadcasting Corporation ('BBC Charter'), Dec 2016, s1

⁵⁵ BBC Research & Development, Piero sports graphic systems, published 1 January 2004. <https://www.bbc.co.uk/rd/projects/piero>

BBC Research & Development, Wing Watch – an AI enhanced interactive wildlife stream, published 27 January 2023; <https://www.bbc.co.uk/rd/articles/2023-01-wing-watch-ai-bird-wildlife-video>

⁵⁶ DotEcon, January 2018, Analysis of Research and Development Investment: A DotEcon Report for BBC R&D. <https://downloads.bbc.co.uk/aboutthebbc/insidethebbc/reports/pdf/DotEconrd.pdf>

⁵⁷ £1 of civil public R&D investment generates £8 in net economic benefits for the UK over the long term. The value of public R&D (2025), Department for Science, Innovation and Technology <https://www.gov.uk/government/publications/the-value-of-public-rd/the-value-of-public-rd>

⁵⁸ Based on total BBC investment of £164 million across nine financial years (2017/18 to 2025/26) and using cost-benefit ratios of £1:514 to £1:£8.73. Using DSIT cost-benefit ratios, the value is £1,316 million.

⁵⁹ RD&I is a market failure for commercial firms because they may not be able to "appropriate all of the returns from their innovations", which means they will likely underinvest in RD&I. https://ifs.org.uk/sites/default/files/output_url_files/fp223.pdf



Getty/Sebastien Bozon

High Definition Production Workflow – Hybrid Log Gamma

One example of the BBC de-risking new technological developments is a screen technology, co-developed by the BBC and NHK, called Hybrid Log Gamma (HLG) which enables more cost-effective production and broadcast of high definition (HD) images. The HLG system developed a single production workflow which enables more efficient production infrastructure, but ensures the same broadcast is available across broadcasting definitions. HLG is now the world's most popular production format for live Ultra High Definition (UHD) production, with the BBC's development enabling production of live sports, music and events of national significance in UHD.

Commercial organisations are benefiting from these developments, with Sky Sports using HLG for all their live sports coverage on UHD, international sports broadcasters like UEFA and WBS, and US broadcasters like NBC, CBS and Fox. In turn audiences are benefiting from the option to access a higher quality viewing experience where this is valuable to them. For example, Now TV offers an Ultra Boost pricing tier which, as part of its package, offers Ultra HD.



BBC/Red Planet Pictures/Joss Barratt

The BBC's public RD&I also reduces risk for other organisations by helping create and drive new standards for media broadcasting and production. The BBC can use its convening power, expertise and influence as a market leader in the UK media broadcasting and production industries to coordinate standards for new technologies and raise standards across the industry. High industry standards that reduce technical and market risk for market participants makes investment in products and technologies more certain for commercial and other organisations because they understand how products will work together.

There are knock on effects of shared technical standards. For consumer-facing innovations, audience standards can mean better reliability of services and more trust in the organisations that serve them. New entrants that meet technical standards can enter the market and compete with existing firms, providing additional competition to existing firms.

BBC RD&I investment in broadcasting resilience is also maintaining the distribution channels for UK public service broadcasting, now and in the future. By investing in broadcasting resilience and future-proofing distribution, audiences are able to benefit from reliable future access to PSB content without having to rely on access through outdated technology. Additionally, this maintains upstream demand in terms of commissioning UK produced content by preserving UK PSB reach amongst audiences.

Freely

One example of investment in broadcast resilience in the face of technological change is Freely, a joint venture between the BBC, ITV, Channel 4 and Channel 5. By launching Freely, which is free-to-air, live and on-demand TV distributed through broadband, the UK PSB's is effectively able to future-proof linear broadcasting as Digital Terrestrial Television (DTT) is switched off. BBC R&D has contributed to the underlying open standards of Freely for many years and made specific interventions to support Freely. One of the key benefits is that Freely is able to maintain PSB prominence, which means audiences are better served by their PSBs. It is widely understood that PSBs provide significant economic and social value to audiences and the UK's creative economy.^{60,61}

Recent analysis of Freely's uptake suggests it is making significant inroads into the market. Freely-adopted manufacturers make up around 55% of the market in terms of TV sales. In the first three months of 2026, Freely sales made up 41% of total TV sales (around 530k devices). The implication is that, if adoption of Freely continues to increase, the associated social benefits of PSBs are more widely delivered now and in the future.

⁶⁰ [Creative Industries Policy & Evidence Centre, January 2022, What is the Value of Public Service Broadcasting?: Exploring challenges and opportunities in evolving media contexts. Discussion Paper 2022/01. https://pec.ac.uk/wp-content/uploads/2024/01/What-is-the-Public-Value-of-Public-Service-Broadcasting-PEC-Discussion-Paper-Jan-2022.pdf](https://pec.ac.uk/wp-content/uploads/2024/01/What-is-the-Public-Value-of-Public-Service-Broadcasting-PEC-Discussion-Paper-Jan-2022.pdf)



Private 5G networks

The BBC is able to build resilience at every part of its supply-chain. Whilst Freely maintains resilience in distribution, other innovations provide resilience in production and broadcasting. For example, production crews increasingly use mobile network technology to cover events where satellite trucks cannot reach. However, at large events, mobile networks can get saturated with too many concurrent users competing to use the available network.

To overcome this, the BBC set up a trial private 5G network at the King's Coronation in 2023, which involved setting up and using a 5G network to transmit images and broadcast from Buckingham Palace and the surrounding area at a time of dense crowds and high mobile network use.⁶² This development won several awards and is now in use with over 60 devices connected from multiple broadcasters right around the world.⁶³

⁶² BBC Research & Development, Using a private 5G network to support coverage of the King's Coronation, published 5 May 2023. <https://www.bbc.co.uk/rdblog/2023-05-5g-non-public-network-coronation>

⁶³ As reported in various industry news outlets: <https://nabpilot.org/nab-best-paper-award-winner-represents-a-crowning-achievement/>; <https://britishcinematographer.co.uk/winners-of-new-look-ibc-awards-revealed/>



4.3 SME Growth and Supply Chain Diversification

The BBC plays an important role in supporting the growth, resilience and diversification of the UK's creative supply chain. Through its scale, commissioning activity and supplier relationships, it provides opportunities for SMEs across the UK to secure work, develop capabilities and expand into new markets.

⁶⁴ Creative Industries Policy and Evidence Centre, March 2025, Unleashing Creativity: Fixing the Finance Gap in the Creative Industries - Creative Industries Policy and Evidence Centre, https://pec.ac.uk/research_report_entr/unleashing-creativity-fixing-the-finance-gap-in-the-creative-industries/

⁶⁵ DCMS economic estimates: Business demographics, 2025 – main report, published 27 November 2025.

<https://www.gov.uk/government/statistics/dcms-economic-estimates-business-demographics-2025/dcms-economic-estimates-business-demographics-2025-main-report>

⁶⁶ House of Commons Library, December 2025, Business Statistics: Research Briefing. <https://commonslibrary.parliament.uk/research-briefings/sn06152/>

⁶⁷ Supplier io data enrichment for BBC for BBC suppliers 2025/26.

SMEs form the backbone of the UK's creative industries but often face challenges associated with demand uncertainty, limited financial resources and difficulties accessing external finance.⁶⁴ SME's make up over 99% of businesses in the creative industries⁶⁵ and the UK economy overall⁶⁶, and businesses with less than nine employees make up 94% in the creative industries, and 95% for the economy overall. As one of the UK's largest commissioners and procurers of creative goods and services, the BBC provides a significant source of business for a diverse range of suppliers.

In 2024/25, excluding independent production companies, the BBC worked with over 7,000 UK-based suppliers, of which almost half (48%) were SMEs. The BBC's supply chain extends across both creative and non-creative sectors, supporting businesses involved in areas such as independent production, post-production, technical and digital services, facilities management, logistics and professional services. The BBC's supplier network is also geographically dispersed, with 68% of suppliers located outside London, accounting for 56% of total spend.⁶⁷ Overall, this equates to approximately £1.29 spent outside London for every £1 spent in London.

Evidence: Working with the BBC supports SME growth and investment

The BBC Supplier Survey's respondent base was heavily SME-focused, with 94% of respondents employing fewer than 250 permanent staff, providing a strong indication of the experiences of the SMEs working within the BBC's supply chain⁶⁸.

Survey findings suggest that working with the BBC can support business confidence and growth. Among SME respondents:

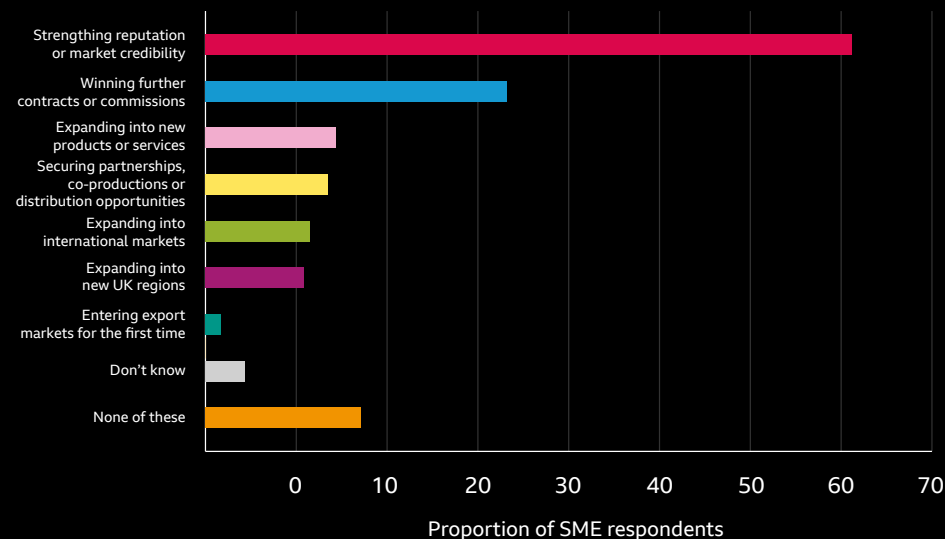
- Almost two thirds (64%) reported that working with the BBC and the consistency of that work, had increased their confidence to make longer-term investment decisions.
- 84% said that BBC work had directly supported business growth.
- 71% reported that working with the BBC had enabled them either to recruit additional staff or retain existing employees.

These findings indicate that working with the BBC can provide an important platform for SMEs seeking to grow and build business stability.

Without the BBC, one in four (25%) of SME respondents report that investment would not have gone ahead and more than six in ten (63%) report that they would have invested less without a consistent and predictable pipeline of work from the BBC.

