‘HIGH-END DRAMA’

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Is there an increasing pressure on British Public Service Broadcasters to produce high-end dramas given the presence of expensive Subscription Video On-Demand competitors?

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ABSTRACT

High-end drama is at the centre of investments in the UK television industry, as well as internationally. High-end dramas, such as *The Crown, His Dark Materials* and *Peaky Blinders* have emerged onto the television landscape, drawing on large numbers of viewers. However such productions are expensive to produce, costing more than £1 million per hour slot. The ability to afford these cultural products vary between Subscription Video-on-Demand services (SVODs) and Public Service Broadcasters (PSBs), who are funded in different ways. The BBC which is subsidized by public license-fees, cannot afford to produce mass amounts of high-end content like Netflix, which is funded by subscriptions. Given the global audience that high-end dramas attract, PSBs are possibly under threat, as their remit requires that they target domestic audiences. This means that they could find themselves in a precarious position considering the shift towards high-end drama production in the digital era. With a specific focus on the BBC as a PSB and Netflix as an SVOD, the aim of this research is to determine whether an increasing pressure exists on British PSBs to produce high-end dramas given the presence of SVOD competitors with deep pockets. Exploring a range of academic theories in each chapter, I will use them to provide insight into how they affect the research question. By the end of this study, we will understand that despite their efforts to produce high-end drama, the low budgets of PSBs will affect their future relevance in television.

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MID BUDGET TELEVISION:

What are you doing here?

HIGH-END TELEVISION:

I'm here to take over.

The television industry is constantly evolving and with the emergence of high-end television, public service broadcasters (PSBs) and subscription video-on-demand services (SVODs) are adapting their platforms to accommodate its increasing presence. As of 2013, when high-end drama was actively being funded by the government in the UK[1], the industry has witnessed a demand for such productions. Particularly in the last few years, there has been a rise in high-end drama, given the advancements and changing tastes in the digital era. Favoured in the industry, high-end drama continuously sees the privilege of being handed a prominent slot on prime-time television or being branded as an SVOD 'Original'. High-end drama can even be seen as the anticipated event that low and mid budget television are shifted to work around, drawing attention from viewers and obtaining investments from studios. They have become increasingly relevant in the non-linear era, as they assist the brand identity of a broadcaster or streamer. According to Audun Engelstad after referencing upon the work of Robin Nelson and Trisha Dunleavy, high-end drama can be defined though:

[1] Screenskills. *Contribute to the High-end TV Skills Fund* [online]. Available: https://www.screenskills.com/industry-partners/high-end-tv-skills-fund/contribute-to-the-high-end-tv-skills-fund/ [19 April 2021].

> high budget, visible in the cinematic production values (budgets per produced hour are close to that of a medium-budget movie); a must-see allure that promotes [sic] a kind of essential viewing experience; authorial input that promises creative innovation . . . a narrative complexity based on systematic cutting between different subplots'.[2]

The two qualities that will be particularly centred on in this study are high-end drama as a 'high budget' product and as an 'essential viewing experience'. An example of high-end drama being seen as a high budget product can first be seen through Left Bank Picture's internationally acclaimed production, *The Crown*[3]. Distributed by and exhibited on Netflix, the high-end drama is notable for being one of the most expensive commissions that Netflix has had. The series centres on the British Queen who battles between serving the nation as the Head of State, and serving the family as a relative. *The Crown*'s less-than-humble expenditure of $13 million (approximately over £9 million) per episode[4], prides itself as an extreme example of high-end drama. The high costs are debited to the authorial input of *The Crown'*s screenwriter and creator, Peter Morgan as well as Queen Elizabeth's replica wedding dress, boasting a budget of $37 million[5] (approximately £27 million). As Engelstad pointed out, high-end dramas usually mirror the budgets of a medium-budget movie, but *The Crown* even exceeds that amount.

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[2] Engelstad, Auden. (2016) 'Sensation in Serial Form: High-End Television Drama and Trigger Plots', *Kosmorama* #263 (2016) (www.kosmorama.org). See also Trisha Dunleavy, *Television Drama: Form, Agency*, Innovation (Basingstoke: Palgrave-Macmillan, 2009) and Robin Nelson, *State of Play: Contemporary "High-End" TV Drama* (Manchester: Manchester University Press, 2007).
[3] *The Crown* (Netflix, 2016 -)
[4] Glisson, Veronica (2020). *'The Crown' Costs Netflix $13 Million Per Episode* [online]. Available: https://www.cheatsheet.com/entertainment/the-crown-costs-netflix-13-million-per-episode.html/ [31 March 2021].
[5] Lakritz, Talia (2021) *9 of the most expensive royal wedding dresses, ranked.* Available: https://www.insider.com/royal-wedding-dresses-most-expensive-ranked-2021-2#kate-middletons-wedding-dress-cost-an-estimated-332000-in-2011-that-would-be-more-than-345000-today-6 [31 March 2021].

Next, *The Crown* demonstrates how high-end drama has enforced itself as an 'essential viewing' in the television landscape. Through its reflection of modern day history and current events, *The Crown* remains relevant in the content displayed. Particularly with the 2021 March interview between Oprah Winfrey, Prince Harry and Meghan Markle, newer generations are relying on fictional content like *The Crown* to educate them on previous events and inform their judgement. Clustered with complex narratives, this high-end drama is globally being used as a factual reference point, despite several warnings by the producers that it is indeed a dramatised fiction of real life events. Furthermore, the series is an 'essential viewing' even beyond the UK. *The Crown* allows high-end drama to be seen as cultural products that can navigate themselves across borders, usually with the guarantee of foreign success. Despite being a quintessentially British show, *The Crown* has been able to perform well abroad, particularly in the USA, hitting Nielsen's Top 10 streaming programmes with the Season 4 debut in November 2020.[6] The high-end drama is widely promoted as a 'must-see' viewing in both the UK and USA, highlighting the international movement of high-end drama.

With high-end drama as the crucial component in rivalry for audiences, the need for international appeal and international finance influences creative decisions from studios and producers, such as choosing which stories to greenlight.[7] In 2017, Tony Hall, ex-Director General of the BBC said that investment decisions in the future for many companies will be targeted at the high-end content. The reason for doing so is that the productions that generate the most profit are the ones

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[6] Porter, Rick (2020) *'The Crown' Hits Nielsen's Streaming Top 10 With Season 4 Debut* [online]. Available: https://www.hollywoodreporter.com/live-feed/the-crown-hits-nielsens-streaming-top-10-with-season-4-debut [31 March 2021].

[7] Doyle, Gillian. (2016) 'Digitization and Changing Windowing Strategies in the Television Industry: Negotiating New Windows on the World', Television & New Media, 17(7), pp. 629–645. doi: 10.1177/1527476416641194.

that have 'international appeal and attract large, global audiences.'[8] This leaves localised content with a domestic appeal at risk of losing future investment, which will be discussed further in the next chapter. In conducting this research, it is important to know that currently, a large quantity of money is being invested into the production of high-end drama, including soft money (tax relief) from the government. Specifically aimed at film and high-end television, the British Film Commission is allowing television production companies to 'claim a payable cash rebate of up to 25% on UK qualifying expenditure.'[9] Contributing to the growth of the high-end television industry, all high-end productions that plan on claiming the tax relief are paying into the High-End TV Skills Fund. Both PSBs and SVODs have contributed to the fund, with productions like *Sex Education*[10] and *Killing Eve*[11] paying into it. The money from this fund is then being used to offer high-end drama training to workers by Screenskills and reconstruct studios for those productions.[12] With such investment, it is actually less appealing to make a mid-budget production, given that it will not reap the financial aid of that from a high-budget production.

