

# **Summary report on the impact of Doctor Who on the Cardiff and South Wales media sector**



**October 2023**

## **Overview**

In advance of the 60<sup>th</sup> anniversary of Doctor Who, this report focuses on the impact of the Welsh rebirth of Doctor Who on Cardiff and South Wales. Interviews and analysis have been conducted by Professor Justin Lewis and Professor Sara Pepper as part of their work in the Centre for Creative Economy at Cardiff University.

## **Context and Approach**

The BBC's Charter sets out the need for the corporation "to reflect, represent and serve the diverse communities of all of the United Kingdom's nations and regions and, in doing so, support the creative economy across the United Kingdom." This report examines the impact of Doctor Who's move to South Wales – as well as the parallel development of the drama studios in Roath Lock in Cardiff Bay – through that lens.

The research captures the views of key industry stakeholders who have been participants in and observers of the media and creative industries in South Wales. We organised focus groups and 1-2-1 calls/emails with a range of media industry leaders in the Cardiff cluster – ten in total - to identify recurring themes, patterns and narratives. Some of those unable to take part in interviews submitted written responses. Their businesses and interests reflect all parts of the production spectrum including pre and postproduction (drama and factual), editing and special effect as well as education, skills, and training.

## **Overview: Doctor Who as a catalyst for change**

There was strong and unanimous agreement across all our interviewees that the influence of Doctor Who – alongside the development of the drama studios in Roath Lock – had been a key turning point in the reputation, imagination and vibrancy of the creative and media sector in South Wales.

It was seen as a moment when the media/creative cluster in South Wales began to move from (hidden) strength to (recognised) excellence. A moment when the sector's focus shifted from a local to a global level of ambition.

This perception was encapsulated by the following comments, which were universally endorsed by all our interviewees.

*"It's hard to underestimate the impact of Doctor Who on Wales and the media scene."*

*“Doctor Who is the absolute catalyst of the beginning of what is a fantastic industry in Wales.”*

*“You can trace back the start of the high-end TV explosion (in Wales) to Doctor Who coming back ...it all stems from that moment.”*

*“I think it’s undeniably been the catalyst for Wales scripted (TV sector), everything has stemmed from that.”*

*“There’s no doubt that Doctor Who is the one singular production that super-charged the early growth of the sector.”*

*“It’s perhaps the single most important production that has cemented the positioning of Cardiff as one of the three key media centres in the UK.”*

These perceptions are backed up by the Centre for the Creative Economy’s data analysis<sup>1</sup>, which shows significantly high growth in employment and turnover in the Cardiff Capital region’s media sector during the last decade, outstripping overall growth rates in the UK. South Wales is now one of the UK’s leading centres of media production, with a highly skilled workforce, prodigious local talent and more studio space than anywhere outside London and the South East.

Our report looks at these perceptions in more detail, focusing on Doctor Who’s impact on this growth in scale and ambition, reputation, skills and talent.

### **Kickstarting the growth of the Welsh TV and creative sectors**

Our interviewees painted a picture of the Welsh TV sector in the period before Doctor Who as solid and full of potential, based on decades of Welsh TV production – mainly in factual – commissioned by BBC Wales, S4C and other UK broadcasters. But interviewees spoke of both a lack of self-confidence and/or recognition in terms of more prestigious TV productions created for wider UK and international audiences. As two of the participants put it:

*“(Pre-Doctor Who) obviously there was a lot of talent in Wales, but it was very much a local scene, a few international films and nothing really else. Network always saw Wales as, okay they can’t be trusted with big stuff.”*

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<sup>1</sup> <https://clwstwr.org.uk/clwstwr-creative-industries-report-no-2-media-sector-cardiff-capital-region-driving-economic-growth>

*“It’s transformed completely from Wales being a place where they can’t really handle big stuff, to where we’re looking at now in terms of film and drama where, if you want big, scalable ambition, you really need to come to Wales, because that’s one of the best places in the world to do it. And I think that’s purely down to (Doctor Who) coming to Wales 17 years ago.”*

One participant took this argument one step further, suggesting that few, even inside the BBC, expected the Welsh rebirth of Doctor Who to be as successful. The scale of its critical and commercial success exceeded expectations to such an extent that it forced a radical rethink of the strength of creative ambition in Wales:

*“Doctor Who had been sent here to die, to fail...I suppose the defiance of that idea was absolutely key. So it wasn’t just it was sent here to see how it could do, it was sent here to fail and it didn’t, spectacularly, and that was absolutely huge.”*

The success of Doctor Who kickstarted the development and growth of the TV cluster in south Wales and, as one participant described, has had very real impacts that continue today:

*“It’s put Wales on the map there’s no doubt. Hugely positive – in our case we caught that wave of drama confidence – producing three series of network drama; we then set up a network facing subsidiary to win new commissions for Wales. We invested in substantial studio and post production facilities moving e.g. our Cardiff operations to a new location and investing in studio and post-production facilities. More recently we invested in a new drama and film studio and we’ve just filmed a new drama series in that studio.”*

### **The value of a returning series, sectoral growth and Welsh champions**

A number of participants made the point that Doctor Who’s value, and its ability to create a legacy, depended upon its status as a returning series, allowing the retention and development of skills and talent, alongside the move of other titles – like Casualty – to Roath Lock in Cardiff Bay.

