

Television Drama Production in Wales

BBC Wales, Roath Lock Studios



A report by the Centre for the Study of
Media and Culture in Small Nations

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The Centre for Media and Culture in Small Nations
Canolfan Cyfryngau a Diwylliant Mewn Cenhedloedd Bach



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Since its establishment in 2006 the Centre for the Study of Media and Culture in Small Nations, University of South Wales, has engaged in dialogue with various stakeholders about the challenges and opportunities for drama production in and from Wales. In 2010 in conjunction with the BBC Trust and Audience Council Wales the centre published the report *Screening the Nation*, which examined the portrayal of Wales in landmark BBC television dramas (Blandford et al. 2010), capturing the centrality of television drama to citizenship and identity in Wales. The next phase of this research agenda coincided with the opening of the BBC's Roath Lock Studios in Cardiff. While the focus of the research was the investment at Roath Lock other developments such the investment in Cardiff by Pinewood studios and Tony Hall's provocative speech in 2014 highlighted that this was an important moment in the development and sustainability of the Welsh television sector. This research contributes to the on-going debates about both public service broadcasting and the wider creative sector in Wales and its ambition to be a serious contender in the television production market.

Our work on Roath Lock is based upon two key research questions¹:

1. What was the rationale behind the development of the Roath Lock studios as a centre for television drama production?
2. What does this new facility means for Wales and its creative industries?

Below we have summarized the main findings and outlined the next phase of our research.

Key Findings

1. For the majority of those interviewed, Roath Lock is a welcome addition to the television production ecology in Wales.

The BBC is the single most important player in Welsh TV drama production. For the majority, but not all of our interviewees, the Roath Lock studios were regarded positively as a tangible sign of the BBC's commitment to television drama production *in* Wales but, crucially, not necessarily *by or for* Wales.

What is Roath Lock?

Opened in March 2012, the BBC's Roath Lock studios in Cardiff Bay is responsible for some of Britain's best known television dramas, including *Doctor Who* and *Casualty*, along with the Welsh-language soap *Pobol y Cwm*, produced by BBC Cymru Wales for S4C. Built following the BBC's announcement in 2008 that it would produce more shows outside London, the 170,000 square foot facility - the BBC's largest drama production centre in the UK. It also provides the centrepiece for the new Porth Teigr development, a major urban regeneration project backed by the Welsh Government.

There was widespread agreement that the facility puts Wales on the cultural map especially in terms of attracting talent and outside investment. Across the sector, there is a sense that this is an exciting and productive time for network TV drama production in Wales, though there is still more to do and additional support is needed if the Welsh TV industry is to be sustainable and thrive in an increasingly competitive television landscape.

2. However, Roath Lock is not geared to screening Wales or Welsh stories and this was regarded as a lost opportunity.

Notwithstanding the production for S4C of the Welsh-language soap *Pobol y Cwm*, Roath Lock's main activity is the production of English-language television drama for the BBC network, including long-running series such as *Doctor Who* and *Casualty*. Most of these dramas are not explicitly Welsh in their setting, dialogue, casting, thematic concerns, or mode of address to viewers. As such, we found enduring concerns that this facility has not led to a significant change in Wales's visibility on the UK television network. These concerns were allied to another set of criticisms made of the BBC that it was cutting its television drama production *for* Wales. In other words, whilst Roath Lock delivers network TV dramas for the UK, it does not remedy the erosion of TV drama production by BBC Cymru Wales for its opt-out service. In 2005/6 BBC Wales' spend on its English language television programmes was £26.8 million but by 2014/15 spend had reduced to £20.8 million a reduction of 25% (IWA 2015). Budget cuts are seen to be depriving Welsh audiences of 'indigenous' Welsh drama that speaks to and about them.