Therefore, the current relevance of high-end drama in the industry makes it worth researching. Whilst there has been previous studies on the increasing dominance of SVODs and the financial threat against PSBs, none of them have focused on high-end drama as a key component. With

[8] Hall, Tony (2017). *Tony Hall delivers the Roscoe Lecture* [online]. Available: https://www.bbc.co.uk/mediacentre/speeches/2017/tony-hall-roscoe?lang=gd [31 March 2021].
[9] *High-end Television Tax Relief* [online]. Available: http://britishfilmcommission.org.uk/plan-your-production/high-end-television-tax-relief/ [31 March 2021].
[10] *Sex Education* (Netflix, 2019 -)
[11] *Killing Eve* (BBC America, 2018 -)
[12] Screenskills. *High-end TV Skills Fund invests £4.2 million in training and skills for HETV* [online]. Available: https://www.screenskills.com/about-us/press-releases/high-end-tv-skills-fund-invests-42-million-investment-in-training-and-skills-for-hetv/. [31 March 2021]. See also RTS (2017). *High-end TV drama is transforming UK studio business.* Available: https://rts.org.uk/article/high-end-tv-drama-transforming-uk-studio-business [31 March 2021].

several big budget productions being released just within the last year, such as *The Irregulars*[13] *and White Lines*[14], we can see how high-end drama is presently dominating the television market.

This research will explore how high-end drama is affecting the production decisions made by PSBs, after its growth in the SVOD market and demand in the television industry. Though exploring PSBs and SVODs as a whole, the focus in this dissertation will primarily centre around the BBC and Netflix. Chapter 1 will begin to investigate how the lower budgets of PSBs impact their ability to produce as many internationally acclaimed high-end series as SVODs. Chapter 2 will focus on the aggressive stance of SVODs, who are willing to pay much more than PSBs to produce or obtain the rights to acquire high-end dramas. Next, Chapter 3 will examine the strategies that PSBs are using to mitigate the threat of the increasing production of high-end dramas. After analysing wider discourses such as the shift from linear to non-linear television, the 'saviour' narrative, as well as what classifies as 'TV', the dissertation will conclude with a discussion of the key findings and the possibilities for the future in television.

[13] *The Irregulars* (Netflix, 2021 -)
[14] *White Lines* (Netflix, 2020 -)

CHAPTER 1: High End or The End.

EASTENDERS:

(anxiously whispers to CORRIE)

They still need us...right?

PSBs are an essential part of British television. In the UK, PSBs are the broadcasters which offer free-to-air servicing and are funded by the government, like the BBC, or commercially through advertising, like Channel 4. The free content offered by broadcasters allows them to be universally available to viewers in Britain[15]. The duty of PSBs is to serve and represent the British public - their primary viewers. By doing so, they must present their programmes with impartiality, refraining from political or religious views. As regionally based companies, it is integral for these broadcasters to address and reflect the diverse races, genders and social identities that Britain has. This is evident in BBC's well-known drama soap *Eastenders*[16], which is targeted at the average working class British citizen who enjoys drama and entertainment. Compared to the £1 million budget that is required to make an hour worth of content of a high-end drama, BBC One's *Eastenders* spends a humble £141,000 per 30 minute episode[17]. That comes to a total of under £300,000 that it takes to produce an hour worth of content, which is not even a third of what it costs to produce a high-end drama. Before the age of digital

[15] Wasko, Janet, & Meehan, Eileen R. (2020). *A Companion to Television.* Newark: John Wiley & Sons, Incorporated. p 117. See also Debrett, Mary. (2009) 'Riding the wave: public service television in the multi-platform era', *Media, Culture & Society*, 31(5), pp. 807–827. doi: 10.1177/0163443709339466. p 809. See also Malik, Sarita. (2013) '"Creative Diversity": UK Public Service Broadcasting After Multiculturalism'. *Popular Communication.* 11: 227–241.
[16] *Eastenders* (BBC, 1985 -).
[17] Douglas, Nicole (2017). *Eastenders: This is approximately how much it costs to make a SINGLE episode of the BBC One soap* [online]. Available: https://www.ok.co.uk/lifestyle/eastenders-bbc-one-time-cost-14471874 [10 February 2021].

streaming giants, cheaper programmes were the central viewing for the British public, with *Eastenders* drawing in viewers of up to 14.8 million in 2007[18]. Along with *Coronation Street*[19]*,* it was the prime show for viewers on a weekday evening. Over a decade later, and the soap is struggling to consistently reach even half of that number of viewers.

As stated above, the BBC, Britain's oldest broadcaster, is funded by license fees from the public, costing £159 a year. As a result of the economic crisis in 2008, the Conservative governments of 2010 and 2015 had to divert large amounts of the license fee income towards reducing the public sector deficit, as opposed to creating programmes for the BBC.[20] And thus by 2018, the then BBC's Director General, Tony Hall, pointed out that this had caused a reduction of around £800 million, leaving insufficient resources for original drama. Due to this, he not only emphasised the necessity of co-production partners, like Netflix, but he suggested how this crisis could put the BBC's local content at risk.[21] The BBC's 2017 drama series, *Three Girls*[22] is an example, which centred on the grooming and sexual abuse in Rochdale. Despite the three-part series achieving some of the highest rating on free to air television, Peter Kominsky, writer and director of Stonehenge Films states that 'if it was commissioned today, it would struggle to get made.'[23] Competing in an era where high-end dramas are dominating, low to mid-budget television, simply struggles to compete.

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[18] Anon (2020). *Viewing Figures* [online]. Available: https://eastenders.fandom.com/wiki/Viewing_Figures [17 February 2021].
[19] *Coronation Street* (ITV, 1960 -)
[20] Wasko, Janet, & Meehan, Eileen R. A Companion to Television. p 115.
[21] Ibid. p 116.
[22] *Three Girls* (BBC, 2017 - 2017)
[23] Kosminsky, Peter. (2019) *(Q47) Corrected oral evidence: Public service broadcasting in the age of video on demand* [online]. Available: http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/communications-committee/public-service-broadcasting-in-the-age-of-video-on-demand/oral/101526.html [8 February 2021].

The coronavirus outbreak in March 2020 is equally at fault with the economic crisis for the decline in viewership for PSB drama content, as well as the loss of finances. The pandemic meant that the government was forced to take a necessary lockdown, halting the shooting of drama productions like *Eastenders*. Unlike streaming services that had a plethora of archived content in spite of lockdown, broadcasters were forced to think of innovative ways to occupy their schedules between the months of June and September.[24] Additionally, the BBC had to face the consequence of the cancellation of their over-75s license fee. Though they had financially prepared for that adjustment, they were not expecting the pandemic. The result of this led to a decision from the Board 'to delay implementation of the over-75s licence fee reform this year [which would] cost a significant sum at a time when revenue from the licence fee is also down'[25]. Being that BBC is funded by license fees, the BBC has faced a huge financial loss over this past year. In the midst of the financial pressure, the broadcaster is seeing SVODs become a substitute for viewers who are affected by the BBC's struggle to deliver content.

