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| <b>Institution:</b> University of South Wales   |  |  |
| <b>Unit of Assessment:</b> 33A Music, Drama, Dance, Performing Arts, Film and Screen Studies  |  |  |
| <b>Title of case study:</b> Providing expert research evidence for improved screen media, policy and sustainable TV production in devolved Wales  |  |  |
| <b>Period when the underpinning research was undertaken:</b> 2010-2020  |  |  |
| <b>Details of staff conducting the underpinning research from the submitting unit:</b>  |  |  |
| <b>Name(s):</b><br>Professor Ruth McElroy   | <b>Role(s) (e.g. job title):</b><br>Professor of Creative Industries, and Co-Director Centre for Media and Culture in Small Nations, USW | <b>Period(s) employed by submitting HEI:</b><br>2007-Present |
| Dr Helen Davies   | Research Assistant<br>Research Fellow  | 2015-2019<br>2019-2020                                       |
| Dr Christina Papagiannouli  | Research Fellow  | 2014-Present   |
| <b>Period when the claimed impact occurred:</b> 2014-2020   |  |  |
| <b>Is this case study continued from a case study submitted in 2014?</b> N  |  |  |
| <b>1. Summary of the impact</b>   |  |  |
| <p>All media systems must navigate global competition and technological innovation on the one hand, and national regulation and public needs on the other. Small nations are challenged by limited resources, the greater muscle of powerful neighbours, and complex multi-tier governmental systems as in devolved Wales. McElroy's research, conducted at the Centre for Media and Culture in Small Nations (CMCSN), has provided evidence of failures in UK and Welsh media adequately to build a devolved democratic public sphere at the very point when devolved nations have seen their legislative powers grow. The research has had impact by enhancing public scrutiny of broadcasting, developing a statutory remit for digital Welsh-language broadcasting, and securing new investment for innovation in Wales' screen sector.</p>   |  |  |
| <b>2. Underpinning research</b>   |  |  |
| <p>There are three strands of underpinning research:</p> <ol style="list-style-type: none"> <li>1. Television production and cultural representation in bilingual Wales</li> <li>2. Devolved media policymaking and increased public scrutiny</li> <li>3. Comparative analyses of small nations globally to stimulate innovation in screen industries</li> </ol>  |  |  |
| <p><b>Strand 1</b> examines the relationship between broadcasting strategy, TV production, and cultural representation in the Welsh screen ecology. It marries methodologies and frameworks derived from media production studies with cultural research examining textual forms and representation. It challenges the dichotomy of business vs culture present in much creative industries thinking, arguing instead for a holistic appreciation of how public media may enrich cultural life in a bilingual nation. Qualitative and quantitative research examines the impact of Public Service Broadcasting (PSB) investment on what appears on screen and the difference this makes to how audiences feel represented (or not) by PSBs. In 2014-16, McElroy led research <b>(3.1)</b> investigating the impact of BBC Roath Lock Drama Studios on both the Welsh production sector (i.e. production companies based in Wales) and the range of cultural representations produced. This research entailed semi-structured interviews with stakeholders (e.g. broadcasters, Welsh Government, producers, and trade unions). It found that while BBC investment delivered reputational gain for production in Wales and enhanced demand for a skilled TV workforce through major popular series such as <i>Doctor Who</i> and <i>Casualty</i>, the exclusive focus on UK network production meant the Studios delivered almost nothing in improving diverse representations of Wales on-screen. The expansion of Roath Lock at speed led to workforce shortages that drew crews from outside of Wales thereby failing against stated strategic aims of developing the Welsh screen workforce. Rather than Wales being unique, research <b>(3.2)</b> demonstrated the common challenge faced by small nations when their screen industry strategy focuses disproportionately on servicing production from</p> |  |  |

larger neighbours (whose focus is economic efficiency, not cultural gain), as opposed to investing in their own production sector.

**Strand 2** entails research examining devolved media policy within the context of an emerging Welsh public sphere (3.3). McElroy's research, reveals the challenges presented by multi-level government structures to policymakers, citizens, and media organisations as they come to terms with what devolution means for civil society. Research undertaken in 2015 by McElroy with the Institute for Welsh Affairs' Media Policy Group (3.5) gathered quantitative and qualitative data on media in Wales. It provided evidence of inadequate public scrutiny of media policy and an enduring democratic deficit in the range and quality of information available to Welsh citizens. It evidenced substantial under-investment in TV production for Wales, showing a fall of 22.4% in spend by BBC on programmes in English for Wales between 2007-2015 and cuts of 36% to S4C since 2010 leading to job losses, increasing TV repeats, and a diminishing service for Welsh-speakers.