The BBC's influence on SMEs extends beyond the provision of work. Contracts often require suppliers to meet high editorial, technical and production standards, creating incentives to invest in skills, people and business capabilities.

FIGURE 12: BBC INFLUENCE ON SMES INVESTMENT BEYOND THE PROVISION OF WORK



Among SME survey respondents:

- 28% reported investing in skills or training as a result of working with the BBC.
- 27% invested in new equipment.
- 21% recruited additional permanent staff.
- 33% recruited freelancers or contractors.

The survey also suggests that SME suppliers working with the BBC can experience a 'halo' effect that can help businesses expand their commercial opportunities.

- More than seven in ten (71%) SME respondents reported that working with the BBC had strengthened their reputation or market credibility.

- One-third (33%) of SME respondents said that working with the BBC had enabled them to secure further contracts or commissions, while 14% reported gaining partnerships, co-production arrangements or distribution opportunities as a result of their BBC work.
- 11% of SME respondents reported expanding into new UK regions and 12% reported expansion into international markets⁶⁹.

These findings indicate that association with the BBC can help suppliers demonstrate their capabilities to prospective customers and collaborators, particularly in sectors where reputation and previous experience are important factors in commissioning and procurement decisions.

The BBC's public service remit may also create opportunities for suppliers to participate in projects and formats that involve greater creative experimentation than might otherwise be commissioned in more commercially driven markets (see Section 4.1). This can provide firms with opportunities to develop new capabilities and build experience across a wider range of content and production activities.

⁶⁸ Based on CBI Economics BBC supplier survey, 2026.

⁶⁹ Based on CBI Economics BBC supplier survey, 2026.

5 INVESTING OUTSIDE LONDON

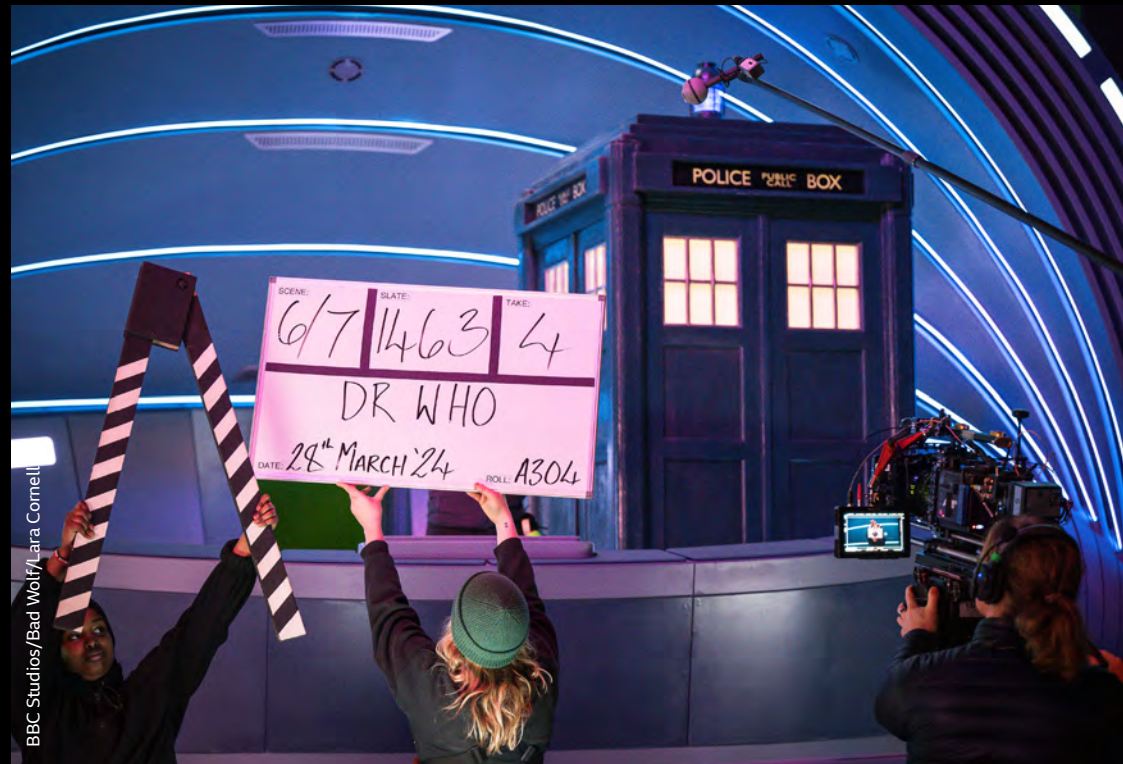
The BBC is not only a national strategic anchor, but a national leader in its investment and support of the creative industries outside of London.

The BBC is a critical regional anchor due to its substantial physical footprint and regional commissioning. Its presence acts as a magnet for third-party private investment and also public funding for skills development and infrastructure funding. This is fundamental to ensuring that regional clusters are not only sustainable but also grow. In short, the BBC's activity across the UK's nations and regions maintains cluster scale and crowds-in other UK and international investors.

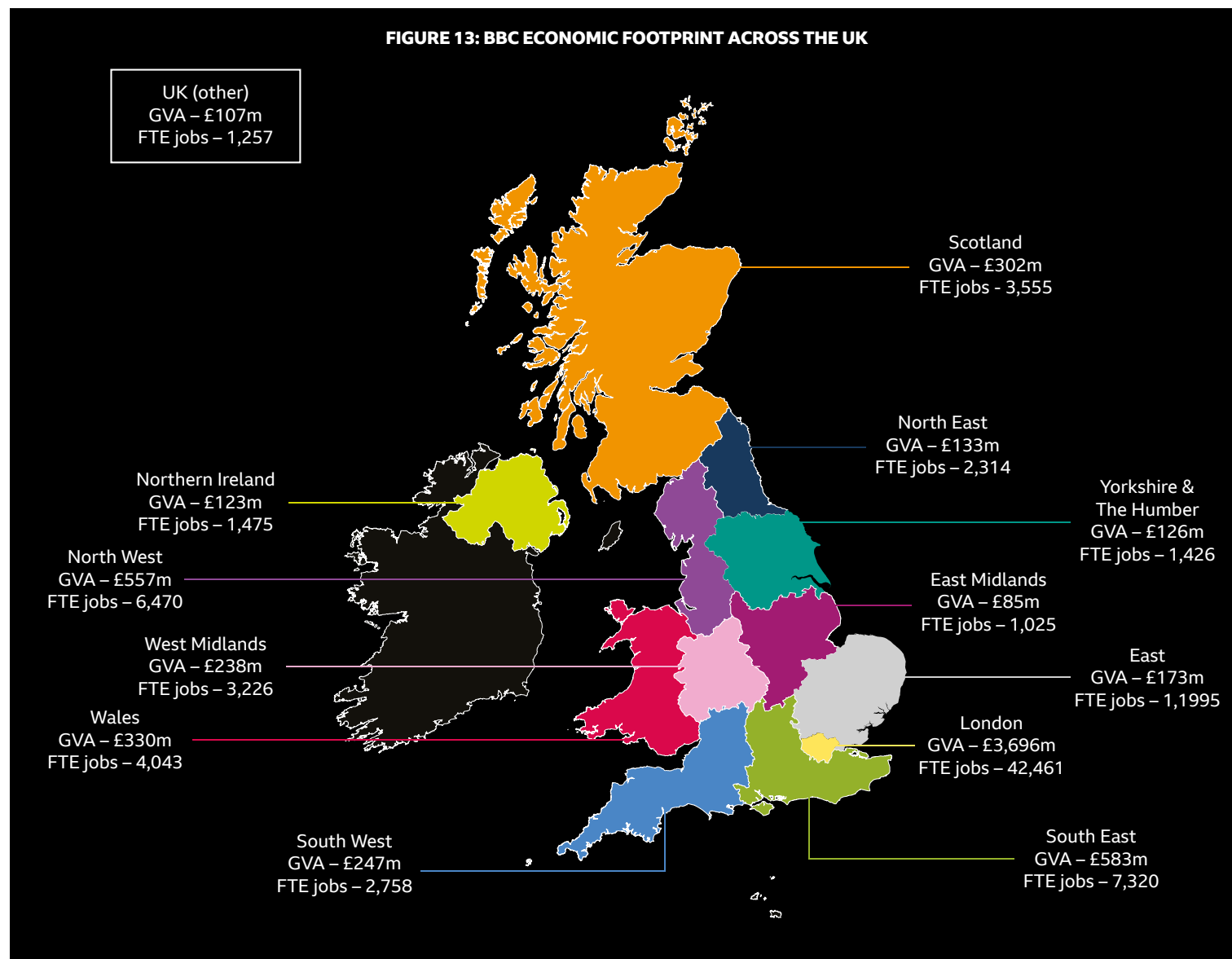
The BBC's Across the UK (ATUK) strategy, published in March 2021, extended the BBC's commitment to better reflect and represent audiences and communities as well as grow its

impact across the Nations and Regions of the UK. The ATUK strategy prioritises investment in regional creative economies beyond London, specifically to improve talent development, provide a renewed focus on regional partnerships and move BBC jobs across the country. This shift matters, not only for regional economies, but also to improve local and national portrayal and delivering value across the UK.

The BBC has continued to build on this strategy throughout the current Charter period through partnership agreements in strategically important clusters, including in the North East of England and the West Midlands.



Now, in 24/25, the BBC has increased its economic footprint outside of London to £3 billion. Figure 13 shows the BBC's total GVA and employment impact across the UK nations and regions.⁷⁰ These figures capture not only economic activity generated by the BBC through its regional employment, but the subsequent economic activity generated through its supply chains and spending by employees of both BBC and its suppliers.



⁷⁰ The analysis presented total GVA and employment impact of BBC Group at ITL1 level (2021 boundary definitions).



BBC_Left Bank Pictures, James Stack

5.1 Regional Anchor Role and Inward Investment

The BBC has a significant and meaningful presence as a creative anchor in multiple locations across the UK. Without anchor institutions such as the BBC pushing activity into the regions, the creative economy would remain unequally concentrated in London – particularly for the audiovisual broadcasting and production sector, of which 25.5% of activity is based on London.⁷¹ The BBC's presence enhances regional cluster visibility, which in turn drives growth and high value jobs outside London.

As discussed in PWC's research on the BBC's role in creative clusters, the BBC can influence cluster formation in several ways; by attracting funding and inward investment, facilitating partnership networks and strengthening local talent pools.⁷²

The research found that local visibility and physical presence matter- a larger local presence in terms of employment has a statistically significant impact on creative cluster growth, whereas an increase in creative procurement spend – without a significant BBC presence – has a positive but not statistically significant impact on clustering.