On a wider scale however, we can understand the decline in broadcast television through exploring it in a digital era. Television was previously offered through programming in a linear format. There was a limited amount of TV programming and the 5 channels available consisted of: BBC One, BBC Two, ITV, Channel 4 and Channel 5. This meant that competition was scarce[26], as audiences were only centred between the 5 channels, two of which are under the same company (BBC One and BBC Two). Catherine Johnson states how 'the internet era is the first time in which television has faced significant competition to its dominant sociocultural

[24] BBC (2020) BBC Annual Plan 20/21 [online]. Available: http://downloads.bbc.co.uk/aboutthebbc/reports/annualplan/annual-plan-2020-21.pdf [17 February 2021] p 20.
[25] Ibid. [17 February 2021]. p 53.
[26] Jenner, Mareike (2018). *Netflix and the Re-Invention of Television*. Cham: Springer International Publishing AG. p 10.

position as the primary medium for delivering video content.'[27] Though broadcast television has always had competition across the 20th and 21st century with other forms of media, such as gaming, radio and the cinema, it was not at a high threat as it served a distinctly different role to the rest of these services. For example, whilst cinema-going is culturally positioned as an event that is done occasionally, watching television in the living room is culturally formed as a casual, everyday experience. However with the changing infrastructure of television through the age of streaming and non-linear forms of television, public service broadcasting is under its biggest threat. In the book, *Netflix and the Re-Invention of Television,* Jennifer Mareike cites Roberta Pearson where she discusses how the main shift between the periods of television, i.e. TVI, TVII (the era of cable and satellite television) and TVIII, is through technology.[28] This convergence era enables for a ubiquitous landscape whereby television can be accessed anywhere at any given time. With the advancement in technology, there is allowance for more globally transferable content which favours the economy for transnational media conglomerates, but puts at threat the PSBs which support local production[29]. PSBs, as stated by Ofcom, should allow 'enough flexibility in the system for provision (and providers) of PSB to change over time, as the needs and preferences of citizens change'.[30] With the shift from TVI gradually to TVIII, it is clear that the needs and preferences of the citizens are changing, and thus, it is the responsibility for PSBs to adjust. The 'needs and preferences' do not only refer to how audiences watch, but what the audiences watch. The model of PSBs that requires them to produce content for and about the

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[27] Johnson, Catherine (2019). *Online TV.* Milton: Taylor & Francis Group. p 6.
[28] Mareike. *Netflix and the Re-Invention of Television.* p 10. See also Pearson, Roberta (2011). 'Cult Television as Digital Television's Cutting Edge.' In James Bennett and Niki Strange (eds.), *Television as Digital Media.* Durham, NC: Duke University Press. 1248– 1592. doi: 10.1515/9780822393658-006. p 107.
[29] Debrett, 'Riding the wave....' p 812. See also Ofcom (2005) *Review of Public Service Broadcasting – Phase 3 – Competition for Quality* [online]. Available: https://www.ofcom.org.uk/__data/assets/pdf_file/0017/15911/psb3.pdf [1 April 2021].
[30] Ibid. p 809.

nation seems rather outdated in a convergence era where global streaming giants are making internationally acclaimed content like *The Crown*.[31]

However the challenge for PSBs in modifying their production to cater for the 'needs and preferences' for the nation, centres in their lower budgets, which mean that it is difficult to afford to produce as many critically acclaimed titles as Netflix. In 2018, whilst the SVOD could allocate as much as $13bn (approximately £9.4bn) on content for the year, the BBC could only afford a humble figure of around £1.5 billion.[32] The comparison between the figures demonstrate why PSBs feel the financial threat between the streaming competitors. Kominsky states in the Parliament live:

> A programme that would have cost about £1.2 million an hour three years ago will now cost about £2 million an hour or more. Of course, PSB drama tariffs cannot keep pace with that. Of that £2 million an hour cost, the PSBs can only contribute about £800,000. If you add the Government's tax breaks—what we call the soft money—that will take it up to about £1 million an hour. If costs are £2 million an hour and input £1 million an hour, the shortfall is £1 million an hour—half the budget.[33]

With the BBC making a commitment to educate, inform and entertain, they have a duty to not only fund dramas but comedy, news, sports, radio etc. This means that high-end dramas cannot

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[31] Pearson, Roberta (2020). 'The biggest drama commission in British television history: Netflix, The Crown and the UK Television Ecosystem,' in Luca Barra and Massimo Scaglioni, *A European Television Fiction Renaissance: Premium Production Models and Transnational Circulation*, pp. 86-100. Abingdon: Routledge.

[32] Waterson, Jim (2019). *BBC boss mocks Netflix's The Crown viewing figures* [online]. Available: https://www.theguardian.com/media/2019/mar/07/bbc-bossmocks-netflixs-the-crown-viewing-figures [10 February 2021].

[33] Kominsky, '(Q47) Corrected oral evidence…' [22 February 2021]

get the level of financial attention that they need. This is most evident in Netflix' commission of *The Crown*, an expensive series mentioned in the Introduction. Given that the duty of PSBs is to serve the British nation, it seems fitting for a series which focuses on the history of the British monarchy to be commissioned and broadcasted on the BBC. *The Crown* which spent £100 million on only its first season[34], would have been a 'classic BBC subject' according to The Director of BBC Television, Danny Cohen[35]. The Chief Creative Officer at Sony Pictures Television, owners of *The Crown*'s UK production company, Left Bank Pictures, reported that the high-end series originally was meant to have been funded by a transatlantic co-production from either BBC or ITV with an American partner like Masterpiece or HBO.[36] However, even financial help from a US partner could not cover the heavy costs that *The Crown* needed to spend, and thus the series was commissioned by Netflix who could afford their desired expenditure. The inability to compete with how much Netflix was willing to pay for the show, meant that BBC were left feeling frustrated for losing out on a series that is now one of the most successful to date.[37]

Yet to what extent must PSBs alter their models and values in order to fit in with the non-linear television? The question lies in whether they would fail more as broadcasters if they were to continuously alter their purpose with the evolving eras, or keep it fixed even when the era does not completely support it. The former would indicate a transient service that lacks a steady vision

[34] Travis, Ben (2016). *The Crown: Netflix's £100 million TV series in numbers* [online]. Available at: https://www.standard.co.uk/culture/tvfilm/the-crown-netflix-s-ps100-million-tv-series-in-numbers-a3385416.html [17 February 2021]
[35] Burrell, Ian (2015). [online]. Available: *The Crown: BBC wanted to make royal epic but 'could not compete' with Netflix financially* https://www.independent.co.uk/arts-entertainment/tv/news/crown-bbc-wanted-make-royal-epic-could-not-compete-netflix-financially-10471342.html [10 February 2021]
[36] Doyle, Gillian. (2016): Television production, Funding Mo-dels and Exploitation of Content, *Icono 14.* 14 (2), pp. 75-96. doi: 10.7195/ri14.v14i1.991. p 88.
[37] Pearson. 'The biggest drama commission...'