Despite BBC Wales' very real success, we must also acknowledge that English language programming from and for Wales has been in decline for almost a decade [...] What does that mean for audiences here? It means, inevitably, that there are some aspects of national life in Wales that are not sufficiently captured by the BBC's own television services in Wales [...] Does this matter? Of course it does: the vitality of any nation must surely rest on more than its journalism. One cannot fully realise a nation's creative potential or harness its diverse talents through the important, but narrow, prism of news. (Tony Hall BBC Director General, 2014)

In 2014 Tony Hall (BBC Director General) acknowledged that whilst improvements have been made to news reporting and Cardiff now houses some of BBC network's most popular English-language dramas, productions from Wales about Wales remain seriously under-developed. BBC Wales's senior executives told us that they were aware of these concerns and that they hoped to address these through the introduction of more dramas about everyday

Welsh life. However, other BBC producers suggest that BBC Cymru Wales's priority should always be to tell good stories regardless of whether these are about Wales or not.

3. Public service broadcasters remain crucial to the creative industries in Wales.

While the Roath Lock development does not directly address or resolve the question of how the BBC represents and speaks to Wales specifically in its TV drama production, the centrality of BBC Cymru Wales and S4C to the television ecology in Wales was reiterated by all of our interviewees. While some argued that at times the independent sector was over-reliant on these two public service broadcasters, their value in terms of training, access to international markets and plurality in the Welsh market was widely agreed. There were repeated concerns about the impact of substantial budget cuts on the ability of BBC and S4C to continue their provision.ⁱⁱ

4. Roath Lock, its cultural and political significance, needs to be understood as part of a post-devolutionary process.

Roath Lock studios gain their wider cultural significance as part of a historical transformation of perceptions of post-

"Doctor Who showed everyone that you don't have to make the dramas in London with London crew, and it really put BBC Wales drama on the map straight away"
(BBC Wales producer).

devolutionary Wales as a place for making television drama. Commonly this is dated back to BBC Wales's successful production of the network re-launch of the sci-fi series, *Doctor Who*, in 2005 and to the key roles played by Russell T. Davies and Julie Garner in that project. But alongside programmes, policy and politics matter too. Following the formation of the Scottish Parliament and Assemblies in Wales and Northern Ireland in 1999 the BBC was forced to engage with the new realities of a devolved UK. This process is on-going. As well as investing £21m to strengthen its news coverage of the new devolved administrations (BBC 2001: 17), the BBC committed itself, through its

2005 charter renewal, to improving its representation of the UK's different nations, regions and communities (DCMS 2005). In 2008, the BBC committed to increase its network productions in the nations from 8% to 17% by 2016. Likewise, Channel 4 has sought to respond to similar criticism through its Alpha Fund and its Creative Diversity initiative which aims to deliver diversity of supply so that at least 35% of original production is commissioned from outside London, and at least 3% of which should be from Northern Ireland, Scotland and Wales'. Television production is therefore tied to the wider civic project of devolution and to the challenges faced by UK public service broadcasters and others in adapting to this new context.

5. While the direct role of Roath Lock in programme-making within Wales is circumscribed, its value to the sector is much wider.

The building of Roath Lock itself has not significantly increased the range of dramas BBC Wales produces given its limited capacity for expansion. The studios are nevertheless seen as symbolically marking the start of a more ambitious and mature phase of BBC Wales' drama production, notwithstanding the fact that it is the BBC Drama Controller, and the relevant channel controller, both of whom are based in London, who ultimately decide which network dramas get produced and screened.

It's a manifestation of what we think of as a selling point for Wales, the Creative Industries in Wales in particular which is that we have a particular heritage and particular strengths in producing television and particularly in producing drama television bilingually some of which is recognized internationally particularly in the last few years the likes of *Doctor Who* and *Sherlock* and *Atlantis* are things that are visible internationally. Roath Lock is a focal point of attention for that kind of activity. (Welsh Government, Creative Industries team)

The studios have also facilitated greater collaboration between BBC Wales productions. For example, the *Casualty* set has been used to film hospital scenes in *Pobol y Cwm*, while in turn the *Pobol y Cwm* village of Cwmderi has been used in *Wizards vs Aliens* and *Doctor Who*. This has helped to make filming more efficient and cost-effective at a time of budgetary constraints. Roath Lock also provides a space where new programme ideas can be developed, even if these are eventually filmed on location elsewhere.