*“It’s an example of a production that’s really delivered sustainable legacy from (being) a returning series. It’s allowed people to actually upscale in a sensible, controlled manner and develop really skilled, talented individuals over time.”*

*“Doctor Who has really been something that’s stayed and allowed companies to grow... and become Emmy Award winning companies.”*

*“There’s no point having something that goes away. So, you get an influx of people coming in and then they train up, stop it, everyone goes away again. So the BBC is central to that planning, because they’re the only non-commercial broadcaster that can do it.”*

*“Somewhere along these are a common range of freelancers – expertise that’s developed here not just shipped in. I think that’s the huge difference with a series like Doctor Who as opposed to a lifted and shifted series that’s controlled and managed from outside and involves significant external hires from outside of the nation/region, which don’t tend to add much in terms of long-term sustainability or leave a significant legacy if they’re not recommissioned.”*

Interviewees also highlighted the importance of having talented and committed individuals who not only made Doctor Who but acted as champions for the show’s Welsh presence.

*“I think it also shows what key individuals who care about Wales, like Jane, Julie, Russell, everybody around, it shows that they can actually make a difference to the landscape of Wales, by actually choosing Wales and really having an impact.”*

One participant suggested that Doctor Who was key to BBC Commissioners making a longer term, more sustained approach to investing in the nations and regions and ultimately to increasing the quotas of production taking place there.

*“I think Doctor Who was also a form of catalyst in enabling broadcasters to take a more strategic, long-term approach to investing in the Nations and Regions, and their commitment to increase the quotas and level of production in those areas....Had that 2004/2005 plan failed and the Tardis and Daleks gone back to the scrapyards after a few seasons would PSBs have been so confident? Was that 2005 series a bit of a test case and gamble for the BBC?”*

## **The impact of Welsh identity and ambition**

A recurring theme, addressed by most of our interviews, was the impact this had on the identity of Wales as a place to study, work and build a business:

*“There was an ambition in Wales, which was like no other place in the UK, which I absolutely loved. We enjoyed working here. When working with crews in London, it was quite a brutal place to work and then you’d come down here and it was a friendly place to be, people were really helpful, people were really nice on set.”*

One interviewee described how this was transformational on a very personal level:

*“For me, my greatest accomplishment is building a team in Wales and taking my team internationally.”*

This helped create a virtuous circle where confidence, ambition and tangible sectoral growth interacted to change perceptions both within and outside Wales.

*“It’s mere presence and profile as a drama mainstream juggernaut has stimulated growth and confidence in the film and tv sector more broadly. This has led to an increase in credibility and clearly enhanced the positive perception of Cardiff as a maturing and exciting media hub capable of producing world class content.”*

This has built trust in Wales’s capability to deliver:

*“When we’ve had high end projects come into Wales , the directors, or the producers, will say that they’ve never worked with such a talented, individual... individually and talented bunch of crew ever, because they work in all weathers, and that’s grown up from working on these shows.”*

An important aspect of this reputational rebirth was the creation of a connection to Wales through the visualisation of Welsh locations on screen. So, when the Tardis landed in Cardiff Bay, for example, it cemented its connection to the place that has produced it:

*“What was fantastic when it first came back was alongside that kind of ambition, the international reach, was the recognisable on-screen Welshness of it. And I thought the balance was perfect, because it wasn’t too much but it was enough, you were reminded where you are, where you were, constantly.”*

This has helped transform Wales into a place with an international reputation, especially in high end TV drama:

*“You’ve got HBO here, you’ve had Hulu here with Oprah Winfrey’s company. Paramount have just arrived, we’ve had Apple here, we’ve had Amazon here, testing the water and making a show that’s done really well. And the other streamers, or the other studios, think, ooh, they’ve done it there, we can do that.”*

### **The impact on skills and the talent base**

Underlying many of the conversations about Doctor Who’s impact was references to its role in building and retaining a skills and talent base for high-end TV production and post-production.

Interviewees reported a transformational impact on the workforce in the region which, they suggest, fundamentally changed the drama production capability in Wales.

*“The importance of such an iconic BBC series, produced here in Wales, has fuelled the sector in a range of ways and built a new dynamic workforce, supporting an indigenous talent base capable of delivering long running drama series. This is huge.”*

This helped to both attract a workforce from outside Wales alongside the development of a skilled indigenous workforce.

