

A night-time photograph of the BBC Manchester building, a large, curved, multi-story glass structure illuminated from within. The building is situated on the banks of a river, with its lights reflecting in the water. Other modern buildings and city lights are visible in the background.

THE BBC'S ECONOMIC IMPACT in Greater Manchester

FOREWORD



Greater Manchester has always been a place of creativity, innovation and ambition. From its industrial heritage to today's thriving creative and digital sectors. The BBC is proud to have played a part in that story.

Our connection to this city region stretches back more than a century. The BBC's move of major departments and roles to Salford in 2011 was the single biggest shift in the history of British Broadcasting and a step change in our commitment to the region. It reflected a belief that brilliant creative talent and great storytelling exists right across the UK. Today, Salford is our largest base outside London and sits at the heart of a wider creative ecosystem across Greater Manchester.

This report demonstrates the scale of the BBC's contribution to the region and its catalytic effect on the region's creative sector. It's clear to see the economic value we create, the supply chain we support and the investment we bring. But for me, the story is much more than the economic data, it's about giving a voice and opportunity to local people.

When I graduated from the University of Salford there weren't enough creative industry opportunities so I, and many others, had to leave the North to pursue our ambitions. Today, people across Greater Manchester can build digital, media and broadcasting careers here, in their home city.

From apprentices taking their first steps into the industry to established creatives, producers, engineers and journalists shaping content watched and listened to by millions, the BBC's presence helps create opportunities not only within our own organisation, but across the wider creative sector.

Our role is also to make sure audiences see themselves reflected in the stories we tell. That means hearing more Northern accents, seeing more Northern towns, telling the stories of Northern families on screen and on air. That connection to audiences is central to our public service mission.

The future is full of potential. Greater Manchester has the talent, ambition and collaborative spirit to go even further in strengthening its position as one of the world's leading creative cities. The BBC is committed to working with partners across the region to help unlock that potential, create more opportunity and ensure that the next generation of talent can thrive right here.

Heidi Dawson

BBC Head of the North of England & Controller,
BBC Radio 5 Live



Small Prophets. Credit: BBC & Hot Olives Productions



Bev Craig
Mayor of Greater Manchester

“Greater Manchester is the beating heart of the UK’s creative industries. Our city region has long been a global powerhouse when it comes to music, art, comedy, theatre, TV and radio, and is the home of creators whose innovations have reshaped the world.

For more than a decade now, MediaCity has been at the forefront of that growth in our creative, digital, and media sectors. The BBC’s commitment to make its world-leading programmes right here in Greater Manchester has helped transform Salford Quays and the wider city region, supporting thousands of jobs, creating hundreds of apprenticeships, and energising a vibrant ecosystem of professionals and freelancers throughout our towns and cities.

But for us, it’s not just about the economic benefits. It’s about telling more of the stories of the people and the communities that live here, and creating more opportunities for young people to follow their dreams and build their careers in the creative industries, without having to leave the place where they grew up.

That’s the difference we want to see made in Greater Manchester - and we’re looking forward to working with the BBC and continuing on that journey.”



Paul Dennett
Salford City Mayor

“The BBC’s relocation to Salford has been a catalyst for economic growth across the city’s digital, creative and media sectors as well as raising the national profile of the city. These figures demonstrate the scale of that impact.

Beyond the significant contribution to the Greater Manchester economy, what matters enormously to us in Salford is the opportunities this investment creates for people - from apprenticeships and high-quality jobs to new routes into broadcasting and the creative industries for local young people.

The BBC’s long-term commitment has not only strengthened the region’s media landscape but has also helped create opportunities for a thriving creative and digital economy, supporting jobs, skills, innovation and growth across Greater Manchester. There is still significant potential ahead. We want to build on this success, attracting further investment and ensuring that the next chapter of MediaCity’s growth delivers even more jobs, skills and opportunities for the people of Salford and Greater Manchester.”

EXECUTIVE SUMMARY

For the past ten years, Greater Manchester has been the fastest growing city region in the UK. The creative industries have been a key part of that growth and the BBC sits at the heart of the sector's success. The BBC's role as a strategic anchor has helped establish MediaCity as a leading creative cluster.

The BBC employs over 3,000 people in Greater Manchester and creates opportunities for local talent through apprenticeships, training, local partnerships and sustained commissioning.

Salford is home to entire departments including Sport, Children's & Education and Radio 5 Live. This means the BBC has been able to foster self-sustaining production ecosystems and attract independent producers, strengthen skills and foster collaboration across organisations.

The BBC's investment and commitment to the region has supported economic regeneration in Greater Manchester. This is a place that creates opportunities, attracts talent, and is somewhere that people can be proud to live and work.

Looking ahead, there is more opportunity for the creative industries in Greater Manchester to expand and fulfil its potential. The BBC is ready to contribute and continue being the anchor institution in a thriving creative ecology in Greater Manchester. However, there are significant headwinds in the production and broadcasting sector along with financial challenges for all Public Service Broadcasters (PSBs). These challenges put the BBC's future investment in Greater Manchester at risk.