A 15% increase in the BBC's local footprint doubles the rate of growth of the surrounding creative industries over time.⁷³ Creative hubs in Salford, Cardiff, Glasgow, Belfast and Birmingham have seen a considerable level of growth as a result of BBC investment, with a larger BBC presence amplifying the local creative economy.

Creative clusters benefit from agglomeration, where the clustering of businesses, workers and investment in the same places, raises productivity through frequent interactions. These agglomeration benefits occur from faster knowledge sharing and innovation spillovers, better matching between employers and talent in local labour markets, and supply chain efficiency, including shared services and economies of scale.

Analysis by Public First found that the audiovisual, production and broadcasting sector drives £470 million per year in productivity gains from agglomeration across the UK's creative sector.⁷⁴ The BBC often acts as a catalyst to agglomeration and the benefits that can be attributed to the BBC are sizeable. The research found that within five years of the BBC's construction of Roath Lock Studios in 2012, the number of creative firms registered or headquartered in a 20km radius of Cardiff Bay increased by 47%. In Glasgow, every £1 spent by the audiovisual, production and broadcasting sector generates a £2.33 return for the local economy. £8 million of the productivity gains from agglomeration in Glasgow, of which 28% (£2.3 million) is driven by PSBs – primarily the BBC Scotland and STV at Pacific Quay and Channel 4's newly established Creative Hub.

Increasing the BBC's footprint in a region encourages investment and business growth from others into that cluster, as demonstrated in the analysis shown on page 42. That growth translates into better job opportunities for the region. New analysis shows that five years after the BBC increases its presence in a cluster, the share of high value jobs is about 2 percentage points higher than if the BBC had not invested.

This compliments PWC's analysis, which identifies that creative clusters are associated with increased opportunities for more highly paid work and better working conditions, such as performing less unpaid overtime. Workers benefit from working in the creative industries, as it is a higher productivity sector; a worker who is employed in the creative industries earns 7.3-9.4% more than a worker with a similar demographic and skill profile in another industry.⁷⁵

⁷¹ Based on BBC analysis of latest DCMS economic sector (GVA) estimates.

⁷² PWC, November 2022, The role of the BBC in creative clusters: Analysing the BBC's wider impact on the UK economy.

⁷³ PWC, November 2022, The role of the BBC in creative clusters: Analysing the BBC's wider impact on the UK economy.

⁷⁴ Public First, September 2025, The Creative Engine: How Media & Entertainment Powers the UK's Creative Economy. <https://www.publicfirst.co.uk/the-creative-engine.html>

⁷⁵ PWC, November 2022, The role of the BBC in creative clusters: Analysing the BBC's wider impact on the UK economy.



Evidence: The effect of BBC moves outside of London on high value job creation

While the BBC is not the sole provider of skills and career development opportunities (as explored in Section 3.2 and 3.3), its differentiating strength lies in where it supports skill development and at scale to influence the wider industry.

This analysis by BBC, supported by EY, explored the BBC's influence on regional and national labour-market outcomes, particularly on the creation of high-value jobs in regions where the BBC has invested. It uses an event-study regression that assesses the extent to which high value jobs which are Standard Occupations Class (SOC) 1-3 in the Communications and Transport (SIC H, J) sector increase after the BBC's entry in a region. This was accompanied by a trend-break regression for further robustness checks.

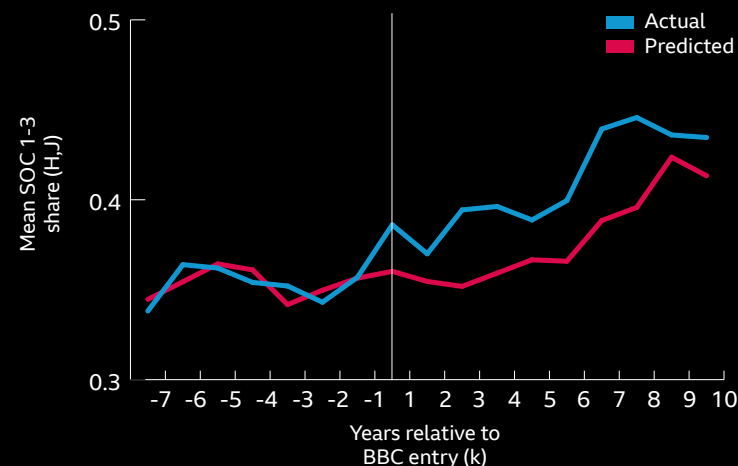
High value jobs are defined as those within SOC1-3 and capture managerial, professional and associate professional and technical occupations. These are more likely to include decision-maker or decision-influence roles in organisations than SOC4-9 and are also associated with more advance skills and qualification.⁷⁶

Focusing on a 21-year window, 2004-2024, three regions were identified where the BBC announced a significant regional investment: BBC move to Pacific Quay in 2007 (Glasgow, South Western Scotland), BBC move to MediaCityUK in 2011 (Salford, Greater Manchester), BBC Roath Lock Studios opening in 2012⁷⁷ (Cardiff, East Wales).

The first step was to estimate a pre-trend for SOC1-3 shares for the communications and transport sector, controlling for unemployment, GVA per capita, SOC1-3 job share outside the Communications and Transport sector (to account for broader regional trends in SOC share), and employment in the transport sector (to isolate the impact on the communications sector). The SOC1-3 share that would have existed had the BBC not entered is then compared to the actual SOC1-3 share in the region post-BBC entry. Finally, all additional effects attributable to BBC entry in the regions are aggregated and tested for positive significance. The results for both a 5- and 10-year post period indicate positive and significant results.

- 5-year interpretation: 5 years after the BBC's entry, the actual SOC1-3 share amounted to c. 39%, which is 2.2 pp higher than if the BBC has not entered the region (i.e. the 'predicted' share).
- 10-year interpretation: 10 years after the BBC's entry, the actual SOC1-3 share amounted to c.43%, which is about 2.1 pp higher than if the BBC had not entered the region.

FIGURE 14: INCREASED SHARE OF HIGH VALUE JOBS (SOC1-3) FOLLOWING BBC INCREASING REGIONAL PRESENCE



Source: BBC analysis supported by EY

It is important to note that this approach does not isolate the impact of the BBC moving high-value staff into the region. However, while the short-term effect may be influenced by this movement, the long-term impact can reasonably be expected to be a result of high value jobs in other businesses moving into the area or internal upskilling and job growth in local businesses.

Whilst the divergence between actual and predicted high-value jobs decreases over time, this is consistent with the gradual fading of the direct BBC entry effect, with later-period outcomes increasingly shaped by broader macroeconomic and sectoral factors rather than the initial intervention by the BBC in moving or expanding its regional base.

Annex A5 provides more detail on the main specification and robustness specification, results and limitations.

⁷⁶ Note, SOC1-3 are used as a proxy for high-value jobs. These roles typically involve autonomy, judgement and complex problem-solving, distinguishing them from occupations with more routine or task-based responsibilities. This distinction is also reflected in patterns of skill mismatch. According to the latest Census, the media skills mismatch rate in SOC1-3 roles in England and Wales was 25%, around 7 percentage points lower than the median skills mismatch in SOC4-9 occupations.

⁷⁷ BBC had other meaningful investment in Cardiff, including BBC Hoddinott Hall in 2009 which is home to the BBC National Orchestra of Wales at Cardiff Bay, and BBC Cymru Wales Central Square office which opened in 2021. However, Roath Lock was selected as it substantially increased the BBC's physical and staff footprint in the city.

The BBC's ATUK strategy identifies clusters where the BBC has historically underinvested and where audience performance could improve, and also focused on regional clusters with potential to become nationally important creative clusters that could grow sustainably as a result of BBC investment, third-party investment of commissioners and producers, and also public funding from regional mayoral and political stakeholders. The BBC's ATUK strategy identified the North East and West Midlands as key focus regions. The BBC activity is highlighted as case studies; the West Midlands is discussed as a case study in this section and the North East (predominantly the BBC's partnership with NESIP) is explored in Section 2.4.

The ATUK strategy has combined BBC regional commissioning commitments and infrastructure investment to expand or re-locate physical BBC footprint. Whilst these distinct impacts can have significant influence (discussed in Section 5.2 and 5.3 respectively), the aggregate impact can be transformative. The BBC's commissioning model works to grow talent and skills that support the writers, directors and regional creative workforce. In turn, this helps attract suppliers and other commissioners to regional clusters which in turn supports investment and growth in regional infrastructure and studios that further grows the regional supply chain.



In 2021, BBC signed a formal MOU and partnership with the West Midlands Combined Authority (WMCA) and Create Central to grow the BBC's content production investment and impact in the West Midlands, including a significant expansion of commissioning spend, and the relocation of network production teams across Radio and News. As part of this first agreement, the BBC relocated key network productions such as *MasterChef* and *Silent Witness*. Both are returning programmes with long filming schedules, enabling the BBC to develop crew volumes and skills in the region, working alongside a growing supply chain.

As a result of its growing commissioning spend, the BBC expanded its Scripted commissioning in the West Midlands, with the commissions of *Phoenix Rise* and *This Town*, diversifying the production base of the region. The commitments in this first MOU have been delivered in full. In 2022, the BBC announced that it would relocate its regional HQ from the Mailbox, to the Tea Factory in Digbeth by early 2028. This will help sustain the growth of the West Midlands as a key UK regional creative cluster and add long-term impact to the BBC's broader Across the UK investments.

The redevelopment of the Tea Factory is expected to add £73 million in GVA to the West Midlands between 2021 and 2031.⁷⁸ This analysis by BOP Consulting and City-REDI also identified that the BBC's combined infrastructure and commissioning investment in the West Midlands is estimated to bring an additional £282 million in GVA to the region over the same period. This is a 44% rise in the BBC's impact than would otherwise been the case.

The BBC's investment in the Tea Factory and its decision to relocate the production of *MasterChef* to the Banana Warehouse in Digbeth Loc Studio, a new high-profile studio that is being developed

by Steve Knight, have been critical to attracting other investors.

The BBC has formed part of a wider investment into the creative sector and redevelopment of Digbeth by WMCA and Create Central, the industry-body for the West Midlands creative content sector. This has coordinated public and private investment across film, television, gaming and digital sectors, as well as public investment from Creative UK, the BFI and Screenskills.