Within BBC Wales, Roath Lock is seen as symbolising the start of a more ambitious phase of drama production. Outside BBC Wales the tone is more ambivalent about the direct effect of the studios. Some of our respondents recognise an increased industry confidence in Wales as a centre of excellence for drama production. Others believe that the physical structure of the studios is only one dimension and that a wider shift needs to take place in the decision-making culture of the BBC. A veteran independent producer suggested that the lack of BBC Wales network dramas about everyday Welsh life was due to the fact that Roath Lock's brief was essentially determined by the

BBC's Drama Controller in London: "It happens to be there [in Cardiff Bay], but it is nothing to do with BBC Wales in many ways, apart from the logo.... Until the brief changes, Roath Lock is essentially a meaningless institution to us [in Wales]. It might as well be in Salford" (Independent producer).

6. What is the role of the Welsh Government?

Our research found that the role of the Welsh Government in encouraging the BBC to locate its studios in Cardiff Bay was highly contested by key stakeholders. There was no consistent view or understanding of what role Welsh Government played in the development. Several interviewees were critical of a lack of leadership regarding the television industry and the creative sector more widely.

7. Roath Lock reveals genuine tensions in BBC Regions and Nations policy

Roath Lock studios reveal genuine tensions in the BBC's regions and nations policy, including its perceived effect on the English regions. During the course of this research, we started to interpret Roath Lock less as a form of strategic decentralisation and more as a process of recentralisation or reconfiguration of production from one main production location (London) to a small handful of centres (Cardiff, Glasgow, Salford) across selected UK cities. While many in the industry in Wales regard Roath Lock studios as having enhanced network drama production in Wales, the facility has been viewed more ambivalently by those in the rest of the UK, especially in the Southwest of England. In particular, the decision to move *Casualty* from Bristol to Cardiff Bay means that a valuable regional asset has been lost, even though several of the *Casualty* cast and crew continue to work on the series in Cardiff.

8. Roath Lock presents a mixed picture in terms of jobs and the career development of Welsh television workers above and below the line.

Contemporary television drama production depends on a highly-skilled but transient workforce who have to negotiate both the realities of significant budget cuts to public service broadcasters and an increasingly complex range of demands placed upon them by the local, national and international markets for television. Roath Lock manages both to attract established talent to Wales, and to provide local technical and craft staff with work, thereby increasing their career opportunities and the levels of technical expertise in the

We very much wanted it to be a training stepping stone; so *Pobol [y Cwm]* would be of entry level point where we could train people up, and they could step on what used to be the *Sarah Jane Adventures*, as a children's show, as very much the next step, they learn a bit more on that. The way that used to be run was akin to *Torchwood* and *Doctor Who*. So you would go *Sarah Jane* then you would go back onto a busier, different continuing drama [such as] *Casualty*, and then up onto *Doctor Who*. (Senior Executive, BBC Wales)

Welsh industry. Roath Lock also offers new opportunities for career development through the particular way it is setup. Having shows like *Pobol y Cwm* and *Casualty* side-by-side with more high-end productions like *Doctor Who* makes it easier for senior executives to spot new talent and offer workers the chance to gain experience on different kinds of productions.

However, a potential consequence of Roath Lock and its sheer scale, may be that productions based outside this facility struggle to secure sufficient experienced technical and craft staff. When *Doctor Who* was first re-launched in 2005 few Welsh crews were employed; yet this has changed over time as the show has become more locally established. Some independent producers report that, when Roath Lock is operating on full capacity, there is not enough qualified technical staff for other productions in Wales. The success of Wales as an international hub for television production also exacerbates the problem. For instance, *Da Vinci's Demons*, which was co-produced in Swansea by the American company Starz and the BBC's commercial arm BBC Worldwide, according to one BBC Wales employee took "a huge amount of *Doctor Who* crew". BBC Wales executives also pointed out that they cannot match the wages of the independent sector and so on occasion have lost out on crew and talent to other productions.