"The BBC is an incubator for the TV industry: the strength of the TV industry [in Greater Manchester] depends on the strength of the BBC"

Rick Murray, CEO, WorkerBee TV

THE BBC'S ECONOMIC IMPACT IN GREATER MANCHESTER AT A GLANCE

£450M

In 2024/25, the BBC contributed **£450 million** to the Greater Manchester economy

39%

The BBC's economic contribution is worth **39%** of the audiovisual production and broadcasting sector in Greater Manchester.

>5,000 JOBS

In 2024/25, the BBC's economic activity in Greater Manchester supported over **5,000 jobs**

7% ANNUAL GROWTH

Since 2019/20, the BBC's economic footprint in Greater Manchester has grown by **7%** per year on average

221

In 2023/24, the BBC worked with **221 small and medium-sized businesses** in Greater Manchester

422 APPRENTICES

Over the past 5 years, the BBC has employed **422 apprentices** in Salford

1 A STRATEGIC CREATIVE ANCHOR IN GREATER MANCHESTER

Greater Manchester has a rich media history and has been home to broadcasting talent for decades.

The BBC has always been at the heart of that; the BBC has been broadcasting and producing radio in Greater Manchester since 1929. New Broadcasting House on Oxford Road was constructed in 1975, which then became home to BBC radio and television broadcasting at network and regional levels and the BBC Philharmonic Orchestra.

In 2011, there was a step-change in the BBC's activities in Greater Manchester. The BBC announced it would be the anchor tenant at MediaCity, a new ambitious creative cluster being built in Salford Quays, with the commitment of significant ongoing investment. This development

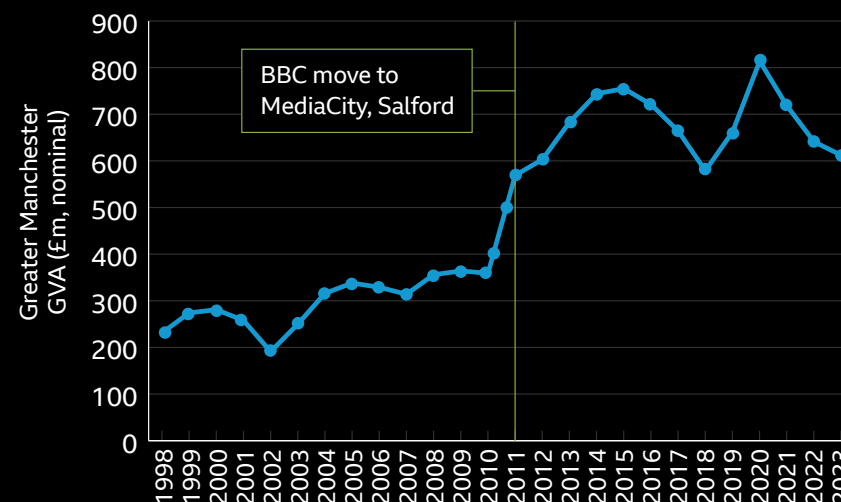
built on the creative industry's foundations in Greater Manchester to develop a high quality digital and media cluster.

The BBC's investment became a driving force behind that redevelopment. From a strategic perspective, it was an opportunity for the BBC to grow its presence outside of London, building on the long-standing connection with partners, stakeholders and audiences in the region.



Credit: BBC

Figure 1: GVA of Greater Manchester for AV and audio production and broadcasting sectors (Sectors SIC 59 & 60), £ million (nominal)



Selection of BBC titles present across Greater Manchester



- | | | |
|---|--|---------------------------------------|
| 1 The Split Up
Leigh | 7 Alma's Not Normal
Bolton | 13 Radio 5Live
Salford |
| 2 Small Prophets
Urmston | 8 Red Rose
Bolton | 14 BBC Breakfast
Salford |
| 3 Daddy Issues
Stockport | 9 Domino Day
Manchester | 15 Match of the Day
Salford |
| 4 Waterloo Road
Manchester and Trafford | 10 The Detectives: Taking Down an OCG
Rochdale | 16 Children In Need
Salford |
| 5 Film Club
Bury and Manchester | 11 Blue Peter
Manchester City Centre | 17 Comic Relief
Salford |
| 6 The Power of Parker
Stockport | 12 Morning Live
Manchester City Centre | |

Along with many more productions

That step change is illustrated by the GVA of the media industry in Greater Manchester. Prior to 2011, the media industry saw steady growth in its economic output but in 2011 this growth accelerated, particularly in the early 2010s (see Figure 1). Much of this growth was driven by the BBC and its crowding-in effect on other creative firms.

The move to MediaCity allowed the BBC to home more permanent staff, more network programming, and more commissioning. Since then, the BBC has expanded its role significantly with more production and decision-making held there than ever before, with Salford now the BBC's largest base outside of London.