A second MOU between BBC, WMCA and Create Central was published in September 2025. As part of this commitment, the BBC will grow its network TV spend from £24 million to £40 million per year and BBC Studios will relocate from its Birmingham Drama Village to set up a new base in Digbeth, amongst other commitments. In turn the WMCA will invest a minimum of £5 million per year in regional creative industries infrastructure – including a production fund, support for facilities, and seek to match the BBC's investment in skills programmes – to support sector growth and attract production businesses to the West Midlands. Further commitments that apply to the MOU, WMCA and Create Central are set out in the second MOU.⁷⁹

⁷⁸ BOP Consulting, November 2024, The BBC in the West Midlands, <https://www.bbc.co.uk/aboutthebbc/documents/the-bbc-in-the-west-midlands.pdf>

⁷⁹ More details available on the second MOU: <https://www.bbc.co.uk/aboutthebbc/documents/bbc-mou-with-wmca-september-2025.pdf>

5.2 Strategic Regional Infrastructure Investment

The BBC Group's physical presence is visible across the UK, from local radio stations to larger BBC hubs. For example, BBC Wales is head quartered at Cardiff Central Square and BBC Studios' Roath Lock studio facility in Cardiff Bay remains a centre of drama production. In Glasgow, BBC StudioWorks production hub at Kelvin Hall in Glasgow's West End launched in 2022 and expands the BBC's presence from Pacific Quay.

The BBC's presence within regional clusters frequently acts as a catalyst, attracting additional investor interest and accelerating development. As an anchor tenant in major redevelopment projects, the BBC helps attract large-scale investment from infrastructure partners and encourages other existing or new creative businesses to establish in the same area.

The BBC has a diverse property portfolio which reflects a mix of both ownership and leasing. Long-term leasing and property-sharing arrangements have helped the BBC expand its regional footprint in places such as MediaCity UK in Salford and Birmingham's creative quarter in Digbeth. This approach provides commitment to regional investors and players, whilst offering cost-effective expansion the BBC's footprint outside of London.

The BBC owns the freeholds or long-term headleases on several of its headquarters and broadcast centres such as New Broadcasting House in London's W1A. Investors typically experience several interconnected benefits from BBC long-term property leases, where the BBC becomes an anchor tenant within a property development. The BBC is a stable, publicly funded institution with long-term occupancy commitments. This provides reliable rental income over extended periods and strong covenant strength (reduced default risk). The BBC's presence often acts as a signal of viability and quality, encouraging other tenants from creative firms and technology firms to locate nearby. Clustering increases demand for commercial space, with faster absorption of new developments, which ultimately enhance asset value and long-term capital value due to sustained demand.

The BBC offers some distinct benefits as an anchor tenant. The importance of the BBC's relationship with audiences across the UK means that place-making and regeneration is prioritised as well as partnerships with local organisations—not just developers and investors. The BBC's convening power can help unlock public-private co-investment opportunities as well as large-scale infrastructure funding that supports local economic growth across other sectors.





CASE STUDY

BBC AS AN ANCHOR IN SALFORD'S MEDIACITY UK



Salford has become the centre of UK broadcasting outside of London. In 2004, the UK Government made public its wish that a large part of the BBC should move outside London. Salford Quays was selected in 2006. BBC North became part of the newly established MediaCity, with the ambition to create a new centre of excellence outside of London for production, technology development, and digital media.

The BBC's move to MediaCity in Salford in 2011 was one of the largest ever public sector relocations and the single biggest shift in the history of British Broadcasting. The BBC became the anchor organisation for MediaCity, a new creative cluster on the banks of the Manchester Ship Canal.

The move was a catalyst for significant growth of the region's creative and digital sector. Substantially increasing the number of media jobs and providing opportunities for people across the region to gain skills and employment through the BBC and the wider industry.

In 2011, the BBC moved significant departments from London including BBC Sport, BBC Children's and BBC Radio 5 Live who joined teams from the BBC's base in Manchester City Centre. The original move saw 2,300 roles relocate but the BBC has continued to move programmes and teams including *BBC Breakfast*, *BBC Children in Need* and *BBC News at One* and there are now over 3,000 BBC staff based in Salford.

In 2013, ITV relocated 500 staff from its central Manchester office to a larger site in MediaCity. This included its Granada news studios and daytime production, CITV and Entertainment departments. Public First⁸⁰ estimate that the media and entertainment sector drive £15 million each year in productivity gains from agglomeration in Salford, of which 48% (£7 million) is driven by PSBs - namely the BBC and ITV. Furthermore, within five years of the BBC and ITV's relocation and the Phase 1 of MediaCity's investment in 2012, there was a 105% increase in the number of creative firms registered or headquartered within a 25km radius.

5.3 Regional Commissioning and Procurement

Investing in homegrown storytelling is essential not just for audience representation and portrayal, but for sharing economic opportunity across the country. Regional commissioning enhances growth for both local areas and the UK as a whole, by strengthening regional productions clusters with consistent demand to support sector and talent development and by de-risking entry from other UK and global commissioners.

The BBC is the largest commissioner, commissioning at scale and from all UK nations and regions. It's commitment to spend outside of London currently outweighs all other UK PSBs. In 25/26, 59% of BBC network TV and 49.8% of radio spend was in the nations and regions beyond the M25.⁸¹

The BBC's role to back the best home-grown story telling means that BBC commissions stories that portray and reflect strong regional voices and experiences. Doing this authentically means working with indies based outside of London, engaging with regional suppliers, filming on location and in facilities based in the region, and using local crew.

This approach, which is reinforced by Ofcom's out-of-London criteria, concentrates economic activity in regional screen sectors and reduces leakage of expenditure and talent to London or other areas. Titles such as *Saving Lives in Cardiff* (Wales), *Murder Trial* (Scotland), *Mastermind* (Northern Ireland), and *Robson Green's Weekend Escapes* (North East England) are all examples of productions that meet each of Ofcom's criteria across these nations and regions.⁸²

⁸¹ 25/26 figures for network TV based on Ofcom's reporting requirements for calendar year 2025, network radio and music spend is based on financial year 25/26.

⁸² A production's Ofcom area is defined as a production meeting two of the following three criteria: (1) producer base (primary office location), (2) predominant crew base (based on threshold), or (3) predominant spending location (threshold spend, used as a proxy for filming location).

⁸⁰ Public First, September 2025, *The Creative Engine: How Media & Entertainment Powers the UK's Creative Economy*.

The BBC is critical in supporting the growth of independent producers based outside of London. The BBC is the leading commissioner of indies based outside of London, as shown in Figure 15. More than 50% of BBC commissioned titles from independent producers between 2020 and 2025 were from indies located outside London.

Furthermore, both the BBC Small Indie Fund and BBC Radio & Music Indie Development Fund aim to support the indies sector in the Nations & English

Regions as well as diverse-led companies. As part of its commitment to supporting the grassroots of the creative industries in all four nations, the BBC is supporting 40 independent production companies that will receive support from the Small Indie Fund and the Radio & Music Indie Development Fund in 2026. 88% of these companies are based in the Nations and English regions. All companies will receive strategic investment from a total £1.3 million pot, mentors from the commissioning

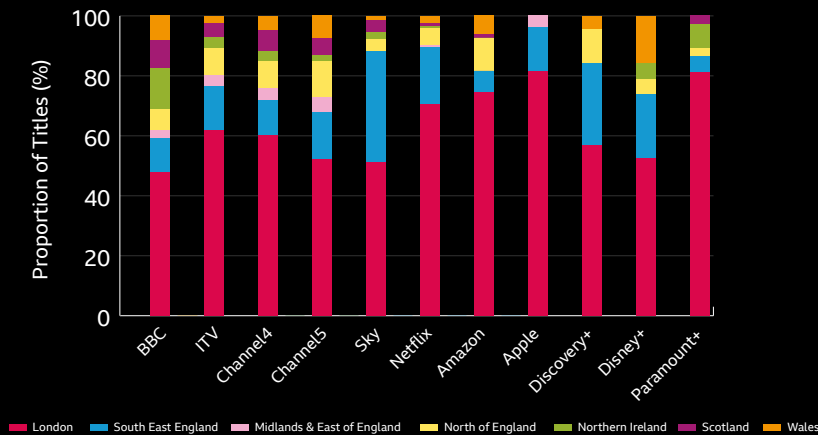
teams, and a programme of introductions to wider BBC teams, to help them grow and develop their ideas and businesses.⁸³

The BBC's ability to make commitments at scale to independent producers and other suppliers means that it can offer greater stability in demand and opportunities for firms and talent based outside of London. Further analysis of the BBC supplier survey finds that:⁸⁴

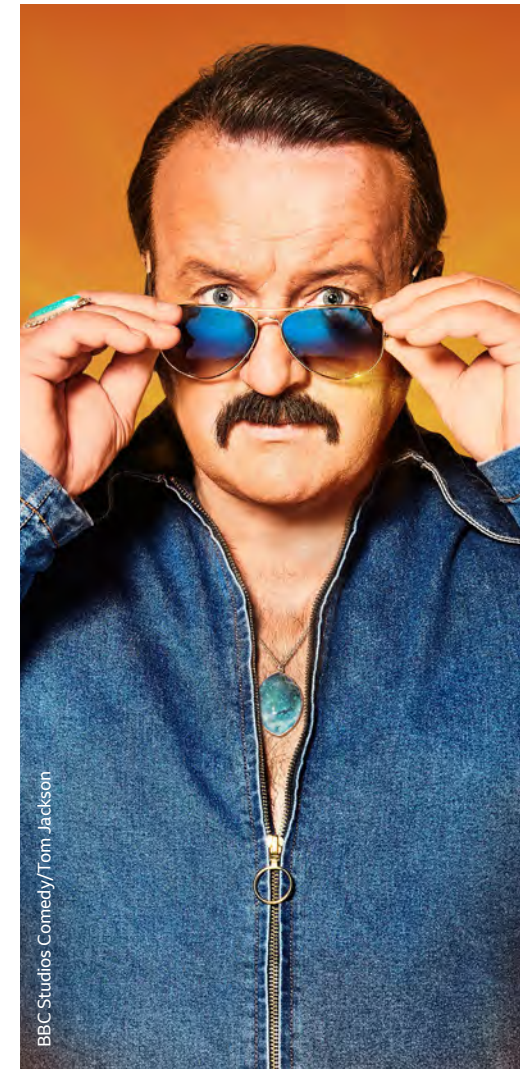
- Of respondents that are indies based outside of London (OOL) who reported high or medium consistency of BBC commissioning, including recommissions, 93% said work with the BBC had supported their organisation's ability to make investment decisions.
- This is compared to London-based indies that responded who reported high or medium consistency of BBC commissioning, where 80% said work with the BBC had supported their organisation's ability to make investment decisions.⁸⁵

The survey also asks whether predictable commissioning from the BBC increases investment. Indies who are based OOL with predictable commissioning responded that they increased investment by approximately 32% compared with an increase in investment of 21% from London-based indies.

