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SCREEN ENCOUNTERS WITH BRITAIN IN THE AGE OF TRANSNATIONAL STREAMING

Alessandro D'Arma, Andrea Esser
and Jeanette Steemers



“Screen Encounters with Britain offers gold standard audience research across four European markets. Essential reading for anyone with an interest in the streaming industry.”

Jean Chalaby, *Professor of International Communication,
City St George's University of London, UK*

“This book excellently explores how young audiences engage with screens and platforms in the streaming and social media era. With sound writing and comprehensive audience data, it's a must-read for anyone aiming to understand young audiences and transnational television.”

Vilde Schanke Sundet, *Professor of Media and Communication,
Oslo Metropolitan University, Norway*



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Screen Encounters with Britain in the Age of Transnational Streaming

Screen Encounters with Britain explores how global streaming platforms are reshaping viewing patterns and audience encounters, using the circulation, consumption and reception of British films and TV shows in European markets as a case study.

Focusing on young audiences in Denmark, Germany, Italy and the Netherlands, the book provides original audience insights drawing on a wide range of methods, including a survey, digital diaries and interviews and offers a critical perspective on the evolving nature of young audiences' engagement with long-form screen content. The evidence presented points towards re-asserted Anglo-American dominance, driven by the power of large US-owned platforms and English as the language of advantage. Building on these findings, the book challenges established theory around the 'home advantage' of domestic media and rethinks linguistic and cultural proximity.

This volume will appeal to scholars and students researching transnational media, audience studies, screen production studies, media industries and youth studies. More broadly, the book will be of interest to scholars and students of the political economy of the media within the social sciences and humanities.

Alessandro D'Arma is a Reader at the University of Westminster, UK and a member of the Communication and Media Research Institute. His work focuses on screen industries, digital media policy and public service media.

Andrea Esser is Professor Emerita of Media and Globalization at King's College London, UK. Her work focuses on transnational audiences and production networks, the global distribution and circulation of audiovisual content and media industries policy.

Jeanette Steemers is Professor of Culture, Media and Creative Industries at King's College London, UK. Her work focuses on media industries transformations in children's audiovisual media, public service media, and the global distribution and circulation of audiovisual content.

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1 Screen Encounters with Britain

Setting the scene

Scope and aims of the book

In a rapidly changing market of globally distributed on-demand screen content, Britain remains a significant exporter of television programmes and films, but always at some distance behind the United States. It has maintained this position for many years, starting when screen encounters across borders were limited and tightly curated by a handful of national broadcasters (Steemers, 2004, 2016). Since then, screen consumption in Europe has been transformed by global (or quasi-global) subscription-funded video-on-demand services (SVoDs), mostly from the United States, including Netflix, Disney+ and Prime Video (Amazon), and overwhelming quantities of short-form video, available on video-sharing and social media platforms, including YouTube, Instagram and TikTok. These changes have been the focus of numerous industry-focused studies (Chalaby, 2023; Jenner, 2018; Johnson, 2019; Lobato, 2019; Lotz, 2017; Lotz et al., 2022), many of which highlight the expanding power of US-owned platforms over global distribution and ‘data-driven’ commissioning (Chalaby, 2022, 2023, 2025; Idiz et al., 2024; Iordache, 2021; Straubhaar et al., 2025).

Although global SVoDs and social media are fundamentally altering production and distribution, affecting the nature of audiences’ digital experiences, we know little about the impact of these changes on audiences, and the extent to which consumption is similarly transnationalising. We also know little specifically about younger audiences, whose viewing has shifted most from linear broadcasting to streaming services (EBU, 2025). This book explores current viewing patterns and screen encounters among younger audiences, using the availability, promotion and consumption of British films and TV shows as a case study to illustrate wider viewing trends.