**Strand 3** comprises comparative research-led innovation undertaken by McElroy bringing together academics, industry and policymakers in international knowledge exchange. McElroy's research (3.2) has explored the cultural and industrial value of innovative 'back to back' TV drama production (where a scene is shot first in Welsh then in English to create distinct Welsh-language and English-language series) as a model for enhancing quality drama production in bilingual Wales. In 2015-6, she led 'TV Production in Small Nations: building a network for cultural and commercial success' (AHRC AH/M011348/1) that gathered 63 academic experts, policymakers, broadcasters and independent producers from 12 European countries to identify the cultural and economic value of indigenous TV production and specific opportunities for non-Anglophone content globally. Findings demonstrated that:

- A. PSB contributes disproportionately to the culture and economy of small nations and helps normalize minority-language use in everyday life.
- B. Digital innovation demands more ambitious thinking by broadcasters and policymakers to enable growth in new media forms in minority-languages (3.4 and 3.6).
- C. While co-production partnerships leverage resource into small nations, they do little to deliver diverse cultural representations. Investment in small nations' own domestic production is vital to sustain indigenous production.
- D. To retain public legitimacy, PSBs must be more inclusive and better communicate their value to audiences in this era of abundant, English-language content.

### 3. References to the research (indicative maximum of six references)

**3.1: McElroy, R. and Noonan, C. (2016) 'Television drama production in small nations: mobilities in a changing ecology', *Journal of Popular Television* 4 (1), pp.109-127**

Quality: Original article based on empirical research examining BBC drama studios in a guest-edited special section edited by McElroy in this peer-reviewed international journal.

**3.2: McElroy, R., Noonan, C. (2019) *Producing British Television Drama: Local Production in a Global Era*, Palgrave Macmillan.**

Quality: Peer-reviewed book drawing on 'TV Production in Small Nations' AH/M011348/1 and 'Screen Agencies as Cultural Intermediaries' AH/R005591/1; listed in REF 2

**3.3: McElroy, R. with Papagiannouli, C. and Wiliam, H. (2017) 'Broadcasting after devolution: policy and critique in the Welsh media landscape 2008-2015', *International Journal of Cultural Policy*. DOI 10.1080/10286632.2016.1268133v.**

Peer-reviewed article in the leading international policy journal in the field. Listed in REF 2

**3.4: McElroy, R., Papagiannouli, C., Davies, H. & Wiliam, H. (October 2017) 'S4C in Context: A comparative overview'.**

Quality: Report to DCMS Independent Review of S4C (2017-18). Published on its website.

**3.5: Institute of Welsh Affairs (2015), *Wales Media Audit Report*.**

[https://pure.southwales.ac.uk/en/publications/iwa-media-policy-group-wales-media-audit-2015\(682e53ee-537e-4cc9-a737-88a0ed93ac7a\).html](https://pure.southwales.ac.uk/en/publications/iwa-media-policy-group-wales-media-audit-2015(682e53ee-537e-4cc9-a737-88a0ed93ac7a).html)

Quality: An original audit of the media in Wales (2008-2015) undertaken with the Institute of Welsh Affairs' (IWA) Media Policy Group of which McElroy was a founding member. McElroy secured ESRC funding on behalf of the Group to employ Papagiannouli as project RA.

**3.6: McElroy, R. and Noonan, C. (2018) 'Public Service Media and Digital Innovation: The Small Nation Experience' in Van Den Bulk, H., Donders, K. and Lowe, G.F. (eds.) [Public Service Media and the Network Society](#), Nordicom, pp.159-174.**

Quality: Peer-reviewed chapter in a leading European book series on PSB.

#### 4.Details of the impact

This research has helped bring about change to the media landscape in Wales resulting in:

- 1) Improved democratic scrutiny of devolved media policy.
- 2) Increased investment in Welsh television production through advocacy for change in BBC regions and nations strategy.
- 3) Greater understanding of the place of innovation in screen production and its value both to speakers of minority-languages and to the industry as content creators.
- 4) An improved, updated statutory remit for S4C reflective of the digital era.
- 5) Better informed public debate regarding the consequences of the democratic deficit and what this means for an informed civil society.

**1a)CMCSN research has informed the Senedd Culture, Welsh Language and Communications Committee on Welsh broadcasting and helped improve democratic scrutiny (see 5.1, 5.2 and 5.4)**

*'Professor McElroy's contributions to the Committee's work have improved my understanding of media policy, and that of politicians'. (5.4)*

Before the Wales Media Audit 2015 (3.5) was published, the National Assembly for Wales had no designated forum through which to scrutinise media policy. In the Audit we recommended improved monitoring of media in Wales drawing on academic expertise to highlight emerging media developments. The Audit galvanised the legislature to create the Culture, Welsh Language and Communications Committee (CWLCC). Since its creation in 2016, this committee has delivered improved scrutiny via numerous public inquiries.