Alongside critical local BBC services the scale of the BBC's presence enables flagship national TV shows to be filmed in Salford, like *BBC Breakfast* and *Match of the Day*, whilst the BBC's *FIFA World Cup 2026* coverage was based in brand new studios. The BBC broadcasts daily radio shows from MediaCity, with 5 Live based in Salford, over 50% of 6 Music and Radio 3's production hours coming from Salford, as well as shows on Radio 1, Radio 2 and Radio 4. There is a variety of other output based in Salford, from landmark TV moments like *Children In Need* or *Comic Relief* which are broadcast live from Salford, alongside regular regional programming like *North West Tonight* and *Radio Manchester*.

However, BBC productions are not just limited to Salford, the BBC's programming reaches across the whole of Greater Manchester. Long running shows like *Blue Peter* and *Morning Live* are filmed at Versa Studios in Manchester City Centre.

BBC commissions reach across the region, with *Small Prophets*, *Daddy Issues*, *The Split Up*, *Alma's Not Normal* and *Waterloo Road* filmed and made across Greater Manchester.





Waterloo Road. Credit: BBC/Wall/Warner Brothers TV Production Services Ltd

The BBC's economic impact in Greater Manchester

By moving to MediaCity, investing in capital and infrastructure and making an ongoing commitment to Salford, the BBC “*gave the existing ecology a national anchor*”, according to Professor Kirsty Fairclough, Professor of Screen Studies at Manchester Metropolitan University (MMU). The commitment gave the industry significant confidence in the cultural infrastructure and signalled the intention for the future. This became the basis for the ecosystem across Greater Manchester to grow.

The BBC focused its investment and infrastructure in MediaCity, rather than spread across Greater Manchester. As a result, a creative cluster within Salford has formed, with many other firms choosing to co-locate alongside the BBC. Creative firms benefit from tight geographical clustering because they are able to share ideas, talent, infrastructure and supply chains. This not only creates efficiency benefits for these firms, but also allows high-quality creative ideas to develop. Research by Public First illustrates this, demonstrating that PSBs spark innovation and productivity gains in the media sector.¹

However, when it comes to reaping the benefits of a creative cluster, it is not just Salford that has felt the benefit of the BBC. According to Rob Page, Managing Director at Space Studios, “*the presence of the BBC and MediaCity has a lighthouse effect and attracts talent to the region. It has been hugely beneficial to the Greater Manchester production ecosystem*”. The screen sector in Manchester works in conjunction with the BBC and MediaCity and, as Rob describes, “*the screen sectors in Manchester and Salford have a competitive but complementary relationship*”.



The Split Up. Credit: BBC & Sister

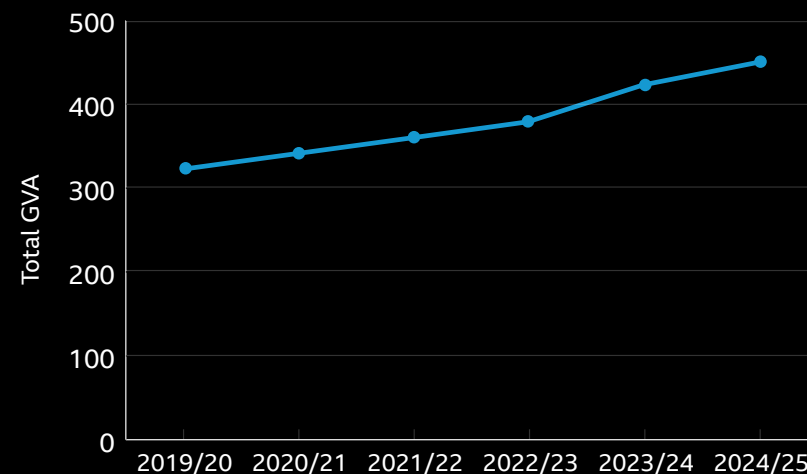
The competition drives up standards of production in the area, with positive effects on workforce skills and experience. That serves to enhance the reputation of the region.

The BBC's consistent investment in production and jobs in the region since the move has had a measurable positive economic impact. In 2024/25, the BBC contributed £450 million to the Greater Manchester economy. In the period 2020 to 2023 the BBC's GVA contributed to, on average, 39% of the audiovisual production and broadcasting sector GVA in Greater Manchester.² The scale and stability of the BBC's investment in Greater Manchester incentivises investment and growth in the region.

In recent years, the BBC's economic contribution to Greater Manchester has continued to increase, despite declining real terms income for the BBC overall and a wider sector facing headwinds. Since 2019/20, the BBC's GVA footprint in Greater Manchester has grown by 7% per year on average (see Figure 2).³ The BBC's GVA growth in Greater Manchester outperforms overall UK GVA growth, the production and broadcasting sector's GVA growth and Greater Manchester's GVA growth.

However, the BBC's future growth and its investment in Greater Manchester is at risk and will be subject to a long-term sustainable funding settlement. Maintaining a healthy sector is likely to be more challenging given the wider cost pressures in the production and broadcasting sector.