FIGURE 15: PROPORTION OF TITLES COMMISSIONED FROM INDEPENDENT PRODUCERS BY REGION (2020-2025)



Source: BBC analysis, Ampere Analysis data. Note: commissioner data excludes any in-house commissions (e.g. BBC PS titles or series commissioned from BBC Studios or PS production).



⁸³ BBC Indies Funds to support 40 production companies across the UK in 2026, 31 March 2026 (updated 1 April 2026). <https://www.bbc.com/mediacentre/2026/indie-fund-production-companies>

⁸⁴ BBC analysis of CBI Economics' survey of BBC suppliers for FY25/26. These results are based on responses from independent production companies.

⁸⁵ Based on responses from 80 indies. High or medium consistency is defined for indies when commissioning from the BBC is very predictable, fairly predictable or neither predictable or unpredictable.

However, in order to better understand the BBC-specific impact on investment it is possible to control for two factors: first is controlling for investment that would have happened anyway, absent the BBC; and second is only including the indies who report some positive effect from consistent commissioning. When controlling for both these effects:

- OOL indie respondents with high predictability of commissioning have ten percentage points higher investment increases as a result of consistent BBC spend than indies with low predictability (15.6% versus 5.3%).
- However, in contrast, indie respondents in London with high predictability of commissioning have lower investment increases than indies with low consistency of commissioning (10.1% versus 13.4%). These results are shown in Figure 16 below.

• These results suggest that the consistency of BBC commissioning and procurement appear to have a greater impact on suppliers outside of London compared to London-based firms. In particular, the BBC appears to have a substantial impact on the ability for suppliers outside of London to secure investment. London-based firms are more likely to find alternative commissioners or customers given the creative industries concentration in London, whereas suppliers based outside of London are more likely to depend on the BBC as one of only a few regional commissioners.

Directing commissioning spend into specific regions is part of supporting development of regional indies and suppliers based outside of London. This is a key feature of the BBC's partnerships with WMCA in the West Midlands and NESIP in the North East. Both MOUs set out content spend commitments and, in the case of

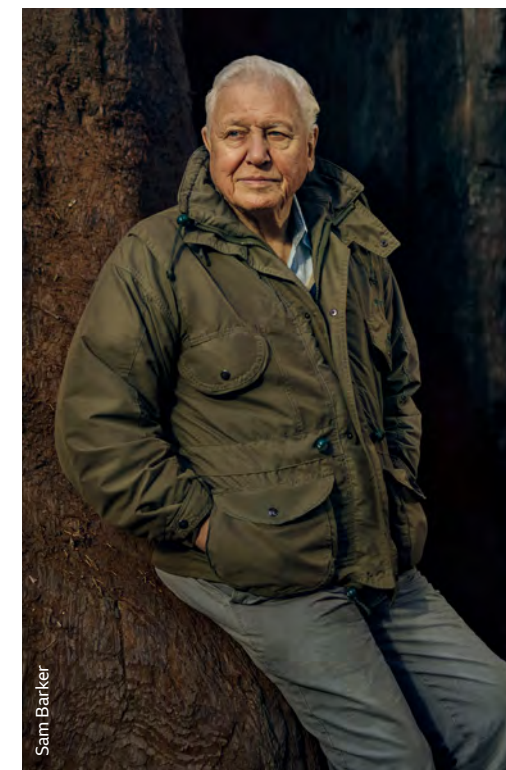
the West Midlands, the BBC has also moved the production out of London of long-running series *Silent Witness*, Series 29 produced by BBC Studios Productions, and new series of *MasterChef*, produced by Shine TV in association with Ziji Productions.

BBC commissioner and studio presence supports regional specialisms

Public service commissioning combined with BBC Studios production footprint has helped to underpin regional clusters and their specialisms. The BBC also has a vast range of non-network services including BBC Local and nations radio stations, local news online as well as regional news on the main channels. This content is made by local teams based across the UK which shapes local clusters.

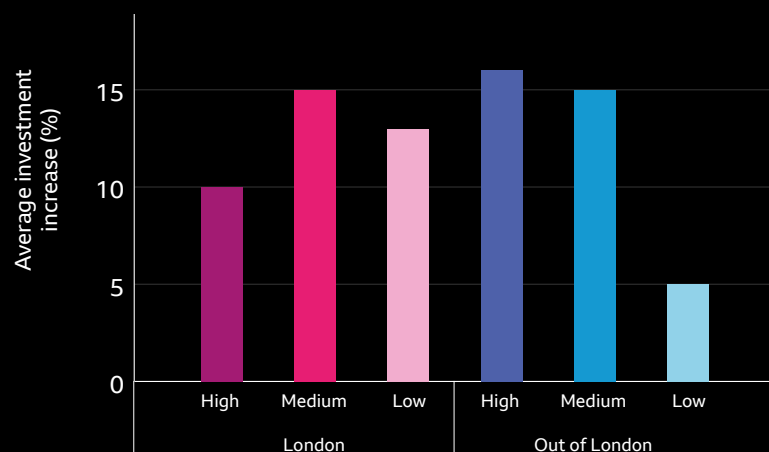
The BBC's production presence had a significant impact on the growth of regional creative clusters. Bristol is recognised as the global centre of natural history production, which is a consequence of BBC Studios Natural History Unit's near 70-year presence in the city and the indies set up by former NHU staff. The city also hosts part of the BBC Studios Production Factual-Entertainment team, and the wider cluster has a strong specialism in factual and factual entertainment. Similarly, *Doctor Who* has been produced in Cardiff since its regeneration in 2005, first by BBC and then BBC Studios at Roath Lock (Series 1 to 13) and then by Bad Wolf at Wolf Studios Wales (Season 1 to 2, co-commissioned with Disney). The show's return was a pivotal moment and became a catalyst for the immense growth of the Welsh screen sector and its specialism in high-end drama.

Similarly, the relocation of BBC Sport and BBC Children's & Education departments to MediaCity has influenced the indies and creative firms established in Greater Manchester. Moving BBC's commissioning and in-house production teams (including part of BBC Studios Productions) strengthened the cluster's specialism in news, sport, children's and education production, as well as creating employment directly with BBC and indirectly through local supply chains.



Sam Barker

FIGURE 16: AVERAGE INVESTMENT INCREASE BY CONSISTENCY OF INVESTMENT – LONDON V OOL INDIES¹⁷



Source: BBC analysis, CBI Economics' survey of BBC suppliers (25/26)

6 CONCLUSION

The evidence presented throughout this report demonstrates the critical role that the BBC has played and continues to play in the growth of the UK's creative industries.

The scale, breadth and stability of the BBC is what drives investment and job creation across the sector. It brings UK storytelling to the rest of the world giving the UK its reputation as a global creative powerhouse. And its decision making is guided by its mission to deliver a universal public service. That affords the BBC a unique position in the market, to take creative risks and invest in talent and skills across the UK in service of economic and social objectives over commercial ones. These factors shape the market over the longer term so that the ripple effect of the BBC extends beyond its direct economic footprint.

That economic advantage is underpinned by a public funding mechanism that allows the BBC to maintain scale and breadth and act solely in the public interest. This sits alongside a mutually reinforcing commercial business that makes licence fee payers money go further by seeking commercial opportunities that are aligned with the BBC's mission and public purposes.

The current Charter Review presents a once in a decade opportunity to renew the BBC's role as part of our national creative infrastructure. The government's Creative Industries Sector Plan

identifies several ingredients for growth - skills, innovation, regional growth, export promotion, investment in IP and entrepreneurialism - as this report shows, these are all areas where the BBC has a strong track record. The Government's BBC Green Paper recognises the cornerstone role the BBC has played, and proposed options on how the BBC could drive future growth.

As outlined in the BBC's response to the Government's green paper, the BBC has ambitious proposals to increase its economic footprint across the UK, with over half of leadership and commissioning roles outside of London. The BBC could also do more to support training and opportunity for young people from all backgrounds, ensuring the creative workforce has the future skills to compete in a global market.

But, this is not a guaranteed future. The UK media market and financial context have changed profoundly since the BBC's Charter was last reviewed a decade ago. Audience behaviour has shifted at speed, production inflation has increased sharply, financial pressures have led to significant consolidation across the market, and the BBC's real terms income has fallen significantly.

These pressures are structural, not cyclical - and without reform, they will increasingly constrain the BBC's ability to deliver a universal public service.

For the BBC to continue to be a foundational economic institution capable of sustaining and driving growth in the UK creative industries, reform of the BBC's public funding model is required. This report evidences the importance of the principles of universality and sustainability for growth and so any public funding reform must meet these tests. The BBC must also be able to adapt to the changing needs of today's audiences. A lighter, more growth focused regulatory framework will enable the BBC to act with agility, to maximise value for audiences and the UK creative industries. And a growing BBC commercial business can do more to invest in UK IP and grow the UK's global reputation.



TECHNICAL ANNEXES

This section presents technical detail on methodological approach and data sources. This analysis is undertaken by BBC, with assistance from EY. BBC solely responsible for presentation of all analysis.

A1: The BBC's economic footprint – 2024/25 GVA analysis

The BBC has a significant economic footprint, as a major employer and substantial supply chain which spreads across the UK.

This technical annex presents the analysis of the BBC Group's economic output, measured as gross value added (GVA), in 2024/25. This analysis presented was produced by the BBC, with support from EY. The BBC is solely responsible for this analysis.

A1.1 Economic impact modelling approach

The BBC Group's economic footprint in the UK is measured in terms of total Gross Value Added (GVA) and Full-Time Equivalent (FTE) employment. This includes direct economic activity generated by the BBC and the multiplier effects within the supply chain and wider economy.

Gross Value Added (GVA) is an economic measure of the value of goods and services produced in an economy, sector, or organisation, net of any leakages that occur in the economy (e.g. imports, intermediate inputs). It captures value created by production and represents the contribution to the Gross Domestic Product (GDP) of a given economy generated as a consequence of investments and business operations.

The approach estimates three main components of BBC GVA: direct, indirect and induced effects. Figure 17 gives more detail. Direct GVA is estimated based on an income approach, whereas indirect and induced impacts use an input-output approach by applying economic multipliers to BBC supply chain spend and expenditure.