*"It is worrying that specific media provision for Welsh audiences is in decline. One result of this is insufficient scrutiny of decisions affecting Wales [...] This paucity of information may also contribute to an ill-informed population. Moreover, given the high value that Welsh audiences place on seeing themselves and Welsh life on screen, the current service and any prospect of further decline, particularly in non-news programming, is concerning" (5.1a, p.24)*

In 2016, McElroy gave oral and written evidence to the Parliamentary ['Welsh Affairs Committee Inquiry into Welsh Broadcasting'](#) (5.1a). Several of their findings cited our research in their [final report](#) (5.1a) including the need to improve scrutiny of broadcasting and the representation of Wales on screen, thus: "Research conducted by the University of South Wales and the BBC Audience Council for Wales concluded that audiences in Wales value the programming produced in, and representing images of, the country. The research stated that "such representations strengthen a collective sense of cultural and social identity" and 'the University of South Wales concluded that important elements of Welsh national life are failing to be captured on screen.'" [Broadcasting in Wales, Section 4, 'Portrayal of Wales on Screen'](#)

McElroy and other researchers in CMCSN have regularly been invited to supply research insights to inform CWLCC inquiries (5.2). This includes [McElroy's evidence](#) on 'The Future of S4C' (8 March 2017) (5.2c); [McElroy's](#) and [Hannah's](#) (CMSN PGR) evidence to 'Film and High-End TV Production' (10 May 2018) (5.2d), whose [final report](#) launched at USW in May 2019; and [McElroy's evidence](#) to 'The Future of PSB: Small Screen, Big Debate' (20 November 2019). (5.2e)

**1b)McElroy's research helped deliver informed scrutiny through her advice to the regulator, Ofcom (see 5.6)**

*'Professor McElroy's research is an invaluable asset to Ofcom as it develops its policy in relation to the media in Wales...She is uniquely placed to provide advice to Ofcom on these matters and to help shape the regulator's response to a rapidly changing media environment.'*

In 2017, McElroy was appointed by DCMS to Ofcom's Advisory Committee Wales (ACW) (2017-2021) to advise on the impact of communications and broadcasting policy in Wales. For example, in 2019/20, she advised Ofcom to scrutinise Channel 4's promised nations strategy to deliver 'For all the UK'. This led to the Channel 4 team appearing before ACW in March 2020 to give evidence of improvements in investment in Wales. During the COVID-19 pandemic, McElroy advised Ofcom of the public impact of differential media coverage of Devolved vs. UK governments' guidance to citizens' understanding of lockdown rules.

## **2) McElroy's research with IWA lead to recommendations that resulted in increased investment in TV production in Wales (see 5.2 and 5.3)**

*'Professor McElroy played a pivotal role in contributing to the research which formed the basis of the 2015 IWA Wales Media Audit and, together with other members of the IWA's Media Policy Group, worked collaboratively with us on shaping its recommendations' (5.3).*

The 2015 Media Audit contributed to substantially increased pressure on the BBC to increase its investment in TV production Wales. We evidenced a significant reduction since 2008 in spend on English- language TV in Wales representing a real-terms decline of 30% and demonstrated there had been a 48% reduction in the total hours per week of output made for Wales. In response, a key recommendation made in the Wales Media Audit (2015) was that 'investment in the BBC's services in Wales should be increased' (3.5) substantially as a priority for BBC.

This had impact firstly through being taken up by National Assembly for Wales' 2015 report on 'BBC Charter' (2015) (5.2a) and the Culture, Welsh Language and Communications Committee's 'The Big Picture' on broadcasting in Wales (2017) (5.2b), which argued for substantial investment increases in English-language drama and broadcasting about Wales. Secondly, our research had impact when the call for greater investment found realisation in February 2017 with the BBC announcing an extra £8.5million investment in Wales. In 2017/18, this resulted in new popular drama series such as *Keeping Faith/Un Bore Mercher*, which had [17 million iPlayer download requests](#) and was one of the most popular ever to appear on BBC iPlayer. This co-production with S4C was also the realisation of the Audit's recommendation that S4C and BBC Wales 'maximise their collaboration across radio and television, without losing the distinctiveness of each others' services' (3.5).

## **3) CMCSN's screen research secured investment in innovation for screen sector growth**

McElroy's research (3.2, 3.3, 3.6) on bilingual screen production, exemplified by the 2015-16 AHRC TV Production in Small Nations Network (5.5), was instrumental in 2017-18 in helping secure [Clwstwr](#). It is one of just 9 UK Creative Clusters funded by AHRC's Creative Economy programme and Welsh government. CMCSN's research and industry collaborations underpin Clwstwr's focus on R&D for screen innovation. Clwstwr leverages more than £1million annually of new investment for R&D in Cardiff's screen industries which McElroy has a key role in delivering as lead Co-Investigator and programme Co-Director. More than 60 industry/HE R&D projects have been funded to date including USW's 2019 collaboration with the company Painting Practice to develop a new product, Plan V. Plan V is a virtual studio that allows a TV producer to visualise virtually-created sets combining VR and AR to plunge the user into deeper levels of immersion. As part of this Clwstwr R&D project, Plan V had its first full industrial application on *His Dark Materials*, produced at Wolf Studios, Cardiff for BBC/HBO. It became BBC's most watched new show in 5 years ([7.2million](#)) and gained millions more worldwide. David McCulloch (exec producer) said '[Plan V was key to bringing the books of His Dark Materials to the screen...we would have been lost without it](#)'.