Taking a viewer-centred approach, we focus on young people aged 16–34 in Denmark, Germany, the Netherlands and Italy, examining what types of British content they watch, why they watch it and how. Drawing on audience research carried out for the AHRC-funded (Arts and Humanities Research Council) project *Screen Encounters with Britain* (SEwB, 2022–25) (Esser

et al., 2023a, 2023b, 2024a, 2024b; Esser et al., 2025), the aim is to provide original audience insights using wide-ranging surveys, digital viewing diaries and interviews. We focus on younger generations because their changing media consumption habits indicate future developments.

Defining younger generations is problematic in that there is no standard definition of what constitutes a young audience (Dharmawardhana et al., 2025). Sundet and Lüders (2023) and Lowe and Maijanen (2019) found that industry representatives do not work with exact age definitions. In Germany, for example, public service broadcasters (PSBs) use a fluid definition of young people that extends from a broad 18–49 demographic for the free-to-air younger-skewing channel, *ZDFneo*, to a much narrower age range (14–29) for the *funk* video-on-demand (VoD) service (Egger and Rhody, 2022). Drawing on industry interviews around ‘industry lore and sensemaking’, Sundet and Lüders (2023: 224) refer to industry perceptions of younger audiences as a ‘new “media generation”’ with their own media habits, who have grown up with global platforms and social media, regarding them enthusiastically ‘as an integral part of everyday life’ (2023: 226). However, as they point out, this generational idea of youth as ‘one group’ risks viewing young people ‘as more similar than they are and to exaggerate their differences from other audience groups’ rather than looking for more ‘diverse perceptions of youth’ (p. 237).

For SEwB, we adopted an age range of 16–34, divided into four sub-groups to capture nuances between younger and older participants. The 30–34 age group is commonly included in marketing research. In this project, it also functions as a control group, as people in this cohort grew up without streaming services. The sub-groups reflect standard ranges used by market research and advertising (16–19, 20–24, 24–29 and 30–34). Drawing on the ‘transnational turn’ in sociology (Athique, 2016), SEwB views young audiences not as representatives of a nation, i.e., as (culturally) national audiences, but as individuals located within particular media markets, whose viewing is fragmented across platforms, devices and different types of output. Their consumption choices and reception are influenced not only by their respective market’s programme availability and history, but also by age, gender, language proficiency, cultural capital, personal interests and needs. They are further influenced by individual familiarity with other cultures and languages, which varies widely across audiences. This familiarity has increased among younger generations, who tend to be more cosmopolitan than their predecessors, due to greater educational and travel opportunities as well as wider access to social media and global streaming services. This has implications for the ‘reconstruction of place or locality’ (Vertovec, 1999: 456) and for ‘socialisation at a very personal level’ (Athique, 2016: 5). As Lüders and Sundet (2026: 52–3) point out, ‘home’, identity and belonging are multifaceted and may now be shaped less by national borders and more by what connects young people to their complex ‘social world’ formed through the interplay of the local, national and transnational. It also impacts how audiences both imagine and experience Britain.

By ‘screen encounters’ with Britain, we mean those encounters that young viewers have with long-form British screen content (longer than 20 minutes) across different platforms, including streaming platforms, broadcasting channels, and video-sharing sites like YouTube. Overall, we are concerned with what these shifts mean ‘for our understanding of programme flows across borders’ (Esser and Steemers, 2026: 17), but also how screen encounters affect young audiences’ real-life perceptions of British culture, history and people.

The research was conducted in four European case study markets: in chronological order, Denmark, Germany, the Netherlands and Italy, all with variations in size, levels of English proficiency (reflected in preferences for subtitled or dubbed imports) and familiarity with British film and television. Exploring both commonalities and differences across these markets enhances the book’s integrated analyses of: (1) how young people in Europe find, value and experience UK screen content and what motivates them; and (2) how they interpret and understand the UK and British culture based on screen consumption and broader UK-related experiences. By examining the consumption of British screen content in four Western European markets, this book contributes to our understanding of the transnational reception of English-language content generally (and British content specifically).