Figure 17: Components of BBC Group GVA and FTE jobs impact

| Components of GVA | BBC data and calculation |
|-------------------|---|
| Direct GVA | Employee salaries and operating surplus (EBITDA), net of any intracompany dividend payment |
| Indirect GVA | Impact of supply chain spend on BBC supplier firms and freelancers (Tier 1 suppliers), calculated using Type I effects on supply chain spend Impact of supply chain spend on other suppliers (Tier 1-n suppliers), calculated using Type I effects on supply chain spend, net of any intracompany payment and imports |
| Induced GVA | Impact of wider economic output driven by BBC employees, calculated using Keynesian consumption multiplier on BBC's direct compensation of employees Impact of wider economic output driven by employees of all suppliers (including freelancers), calculated using Type II effects on supply chain spend, net of any intracompany payment and imports |

The analysis identifies the BBC's economic footprint across the UK's nations and regions, as well as separating the impact of the BBC Public Service (PS) from BBC Studios and other commercial holdings (BBCC).

Indirect and induced impacts are calculated using economic multipliers, which estimate the 'effects' driven by the non-salary costs incurred by the BBC. These effects show the additional impact on the economy for each £1 of spending at a sectoral level. The effects are driven by the structure of the national and local economy, including the extent to which the local economy relies upon imports from abroad and from elsewhere in the UK (assumed through a Location Quotient analysis of the different UK regions).

This follows the input-output framework pioneered by Wassily Leontief, and is based on national and local economic accounts (note these are based on the latest available data published by ONS on the 2022 Input-Output tables). Specifically, the methodology allowed us to calculate:

- Type I effects – which represent the economic impacts generated by £1 of spend in a specific sector along the sector's supply chain (Tier 1-n suppliers);
- Type II effects – which represent the economic impacts generated by £1 of spend in a specific sector along the sector's supply chain (Tier 1-n suppliers) and the wider economic output driven by the spend of suppliers' employees across the economy;

- Keynesian consumption multipliers – which mirror the marginal propensity to consume of an average BBC employee, and represent the economic impacts generated by £1 of BBC employee compensation in the wider economy.

The analysis uses Type I and Type II multipliers calculated for both UK and the ITL1 regions using input-output tables published by the ONS and employment data published by BRES (both latest year 2023). These are based ITL1 multipliers are applied to the corresponding ITL1 regional spend, and these are then aggregated. As these multipliers do not capture elements of leakage between regions, there is a difference the UK figure calculated using UK-level multipliers and the UK-equivalent ITL1 aggregate. This difference is then rebalanced across ITL1 regions based on BBC employee spend for direct GVA, BBC supplier spending for indirect GVA, and BBC or supplier headcount for induced GVA.

The analysis excludes any BBC economic contribution outside of the UK economy i.e. UK-only GVA. The analysis excludes any non-UK staff, freelancers or suppliers from the analysis; however, it includes UK expenditure associated with the BBC Group's international services and activities, where information is available, and any international operating surplus that returns to BBC Group in the UK.

Spillover effects are not quantified as part of the analysis. This is in line with KPMG's previous analysis of the BBC's economic contribution in 2019/20.⁸⁶ Spillover effects impact those (firms, government, society) not directly involved in the BBC's economic activity.

⁸⁶ KPMG, March 2021, An Assessment of the Economic Impact of the BBC: A report for the BBC for Financial Year 2019/20. <https://downloads.bbc.co.uk/aboutthebbc/reports/reports/kpmg-economic-impact.pdf>.

Some of the economic spillovers on the creative industries and adjacent industrial sectors that result from the BBC's operation and expenditure (as opposed to audiences' consumption of BBC services) are qualitatively and quantitatively explored in separate analyses in the main body of the report.

A1.2 Data sources and adjustments

The analysis uses multiple sources of BBC data, including:

- BBC HR data for employee and freelancer headcount and costs.
- BBC Procurement data on supplier invoicing and card costs.
- BBC General Ledger data and BBC Group Finance's long-term financial model, which is used to identify and reconcile missing spend categories and operating surplus that are not included in BBC HR or BBC Procurement data.

The General Ledger and long-term financial model are used to identify and reconcile missing spend categories that are not captured in the BBC HR or BBC Procurement data.

A bottom-up approach was adopted to ITL1 regions and industrial sector (based on standard industrial classification (SIC) codes).

- BBC HR data provided employee and freelancer data at aggregated ITL1 region. Freelancer data were assigned based on contracting BBC Division/Sub-Division.⁸⁷
- BBC Procurement data was used to assign ITL1 region based on Procurement data postcodes.⁸⁸ Any unaccounted supplier spending i.e. identified and reconciled from BBC General Ledger was assigned a SIC code based on cost type and apportioned across ITL1 regions based on regional distribution of costs, by SIC, observed in the BBC Procurement data.
- Any operating surplus (part of direct GVA) is assigned to ITL1 London to reflect current head office locations of BBC PS and BBCC.

Each data source also identified operating surplus and intermediate costs across BBC Group i.e. BBC PS or BBCC. The data reconciliation also adjusted for intra-company payments to avoid double counting between PS and BBCC.

A1.3 The BBC's economic impact in the UK

In 2024/25, the BBC Group contributed £6.7 billion in GVA to the UK economy and supported over 79,000 jobs, shown in Figure 18 and Figure 19. For every £1 the BBC adds to the economy, £3.49 is generated in the UK economy as a whole due to the economic activity it generates.⁸⁹

⁸⁷ BBC HR data provided staff cost (employee salary including London weighting or freelancer payment), total headcount and FTE aggregated at ITL1 level as of 31 March 2025 (financial year end). For freelancers, this includes any contracts and any payments during financial year 2024/25.

⁸⁸ BBC Procurement data identified UK/non-UK suppliers. UK supplier postcode was used to identify ITL1 region; non-UK suppliers and procurement spend were excluded from the analysis.

⁸⁹ The BBC Group's economic multiplier is calculated by dividing total GVA (£6,699 million) by the direct GVA (£1,922 million).

FIGURE 18: BBC GROUP GVA IMPACT, £M

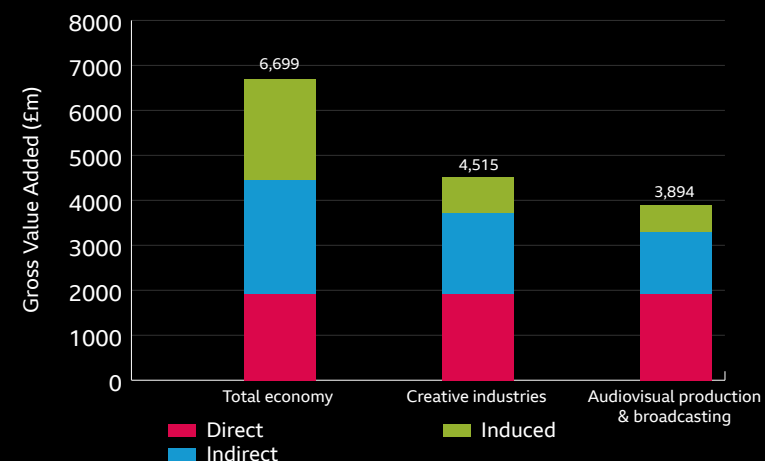
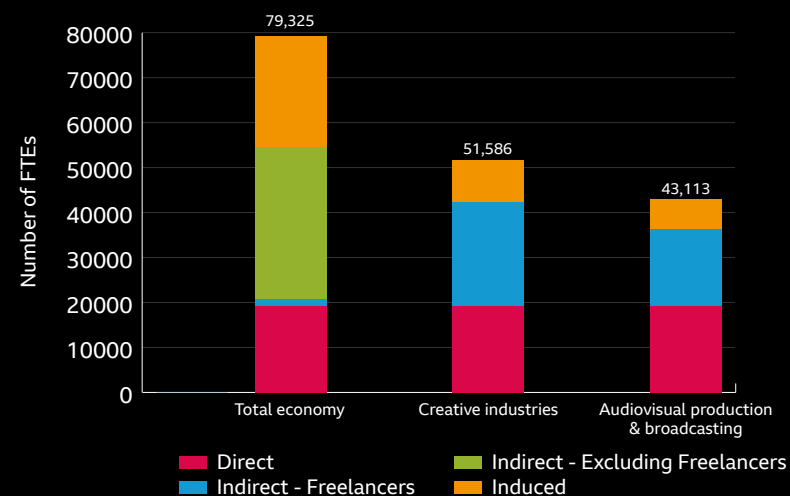


FIGURE 19: BBC GROUP FTE JOBS IMPACT, £M



Within the creative industries, the BBC's economic contribution is particularly significant. A substantial share (67%) of the BBC's economic contribution to the UK economy lands direct in the creative industries and 58% lands within the subsector of audiovisual production and broadcasting (i.e. the BBC Group's industrial subsector). Figure 20 and Figure 21 provides detailed breakdown.

Figure 20: 2024/25 BBC Group GVA (£m) across economic sectors

| GVA (£ millions) | | | |
|------------------|---------------|---------------------|---------------------------------------|
| | Total economy | Creative industries | Audiovisual production & broadcasting |
| Direct | 1,922 | 1,922 | 1,922 |
| Indirect | 2,515 | 1,794 | 1,376 |
| Induced | 2,262 | 798 | 595 |
| Total | 6,699 | 4,515 | 3,894 |
| as % sector GVA | 0.24% | 3.64% | 17.35% |
| GVA multiplier | 3.49 | 2.35 | 2.03 |

Note: updates from BBC Green Paper response figures

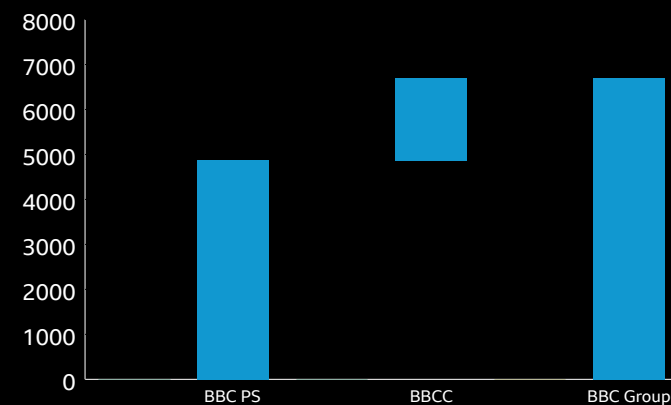
The BBC economic impact figures that are stated in this paper reflect a number of incremental updates to the underlying economic impact model and data inputs since the BBC's Green Paper response (published March 2026) – which reported a slightly more conservative BBC total GVA contribution of £6.5bn, supporting over 77,000 jobs, and with a GVA multiplier of 3.55. The main driver of the higher GVA and

Figure 21: 2024/25 BBC Group and FTE jobs across economic sectors

| FTE employment | | | |
|----------------------------------|---------------|---------------------|---------------------------------------|
| | Total economy | Creative industries | Audiovisual production & broadcasting |
| Direct | 19,260 | 19,260 | 19,260 |
| Indirect - Freelancers | 1,514 | 23,041 | 16,969 |
| Indirect - Excluding Freelancers | 33,697 | | |
| Induced | 24,853 | 9,285 | 6,884 |
| Total | 79,325 | 51,586 | 43,113 |
| as % sector FTE | 0.24% | 3.64% | 17.35% |
| FTE jobs multiplier | 4.12 | 2.68 | 2.24 |

FTE jobs figures in this report is the inclusion of BBCC freelancer costs, that were not captured within the model at the time of the Green Paper response. The BBC's economic multiplier has also changed due a minor reclassification in costs that reduced the BBC's intermediate spend in the audio and visual production and broadcasting sector, which is a high productivity sector i.e. more was spent in less productive sectors and therefore reduced the BBC-specific overall economic multiplier.