for itself as a broadcaster and the audience that it serves. Meanwhile, the latter would suggest that they are failing to adapt to the 'needs and preferences' for their audiences. The alternative proposal is that they combine both. Though cheaper programmes like *Eastenders* may not have the biggest appeal, removing such would be a huge loss for the cultural identity of BBC. Viewers may feel the lack of dramatic substance on the channel. Therefore, the content must remain, however it is also crucial to emulate the changing times. Though maintaining cultural integrity is essential, it is to be remembered that the BBC is also a business corporation. Successful businesses identify patterns in their markets and work to improve their services. If the appeal of high-end drama was simply a fleeting trend, it would not make sense for the BBC to alter its whole model to accommodate it. However high-end drama appears to be more than a trend, but a future in television. Even Tim Davie, the current Director General of the BBC, states that the dominance of high-end drama on SVODs demonstrates how 'people are clearly looking for content that is 'must-have.''[38] The important route for the BBC is to consider what is a 'must have' and an essential viewing in relevance to their corporation and their audiences, more so than to the industry as a whole. Content that could be deemed as 'must have' on their platforms range from news affairs, *Eastenders* and high-end content. They recognised this through their commission of *His Dark Materials*[39], a high-end fantasy drama produced by Bad Wolf and New Line Productions and also one of the expensive investments in television history. The cost shared with HBO, handling international distribution, is not a foreign strategy when investing in high-end drama. However the problem lies in their ability to do this often. Even with foreign investment, it is difficult to compete with the deep pockets of American streaming companies.

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[38] Pearson, Roberta (2018). 'Sherlock and Elementary: The Cultural and Temporal Value of High-End and Routine Transatlantic Television Drama' in Matt Hills, Michele Hilmes, Roberta Pearson's (Eds.), *Transatlantic Television Drama: Industries, Programs, and Fans.* pp 109 - 130. USA: Oxford University Press.

[39] *His Dark Materials* (BBC, 2019 -)

This chapter highlighted that with such financial setbacks, PSBs' ability to produce high-end dramas proves to be a challenge. It is clear that the BBC is aware of the imperative demand for high-end drama, with its costly commission of *His Dark Materials.* Yet to produce these types of dramas at a constant rate will be difficult at the company who is recovering from the coronavirus outbreak and cancellation of the over-75 license fees. Not only are they feeling the heat financially, but the industrial transformation to alternative ways of television in a convergence era is a large contribution to their setback. Though PSBs are essential in the UK for providing content specifically for the British nation, the needs and preferences of these audiences are shifting away from desiring only that content. With high-end television being an essential viewing on television, the relevance of low and mid budget television is diminishing. Although these broadcasters are aware of the threat, their financial and regulatory limits make it difficult to see how they will sustain themselves in the high-end drama future.

CHAPTER 2: Don't hate the player, hate the game.

SVODs:

Seize all of the High-End Drama shows at once!

In the digital era of TVIII, SVODs like Netflix, do not hesitate in investing huge sums into high-end dramas. The previous chapter explored how PSBs are financially struggling to do the same, given the age of TVIII, the declining relevance of their content, and setbacks such as the pandemic. Meanwhile in lockdown, Netflix saw an increase of 15.77 million new subscribers worldwide in only the first three months of the year. In its quarterly report, it is revealed that this figure was '+ 9.4% more than their forecast of 7 million new subscribers'.[40] Making three times more TV series than films, Netflix positions itself as a key television streamer in the market today. The continual commission of new programmes indicates Netflix' desire to develop a long-term commitment from audiences and keep them subscribing for more similar content.[41] This affordable, advertising-free, binge-worthy service is gradually wiping out the need to watch television dramas from broadcasters.[42]

It is first important to recognise that Netflix' aim is to obtain all the rights to the intellectual property that they commission, in the hopes of continuing their status as the leading global service. The company is willing to provide finances for the full cost of a series in order to possess complete ownership and have worldwide distribution rights.[43] This stance is intimidating

[40] Vlassis, Dr. Antonios (2020). *Analytical Report* [online]. Available: https://orbi.uliege.be/bitstream/2268/247652/1/MAY-2020-_-N%C2%BA4.pdf [1 April 2021].
[41] Wasko, Janet, & Meehan, Eileen R. A Companion to Television. p 157.
[42] Ibid. p 121.
[43] Patel, Sahil (2018). *Netflix's deal terms pose a conundrum for TV studios* [online]. Available: https://digiday.com/future-of-tv/netflixs-deal-terms-pose-a-conundrum-for-tv-studios/ [12 February 2021].

for broadcasters who do not have a foothold in 190 countries as Netflix has. Doing so puts Netflix at an advantage in maintaining their position as a global leading streaming service, as they are not bound to licensing agreements that restrict their decisions. Ramon Lobato observes that Netflix is a cultural product that adapts itself to the tastes of the audiences:

> 'Just as Netflix is changing, users are changing Netflix. The platform learns from its new global audiences, tracking tastes and viewing habits...These user data feed back into the company's strategic decisions about original programming, licensing, and marketing. Netflix, then, should not be seen as a static cultural object...It is constantly evolving'.[44]

As discussed in Chapter 1, the BBC has a purpose in appealing to the 'needs and preferences'[45] of the public, however, such preferences are adapting towards that of high quality, big budgeted productions which is a financial concern for the British broadcaster. Netflix, on the other hand, has the monetary resources and mass quantity of data to learn from and adapt to the needs and preferences of their audiences. From the success of Netflix's first original high-end dramas, *Orange is the New Black*[46] and *House of Cards*[47], it was clear that audiences across the world were enticed by content with a global appeal. These programmes solidified the streamer as a 'must see' TV platform. Though being US productions, they evidently had great success in international territories. Learning from this, Netflix has continued to capitalise off of obtaining international content like *The Crown. The Crown* was a strategic choice for Netflix to commission, as British television dramas in particular have an appeal on the global market;

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[44] Lobato, Ramon (2019). *Netflix Nations: The Geography of Digital Distribution.* New York: University Press. p 14.
[45] Debrett, 'Riding the wave....' p 809.
[46] *Orange is the New Black* (Netflix, 2013 - 2019).
[47] *House of Cards* (Netflix, 2013 - 2018).

viewers seem to value particular representations of British national identity. It could even be suggested that the commission was a bold attempt to challenge the BBC's role as a source of uniting the nation through British stories.[48] Through this commission, the company was able to penetrate into the British television market.[49] It could be said that the same choice was made when commissioning the Spanish hit, *Money Heist*[50] and French sensation, *Lupin*[51], which both share a strong grounding in their national identities. With the demand for high-end dramas increasing each season, it demonstrates that out of all the content on Netflix' vast archive, they are the ones that have the most appeal, bring in subscribers and break previous viewership records. These shows being transnational in their content highlights how viewers are not interested anymore in restricting themselves to local programming, but instead are attracted to high-end shows that are from other regions or can attract other regions. According to Lobato, Netflix' Chief Content Officer, Ted Sarandos, claimed that in 2019, around 15% to 20% of Netflix' catalogue was made up of local content, whilst the rest consisted of Hollywood or other international content.[52] Local content is the key to international success for the SVOD. British viewers subscribe to streaming services like Netflix to gain access to the internationally acclaimed high end shows that are not produced by PSBs, as opposed to subscribing to watch locally produced shows like *Eastenders.* Audiences understand that whilst 'local programming is good for some things (news, sports, comedy, reality TV)', foreign programming, particularly 'American imports are often better for other things (high-end drama, spectacle, thrills).'[53] In this way, viewers tend to combine both local programming and global programming to the needs of their everyday lives, using the BBC for example, as a source of information, whilst using Netflix

[48] Hills, Matt. 'Black Mirror as a Netflix Original'. In *Transatlantic Television Drama...*pp 213 - 238. p 219.
[49] Wasko, Janet, & Meehan, Eileen R. A Companion to Television. p 155.
[50] *Money Heist,* (Netflix, 2017 -)
[51] *Lupin,* (Netflix, 2021 -)
[52] Lobato, 'Netflix Nations…' p 135.
[53] Ibid. p 160.

as a source of entertainment. Thus, it is difficult for PSBs to attract a mass audience if their content is not centred on high-end drama, as it is what is considered 'essential viewing' by contemporary audiences.