Figure 2: BBC GVA in Greater Manchester from 2019/20 to 2024/25 (£m, nominal)



The impact of the BBC's anchor investment

Sustained investment in infrastructure, staff and the creative supply chain by the BBC boosts businesses confidence in the wider sector. It helps to de-risk inward investment from other broadcasters and streamers and creates conditions under which businesses across the sector can plan and invest. Stakeholders report how predictable commissioning opportunities from the BBC, alongside the region's high-quality infrastructure, allow them to hire and develop talent. That investment and development allows talent to maximise their creative potential.



"The BBC has been the catalyst for Audio Always' growth. Without BBC commissioning out of London, the growth potential would be limited and we would not be able to grow business at the scale. Being able to say that we have worked with the BBC has an intangible value – in terms of training, support, and access to talent"

Stuart Morgan, Managing Director, Audio Always

Analysis from the BBC's recent report '*BBC & Creative Industries Growth*' reinforces the importance of sustainable and consistent commissioning investment by the BBC, particularly outside of London. Independent production companies outside of London who benefit from highly predictable commissioning from the BBC experience an additional 10% increase in their investment versus those who have low predictability. The BBC is able to offer greater commissioning predictability to producers in Greater Manchester as a result of the scale of its presence in the region.⁴

"Greater Manchester has an incredible depth of creative talent, both on and off screen, and sustained investment from the BBC has played an important role in helping that talent and the wider production sector to thrive. For companies like Quay Street Productions, having a strong broadcasting and production ecosystem here means we can build ambitious shows in the region, create opportunities and continue developing the next generation of talent."

*Samantha McMillon, COO,
Quay Street Productions*



Third party research identifies the same story: Public First found that, within five years of the BBC and ITV's relocation to Salford and Phase 1 of MediaCity UK's investment in 2012, the number of creative firms registered or headquartered in a 20km radius increased by 105%.⁵ Similarly, PWC found that a 1% growth in the BBC's local footprint accelerates the rate of creative cluster growth over time by 6.9%.⁶

However, the BBC's impact extends beyond the media sector. Stakeholders tell us how an anchor institution can create spillover effects on consumers, universities and sectors outside of broadcasting, and can change the way an area is perceived. For Salford and MediaCity, it is now an attractive place to set up a business whereas, prior to the BBC's move, it would have been perceived as more of a risk.

"Because of the BBC's long-term commitment, which is not subject to shareholder returns, it has a unique ability to de-risk commercial investment and unlock private returns. Without sustainable funding, it cannot do that."

Alice Webb, CEO, MediaCity

2 THE BBC CREATES OPPORTUNITIES FOR LOCAL TALENT

The BBC's expansion in Greater Manchester required a mix of functions and roles to move to Salford, including highly skilled roles and functions core to the BBC's mission.

This expansion of the creative sector in Greater Manchester had positive impacts on the local economy, creating jobs in a highly productive sector with higher wages.

Research by the Centre for Cities finds a 72% increase in the number of media jobs in Greater Manchester since the BBC's move. Research by the LSE shows a similar uplift on jobs as a result of the BBC's move, and an uplift on average wages in the area.^{6,7} This is because investment in more productive sectors bring more skilled and higher-paying jobs.

As of 2024/25, the BBC has over 3,000 Full Time Equivalent (FTE) jobs in Greater Manchester, with the BBC's investment in the wider supply chain and spending by employees creates a further 2,231 jobs. This means the BBC's total impact on jobs in Greater Manchester is over 5,000 FTEs.

The BBC's role in developing skills in the creative workforce is the largest in the UK, with the BBC investing over £47 million annually in skills and talent development.⁸ The BBC has a direct role in developing skills in Greater Manchester through apprenticeships and local skills schemes as well as creating opportunities to develop talent.

"BBC commitment to training and development surpasses others in the industry."

Cameron Roach, Executive Producer, Rope Ladder Fiction





Creating opportunities to develop talent

Alongside formal investment in skills and training, the investment the BBC makes in commissions and productions across the region provides employment opportunities that nurture local talent.

Continuous commissions for long-running network shows create sustained opportunities for production staff and freelancers to develop their skills and experience. This is particularly important in Greater Manchester where relatively stable commissioning budgets in genres based in Greater Manchester, like Children's TV and Sport, help provide a reliable source of regional commissions.

This supports both workforce development and broader industry sustainability.

There are several economic benefits from predictable BBC commissioning, as discussed in the previous chapter. However, making work less precarious is a critical outcome that helps to retain, grow and progress talent within the region. This is particularly important to enable greater accessibility to the industry for people from a wider variety of backgrounds. It also unlocks new career opportunities for young people in the region, without the need to move to London to get in.



CASE STUDY

SOPHIE CROSS AT MORNING LIVE

Morning Live has been an ongoing commission in Manchester since 2022, produced by BBC Studios. Its consistent commissioning in Manchester has been a signal to suppliers and freelancers in the area that the BBC is committed to producing shows in the region. Emma Morris, Executive Producer of *Morning Live*, said that they have “worked with over 180 suppliers and hired over 500 people” since being in Manchester.