The research is timely not only because it unfolded against a backdrop of radically changing digital encounters but also because it was conducted in the wake of Britain’s departure from the European Union (EU) in January 2021, following the 2016 Brexit referendum. In this context, the United Kingdom is forced to reimagine its relationship with its European neighbours, including younger generations whose perceptions of Britain will be partly shaped by their screen encounters.

Five sets of research questions guide the book’s empirical focus across four countries:

- RQ1:** What do young audiences in Europe watch, and how do they watch? (Chapter Two)
- RQ2:** How do they get to know about, find and access British titles across different platforms? (Chapter Three)
- RQ3:** What are their motivations for seeking out British screen productions? What values and experiences do they attribute to British titles and recognise as ‘British’? (Chapter Four)
- RQ4:** How do domestic providers and content perform relative to global streamers and their predominantly Anglo-American fare in each case study country? (Chapter Five)
- RQ5:** How does screen content influence perceptions of Britain in the wider context of mediated (e.g., news) and non-mediated experiences (e.g., personal encounters, tourism, education)? (Chapter Six)

4 *Screen Encounters with Britain in the age of transnational streaming*

In seeking to bridge a knowledge gap about viewing among young people in Europe, the book engages with audience research, conceptualising screen consumption as a social practice shaped by market and cultural contexts as well as viewer agency and competencies. Recent years have seen calls for more empirical audience research to understand how audiences engage across multiple media platforms and screens (Johnson et al., 2024; Livingstone, 2019; Lotz et al., 2026). There have been influential audience research studies focusing on the overseas consumption and reception of European productions (Bondebjerg, 2020; Hill, 2016; Jensen and Jacobsen, 2020a), including three funded projects: *MeCETES/Mediating Cultural Encounters through European Screens* (2013–17), *Danish TV Drama* (2014–18, <https://danishtvdrama.au.dk/>) and *DETECT* (2018–21, <https://www.detect-project.eu/>). Beyond Western Europe, there have been studies of how non-domestic audiences engage with content from South Korea (Jeong et al., 2017; Kaptan and Tutucu, 2021; Lee, 2018) and Turkey (Khan and Rohn, 2020; Kraidy and Al-Ghazzi, 2013), many of which also explore these countries' deliberate efforts to harness popular culture as a form of soft power.

These earlier research findings inform the book's objective of refining and extending theoretical approaches to audiences, transnational consumption and flow theories. SEWB suggests a reconceptualisation of previous theories on international flows based on the 'home advantage' of domestic media (de Sola Pool, 1977), 'cultural discount' applied to non-familiar overseas content (Hoskins and Mirus, 1988) and preferences for national content, followed by regional content from culturally proximate neighbouring countries demonstrating ethnic, linguistic, cultural and geographic proximity as part of 'geo-linguistic' (Sinclair et al., 1996), 'cultural-linguistic' or 'geocultural' regions (Straubhaar, 1991, 2007: 167–71). Instead, viewing preferences among younger audiences, at least in Western Europe, now point to a re-asserted Anglo-American hegemony (Esser and Steemers, 2026), driven by the renewed dominance of large US-owned corporations who control large amounts of content and global streaming services (Chalaby, 2023), as well as by the growing status of English as the 'language of advantage' (Collins, 1989).