We also heard repeated concerns that above-the-line talent (writers, directors, producers, and actors) is not being sourced in Wales. Arguably this is a major risk to the future sustainability of the television production sector in Wales, as one skills development executive explained:

Interestingly, in relation to Roath Lock, feedback we've had from the BBC is that there's no shortage now of craft and technical skills. Generally, the perception that Wales couldn't make those programmes has gone, but actually the iceberg looming is, where's the next Steven Moffatt or Russell T. Davies [going to come from], and again it's these people that can actually bring the work in and run the shows, that's where the gap is there. (Creative Skillset Cymru)

This reflects the fact that drama commissioning continues to be London-based. Access to these jobs entails individual Welsh talent gaining visibility and interest from a range of cultural intermediaries who have limited, if any, knowledge of their work in Wales. Many locally-based creative professionals also complain that they are not being given access to Roath Lock because their work on 'regional' and/or Welsh-language drama is not recognised by network executives. Some schemes have been launched to develop local talent, including the Wales Drama Award (in partnership with National Theatre Wales and the BBC Writersroom) and the Creative and Digital Media Apprenticeship programme. However, a distinct challenge remains in how to develop the career opportunities of experienced, established Welsh writers, directors, producers and so on.

9. Confidence within the sector allows some well-managed risks to be taken.

Throughout our interviews the series *Y Gwyll/Hinterland* was used as a concrete example of the creative potential in the sector and its ability to take well-managed risks. There is clearly room for further productive collaborations and co-productions that may enable Welsh content to travel.

So, for example, I'm sure you know S4C has got a really good track record in the past of doing really good drama. So a lot of those camera people, for example, have been working on those [S4C] dramas, but they wouldn't get a look in as a DOP [Director of Photography] on the BBC Drama Village, because the BBC now are so terrified of risk. (BECTU/CULT Cymru)

Conclusion

Since its opening in 2012, Roath Lock has come to be seen as an important statement of the BBC's commitment to television drama production in Wales. Building on the legacy of shows like *Doctor Who*, the studios have attracted outside investment and provided jobs for local creative industry professionals, offering a significant boost to the Welsh economy. However, having interviewed a range of people both within and outside BBC Wales, it is clear certain concerns remain. Firstly, while the expansion of network drama production has put Wales on the map, there are complaints that BBC Wales has effectively ceased production of Welsh-based dramas. Secondly, and related to this, many feel that Roath Lock is not providing sufficient opportunities for Welsh writers, producers, directors and actors. Thirdly, there are also concerns about skills shortages, production credits, career development, risk-taking, diversity within the industry, and long and unsociable hours which creative professionals are often forced to work. Whilst these are not unique to Wales, an understanding of the sustainability of Welsh television production demands a proper understanding of the local labour market and the challenges facing diverse workers at different career stages.

What Next?

In August 2015 we began the third phase of our research. It was evident from our interviews that Welsh producers and broadcasters were increasingly looking beyond the domestic and UK market for commissions and co-productions. The emergence of Nordic Noir as a commercially successful style of drama and the growth of subscription-based digital platforms like Netflix and Amazon Prime meant there were lots of reasons to share international best practice in relation to funding, production and talent development. To facilitate this interaction the Centre successfully secured AHRC funding to establish an international research network, on 'Television from small nations:

building a network for cultural and commercial success.' The network aims to draw together TV professionals and academics (from a range of disciplines) to address the specific challenges and opportunities facing broadcasters and producers in small nations.

This network will run for one year from August 2015 to the end of July 2016. This is a collaborative venture between centre co-director Dr Ruth McElroy (University of South Wales), centre member Dr Caitriona Noonan (Cardiff University), and Dr Anne Marit Waade (Aarhus University) together with our project partners, S4C, the European Broadcasting Union (EBU), Royal Television Society (Wales), and Irish-language broadcaster TG4.