FIGURE 22: 2024/25 BBC GROUP GVA (£M) BY BBC GROUP TOTAL, PS AND BBCC



A1.4 BBC Public Service and Commercial contribution

The analysis also identifies the economic contribution across BBC Group, as shown in Figures 22, 23 and 24. The BBC' commercial arm BBCC delivers 27.3% of the BBC Group's total GVA contributions.

Figure 23: 2024/25 BBC Group GVA (£m) by BBC Group total, PS and BBCC

| GVA (£ millions) | | | |
|------------------|--------------|--------------|--------------|
| | BBC Group | BBC PS | BBCC |
| Direct | 1,922 | 1,280 | 642 |
| Indirect | 2,515 | 1,873 | 642 |
| Induced | 2,262 | 1,720 | 542 |
| Total | 6,699 | 4,873 | 1,826 |
| GVA multiplier | 3.49 | 3.81 | 2.84 |

Figure 24: 2024/25 BBC Group FTE jobs by BBC Group total, PS and BBCC

| FTE employment | | | |
|----------------------------------|---------------|---------------|---------------|
| | BBC Group | BBC PS | BBCC |
| Direct | 19,260 | 16,044 | 3,216 |
| Indirect - Freelancers | 1,514 | 1,030 | 484 |
| Indirect - Excluding Freelancers | 33,697 | 26,076 | 7,621 |
| Induced | 24,853 | 18,882 | 5,971 |
| Total | 79,325 | 62,033 | 17,292 |
| FTE jobs multiplier | 4.12 | 3.87 | 5.38 |

A1.5 The BBC's economic footprint across the nations and regions

The BBC's economic footprint extends across the UK. The analysis identifies GVA contribution and FTE jobs impact from the BBC Group for ITL1 regions.

The regional GVA and FTE impacts are calculated using the approach (i.e. economic multipliers) and data outlined in Section A1.1 and A1.2. "UK (other)" captures GVA and FTE jobs impact that are UK operating expenditure but cannot be assigned to an ITL1 region.

Figure 25: 2024/25 BBC Group GVA (£m) and FTE jobs impact by ITL1 region (rebalanced)

| | GVA (£m) | FTE jobs |
|---------------------------------|--------------|---------------|
| ITL1 - London | 3,696 | 42,461 |
| ITL1 - East | 173 | 1,995 |
| ITL1 - East Midlands | 85 | 1,025 |
| ITL1 - West Midlands | 238 | 3,226 |
| ITL1 - North East | 133 | 2,314 |
| ITL1 - North West | 557 | 6,470 |
| ITL1 - South East | 583 | 7,320 |
| ITL1 - South West | 247 | 2,758 |
| ITL1 - Yorkshire and The Humber | 126 | 1,426 |
| ITL1 - Scotland | 302 | 3,555 |
| ITL1 - Wales | 330 | 4,043 |
| ITL1 - Northern Ireland | 123 | 1,475 |
| UK (other) | 107 | 1,257 |
| UK total | 6,699 | 79,325 |

A2: Public funding consistency and creative industries growth

The analysis assesses how consistency in public funding across Europe's main PSBs affects GVA growth in the creative industries. A summary of the main findings are discussed on page 13.

Methodological references

The analysis uses an econometric Ordinary Least Squares (OLS) fixed effects model that assesses the extent to which consistency in public funding across major European PSBs leads to GVA growth in the 'Motion Picture, Video & TV Programme Production, Sound Recording & Music Publishing Activities & Programming And Broadcasting Activities' sector ('audiovisual production and broadcasting sector' hereafter, i.e. sectors J59 and J60).

The analytical approach draws on an academic paper by Furceri (2007), which investigates whether volatility in government expenditure (i.e. in public spending across the business cycle) affects long-run economic growth. Using a panel dataset covering multiple countries between 1970 and 2000, Furceri estimates the relationship between spending volatility and growth while controlling for standard growth determinants such as investment, average government expenditure, human capital, population growth, and output volatility. The core finding is that higher volatility in government expenditure is associated with lower long-run growth. This conclusion remains robust across different measures of business-cycle volatility. The study by Furceri provides the empirical foundation for the consistency metrics and the underlying assumption that public funding stability provides better long-term economic outcomes.

Data and key variables in specification

The analysis uses data published by the European Broadcasting Union (EBU) member PSBs to identify the largest, primary PSB in receipt of public funding for each EBU member country across 25 countries with complete information.

The analysis excludes secondary or non-national PSBs that have some element of public funding and

any audio-only PSB services. Observations across a 12-year window (2012-2023) are used to compute country-specific metrics (i.e. cross-country dataset with one observation and no time dimension in the regression stage). This is supplemented with macroeconomic data from the OECD and Eurostat (Ireland only), Oxford Economics (GDP per capita) and Olsberg-SPI (data on production incentives (i.e. tax credits, cash rebates, other)).

Two dependent variables of GVA sector growth are tested using the OLS fixed effects specification:

- Compound annual growth rate (CAGR) of real GVA growth in the audiovisual production and broadcasting sector between 2012-2023
- Average annual growth rate (AAGR) of real GVA growth in the audiovisual production and broadcasting sector between 2012-2023.

The main variable of interest is the consistency of public income of the largest PSB, which is the inverse coefficient of variation on public income in real terms between 2012 and 2023.

The second variable of interest is consistency of commercial income of the largest PSB (using the same definition). The specification also includes controls for sector revenue share (PSB income divided by total income in the audiovisual broadcasting and production sector), 2012-2023 real GDP per capital growth, viewing share (PSBs' average TV daily share), and region fixed effects based on production incentives.

Results of the main specification and interpretation

Both specifications, which use different GVA growth metrics, indicate that greater consistency in PSB public funding over a 12-year period leads to an increase in annual GVA growth of the audiovisual production and broadcasting sector. On the other hand, consistency in commercial funding does not have a statistically significant effect on growth.

The results are analysed further to provide a more intuitive interpretation: on average across all countries, halving volatility of public funding over a 12-year period (which is ca. the same as reducing volatility by one standard deviation) leads to an annual growth of 2.05 to 2.3% in the 'audiovisual broadcasting sector'.

Further interpretation, as discussed in Section 2.1 (page 13), used a scenario analysis to estimate how different levels of public funding between 2012 and 2023 would have affected the BBC and GVA growth in the UK's audiovisual broadcasting and production sector. This uses the AAGR specification as it shows a marginally stronger statistically significance for the main independent variable (consistency of public funding) and is a particular good model fit for the UK.

Robustness checks and limitations

A series of tests were conducted to validate the results of the main specification, including multicollinearity and endogeneity tests,⁹⁰ plotting of residuals and fitted values, and outlier exclusion,^{91, 92}

The findings are robust, but the funding consistency metric captures only broad effects and does not disentangle underlying drivers or account for the timing of budget announcements. The analysis is limited by its focus on the largest PSB in each country and does not fully control for differences in national funding models or the role of additional broadcasters. Cross-country comparability issues and unobserved factors may also introduce measurement noise and residual bias.

A3. Impact of BBC creative risk taking on talent development

The data used for this analysis is from IMDb which includes data on show titles, credits, roles, years and regions. The analysis was restricted to UK-relevant productions, contains data from 1990 to 2026 and features all individuals with credits in audiovisual production both on- and off-screen. This data was matched with BBC production data based on two approaches. First was direct title ID matching, and the second was a high-confidence fuzzy matching methodology.⁹³ The combined dataset allowed identification of individuals in the IMDb data who had worked with the BBC. This is then matched with BBC spend data to allocate BBC productions to a production cost category. Low-cost productions are defined as under £100k for unscripted, under £700k for scripted; medium-cost productions are between £100k and £280k for unscripted, between £700k and £1.8 million for scripted; and high-cost productions are above £280k for unscripted, above £1.8 million for scripted. The key variable of interest is credit per person-year.

The total number of UK-associated productions was 386,764 with 11,050 BBC-tagged productions. The total number of individuals in the data was 1,267,315 with 60,759 associated with the BBC.

Halving volatility in public funding
(in real terms) over a 12-year period



Annual GVA growth in Motion
picture sector of **2.0% – 2.3%**

Reducing by 1 standard deviation
the volatility of public funding
(in real terms) over a 12-year period



Annual GVA growth in Motion
picture sector of **1.9% – 2.2%**

⁹⁰ Variance Inflation Factor (VIF) test for multicollinearity, Wu-Hausman test for endogeneity.

⁹¹ Regressions repeated excluding outlier countries from the dataset; Serbia, Romania, Ireland and France (various exclusions).

⁹² Alternative specifications replaced the inverse coefficient of variation with two alternative consistency metrics. In line with Furceri (2007), these were defined as the inverse of the Hodrick and Prescott filter for volatility, using different smoothness parameters, λ : one with $\lambda=6.25$ and one with $\lambda=100$. The below results show that, using other consistency metrics, β_1 remains positive and significant.

⁹³ Fuzzy matching refers to the process of identifying and linking similar strings across different datasets, even where exact matches are not present. Further details on the specific methodology applied can be found here:

<https://cran.r-project.org/web/packages/fedmatch/vignettes/Fuzzy-matching.html>

Career progression was assessed using two complementary approaches:

- **Career duration analysis:** careers were indexed relative to each individual's first credited role, focusing on the first 15 years of activity.
- **BBC participation event study:** Outcomes were measured relative to each individual's first BBC credit, enabling comparison of career trajectories before and after BBC involvement.

The study involved three methodological approaches:

- Analysis of career progression from 5 years pre- to 10 years post-BBC, comparing post-BBC career uplift across different production spend cohorts and genre type (scripted vs. unscripted) relative to first BBC credits. This approach considered whether the BBC acted as a career booster to developing talent.⁹⁴
- Analysis of mean and median career progression per year across talent that has or never has worked with the BBC between 2010 and 2025. This develops an understanding of the career of talent who works with the BBC.
- Analysis of when talent received their first BBC credit in different production cost cohorts and genre types (scripted vs. unscripted). The analysis considers the average timing of that first BBC credit and its trend. This assesses whether the BBC can help kick-start careers in the industry.