One of these freelancers was Sophie Cross, a researcher at *Morning Live*. Sophie is from a working-class background in Bolton with no previous links to the industry but a passion for television and journalism, landing her a place at Manchester Metropolitan University to study Broadcast Journalism. During her studies she applied for an internship at *Morning Live*, before receiving a freelance role as a runner in the team.

“When I think of media companies, I always thought it wasn’t accessible – but I realised it wasn’t like that. They take people on if you’re passionate about working in TV. It was easier to start my career in Manchester and there is a lot of stuff in Manchester, it feels exciting. Having MediaCity practically on my doorstep is really



convenient. It doesn’t mean that these opportunities are inaccessible.”

Sophie Cross, Edit Researcher, Morning Live

That opportunity, not only to work in TV in Greater Manchester, but to progress a career in TV in Greater Manchester might not have been possible without the BBC’s commitment to production in the region. Consistent commissioning by the BBC offers freelancers more frequent and consistent work than having to regularly switch from job to job or move to get an ongoing role. Sophie told us that “working on *Morning Live*, I feel a lot more secure in my job”.

Finally, the BBC is able to offer young people who work in the industry, like Sophie, formal training and development opportunities. In September 2025, she got the opportunity to train as a researcher and then became a researcher in early 2026. Sophie told us that “The BBC is great for giving people opportunities like courses and work placements”, which help further careers in the industry. Without the BBC’s large and growing presence in Greater Manchester, these careers would be far harder to access for Sophie.

The BBC's role in developing skills

There is a significant pool of creative talent in Greater Manchester which, in part, is due to the BBC's continuous and growing investment in the region. But to remain relevant in a fast-moving industry this talent pool needs to be continually refreshed and upskilled.



Credit: BBC

Apprenticeships

A key aspect of the BBC's skills and training offer has been its apprenticeships. In Salford, the BBC offers a wide range of apprenticeship programmes, from software engineering and user experience in Media Tech, to content production and *Newsround*. Over the past 5 years, the BBC has employed 422 apprentices in Salford, with 231 of those being early careers apprentices. Moreover, 97% of BBC apprentices in 2024/25 were satisfied with their BBC experience.

As a large firm, the BBC can enable high-quality entry routes for early careers apprentices into the industry. Speaking to BBC Apprentices, they told us that the opportunities they gained from apprenticeships were extremely valuable, and a pathway to a career that suited them. Larbi Fadili, a former BBC apprentice, said that

"University is not for everyone and the BBC provided opportunities I wouldn't have got anywhere else".

The knock-on benefit of the BBC providing apprenticeships in an organisation at scale in Greater Manchester is that it helps to build networks for young people. Apprentices are able to go on attachment to local production companies for several weeks and apply the skills they have learnt. The network effects for young people in their communities are part of what maintains the ecosystem for future generations.



Credit: BBC

"There are so many opportunities that I did not know existed before – I get to experience a whole range of skills because I work for the BBC. I got to work with a variety of senior people in roles I did not know existed. The people really boosted me and really encouraged me: they empowered me to be where I am."

Ava Jordan, Business Coordinator, 5 Live, BBC (former BBC apprentice).

Local skills schemes

Alongside the apprenticeship programme, the BBC works with a wide range of local partners to generate a large and healthy pipeline of talent in the area. While local colleges and universities provide high-quality skills to young learners, the BBC helps to make that relationship symbiotic. Building on strong foundations, the BBC works with local institutions to ensure that learners at those institutions are given the practical skills for the creative workplace. In practice, that means local journalists and producers providing masterclasses or advising on the latest technologies. But it may also be providing teachers with the latest developments in technology and how broadcast TV is evolving. By working in the public interest with academic partners, the BBC can help train the next generation of creative talent.

"Because the BBC is not driven by profit, it is able to pursue activities that are guided by its public service mission. This enables it to build partnerships and relationships that are focused on delivering wider public value rather than purely commercial outcomes."

Ivan Garcia, Deputy Dean, Salford University

The BBC's partnerships with local universities can act as a beacon for young talent to the area and to the university. The BBC has helped to establish a credible digital and creative skills pipeline from university into the industry. These universities are now attracting the best creative talent from Greater Manchester and beyond because they see Greater Manchester as a media centre where they can start their career.



CASE STUDY

HARRY O'CONNOR, DIGITAL SPORTS PRODUCER

The BBC can enable local talent to progress from local colleges, through the BBC and into a career in the industry as an established professional. Harry O'Connor grew up in Salford and joined FutureSkills College in 2016 to study Journalism.

"I remember MediaCity being built, it was a wasteland and shopping centre. But it was always in the back of my mind as [a] window of opportunity."

From that experience, learning creative and practical skills, Harry successfully gained a place at the BBC as a digital journalism apprentice. This was at a time when digital news and sport content was accelerating.

