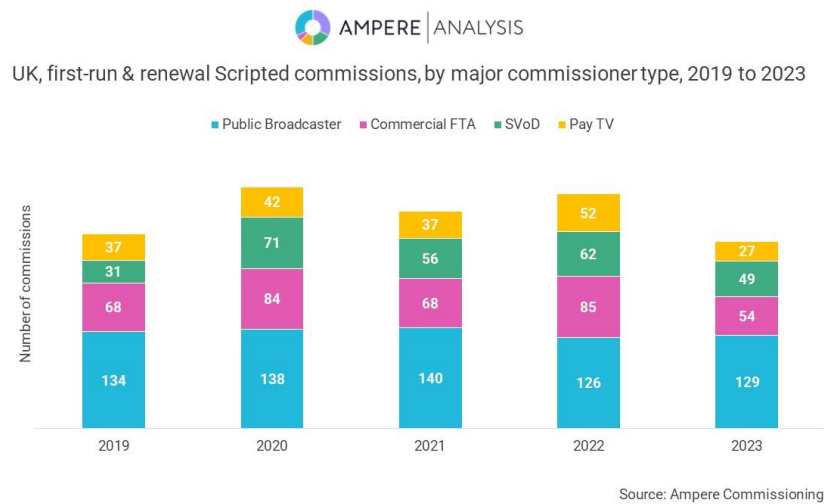


The BBC defies a UK commissioning downturn in 2023

The BBC commissioned half of all scripted content in the UK last year

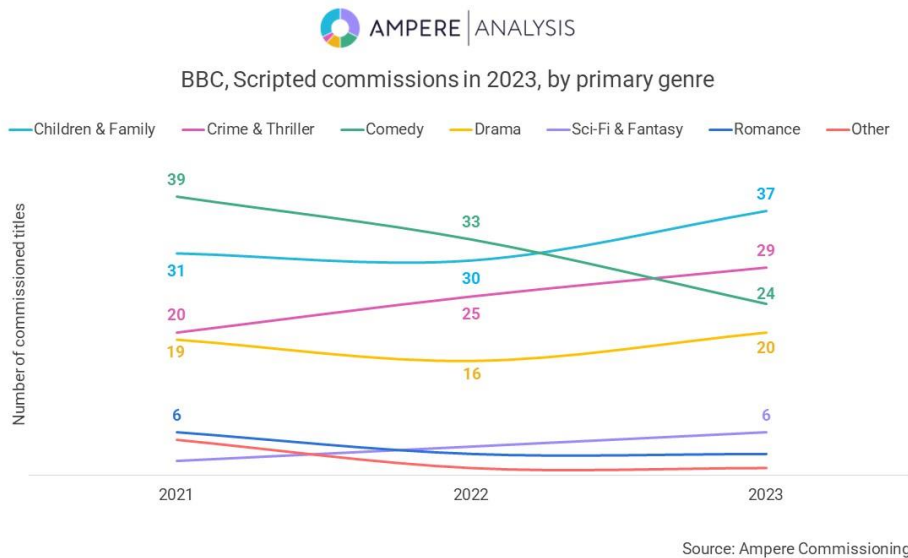
London, 25th March 2024: A new report from Ampere Analysis reveals an 18% decline last year in the UK’s market for scripted TV commissions (Drama, Sci-Fi, Crime & Thriller, etc.) as major UK broadcasters cut spend and most global SVODs trimmed investment in international content. Changes in consumer behaviour and a weak advertising market saw Pay TV operators and commercial free-to-air broadcasters slash scripted commissions. UK scripted commissioning activity fell by 48% at local Pay TV operators, 36% at commercial free-to-air broadcasters, and 21% at SVoD services. However, the BBC’s scripted commissions remained stable with the public service broadcaster focusing on Kids, Family and Crime genres and ramping up literary adaptations and multiple-episode series orders.



The BBC maintained its level of scripted commissions

- As other players reduced their scripted commissioning activity, the BBC managed to maintain constant levels, increasing its share of UK scripted TV commissions to 50% last year.
- Early last year, the broadcaster announced a raft of cost-saving measures in response to the license fee freeze and wider economic pressures. One of the actions was to cut 1,000 hours of original programming annually and trim spending on original

content. However, the impact of these reductions has initially been felt by reductions in cheaper-to-produce unscripted programming.



A change of genre: Children & Family up, Comedy down

- As the BBC tackled budgetary pressures, changes in the scripted commissioning strategy of 2023 can be seen versus prior years. Children & Family grabbed the most orders of the BBC’s scripted commissions, up by 23% year-on-year. Crime & Thriller titles were up 16%. Comedy fell out of favour, enduring a 27% drop. It was the most heavily impacted of all scripted genres in 2023 with an overall decline of 41% among UK commissioners
- As the Corporation responds to evolving media consumption, it is making the switch from one-episode specials to a multiple-episode content strategy to expand its iPlayer audience and satisfy VoD binge-watching. As a result, the proportion of BBC commissions which were one-episode specials dropped to just 7.5%, its lowest for five years.
- In another risk-mitigation move, the BBC increased its investment in IP with an existing following. Roughly a fifth of BBC scripted commissions last year were book adaptations.

The opportunities for co-commissioning

Favoured by many other European broadcasters, co-commissioning offers cost-sharing potential that the BBC could further explore. Last year, 13% of the BBC’s scripted commissions ordered were co-commissions. Co-commissions involve trade-offs around control of rights, but may offer cost-efficiencies. German broadcaster ZDF uses co-

commissioning more extensively, with over 30% of its scripted output co-commissioned. The BBC's late 2022 co-production deal with Disney Branded Television for *Doctor Who* offers an idea of how funding for high-end scripted commissioning could evolve in the UK.

Zuzana Henkova, Senior Analyst at Ampere Analysis says: "As media consumption patterns continue to change, commissioning strategies are evolving. While commercial operators and broadcasters adapt to pressures on consumer spend and a tough advertising landscape, public service broadcasters have maintained their commissioning activity. This is undoubtedly one of the strengths of the public funding model. As all broadcasters look for new ways to optimise their output, we expect to see the BBC continuing to explore partnerships and co-commissioning to stretch budgets for valuable – but expensive – scripted commissions."

Ends

Notes to Editors: A commission is defined as a piece of content (first-run series, renewed series or a movie) funded by a given company or companies. The commissioner engages with the projects before the production starts or in its early stages and provides the majority of the funding necessary for the project to complete production.

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About Ampere Analysis

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company's experienced team of sector-leading industry analysts specialises in sport, games, pay and multiscreen TV and next-generation content distribution. Our founders have more than 60 years combined experience of providing data, forecasts and consulting to the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. www.ampereanalysis.com