Michael L Wayne argues that the business model of Netflix has inevitably placed them as a replacement for broadcast television, viewing them as its primary competitors.[54] Following on from Wayne's point, Netflix has almost comically positioned itself as a 'saviour' to linear television which is declining. I shall term this as the 'saviour narrative', whereby a competitor acquires the content from a broadcaster or streamer and makes it more successful on their own platform. This is firstly evident in the way in which the US streamer, Netflix, 'saves' the popular series, *Black Mirror*[55], from its original British commissioner, Channel 4. After two seasons, Netflix picked up the show from Channel 4 who allegedly could not afford to continue producing the high-end series. Not only does this demonstrate a transatlantic movement from a British broadcaster to a US streamer, but what Matt Hills refers to as a 'transtelevisual'[56] movement, as there is a shift from terrestrial television to on-demand programming. This reiterates the discussion in Chapter 1, in regards to the modern forms of watching television replacing the traditional forms.

To add to this, the saviour narrative is exemplified through Netflix globally releasing the UK based series as a 'Netflix Original' in 2016, which is emblematic of the aggressive and unapologetic domination of Netflix in the UK television market. The erasure of Channel 4's

[54] Wayne, M. L. (2018) 'Netflix, Amazon, and branded television content in subscription video on-demand portals', *Media, Culture & Society*, 40(5), pp. 1–17. doi: 10.1177/0163443717736118. p 2.
[55] *Black Mirror* (Channel 4, 2011 - 2013), (Netflix, 2014 -)
[56] Hills, Matt. 'Black Mirror as a Netflix Original'...p 213.

identity and logo on the series, combined with the promotion of *Black Mirror* as a Netflix Original is what Wayne suggests is done to 'blur the lines between its original programming and other content, thereby positioning themselves as the audience's primary point of identification.'[57] Performing this strategy enables the company to build its brand equity, attracting a larger number of viewers. *Black Mirror* is not the first show that Netflix 'saved', having picked up the British series *Top Boy*[58] and partnering up with Canadian popular artist Drake to continue the production after it was dropped by Channel 4 after two seasons. Building a 'saviour' narrative into its strategy, strengthens Netflix' position in being painted as a hero amongst the fragile broadcasters.

Furthermore, this 'saviour' narrative is continued with the relationships that are formed with UK independent production companies, who see Netflix as their primary point of contact. Peter Kominsky, states in the House of Lords Select Committee of Communications, 'if, as producers like us, you have a highly commercial programme idea, you don't bother with the PSBs anymore; you just take it straight to Netflix, Amazon or Apple. They'll talk a lot about global appeal, and if you have that kind of show they will welcome you and they are fully financing.'[59] This reiterates Netflix' rebranded business model as a platform that favours titles that can gain a global audience. Unlike the PSBs, independent production companies do not have to worry about finding a co-partner in another territory to fund their high-end drama titles as the streaming giants have more than enough to afford them. These streaming companies are willing to pay above the market prices just to satisfy the needs of their audiences, contributing to their leading status in television viewing.

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[57] Wayne, 'Netflix, Amazon, and branded television content...' p 2.
[58] *Top Boy* (Channel 4, 2011 - 2013), (Netflix, 2019 -)
[59] Kominsky, '(Q47) Corrected oral evidence…' [22 February 2021]

Moreover, the key to the streaming company's success with the independent producers is in allowing them to participate in 'good work', more so possibly than that of traditional broadcasters. According to Richard Arneson, good or meaningful work can be defined as 'work that is interesting, that calls for intelligence and initiative, and that is attached to a job that gives the worker considerable freedom to decide how the work is to be done'.[60] This is important in this context of collaboration as it highlights how independent producers should feel as though they are contributing massively to the content that is shown on the platform, and thus, they should have creative freedom in the producing process. By Arneson's definition, such should be valued in the creative sector, for them to feel like they are participating in 'good work'. Through working at a company like Netflix that emphasises the importance of creative freedom, these independent producers are encouraged to use their vision in the project. Reed Hastings, CEO of Netflix, states that 'giv[ing] employees more freedom' and allowing them to 'exercise their own judgement', makes way for a happier workforce, enabling them to make better decisions.[61] Meanwhile, traditional broadcasters have regulations and duties to fulfill when producing content for their local audiences, therefore, they tend to have substantial input during the creative process. The independent producers therefore have to produce their content in alignment with the strict requirements of serving the nation. What's more, the streaming giants can afford to fulfill the creative expectations of the independent production companies, whilst traditional broadcasters sometimes cannot. The choices to produce *The Crown* and *Black Mirror* with Netflix, as opposed to BBC or Channel 4 respectively, are demonstrative of the television industry whereby British television talent would rather collaborate with streaming services who

[60] Arneson, Richard J. (1987). Meaningful Work and Market Socialism. Ethics, 97(3), 517-545. p 517.
[61] Meyer, Erin and Hastings, Reed. (2020). *No Rules Netflix: Netflix and the Culture of Reinvention*. USA: Penguin House.

can not only guarantee them big budgets but creative freedom. Choosing to collaborate with streaming companies is what aids them in dominating the market with premium content, as they are the first points of contact.

This chapter illustrated how unlike the restrictive model of PSBs, the flexible business model of Netflix is their key advantage in targeting the needs and preferences of viewers. Its high complexity in tailored content serves to solidify them as the global leading streaming service, and their commission of high-end content with an international appeal aids that goal. Through the commission of global content, they indirectly exert pressure onto PSBs that have difficulty producing that type of content. We see how SVODs like Netflix unapologetically position themselves as heroes in the television industry, rescuing IP from cheap broadcasters, providing healthy relationships with independent production companies and allowing them to participate in 'good work'. This 'saviour narrative' assists them in their acquisition and streaming of high-end content. Chapter 3 will explore PSBs as the victims of this digital shift, examining the ways in which they have sought to overcome their shortfalls.

CHAPTER 3: The fight must go on.

NETFLIX smirks.

BBC:

You think this is funny, do you?

Well...I am not going down without a fight.