SEWB's audience research complements the many studies on transnational streaming strategies (Asmar et al., 2023: 2024; Chalaby, 2023, 2025; Jenner, 2018; Lobato, 2019; Lotz, 2020) that consider the hegemony of global streamers and the dominance of US content from an industry perspective. It also contributes to a growing body of transnational audience studies by reevaluating previous theorisations of audiences. The more commissioning and cultural exchange take place at a transnational level, the less it makes sense to assume that each nation-state has just one 'national television culture' and, more broadly, one 'national culture'. Sociologists and anthropologists (Aksoy and Robins, 2000; Athique, 2016; Harindranath, 2005; Tomlinson, 1991) have long critiqued the belief that certain characteristics are inherent within a particular culture or nation,

because this implies that culture is place-bound, static and impervious to outside influences. Viewing as a cultural practice has always been complex, involving a mixture of local, national and transnational factors. Today, cross-border digital flows of audiovisual content on streaming platforms and social media further blur distinctions between local, national and global, while connecting audiences across borders. This suggests that audience research also needs to be (re)framed around the shifting dynamics of local, national and global viewing. Accounting for nationally grounded and market-based factors such as regulation and availability, as well as influences related to culture, education, and family, the SEWB project illuminates the increasingly transnational consumption and reception of content by young audiences in Europe. In doing so, it explores the similarities and universal proximities that connect young people as well as the differences that distinguish them.

Having set out the aims and scope of this book, the chapter next considers the transnationalisation of British production and distribution, before outlining a theoretical framework focused on Anglo-American hegemony, cultural proximities and soft power. It concludes with an overview of SEWB's methodology and the structure of the book.

The transnationalisation of British production and distribution

The United Kingdom has long been recognised as a significant exporter of television productions, with Europe ranking as its largest market after the United States for sales value (Pact, 2025). British export successes have included enduring broadcaster-commissioned crime dramas like *Sherlock* (2010–17) and *Midsomer Murders* (1997–), as well as high-end natural history productions like *David Attenborough: A Life on Our Planet* (2020). British productions account for some hugely popular Netflix 'Originals' targeting younger audiences including *Sex Education* (2019–23), *Heartstopper* (2022–24) and *Baby Reindeer* (2024), and also more mainstream audiences such as *The Crown* (2016–23) and *Adolescence* (2025). In 2022, the United Kingdom was estimated to rank fourth (5.5%) as a supplier of Netflix titles, including licensed content, after the United States (40.8%), India (8.7%) and Japan (6.1%) (Lotz et al., 2022: 515). In 2023, British titles were estimated to account for 15% of unique TV seasons in European VoD catalogues (after the United States and EU, 32% each) (European Audiovisual Observatory [EAO], 2023: 75–6) and just under 7% of unique film titles (EAO, 2023: 27). Significantly, British productions attract higher investment than other European productions. In 2024, 29% of €25.1bn spent in total on European original content was attributable to UK productions (EAO, 2025: 17), ahead of Germany (18%), France (13%) and Spain (11%). Of the €8.5bn of this spent by global streamers in 2024,

mostly on scripted series, 34% (€2.9bn) was attributable to Britain, ahead of Spain (€2bn) and France (€0.8bn) (EAO, 2025: 18).

For British producers, investment by Netflix, estimated to account for 30% of Netflix investment in new European titles in 2020 (Afilipoale et al., 2021: 315), has been especially important, creating new funding opportunities (Steemers, 2016). However, in the early 2020s, there are mounting uncertainties in what is an increasingly competitive market, raising questions about the future attractiveness and sustainability of British production with rising costs and falling revenues for domestic broadcasters (House of Commons, Culture Media and Sport Committee, 2025). High-end drama, in particular, is now nurtured by a complex combination of limited public funding from the BBC or commissions from the United Kingdom's commercially funded PSBs (ITV, Channel 4, Channel 5), supported by international pre-sales, co-production finance and tax credits for high-end productions. Or it is supported by outright commissions from Netflix, Prime Video and Disney+, also making use of UK tax credits. This funding mix supports a production sector, which looks to overseas markets and transnational VoD platforms to bridge ever-growing budget deficits (Doyle et al., 2021). In 2024, UK producers received £1.1bn from international primary commissions, compared to £1.7bn from UK primary commissions (Ofcom, 2025: 54).