As part of the network we will hold three thematic workshops which partly emerged from the research summarized in this document:

1. Internationalisation: challenges and opportunities for small nations (University of South Wales, Cardiff, November 2015)
2. Digital Innovation: recipes for cultural and commercial success (S4C, Cardiff, Winter 2015)
3. Sustaining Talent in small nations (Aarhus University, Aarhus, Denmark in June 2016)

If you would like to be part of our network, engage further with the Centre for Media and Culture in Small Nations or offer your thoughts on this research agenda please contact our research assistant Dr Christina Papagiannouli (Christina.papagiannouli@southwales.ac.uk).

About the authors

Dr Ruth McElroy is Director of the Centre for Media and Culture in Small Nations, and Reader in Media and Cultural Studies at the University of South Wales. Her main research interests are in television, gender and cultural identity. She is a member of the Institute for Welsh Affairs Media Policy Group and has served on the management committee of BAFTA Cymru, and Cyfrwng, Media Wales Association. Ruth leads the Arts and Humanities Research Council international research network on Television Production in Small Nations with partners at Aarhus University, Denmark. In 2010 she was part of the research team, led by Emeritus Prof. Steve Blandford and commissioned by BBC Audience Council Wales, that published *Screening the Nation: Wales and Landmark Television*. Ruth is co-editor (with Stephen Lacey) of *Life on Mars: From Manchester to New York* (2012, University of Wales Press) and editor of *Contemporary British Crime Drama* (forthcoming, Ashgate).

Dr Caitriona Noonan serves on the steering group of the Centre for Media and Culture in Small Nations as a representative of Cardiff University where she is a lecturer in media and communications in the School of Journalism, Media and Cultural Studies (JOMEC). She is an active researcher in the areas of television production, creative labour and cultural policy and her articles appear in journals such as the International Journal of Cultural Policy, Cultural Trends, and the European Journal of Cultural Studies. She co-edited a book on Cultural Work and Higher Education (Palgrave Macmillan) in 2013. Prior to her academic career Caitriona worked as a market adviser in the area of digital and broadcast media for Enterprise Ireland, the trade development agency of the Irish government. She has also carried out a variety of consultancy projects on themes such as talent development, leadership and business mentorship.

About the Centre

The Centre for the Study of Media and Culture in Small Nations was established in 2006 as a means of co-ordinating and supporting the research of academic staff in the areas of media, culture, communication, theatre and performance. Much of the Centre's work is focused on the creative industries in Wales, explored through the frame of small nations globally, and the wider economic, social and political contexts in which these industries operate.

The Centre supports research projects, organises conferences and seminars, publishes its own book series, hosts plays, films and exhibitions, and sponsors postgraduate research. It has established connections with media practitioners across Wales and the UK, as well as academic links with colleagues in Scotland, Northern Ireland, Catalonia, Belgium and New Zealand.

The Centre is based in the Faculty of Creative Industries, but has members from across the University, reflecting the interdisciplinary nature of our work. It works in partnership with a host of industry, arts and educational organisations and funders. The Centre welcomes the opportunity to collaborate with like-minded individuals across the globe.

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ⁱ The project was funded by the University of South Wales' Research Investment Scheme. It drew upon a number of different methods and sources, including: Interviews with key stakeholders including BBC, S4C, Creative Skillset, BECTU, and independent production companies from across the creative sector; analysis of newspapers and the television trade press; analysis of policy documents, reports and other 'grey' literature; and a review of existing academic literature on Welsh television drama.

ⁱⁱ Following the licence fee settlement agreed in 2010, BBC Cymru Wales has had to deal with a 16% cut in funding spread over a period of five years through the BBC's Delivering Quality First project, while S4C has faced a real terms cut of 36% in funding, following the broad range of cuts imposed on public bodies during 2010/11.