

Broadcast Indie Survey 2024

We would like you to take part in Broadcast's 2024 Indie Survey. Here is your opportunity to tell us about your business, and your thoughts on broadcasters, commissioning and the industry as a whole.

To qualify, you need to be a UK company and to have had at least one piece of original commissioned programming broadcast in the UK or around the world in 2023.

The minimum we need you to complete is the opening section on turnover and programming and questions marked with a *, but it will help us to shape our analysis of the production sector to have your thoughts on other areas of the industry. All qualitative answers will be dealt with confidentially.

All results will be used for statistical analysis only and your data will not be used for marketing purposes. Your data will not be sold to any third parties.

Please complete your submission by Friday 2 February 2024

* 1. Company name

* 2. Please enter your contact details. All answers submitted will be treated as anonymous

Name

Job title

Company

Email address

Phone number

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Your company

* 3. Is your company

- Owned by a parent company with more than a 50% stake
- Receiving minority stake investment of 25-50%
- Receiving minority stake investment up to 24%
- Fully independent

* 4. If you do have outside investment, please give details of which company is backing you and the exact size of their stake. *(Please answer N/A if this is not applicable to you)*

* 5. Your 2023 global turnover (in £m):

*or your most recent financial year, stating when that year ended. (If you did not complete last year's survey, please offer the previous year's figure if possible, for comparison purposes.) Please indicate if your reporting period has changed and offer a figure for previous comparable period.

* 6. Figure for your 2023 turnover from UK commissions (not including distribution fees):

* 7. Figure for your 2023 turnover from UK commissions (including distribution fees)

* 8. Your biggest first-run UK commissions to air in 2023 (please detail volume and duration of episodes, e.g. 4 x 60, as well as the commissioning broadcasters) Please list up to five 1) 2) 3) 4) 5)

1.
2.
3.
4.
5.

* 9. Hours of programming (excluding repeats) broadcast in 2023

In the UK

Outside UK

* 10. No. of full-time, permanent staff:

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Your business

* 11. Did your programming budgets increase or decrease in 2023?

- Increased
- Decreased
- Stayed the same

12. If your programming budgets **increased** in 2023, how much was that by?

- 0%
- 1-10%
- 11-25%
- 26-50%
- More than 50%

13. If your programming budgets **decreased** in 2023, how much was that by?

- 0%
- 1-10%
- 11-25%
- 26-50%
- More than 50%

* 14. In 2023, what was the average budget you were given for an hour of **unscripted** programming?

* 15. Was this content predominantly:

- Daytime
- Factual Entertainment/Reality
- Factual/Premium
- Other
- Factual/Specialist
- Factual/Premium Docs

* 16. In 2023, what was the average budget you were given for an hour of **scripted** programming?

* 17. Was this content predominantly:

- Comedy
- Drama
- Other

* 18. What proportion of your commissions in 2023 were fully funded by the commissioner?

- | | |
|------------------------------|-------------------------------|
| <input type="radio"/> 0% | <input type="radio"/> 26-50% |
| <input type="radio"/> 1-10% | <input type="radio"/> 51-75% |
| <input type="radio"/> 11-25% | <input type="radio"/> 76-100% |

19. Has the need to secure third-party funding for commissions increased in the past year?

- No change
- Somewhat
- Significantly

Please explain

20. Did you make any redundancies in 2023?

- Yes
- No

Please explain

Commissioning slowdown

* 21. How would you characterise 2023 as a trading year for your company?

* 22. Has the **UK** commissioning slowdown had an impact on your business?

- No
- Yes slightly
- Yes to a moderate extent
- Yes dramatically

Please explain

* 23. Has the **US** commissioning slowdown had an impact on your business?

- No
- Yes slightly
- Yes to a moderate extent
- Yes dramatically

Please explain

* 24. When do you think the rate of commissioning might pick up?

- First half of 2024
- Second half of 2024
- Into 2025
- Don't know

Please expand

* 25. How do you predict the number of indies will change in the next two to three years?

- There will be more
- There will be around the same number
- There will be fewer

Please expand

* 26. How big a problem has the rise in the cost of production (inflation) presented for your company this year?

- Not a problem at all
- A small problem
- A moderate problem
- A huge problem

Please expand

* 27. How have British broadcasters handled the slowdown?

- Very badly
- Fairly badly
- Neither badly nor well
- Fairly well
- Very well

Please expand

* 28. How has the number of freelancers you have taken on this year changed in comparison to a 'typical' year?