## **4) CMCSN research substantially advanced the case for an updated S4C statutory remit**

McElroy's research (3.6) has helped drive forward the agenda on digital innovation in Welsh-language broadcasting, which is vital to normalising the Welsh language in contemporary life. A major plank in this agenda has been securing a statutory digital remit for S4C allowing it to

modernise (see 3.3). CMCSN's research situated *S4C in Context* (3.4) for DCMS' 2017-18 Independent Review of S4C (conducted by Eurnyng Ogwen Williams), providing a comparative analysis of S4C in relation to other small nations' broadcasters and demonstrating the need for greater digital innovation and responsiveness to Welsh-speaking audiences within and beyond Wales. It delivered a convincing case for a new statutory digital remit for S4C by framing it within wider international evidence of the role of PSB in sustaining minority-languages. Direct citation of CMCSN research is made by Eurnyng Ogwen Williams in his DCMS ['Building an S4C for the Future'](#) 2017. The case for a new statutory digital remit was accepted by the [UK Government Response to the S4C Independent Review](#) on 29 March 2018 where Matt Hancock, then Secretary of State DCMS, stated 'Updating the remit will allow S4C to make its content available on a wider range of platforms - in Wales, across the UK and abroad'.

#### 5) McElroy's research better informed public debate in Wales through a diverse media dissemination process

*'Wales is facing a media market failure that will leave the nation with a deficit of reliable information.'* ([Maggie Brown The Guardian \(11/11/15\)](#)).

Media policy in multi-level governmental nations is complex and can seem irrelevant to citizens and licence-fee payers. McElroy's research is the basis of her [public communication](#) to impact and improve the public's understanding of how policy shapes what we see on screen. She provides [expert interviews](#) to both mainstream UK and [Welsh media](#) and specialist media (e.g. [Welsh Football Magazine](#) 2017). The Wales Media Audit (3.5) gained UK-wide media coverage. On 11/11/15, McElroy was interviewed on the Audit's findings of market failure and underinvestment in programmes for Wales on the [Radio 4 Media Show](#), the premier weekly programme examining UK media, alongside Ian Hargreaves, former editor of *The Independent* described the Audit as *'a brilliant pull-together of things you never knew [...] get reading and rejoice in this thorough and classy piece of work'*. McElroy communicated Audit findings to Welsh citizens on Radio Wales' *Good Morning Wales* which advanced public debate on media in Wales and increased pressure on broadcasters such as the BBC to improve investment in Welsh productions.

#### 5. Sources to corroborate the impact

##### 5.1 Parliamentary Sources

- a) Welsh Affairs Committee, 1 February 2016 [Parliamentlive.tv - Welsh Affairs Committee](#)  
First report of session, 16 June 2016 [Broadcasting in Wales inquiry - publications - UK Parliament](#) see p.10; pp.24-25;p.27; p.30; p.39
- b) Department of Digital Culture Media and Sport, December 2017, [Building an S4C for the future \(publishing.service.gov.uk\)](#)

##### 5.2 Senedd Sources

- a) Communities, Equality and Local Government Committee, Inquiry into the BBC Charter Review, 4 November 2015 Schedule of oral evidence listing McElroy [Inquiry into the BBC Charter Review \(senedd.wales\)](#). [Final report, 'Inquiry into BBC Charter Review'](#) March 2016, citing McElroy
- b) Senedd report, ['The Big Picture'](#), February 2017 cites the IWA Media Audit throughout
- c) CWLCC [The Future of S4C, 8 March 2017](#)
- d) [CWLCC Film and High-End TV Production, 10 May 2018](#) and [Hannah's written evidence](#). USW/McElroy are referenced in the [Final report, Inquiry into Film and Major Television Production in Wales](#), May 2019.
- e) [CWLCC Small Screen, Big Debate](#), 20 November 2019

##### 5.3: Testimonial Auriol Miller, Director Institute of Welsh Affairs

##### 5.4: Testimonial Robin Wilkinson, Researcher to Senedd (Welsh Parliament) Welsh language, Culture and Communications Committee

##### 5.5: Testimonial Dr Roberto Suarez Candel, Head of Media Intelligence Service, European Broadcasting Union.

##### 5.6: Testimonial Eleanor Marks, Director Ofcom Wales