*“It is so easy, now, to get people to travel to Wales to work, that’s what I see, and that’s changed over the last 15 years. It would always be a feeling that people wouldn’t really want to go to Wales to work and I think, over the last 15 / 20 years, you just have no problem getting people down here to work at all.*

*“...when Doctor Who came and over that period, of three or four years, I remember, at the beginning, everyone came in to produce those productions, from the bottom to the top, they were all shipped in. And then, over a period of years, that changed from a few different people and after a while, they were all mostly Welsh people, or people who live in Wales, and I think that’s kind of where you see it now.”*

*“What Doctor Who did was show that there is a crew here, or we can use people coming in to train up, build up, and just keep everything in Wales rather than flying people in.”*

Doctor Who played a direct part in this process by transferring skills developed in the production of a high-end drama like Doctor Who to the wider Welsh media sector:

*“Doctor Who, I would say, the crew is a family and the family has grown. It has transferred its skills. When you go into Doctor Who now in the studio you’ll see people who’ve been involved with the shows for years and years. But they are transferring their skills to new people coming in.”*

This has significantly enhanced the capacity of the Welsh screen sector to deliver high end productions:

*“You can crew from Wales now, you can have about, what, five high end crews, I reckon. Whereas before, you would only be lucky to get one.”*

It also impacted the market for recruiting freelance talent highlighting the importance and value of this part of the workforce:

*“It possibly exposed a variance in how much different dramas produced for different broadcasters can afford to pay freelancers. Might have put some strain on budgets – I remember a lot of talk about this during the late 2000s and early 2010s.”*

Doctor Who’s presence filtered through to the skills and education sector, with a positive impact on the recruitment of students to the region’s higher education institutions, and a notable increase in both UK based and international students choosing to study in Wales.

*“Students coming to Wales, for instance, they’re coming here with a sense, an expectation that this is somewhere to happen. Designers coming in, international postgraduates, they come here thinking that Wales is a place where serious, largescale things happen.”*

*“I teach quite a lot of students from the Far East, particularly China but, increasingly, India as well, and to see them coming to Wales because of its reputation is remarkable really. I look back to the beginnings when I first taught in Wales in the 1990s and it would just be out of the question. I know other things have changed, it’s not just about the growing growth of the industry, but that’s been really significant, and Doctor Who has been at the core of that.”*

## **The contribution from stakeholders**

While Doctor Who’s importance to the growth of the Welsh screen sector is clear from our interviews, many were keen to stress that this didn’t happen in isolation. Alongside the BBC, Welsh Government was identified as a key stakeholder enabling the growth and development of the media cluster during this period.

The Welsh government identified the creative industries (and the screen sector in particular) as a key sector, supporting other key developments in Cardiff Bay (Wolf Studios and the Gloworks), making the Roath Lock studios part of a wider ecosystem in Cardiff Bay.

*“Welsh Government I think is part of it. If you look at the catalyst for this, it’s a collaboration, isn’t it? It was kind of a leap of faith by the BBC, then you have the creatives becoming involved, but you need some other body to come in there and back it as well, and I think the Welsh*

*Government policy for the last 15, 20 years, and continued policy, has really been an external drive forward.”*



This focus has been supported by parallel developments in Higher Education, notably the growth of the Creative Industries Atrium campus at the University of South Wales and Cardiff

University's establishment of Creative Cardiff (of which BBC Wales was a founder member) and their subsequent leadership in winning two major UKRI awards (Clwstwr and Media Cymru) to support innovation in the Welsh media sector.

### **The importance of retaining Doctor Who's legacy**

While our interviewees were overwhelmingly positive about the transformational impact of locating Doctor Who in Wales, a number sounded a note of caution about the need to maintain momentum and the challenges of building on this legacy.

Alongside the success in growing the skills talent base comes the inevitable fragility facing any production centre outside London and Southeast (which remains by far the largest UK centre for TV production). One participant noted that because of the success achieved in building the talent base in Wales, there were now challenges with the retention of that talent.

*"I'm actually trying to fight at the moment that a colourist that we have, that's been mentored up, is being poached to London, because as we expose the people and they're known and they get known...and all of a sudden the phone keeps ringing, ooh come and join us, here's more money, come to London."*

*"It is very important to keep the crew here because otherwise what we've all invested in over a period of time goes. And it's always good to go to London but as long as you come back."*

The precarity of a 'lift and shift' culture of production was also highlighted as a threat to the development of longer-term strategy for Welsh TV production.

*"So all these lift and shift productions are just based on, can we make this production work with this spreadsheet? There's no concept of year 2, year 5, year 10, and really that's what we need, is something that's going to come and be a legacy."*

There was also a concern about the long-term future of Roath Lock, where Doctor Who's Welsh journey began (production of Doctor Who has shifted across Cardiff Bay to Wolf Studios), and

which currently hosts the continuing dramas Casualty and Pobol Y Cwm. A number of

interviewees were concerned about its long-term future and (what was seen as) its over-

complex management/ownership structure. While other studios in the region continue to develop, there was a perception of stasis at Roath Lock:

*“I went there a little while ago for a meeting, I think for Casualty, and it was just really sad, it even looked a bit tired, but it could be so much more.”*

*“Clearly it needs to be realign itself it needs to find a new purpose.”*

While these concerns were not seen as fundamental to the continued growth and success of the South Wales media cluster, it demonstrates an understanding of the precarity of regional creative clusters, with limited size and scale.