The threat of the increasing productions of high-end drama is palpable in the PSB corporations. As Chapter 1 demonstrated, PSBs' relatively small budgets make funding a continuous output of high-end drama practically impossible. In Chapter 2, it was noted how the production of high-end drama from streaming services is threatening their budgets, UK talent and local audiences. Thus, PSBs have been incorporating strategies to control their budget shortfalls, such as third party financing where PSBs collaborate with another production company. Ofcom reported that in 2018, third-party funding contributed a substantial amount of £455 million to PSB productions, £311 million of which was specifically for high-end drama.[62]

The two types of third party financing include deficit financing and co-productions. In deficit financing, a PSB commissions a programme but pays less than the cost of production for the primary rights. The production company then makes up the remaining production costs and pays off the deficit by selling the secondary and international rights when the programme is finished.[63] During the primary phase of its content production, PSBs were Netflix's main partners, permitting them to obtain rights in their local territories, whilst Netflix obtained the global rights. For example, Netflix handled the international distribution of both Channel 4's *The End of the*

[62] Authority of the House of Lords (2019) *Public service broadcasting: as vital as ever* [online]. Available: https://publications.parliament.uk/pa/ld201919/ldselect/ldcomuni/16/16.pdf [22 February 2021]. p 39.
[63] Ibid.

*F***ing World*[64], as well as BBC's *Bodyguard*[65]. This business model works in favour of both companies; whilst PSBs can benefit from global distribution and bigger budgets, Netflix can brand them as 'Netflix Originals' in foreign countries, assisting their own reputation.

The second type of third party financing is through co-productions whereby PSBs can co-produce with international production companies or SVODs. Co-productions with international production companies have transformed into becoming the 'norm' for British broadcasters, whereby both parties invest money and creative input into the making of the content. The British broadcasters will then have rights to the IP in the UK, whilst the international production companies will have rights over the global rights or other licensing agreements. Whilst the US is the UK's biggest competitor, being the largest exporter of television IP, they are also the most frequent co-production partners. This is evident in ITV's period piece, *Downton Abbey*[66], who co-produced with US' Masterpiece to fund the high-end drama. Costing approximately £1 million per episode to produce,[67]co-production was vital to the execution of the series. Co-productions are one of the few strategies to compete with an SVOD like Netflix, which has produced and will continue to produce numerous expensive productions.

However although co-productions have been a great part of Netflix's strategy, the streaming giant is also increasingly commissioning IP of its own.[68] PSBs' dependence on co-productions is risky, considering that the long term business model of Netflix indicates a refusal to share the

[64] *The End of the F***ing World* (Channel 4, 2017 - 2019)
[65] *Bodyguard* (BBC, 2018 - 2018)
[66] *Downton Abbey* (ITV, 2010 - 2015).
[67] Anon (2021) *22 things you never knew about 'Downton Abbey* [online]. Available: 'https://britishperioddramas.com/lists/downton-abbey-trivia-facts/ [22 February 2021].
[68] McCabe, Maisie (2019) *Netflix: 'No amount of data can tell you what to commission next* [online]. Available: https://www.campaignlive.co.uk/article/netflix-no-amount-data-tell-commission-next/1586932 [22 February 2021] .

rights to the IP. The unintentional yet inevitable consequence of their business model negatively impacts PSBs as it means that they must find other partners to assist them in producing high-end content. Tony Hall, Ex-Director General of the BBC, predicts the imminent independence of Netflix and Amazon, as they commission their own projects without UK broadcasters. The BBC is eager to partner with other production companies to not only defray costs, but ensure that their programmes will perform well in their target markets.[69] However Hall expects that due to the growing independence of SVODs, the PSBs will need to get used to something that will be 'much less' to produce in the future, possibly collaborating with the people who are already 'part of the free to air community'[70].

Whilst both PSBs and SVODs are available to watch in the UK, PSBs are regulated and SVODs are not. PSBs have content obligations that are mandated with their licence to broadcast. PSBs are required to pay levies as part of broadcasting their content in the UK. SVODs however, which are shown on the same UK screens, have no regulatory obligations to pay levies at all. Tony Hall calls for SVODs to be regulated as much as PSBs, as he complains that in regards to 'prominence, competition rules, advertising, taxation, content regulation, terms of trade, production quotas'[71], the laws that apply to PSBs differ from that of SVODs. As a result, SVODs are able to '[disrupt] the television ecosystem'[72] without facing consequences of mandatory levies to pay. Yet Adam Minns, Executive Director of the Commercial Broadcasters'

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[69] Chessell, James (2016) 'Streaming Brings BBC 'Golden Age', Australian Financial Review.
[70] White, Peter (2019). *BBC Expects Fewer Global SVOD Co-Productions & Eyes Partnerships With International Free-To-Air Networks* [online]. Available: https://deadline.com/2019/06/bbc-expects-fewer-global-svod-co-productions-1202634171/ [18 February 2021].
[71] Waterson, Jim (2018) *Tony Hall: regulate video streaming services or risk 'killing off' UK content* [online]. Available: https://www.theguardian.com/media/2018/sep/16/tony-hall-regulate-video-streaming-services-or-risk-killing-off-uk-content [22 February 2021].
[72] Pearson, 'The biggest drama commission...'.

Association, states that whilst a levy would require SVODs to reduce their budgets that they invest into high-end production, it would also result in less money to co-produce content with PSBs.[73] Having said that, the levies from SVODs would be used to fund the PSB sector, meaning that PSBs possibly would not be so dependent on SVODs as much.

The debate as to whether SVODs should follow the same rules as PSBs, stems from the question of whether or not to class SVODs as 'television'. Can SVODs be discussed in the same way as broadcast television with regard to local mandates? Catherine Johnson in her chapter, 'Defining Online TV', raises the point that television now has become 'increasingly internet-connected, changing and expanding at the level of infrastructure, device, service, frame and content'.[74] SVODs exist in a media ecosystem that transcends geographical boundaries and can be accessed anywhere at any time. The nature of these SVODs is that they are 'over-the-top' (OTT), meaning that they are not limited to broadcasting nor cable infrastructure. This differs to that of PSBs on linear television, which exist within national regions and can only be accessed at scheduled times. VPN access to PSB content is even restricted in regions beyond the UK, as they are committed to serving only their nation.

On one hand, these differences serve to exclude SVODs from categorising themselves as television. From a cultural perspective, it is difficult to see SVODs as television seeing that in the TVI and TVII era, the physical television sets or cable infrastructure equated to 'watching television'[75]. Without these infrastructures, television might no longer be television. Television was first associated with watching programmes at scheduled times, and if one were to miss the

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[73] Authority of the House of Lords, '*Public service broadcasting…'* p 42 - 43.
[74] Johnson. *Online TV*. p 30.
[75] Ibid.

scheduled broadcast, a programme could not be accessed again unless it was repeated later. This idea of television being a cultural experience of viewing from a television set is opposed to the ubiquitous experience of 'watching television' from a phone or tablet. Amanda Lotz' work, which describes SVODs as the 'post TV period',[76] demonstrates how SVODs can easily define themselves as not television, drawing on the notion that SVODs are more than TV.