"I didn't want to go to university so when I first heard about [the BBC apprenticeship] it felt perfect."

"When I first went in, it was quite intimidating, being the youngest person and being from Salford. As I went to different places around the BBC and as more people flooded in, I felt more at home. As I learnt more skills, I was doing more pieces of work independently and was able to develop ideas and make content that do well."



Following his successful apprenticeship, Harry worked at Radio 5Live on the Breakfast show team and then joined BBC Sport as an assistant digital producer in the football content hub. The work in these years set up Harry for the future. *"I learnt to video edit quite quickly, with quick turnaround on a daily show. Looking back, I am using lots of the stuff I learnt back then."*

During that time, Harry worked on the BBC's flagship football programmes, *Football Focus*, *Final Score* and *Match of the Day*. This allowed Harry to develop his experience: *"BBC Sport gave me bigger scope to create lots of digital content. It was the highlight of my time at the BBC and everything I wanted it to be."*

In 2025, Harry moved on from the BBC as a freelancer, and then to another role in the industry, working for *The Overlap* - most recently on the *Stick To United* podcast. In Harry's words, he now has *"so much experience in digital sport content, I've been around since it came onto the scene"*.

Without the BBC, Harry may not have been able to access a high-quality start to his career in the North West. It is not just about access: being able to develop the skills that allows career progression is crucial, particularly for people from working class backgrounds *"One thing I thought when I joined is 'am I going to have to move to London to progress?' But that was not the case as I progressed through the BBC."*

However, the BBC also partners with other organisations in Greater Manchester to provide different types of creative and technical skills. The BBC regularly works with organisations such as Screen Manchester to provide opportunities for talent to develop skills. The BBC also develops strategic partnerships in sectors where there are regional skills gaps. For example, the BBC and the Greater Manchester Institute of Technology recently partnered to help maximise vocational training for students. The BBC offers guest lecturing, hands-on experiences, mentoring, networking and input into curriculum which, in turn, opens new routes into media and technology roles. The BBC partners with The Black Collective of Media in Sport (BCOMS), providing events, networking, placements and work experience designed to develop the next generation of diverse sports media professionals.

The BBC offers its own schemes in Salford. One example is First Step – Salford which offers four-week paid researcher-level placements in BBC Newsrooms to people from diverse backgrounds. This programme aims to find local talent from diverse backgrounds who can be given experience and mentorship in the hope they will become future journalists in Salford. These schemes complement local partnerships to enable talent from all backgrounds an opportunity to enter the creative workforce.

Creating talent pools in Greater Manchester

The talent pipeline fostered by the BBC creates a virtuous and reinforcing circle. Creative businesses and indies now recognise there is a talent pipeline in Greater Manchester. That pool of talent, alongside the BBC's anchor investment and the wider ecosystem means Greater Manchester can attract all types of talent to the region. As a result of the larger talent pool in Greater Manchester, there are more indies who have started up in Greater Manchester, or relocated from other areas in the UK, in order to take advantage of the talent in the region.

"The BBC strengthens the identity of the place and creates an ecology [that] makes the place sticky. This means the BBC is crucial in attracting talent to the area, but also enabling a network of opportunities, which makes people stay."

Darren Grice, Director of Culture, Salford City Council

This talent pool has made Greater Manchester into a creative industry hub that competes on a global scale. This is evidenced by the global productions coming to shoot in Greater Manchester, with Netflix dramas such as *The Stranger*, *Fool Me Once* and *Missing You* all filmed in the region.

3 THE BBC GROWS & DIVERSIFIES PRODUCTION ECOSYSTEMS

One part of the strategy behind the BBC's move to Salford was to move entire departments, with several departments now having operations based in Salford like Sport, Children's and Education, 5 Live, and the Philharmonic Orchestra, as well as flagship radio shows and *BBC Breakfast*.

By locating entire departments, including their leadership, and the associated production base, that encourages indies to co-locate in Salford. Moving a department like Children's, where the BBC is by far the largest commissioner, means that entire ecosystems have been able to grow in Greater Manchester, bringing skills and experience to the region.

Some commissioned titles like *High Hoops* are set and filmed in the North West, while successful production companies that focus on Children's TV like Three Arrows Media are based in Greater Manchester.

"The first few years of Three Arrows would never have existed without the BBC."

Dominic Parry, COO, Three Arrows Media

For Sport, where the BBC is a large player in the market, there is a similar effect, with production companies able to expand and win business from Greater Manchester, developing the talent in the region. In-house production teams have long

created high profile sporting shows like *Match of the Day* from Salford, alongside a range of video and audio content produced in the region such as *The Wayne Rooney Show*.

"Greater Manchester is such a natural home for BBC Sport: it is an obvious and buzzing place for sport; everybody is living and breathing it."