The results from these analyses are as follows.

- For method (1), when plotting average trends in credits per person-year before and after their first BBC credit, on average low and mid-spend cohorts exhibit a stronger career boost than the high-spend cohort. This uplift appears to persist over time: the level of career activity increases after receiving a BBC credit, although the growth rate of career activity does not increase. This suggests that the BBC credit offers a higher baseline of activity, rather than an accelerated career path. The finding is strongest for scripted genres and low-cost unscripted genres.
- For method (2), the analysis finds that people who have worked with the BBC tend to have stronger and more long-lived careers overall than those who have never worked with the BBC. Both mean and median number of credits are higher for those who have worked with the BBC (mean: 15.8, median: 9) than those who have not (mean: 5.2, median: 3). Results also suggest that a large proportion talent who worked with the BBC receives that credit early on in their career.
- For method (3), the analysis finds that lower- and mid-spend BBC productions are associated with stronger long-term career progression and talent development, and consistent with the view that the BBC engages talent at materially earlier career stages. The effect is stronger for unscripted content across production cost cohorts.

The analysis predominantly observes relationships using descriptive statistics rather than econometric event studies or causal statistical analysis. This means that each individual methodological

approach does not prove whether the BBC had a positive effect on the careers of individuals. However, the three approaches together, alongside qualitative stakeholder evidence, suggest that the BBC does have some positive effect on talent.

The other caveat to this analysis is the measurement of career progression, which is credits per person-year. The implication is that the number of credits received in a year is a proxy for career development and job security. However, there are potentially limitations in how well this variable explains career development. For those working on high-cost productions, they may have a ceiling on how many productions they can work on in a year as these are typically longer-term projects. Those working on low- and medium-cost productions may develop skills through working on more projects (and gaining more credits), but individuals can also develop skills by moving to high-cost productions (and gaining fewer credits). Over the long-term, moving to high-cost productions may reduce the observed impact of the BBC on career development.

A4: Evidence of BBC PS's ability to take creative risk in commissioning

This analysis provides case study evidence on the BBC's ability to take creative risks in its commissioning as it can commission content that delivers a delayed return in terms of viewership. In other words, that the BBC can (re)commission shows where audience viewing is anticipated to grow over time rather than providing an immediate return, as required for streamers.

Approach and data sources

This analysis uses data from BARB's UK viewing hours by title and genre for BBC and other UK content providers, and combine this with BBC internal "What's On" data that has the BBC total production cost (including BBC PS and third-party budget contributions) for the years 2020 to 2025. The two datasets are merged into a title-year-series databased using a fuzzy matching approach, to map programme-specific viewership data to BBC What's On data.

Note that BARB viewership data provides aggregate viewing for the title (i.e. cumulative figure for latest and any prior series for a specific year) whereas the BBC What's On data captures only the title cost of the latest series based on year a title's latest series is first aired.

This is then used to calculate a cost per viewer hour for each title-year-series. This captures cumulative commissioning cost (i.e. Series 2 total production cost is total Series 1 and Series 2 costs). This is then compared across selected BBC titles that belonged to subgenre that are under-indexed by the market (i.e. BBC over-indexing on this content is based on analysis of UK original content spend and hours by VOD platform, sourced from Ampere Analysis) and then normatively determined to represent creative risk taking in BBC commissioning decisions.

A real-terms adjustment is applied to the BBC total production costs prior to the cost per viewer hour calculation; nominal costs (as reported) are converted to real 2025 prices using CPI All Items metric and to improve cross comparison across years.

⁹⁴ In this context, "talent" is referred to as individuals working on the production of TV shows, which includes on- and off-screen role.

Main results

The selected case studies indicate successful BBC titles move down the cost-per-hour curve as audiences build over time. This suggests that the BBC commissions first series and then commits to recommissions further series before achieving audience scale potentially required to support commercial commissioners re-commissioning decisions.

There are three examples selected and presented in Section 4.1; *RuPaul's Drag Race UK* and *The Traitors*.

Robustness checks and limitations

The analysis selected several case studies - the normative selection of case studies may affect robustness of the results (not every BBC title was tested).

Another limitation of this analysis is that, due to data constraints, the analysis cannot examine whether the wider market shows stronger engagement or spend for comparable content. Specifically, the analysis is unable to test whether the BBC commissions – i.e. evidencing audiences' appetite for content within a specific sub-genre – subsequently influences market commissions for adjacent content in that sub-genre. This extension would evidence the BBC having a market shaping influence as a result of its creative risk taking in commissioning decisions.

A5: The effect of BBC moves on high value job creation outside of London

This analysis assesses the BBC's influence on regional and national labour-market outcomes, particularly on the creation of high-value jobs in regions where the BBC has invested.

Methodological references

This analysis draws on the methodologies and economic theory of two core academic papers. The main specification is based on an event-study analysis by Aguzzoni, Langus and Motta (2013).⁹⁵ This paper provides a robust and widely used event-study framework for estimating how an external intervention shifts outcomes relative to a predicted counterfactual trend. The robustness specification is based on a trend-break analysis based on Bai (1997),⁹⁶ which allows clean comparison of pre- and post-entry slopes and supports our examination of whether the change led to a measurable change in the long run.

Data and key variables in specification

The analysis relies on a dataset that combines data from BRES, ONS and the BBC and captures a 21-year period (2004-2024). We do not include years prior to 2004, as the relevant metrics from BRES are incomplete. This therefore means that the analysis is limited to BBC footprint expansions and new office openings in three ITL2⁹⁷ regions:

- South Western Scotland – BBC moved to Pacific Quay, Glasgow in 2007
- Greater Manchester – BBC moving to MediaCity UK, Salford in 2011
- East Wales – BBC opening Roath Lock Studios, Cardiff in 2012.⁹⁸

The BBC's expansion data into these regions is used to identify a "BBC entry year".

The main variable of interest is the Standard Occupational Class (SOC) 1-3 share in the Communications and Transport sector as a percentage of total jobs in the sector (BRES data). SOC1-3 occupations are used as a proxy for high-value jobs. These jobs include managerial, professional and associate professional roles, where decision-making responsibility is a central feature of the work. These roles typically involve autonomy, judgement and complex problem-solving, distinguishing them from occupations with more routine or task-based responsibilities. This distinction is also reflected in patterns of skill mismatch. According to the latest Census, the median skills mismatch rate in SOC1-3 roles in England and Wales was 25%, around 7 percentage points lower than the median mismatch in SOC4-9 occupations.

The first step of the analysis estimates a pre-trend for regional SOC1-3 share in the Communications and Transport sector between the first available year (T0) and last available year (T1) of data pre-BBC entry. The main variable of interest is a time dummy (e.g. -10 years if 10 years pre-BBC office opening, -5 years if 5 years BBC office opening) and control variables from BRES and the ONS:

- Unemployment rate (to account for year and region-specific market factors)
- GVA per capita (control for year and region-specific productivity)
- SOC1-3 in sectors that are not Communications and Transport sector (to account for broader regional trends in SOC1-3 share); and
- Log of transport employment (to isolate impact specific to communications sector).

The second step then repeats this analysis to estimate the post-trend, SOC1-3 employment between first available year (T2) and last available year (T3) of data post-BBC entry. This estimates high value job share had the BBC not expanded in each region. In step 3, this is then compared against the actual SOC1-3 share registered in each region. All additional effects attributable to BBC entry in the regions are aggregated to calculate a Compounded Average Expansion (CAE) effect) and tested for positive significant using a J-test.

⁹⁵ Aguzzoni, L., Langus, G., & Motta, M. (2013). The Effect of EU Antitrust Investigations and Fines on a Firm's Valuation. *Journal of Industrial Economics*, 61(2), 290–338.

⁹⁶ Bai, J. (1997). Estimation of a Change Point in Multiple Regression Models. *Journal of Applied Econometrics*, 12(3), 343–363.

⁹⁷ ITL2 (International Territorial Level 2) refers to the second tier of the UK's official statistical geography framework, designed by the Office for National Statistics (ONS) to replace the EU's NUTS classification.

⁹⁸ BBC had other meaningful investment in Cardiff, including BBC Hoddinott Hall in 2009 which is home to the BBC National Orchestra of Wales at Cardiff Bay, and BBC Cymru Wales Central Square office which opened in 2021. However, Roath Lock was selected as it substantially increased the BBC's physical and staff footprint in the city.

Results of main specification and interpretation

The analysis provides consistent evidence that BBC entry into specific UK regions has had a positive and meaningful impact on the share of high-value jobs (SOC1-3) within the Communication and Transport sector over the long term in the regions assessed.

Both taking a post-period of 5 years and a post-period of 10 years, the specifications show a positive and significant CAE. This indicates that within these three regions, the BBC has had a positive effect on the SOC1-3 share in both the short-term and long-term. Note, the regression does not isolate the impact of BBC moving high-value staff into the region; however, this is likely to be a short-term effect (as discussed in the main body of the report).

These results are further interpreted to identify the impacts on high value job share, 5 and 10 years after BBC expansion in the region. These are presented in Section 5.2, page 44).

Robustness checks and limitations

The robustness specification uses a trend-break approach on the same data and regression specification as the trend-break analysis. It also tests Inner London in 2011 (aligns with redevelopment of Broadcasting House, W1A); this is used as a falsification test to assess whether the impact also occurs in London as opposed to regions only. The trend-break analysis provides evidence that a positive trend break exists; the post-entry coefficient is higher than the pre-entry coefficient with 80% confidence i.e. an increase in positive effect compared to status quo. Furthermore, the post-BBC entry coefficient (slope) is positive at the 89% confidence level; this implies that BBC entry has a positive effect on high-value job share.

The same analysis using Inner London only does not find that BBC office opening has any effect on the sectors SOC1-3 employment; the pre- and post-entry coefficients are almost identical. This supports the conclusions that the BBC has a more influential effect on employment in regional clusters outside of London.

The results are robust. However, there are several limitations to this analysis including the inability to isolate BBC staff relocation effects and constrained sectoral granularity, which may dilute BBC-specific impacts. The analysis is further limited by a small sample of (three) treated regions and a restricted 2004–2024 timeframe. Finally, causal interpretation relies on event-study assumptions, with potential bias from unobserved regional shocks and the use of pooled regional trends to generalise effects. On average, after entry in the three regions, the BBC contributed to a 0.32pp year-on-year increase in the share of SOC1-3 jobs in the Communications sector compared to the pre-entry trend.