On the other hand, if we view television as a service, then it is possible to view SVODs as television. Drawing on the shift in the TVIII era, Johnson goes on to state that 'it is the cultural form of the service that has emerged as the central site that mediates our experience of watching television.'[77] Therefore, television viewing is not limited to broadcast, cable and satellite infrastructure, as it can be accessed through an array of websites, apps and devices. It can be argued, then, that though it is true that infrastructure may order the form of television services, 'it is through the service that we experience television in the internet era.'[78] What's more, Michael Strangelove recognises that whilst linear television has been restricted to industrial modes of production, digitalisation and technology advancement has increased the global ability of producing and distributing content, permitting the emergence of non-industrial forms of 'television'.[79] In fact, despite the differences between the forms of television, both PSBs and SVODs still produce, license and commission content. Strangelove goes on to say that the idea that online television should not be classed as television as it 'lacks some essential character of twentieth-century television is misguided. Television is not a fixed experience defined by a particular industry structure, ontological status, or technological context'.[80] Strangelove assumes

[76] Lotz, Amanda D. (2017). *Portals: a treatise on internet-distributed television.* Michigan: Maize Books.
[77] Johnson, *Online TV*. p 35.
[78] Ibid.
[79] Strangelove, Michael (2015). *Post-TV : piracy, cord-cutting, and the future of television*. Toronto: University of Toronto Press.
[80] Ibid. p 164.

that the definition of 21st century television should not be limited to the ways in which television in the TVI and even TVII era were defined. Devices and SVODs in the convergence era have not replaced the television set nor the linear schedule, but simply increased the ways in which to view television. Television therefore can be understood by knowing that 'older and newer technologies and cultural forms intertwine and coexist'[81]. Strangelove's definition indicates that television is a changing experience and thus implies that if there came to be a TVIV, the same definition of television would stand.

Therefore, if it is to be concluded that television is an evolving service, it makes sense to include SVODs in the category of television. Concluding this would therefore imply that they must be rightfully subjected to the same regulations as PSBs.[82] Kosminsky shares the same view as Hall in that the consequence of SVODs being able to broadcast their content to the UK audience of 60 million plus, means that they should be mandated to 'pay a levy per head on all their UK subscribers'.'[83]

> 'That would create a pot of money available exclusively to UK PSBs to compete for, programme idea by programme idea, to replace the shortfall caused by the SVOD decision to withdraw from co-productions with the PSBs...in that way ensure that our public service broadcasters can continue to make drama that speaks to the specific concerns of UK audiences as well as the wider world.'[84]

[81] Johnson, *Online TV*. p 33.
[82] Strangelove, *Post-TV : piracy, cord-cutting, and the future of television.* p 15.
[83] Kominsky, '(Q47) *Corrected oral evidence*…' [22 February 2021]
[84] Ibid. [22 February 2021]

Levies would mean that the government can reclaim the fees that SVODs are not paying when they stream their content for free on UK television. These fees can then be reinvested into PSBs, allowing them to afford more expensive programming. Kominsky reports that Reed Hastings, CEO and co-founder of Netflix, is even willing to comply with the payment of levies, given that it is a mandatory imposal.[85] However this idea has not been agreed by the government:

> 'We heard concerns from industry figures that third-party funding could decline in future once broadcasters have become dependent on it. Losing this funding would pose a serious danger to public service broadcasters and impair their ability to produce high-quality programmes...We do not support proposals for a levy on SVOD subscriptions at this time, but we would expect Ofcom to assess the merits of a levy if the situation changes and to make recommendations accordingly.'[86]

This provokes one to question where the fairness of this mandatory levy discourse lies. SVODs have the advantage of spending lavishly without needing to pay the mandatory levies that PSBs pay. Kominsky's claim appears fair, given that both SVODs and PSBs deliver to the same UK audience. Combined with low broadcaster budgets and SVODs' refusal to continue co-productions with PSBs in the future and the mandatory levies, the ability for SVODs to dominate in the market with high-end drama seems inevitable. With this analysis, it is possible to empathise with PSBs who recognise the shifting needs and preferences of their audience towards high-end content, as discussed in Chapter 1, but are still unable to avoid the payment of levies like their competitors. The burning question at hand - are SVODs television or not? Drawing on Strangelove's argument regarding the evolving forms of television in a convergence era, it is

[85] Ibid. [22 February 2021].
[86] Authority of the House of Lords, *'Public service broadcasting…'* p 43.

justifiable to conclude that they are. Yet the government's excusing SVODs from paying levies indicates it either does not count them as television, or that the UK television system is unjust. Either way, this foreshadows the ascending power of SVODs in the television market, making the future of high-end drama prominence in the PSB sector unlikely.

CONCLUSION

This study examined whether competition from SVODs exerted pressure on British PSBs to produce high-end dramas. The dissertation focused specifically on the BBC and Netflix, as the two dominating services of PSBs and SVODs. Given the analysis of the budgets and business models of the two services, academic discourses have supported my argument that there is much pressure on PSB corporations with regard to the production of high-end drama.

As outlined in the first chapter, this study initially aimed to recognise the financial predicament of PSBs. It was first important to understand their volatile position in the television market, in regards to the rise of high-end drama productions. Knowing that PSBs were funded by license-payers which does not compare to the vast subscriptions of SVODs, the cancellation of the over-75 license fees as well as the pandemic, helped to solidify our understanding as to why their budgets for high-end drama fall short. The central focus was on the evolving state of the television industry - the shift from linear television to the era where technology has allowed more ubiquitous forms of television. This shift has weakened the relevance of PSBs and caused viewers to seek alternative forms of television. The argument was whether PSBs needed to maintain their cultural integrity even with their declining British content or strategise themselves according to the times like the streaming giants. It was concluded that they should maintain their commitment to less expensive content, but that investing in high-end drama is also a necessity in this climate.

The second chapter investigated how SVODs are able to dominate the market with high-end dramas. The core part of the strategy was through their business models. Netflix in particular, seeks to obtain all the rights to the IP to gain ownership and distribute content on a global scale. Hence it seeks to work more independently and commission or acquire high-end content which has a global appeal. In doing that, it does not hesitate in acquiring material from broadcasters which are failing to achieve their full potential. I termed this strategy as the ‘saviour narrative’. In addition, Netflix’ relationships with UK independent production companies allowed them to participate in ‘good work’; this ensures that independent producers are likely to turn first to Netflix rather than the PSBs. Both strategies aid Netflix in obtaining high-end dramas to advance its position in the television market.

Finally the third chapter explored how PSBs are mitigating their financial setbacks in producing high-end dramas. Third-party funding is a huge part of their strategy, building partnerships with streaming services and foreign territories. However, due to SVODs’ desire to own all IP rights, these partnerships will be short-lived and PSBs will have to find another source of funding. The chapter explored more closely the discourse surrounding the classification of television. In knowing what classifies as television, we could see if SVODs should be obliged to pay levies or not. Paying levies would mean that PSBs could have a higher pot for funding high-end dramas. The fact that SVODs are not currently required to pay levies, increases their financial dominance and makes PSBs vulnerable to declining at a faster rate. It makes it inevitable that funding high-end drama will be difficult for PSBs to do so in the foreseeable future.

The main research question asks: is there an increasing pressure on British public service broadcasters to produce high-end dramas given the presence of expensive subscription video on-demand competitors? A variety of pressures on the PSBs have been explored within this study, being that of: financial pressure, industrial pressure and cultural/ global pressure.