- It is much smaller
- It is slightly smaller
- It is about the same
- It is slightly larger
- It is much larger

Please expand

* 29. Are you doing anything to support freelancers affected by the slowdown?

- Yes
- No

If so, what?

* 30. Whose job is it to support freelancers affected by the slowdown (tick all that apply)?

Indies

Bectu

Broadcasters

Freelancers themselves

The Film and TV Charity

Other (please state)

* 31. Are you aware of freelancers taking on roles for which they are overqualified this year?

Yes

No

Please expand:

International business

* 32. What percentage of your 2023 turnover came from:

a) Finished tape

sales (Please give up to three examples)

b) Format sales

(Please give up to three examples)

C) Non-UK

commissions (Please give up to three examples)

* 33. How important is winning international commissions to your business?

- Very
- Somewhat
- Somewhat unimportant
- Not important at all

Feel free to elaborate

34. Please list your key non-UK **shows** (if applicable), and their country of origin:

1.
2.
3.
4.
5.

35. Please list your key non-UK target **markets** for the next year (if applicable)

1.
2.
3.
4.
5.

* 36. How much of your total output is co-produced with an international partner?

- None
- Up to 25%
- Up to 50%
- Up to 75%
- More than 75%

* 37. Has Brexit affected your ability to attract international commissions or land co-productions?

- Yes
- No

If so, please explain how

* 38. Has Brexit affected your business in any other way?

- Yes
- No

If yes, how has it affected your business - for example, accessing locations or importing goods?

* 39. Did you attend any international television markets and/or conferences last year?

- Yes
- No

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SVoD commissions

* 40. Did you win any original commissions from an SVoD service in 2023 (Tick all that apply)?

- | | |
|---|-------------------------------------|
| <input type="checkbox"/> Netflix | <input type="checkbox"/> Peacock |
| <input type="checkbox"/> Amazon | <input type="checkbox"/> HBO Max |
| <input type="checkbox"/> Disney+ | <input type="checkbox"/> Lionsgate+ |
| <input type="checkbox"/> Apple TV+ | <input type="checkbox"/> None |
| <input type="checkbox"/> Other (please specify) | |

* 41. Are you in active conversations with these companies about future projects?

- Yes
- No

Please give details if possible

42. How important are global streaming services to your business?

- Extremely important
- Important
- Somewhat important
- Not very important

Feel elaborate

43. Has this changed since last year and if so, how?

* 44. Which of the following SVoD services do you expect to win the most business from in 2023? (Please pick a maximum of two)

- Netflix
- Amazon
- Disney+
- Apple TV+
- Peacock

- HBO Max
- Lionsgate+
- Other
- None
- Don't know

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Nations and regions

* 45. Is your company headquartered in London?

- Yes
 No

46. If your headquarters are outside of London, in which town/city and region are you based?

47. If you are headquartered in London, do you have an out-of-London office?

- Yes
 No
 Plan to launch
 If yes, where is it/are they based?

* 48. What percentage of your commissions in 2023 qualified as nations and regions productions?

- None
 1-10%
 11-25%
 26-50%
 More than 50%

* 49. Do you expect the volume of your qualifying out-of-London commissions to go up in the next two years?

- Yes
 No

Please give details

50. What types of talent are in the shortest supply outside London? (Please select three)

- | | |
|---|--|
| <input type="checkbox"/> APs | <input type="checkbox"/> Directors of photography |
| <input type="checkbox"/> Camera operators | <input type="checkbox"/> Editors |
| <input type="checkbox"/> Casting executives | <input type="checkbox"/> Executive producers |
| <input type="checkbox"/> Development executives | <input type="checkbox"/> Post-production specialists |
| <input type="checkbox"/> DV operators | <input type="checkbox"/> Production managers |
| <input type="checkbox"/> Directors | <input type="checkbox"/> Series producers |

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Broadcasters

Please note all answers will be treated as anonymous

51. Which is the **best** broadcaster to deal with overall and why?

52. Which is the **most difficult** broadcaster to deal with and why?

53. In your opinion, who is the **strongest** broadcaster at the moment - in terms of output, senior executives and strategy?

54. In your opinion, who is the **weakest** broadcaster at the moment - in terms of output, senior executives and strategy?

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Genres

* 55. What is currently the **strongest** genre of programming?

- | | |
|---|---|
| <input type="radio"/> Drama | <input type="radio"/> Entertainment |
| <input type="radio"/> Factual / documentary (high cost) | <input type="radio"/> Comedy (unscripted) |
| <input type="radio"/> Factual / documentary (low cost) | <input type="radio"/> Comedy (scripted) |
| <input type="radio"/> Factual entertainment | <input type="radio"/> Children's television |

Please explain why

* 56. What is currently the **weakest** genre of programming?