Alex Jay-Kelski, Director BBC Sport

The network effects on production ecosystems lead to growth and productivity benefits: when organisations are closer, they are able to more effectively collaborate and to achieve more. Public First were able to measure this effect in Salford. They found that the productivity gains from the audiovisual production and broadcast sector in Salford have been worth £15 million since per year and that Public Sector Broadcasters drove almost half of these gains.⁹





Match of the Day. Credit: BBC Sport



Blue Peter. Credit: BBC James Stack

“The BBC move gave producers the confidence to set up in Salford, and that they can start their own thing. The BBC allowed people a chance to progress in their careers but then enabled a jumping off point into a supportive and encouraging community. The BBC helps create solid foundations that allows people to express themselves creatively.”

Sam Kershaw, Red Bricks Media

For Children’s TV specifically, the network effects complement the wider TV production ecosystem. The generally lower budget work of Children’s TV typically means that production staff are exposed to a higher variety of experiences. This can help workers develop the transferrable skills for other types of production, which they can use when not being commissioned on Children’s TV. Conversely, we know that a range of producers have historically had success in moving into children’s TV in response to the opportunity created by BBC’s investment, which has enabled more competition for the pool of work in the genre. That means more skilled people are able to do the work, a more diverse set of ideas are generated and, ultimately, better outcomes for audiences.

“There is a real strong and mixed ecology in Greater Manchester”

Chris Curley, Head of Nations and Regions, Pact

There are substantial benefits from locating different departments in one centre, as it allows for more natural collaborations. Adam Szabo, Director of the BBC Philharmonic Orchestra, says the team now “works across departments in a different way” citing *Musical Storyland* (a TV commission with CBeebies) a result of “learning more about what children need”. That collaboration led to an audience success story (with over 15 million streams on iPlayer) and sell-out live shows across the UK.

4 CREATING PRIDE IN GREATER MANCHESTER

In the context of Salford's history, the turnaround in the city's economy from post-industrialism to a global media hub is substantial.

In South-West Greater Manchester (i.e. Salford and the surrounding area), the relevant creative sector more than quadrupled in size between 2010 and 2023. While this cannot be entirely attributed to the BBC, the BBC's significant presence in the region has contributed to growth and enabled opportunities for people in the area.

Paul Dennett, the Mayor of Salford, told us that *"Salford continues to create opportunities for people. Post-industrialism created lots of challenges for people in this area. People felt like they had to leave the City of Salford for a career: no longer."*

The impact of developed spaces and opportunities may offer young people from Greater Manchester and Salford, greater sense of pride in the area they live. The BBC has helped make Salford a place to be proud of, not just with the investment in MediaCity, but explicitly showing that programmes are from Salford, with *BBC Breakfast's* backdrop on the Salford waterfront. The knock-on impact is that people are may see the region as a place for opportunity and could be more likely to stay for their career.

"[The BBC] talk about Salford, which has a huge impact on the people and city. [It] gives them a real sense of pride."

Stephen Young, CEO, Salford City Council

"Being from Salford is now a positive attribute, not a hinderance. That enables people to stay and want to take the job, which in turn brings upward mobility and self-confidence."

Matthew Ainsworth, Director of Skills and Employment, Salford City Council

This is crucial for Salford and places like it. It is a region that, based on 2025 data, is more deprived than 89% of Local Authority Districts in England, while Manchester is more deprived than 99% of Local Authority Districts. By having an institution that is visibly present, and by working with local organisations, the BBC can help provide genuine pathways to young people from disadvantaged backgrounds to get a route into the industry.



One example of the BBC's representation and portrayal of Greater Manchester is best shown by *Rafi the Wishing Wizard*, a children's TV programme based in modern Manchester with landmarks from the city visible in the series. The programme showcases a contemporary city in the UK to children and show places children might recognise on screen.

"The BBC helps break down cultural and economic barriers to expand the horizons of learners... The BBC on the doorstep means it is within reach."

Catherine Davies, Principal, Salford City College Group

"Visibility is critical for representation."

Chris Curley, Head of Nations and Regions, PACT

"The BBC has to be able to connect with local people; being a big presence in Greater Manchester helps enable that."

Roger Johnson, Presenter North West Tonight

5 THE FUTURE OF THE CREATIVE INDUSTRIES IN GREATER MANCHESTER

Greater Manchester has become a cultural and creative hub in the UK supported by the BBC's initial investment in MediaCity.

But there is significantly more potential for the BBC and the creative industries in Greater Manchester. There is high-quality production infrastructure in the region and, while young people in the region have the talent and drive to succeed, they do not always have the access or know where to look for roles in the sector.

However, despite the success of Greater Manchester's creative ecosystem, there are major challenges that are affecting the sector's growth. The cost of production across the UK has risen driven by rising labour costs, energy prices and production expenses. For independent producers, tighter margins can limit the ability to invest in skills and business growth.

For commissioners, particularly for PSBs, there is increasing pressure on budgets with declining incomes alongside increased audience expectations. Wider economic pressures can contribute to investor caution, reducing the demand for commercial content, which in turn affects production companies and freelancers.

These pressures are hitting PSBs, and since PSBs operate proportionally more outside of London than others in the sector, places like Greater Manchester get hardest hit by these challenges. Ultimately, that affects those working in the sector today and will affect the opportunities for young people in the future.