Financial pressure is the most overt of the three, being that it is clear how the BBC in particular, has been setback with the cancellation of the over-75 license fees, the pandemic as well as the levies that they but not SVoDs must pay. The cost of productions are rising over the years and whilst PSBs could have afforded them a few years ago, producing a high amount of them now prove to be difficult.

Next, there exists the industrial pressure in the transforming market of television. The convergence era poses a threat to linear television as there are now more convenient ways of accessing content. Television which used to be centred on the five PSB channels in the UK, has now fragmented into a plethora of more channels as well as streaming competitors. With the decline of PSBs, it makes it easier for streaming services to also pick up their content and make it better on their own platform.

Additionally, there exists the cultural and global pressure that PSBs face from their audiences. Even the local audiences that PSBs serve are turning their attention towards other dramas with a bigger appeal than that of *Eastenders.* From the way that audiences are responding to high-end dramas, it is clear that viewers are drawn by productions with a global rather than simply domestic appeal. However PSBs which are required to only serve their audience, mean that they are restricted in making the same type of domestic content.

Key factors to consider in the near future begin with the relevance of PSBs' localised content. Seeing that high-end drama is not a trend but an integral part of television, it means that PSBs must strongly consider what type of content they want to make in their future. Will they be inclined to make high-end drama since they can profit from it via overseas distribution? And if they are, will they leave a domestic audience unserved? Another key factor is that of the saviour narrative. How long will PSBs be positioned as the victims and SVODs as the heroes? How long will PSBs be neglected in their plea to mandate SVODs to pay the same levies that they do? In all of these future considerations, it will be easier to determine how PSBs respond to producing high-end television drama in the future. Until then, their victimised position in the television ecosystem appears to remain, as it is inevitable that the streamers' production of high-end drama will continue at a faster rate.

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*The End of the F***ing World* (Channel 4, 2017 - 2019)

The Irregulars (Netflix, 2021 -)

Three Girls (BBC, 2017 - 2017)

Top Boy (Channel 4, 2011 - 2013), (Netflix, 2019 -)

White Lines (Netflix, 2020 -)

APPENDIX

Research Diary

Tuesday, October 27 2020

4:30 PM - 5:21 PM

Today I met my supervisor, Mark Gallagher for the first time. I had met him before as my lecturer, but this was my first time meeting him as my supervisor. I explained to him my concerns about my dissertation topic - I have too many options! He helped me explore the practicalities of each one and from there, I was able to narrow it down to two areas - Netflix as an accelerator of productions or the commissioning of a British series. He said that the best thing to do was to create a mind map and bounce off different ideas, and then create two outlines and see which one I preferred. So, that's what we have agreed to until our next meeting.

Tuesday, November 3 2020

12pm - 12:45pm

With the hope of getting more advice on my dissertation, I attended a department drop-in session for a quick approval of what I had formulated in the past week. I was immediately assigned to Professor Roberta Pearson, who is an expert in the TV industry, and therefore shared the same excitement as me. She instantly sent me a study that she wrote on *The Crown* as 'the biggest drama commission in British Television', and it was so insightful! During our conversation, she was giving me more insight into my topic and my headspace was getting clearer. Both passionate about this topic, she thought it would be best to take me on as her supervisee despite the original agreement with Mark. Considering how enthusiastic we both were in the session, I think that this is the best decision to take. Roberta advised me to spend the week looking into the sources in her study and use them to support my idea.

Tuesday, November 10 2020

12pm - 12:30pm

After a week of not only researching into sources that would be beneficial for my idea, but starting to watch *The Crown* for a wider knowledge on high-end dramas, I came to our meeting with a clearer vision. I decided that I possibly wanted to research into how public service broadcasters may feel pressure to produce high-end series in an era with competitive streamers like Netflix. Roberta agreed that this was an interesting and unique idea, giving that it was more niche than my previous idea. Roberta kindly virtually introduced myself to her PhD student, Ayeesha, who not only did a similar study to my topic, but works at the BBC. With this introduction, the hope is that Ayeesha could give some useful insight into my topic and the BBC, possibly even connecting me with people that would be great to interview. I have now arranged a meeting with Ayeesha and I am excited to hear her thoughts on my topic. Roberta has advised me to research into high end series this week and get back to her for our next meeting.

Tuesday, November 17 2020

12pm - 12:30pm

I came into the meeting with Roberta discussing my final focus area on high-end television drama. She was satisfied with this concept, as we both agreed that it was a niche area that had not been intensively researched into. This area also excites me, given that I want to produce high-end dramas as a career after university. After my research in the week, I found that a lot of the studies I came across were written/ co-written by Roberta herself! She shared with me the pdf of the book that she co-wrote, *Transatlantic Television Drama*, which I had already been looking into and advised me to read it for this week. Additionally, I shared with Roberta my recent industry connection, David P Davis, executive producer at Bad Wolf. In his career, he's worked at Left Bank Pictures and BBC, with credits including *Doctor Who* and the new BBC series, Industry. Thankfully, I am in the process of arranging two meetings with him, regarding specific insight into his career and advice for myself, as well as a potential interviewee for my dissertation. Roberta advised me to keep the two separate, which I think is a good idea. For this week, Roberta has given me the task of writing an outline for my research question and sending it to her before our next meeting on Tuesday. I'm also going to finish reading her book to help me with this task. I am so excited to get working on this!

Tuesday, November 24 2020

12pm - 12:30pm

After sending my outline and revised proposal to Roberta a few days prior, we discussed her thoughts on it in the meeting. She was pleased with my progress and gave me a few areas to tweak. I also shared with her the success of the meeting with Ayesha, and how she has been very helpful with advice for my dissertation. Roberta then showed me onto 'Nexis', a useful search for primary research such as press releases. She instructed me to use the Christmas period to collect as much information and sources on here, getting the core foundation elements for my research. Although I am eager to get started on interviews and writing chapters, she told me that it's better to not worry about any of those for now, and simply focus on collecting evidence for my question.

Friday, January 15th 2021

12pm - 12:30pm

After spending a long and isolated Christmas watching high-end drama series like *Downton Abbey* as well as gathering an exhaustive list of primary and secondary sources, I set up a meeting with Roberta to discuss what to do next. Roberta advised me to write up a detailed chapter outline that specified subsidiary research questions that addressed the overarching one. As my list of sources was vast, Roberta told me to narrow it down and select the relevant ones. In order to do so, I would now have to select the exact quotes from the sources that I wanted to use and see if my research question was still appropriate after analysing the quotes. Nevertheless, Roberta also advised me to come up with a timeline that would enable me to structure my writing process amongst the deadlines of my other modules.

**Note:* Between the meeting in January and through the course of February, Roberta and I were exchanging emails that were assisting me in my writing process. After reviewing my chapter outline, she advised me to collect more academic sources, although I found them rather difficult to find on the niche topic of high-end drama. Still, she suggested that I use them as part of my overarching discussions. We agreed that she would continue to assist me in accordance to the timeline that I had constructed for myself. She also advised me that I needn't conduct interviews, as I have sufficient information and sources on the topic.

Easter Break

Roberta and I communicated via email over the Easter break. I submitted in my first draft and she gave me feedback accordingly. I am now acting on my feedback and will hand in my final draft, hopefully just after the Easter break.

Thursday, 29 April 2021

14:14pm

I think that I am finally ready to hand it in.