- | | |
|---|---|
| <input type="radio"/> Drama | <input type="radio"/> Entertainment |
| <input type="radio"/> Factual / documentary (high cost) | <input type="radio"/> Comedy (unscripted) |
| <input type="radio"/> Factual / documentary (low cost) | <input type="radio"/> Comedy (scripted) |
| <input type="radio"/> Factual entertainment | <input type="radio"/> Children's television |

Please explain why

* 57. Which genre have you produced the most in 2023?

- | | |
|---|---|
| <input type="radio"/> Drama | <input type="radio"/> Entertainment |
| <input type="radio"/> Factual / documentary (high cost) | <input type="radio"/> Comedy (unscripted) |
| <input type="radio"/> Factual / documentary (low cost) | <input type="radio"/> Comedy (scripted) |
| <input type="radio"/> Factual entertainment | <input type="radio"/> Children's television |

Please explain

Peer poll

58. Peer Poll: Which are the top three rival production companies you most respect and why?

Please state your favourite first.

1.

2.

3.

Production

Please note all answers will be treated as anonymous

* 59. Which of these is your biggest concern regarding the future of your company?

- | | |
|---|--|
| <input type="radio"/> Falling margins | <input type="radio"/> Returning commissions |
| <input type="radio"/> Size and scale of competition | <input type="radio"/> Fragmenting audiences |
| <input type="radio"/> Impact of Brexit | <input type="radio"/> Commissioning slowdown |
| <input type="radio"/> UK economy | <input type="radio"/> Other |

Please explain why

* 60. How do you feel about the future prospects of your company in 2024 compared to 2023?

- Better
- Worse
- About the same

Diversity

Please note: these questions are anonymous and apply to the industry as a whole and will not be taken as a reflection of your own company.

61. How much meaningful progress do you think TV has made in diversity **off-screen** in 2023:

- Great strides
- Some progress
- A little progress
- No progress
- Got worse

Please give details, including examples from your own company if you wish

62. How much meaningful progress do you think TV has made in diversity **on-screen** in 2023:

- Great strides
- Some progress
- A little progress
- No progress
- Got worse

Please give details, including examples from your own company if you wish

63. When it comes to **disability**, how much meaningful progress do you think has been made towards making TV an accessible and inclusion place to work?

- Great strides
- Some progress
- A little progress
- None
- Got slightly worse
- Got significantly worse

Please explain

64. When it comes to **ethnic diversity**, how much meaningful progress do you think has been made towards making TV an accessible and inclusive place to work?

- Great strides
- Some progress
- A little progress
- None
- Got slightly worse
- Got significantly worse

Please explain

65. When it comes to **social class**, how much meaningful progress do you think has been made towards making TV an accessible and inclusive place to work?

- Great strides
- Some progress
- A little progress
- None
- Got slightly worse
- Got significantly worse

Please explain

66. Is there an area of diversity which you think is currently being overlooked by the industry (for example: gender, age, sexuality or another?)

67. Who is most responsible for improving the diversity of British television on- and off-screen?

- Broadcasters
- Producers
- Government
- Industry bodies
- All of the above
- Please explain why

68. How much meaningful progress do you think TV made in diversity overall in 2023?

- Great strides
- Some progress
- A little progress
- None
- Got slightly worse
- Got significantly worse

Please explain

Current climate

69. Do you expect to seek investment in/a sale of/ a new commercial partnership for your company in the next 12 months?

- Yes
- No

Please explain

70. Do you expect to see a significant amount of M&A activity in the indie sector in the next 12 months?

- Yes
- No

Please explain

71. How concerned are you by the proposal to allow Channel 4 to move to in-house production?

- Not at all concerned
- Slightly concerned
- Moderately concerned
- Very concerned

Please explain

72. Do you believe commissioners are currently more enthusiastic about reboots than they have been previously?

- No, our commissioning editors are not interested in reboots
- There has always been an interest in reviving strong IP
- Yes, there is more interest than previously

Please explain

73. Do you have IP which you hope to reboot/resurrect in the next 12 months?

Yes

No

Please explain

74. Do you believe there has been an increased appetite to order bought-in formats among commissioners in the past year compared to previously?

No - our commissioning editors are not interested in bought-in formats

There is an appetite but it has not increased

Yes, there is more of an appetite than there was previously

Please explain