Film Club. Credit: BBC/Gaumont/Ben Blackall

It is possible to overcome this with renewed ambition in the region. The BBC's move in 2011 had seismic implications for the reputation of Greater Manchester as a home for institutions in the creative and media sectors. The imagination that instigated the BBC's move showed other cultural institutions, such as the Arts Council, the Brit Awards and the English National Opera, that it is possible to be based outside of London. Having creative institutions in Greater Manchester continues its rich cultural heritage, directly inspires more young creatives to get into the industry and changes perceptions of the area.

"The scale of the BBC's move to Salford has helped people imagine other things are possible in Greater Manchester".

John McGrath, CEO, Factory International

The BBC has been a real success story in Greater Manchester which has been driven through a long-term plan and committed investment. The BBC's move has become the case study for devolving creative industries in the UK. There is opportunity to do more and to renew that ambition. This relies on a sustainable funding model and coordinated strategy. By investing in UK storytelling, promoting impartial news and unlocking PSB partnerships, the BBC can continue being the anchor institution in a thriving creative ecology in Greater Manchester.

ABOUT THE REPORT: ACKNOWLEDGEMENTS & CONTRIBUTIONS

This report was prepared in-house by economists in the BBC Economics team.

The analysis presented is based on:

- Primary research from BBC-led stakeholder interviews with 30 individuals working across the Greater Manchester city region, across various organisations (list provided in below).
- BBC analysis of financial data to create economic output figures.
- Complementary desk research of information and reports published by the BBC, academia and industry.

The BBC interviewed the following stakeholders and thanks them for their contributions and feedback:

- **HEIDI DAWSON**
Head of the North of England & Controller, BBC Radio 5 Live, BBC
- **ADAM SZABO**
Director, BBC Philharmonic
- **ALEX JAY-KELSKI**
Director, BBC Sport
- **KATE SQUIRE**
Senior Head of Content Production, BBC Nations
- **ROGER JOHNSON**
Presenter North West Tonight
- **AVA JORDAN**
Business Coordinator, 5 Live, BBC
- **LARBI FADILI**
Business Assistant, BBC Sport
- **EMMA MORRIS**
Executive Producer, Morning Live
- **SOPHIE CROSS**
Edit Researcher, Morning Live
- **JON HANCOCK**
Managing Director, Three Arrows Media
- **DOMINIC PARRY**
COO, Three Arrows Media
- **SAMANTHA MCMILLON**
COO, Quay Street Productions
- **CAMERON ROACH**
Executive Producer, Rope Ladder Fiction
- **RICK MURRAY**
CEO, WorkerBeeTV
- **SALLY EVANS**
Creative Director, Salamanda Media

- **LIZ BAYLIFFE SMITH**
Head of Production, Salamanda Media
- **SAM KERSHAW**
Creative Director, Red Bricks Media
- **STUART MORGAN**
Managing Director, Audio Always
- **HARRY O'CONNOR**
Channel Manager, The Overlap
- **CHRIS CURLEY**
Head of Nations and Regions, Pact
- **ROB PAGE**
Managing Director, Space Studios Manchester
- **JOHN MCGRATH**
CEO, Factory International
- **IVAN GARCIA**
Deputy Dean, Salford University
- **PROFESSOR KIRSTY FAIRCLOUGH**
Professor of Screen Studies, SODA, Manchester Metropolitan University
- **ALICE WEBB**
CEO, MediaCity
- **PAUL DENNETT**
Mayor of Salford
- **MATTHEW AINSWORTH**
Director of Skills and Employment, Salford City Council,
- **DARREN GRICE**
Director of Culture, Salford City Council
- **STEPHEN YOUNG**
Chief Executive, Salford City Council
- **CATHERINE DAVIES**
Principal, Salford City College Group

Endnotes

- ¹ <https://www.publicfirst.co.uk/the-creative-engine>
- ² The most recent years available with comparable BBC and DCMS data
- ³ 7% annual growth is in nominal terms; this figure would be lower when adjusting for inflation
- ⁴ <https://www.bbc.co.uk/aboutthebbc/documents/bbc-and-creative-industries-growth-economic-impact-report.pdf>
- ⁵ <https://assets.nationbuilder.com/stonehaven/pages/2682/attachments/original/1770827849/The-Creative-Engine-v06.pdf?1770827849>
- ⁶ <https://downloads.bbc.co.uk/aboutthebbc/reports/reports/creative-clusters.pdf>
- ⁷ <https://www.centreforcities.org/reader/move-public-sector-jobs-london/relocation-bbc-activities-salford/>
- ⁸ <https://www.bbc.co.uk/aboutthebbc/documents/bbc-and-creative-industries-growth-economic-impact-report.pdf>
- ⁹ <https://assets.nationbuilder.com/stonehaven/pages/2682/attachments/original/1770827849/The-Creative-Engine-v06.pdf?1770827849>