Historically, the United Kingdom's position as a smaller English-language exporter placed it within an Anglophone culture dominated by the United States (O'Reagan, 2000; Tunstall and Machin, 1999). Previous export successes were explained by the United Kingdom's 'complementarity' (O'Reagan, 2000: 309) to the United States as a niche provider of English-language, public service-imbued 'oddball' comedy (Collins, 1986: 77), complex thrillers and period drama that appealed to an elite, by a long history of collaboration with the United States (Weissmann, 2012), and by content that is not recognisably British (animation, natural history, formats) (Steemers, 2004). Before streamers, most UK programme sales to Europe involved content commissioned by UK broadcasters (BBC, ITV, Channel 4) and sold to other broadcasters. Even in the United States, the biggest volume of sales was to the publicly funded Public Broadcasting Service system or its affiliates. This changed with the arrival of SVoDs, primarily Netflix in 2012, which fuelled a sales boom and changes in the structure of the trade in TV programmes and rights (Steemers, 2016).

Netflix, more than other SVoDs, has reshaped UK production through significant investment in 'Netflix Originals' such as teen-oriented, high-school drama *Sex Education* (2019–23), which exhibits the 'grammar of transnationalism', designed to appeal 'outside the source culture' (Jenner, 2026: 1). Targeting younger transnational audiences from the outset, *Sex Education* reflects universal, progressive, cosmopolitan values around gender, sexuality and ethnic diversity (Asmar et al., 2023), creating 'flexible geographies' that cut across 'genres, (trans)national borders, televisual

conventions and cultural politics' (Asmar et al., 2025a: 554). Netflix's emphasis on these algorithmically determined taste communities over national identities, through its aggregation of niche, or in this case, youth audiences, delivers transnational reach and financial returns that national platforms cannot achieve, as domestic youth audiences are too small to justify comparable investment (Lüders and Sundet, 2026). SEWB audience research offers a way to assess how well this strategy resonates with young audiences.

UK sales to national VoDs and broadcasters still take place on a territory-by-territory basis, but less on an exclusive basis (Steemers, 2016). The most exportable genres remain certain forms of scripted fiction (action, comedy-drama, crime, fantasy) and entertainment formats, but not soaps, sport, factual or entertainment shows, which are thought to be too local (Donders and Van den Bulck, 2016: 11). By 2024/25, according to data published by Pact (Producers Alliance for Cinema and Television), the UK trade association for content producers (2025: 12), TV drama (scripted fiction) accounted for 46% of UK export revenues by genre, a figure that has been fairly consistent since 2018/19 at about half of content sales. Entertainment exports grew from 15% in 2018/19 to 24% in 2024/25 (Pact, 2025: 12), driven by the United Kingdom's strong position as an originator of formats, which can be produced locally by UK-based format owners or exported as finished products.

According to Pact, North America (including the United States and Canada) accounted for 48% (£977m) of £2bn in UK sales in 2024/25. Europe was the second-largest regional market, accounting for 32% of sales (Pact, 2025: 6). Adding Australia and New Zealand, sales to English-speaking territories accounted for 59% of sales (Pact, 2025: 6). These linguistically proximate countries are much more important than Asia (3%), including India and China, two huge markets. Over time, little has changed in the geographical spread of sales. In 2013–14, 42% of Britain's export revenues came from North America; in 2005–06 it was 40% (Steemers, 2016: 743). In 2013–14, 31% of sales originated in Europe, and 32% did so in 2005–06 (Steemers, 2016: 743). Germany (£122m) and France (£133m) are Britain's largest European export destinations (Pact, 2025: 3), because of their size, higher numbers of buyers and higher licensing costs. The Nordics (including Denmark) (£120m) and the Netherlands (£37m) have been consistently strong as smaller territories, on a par with Italy (£48m), a larger market with more channels, platforms and demand (Pact, 2025: 3).

However, the nature of the trade in British content, undertaken by UK-based international distribution companies, has changed considerably in recent years. Challenging 'the territory-based international sales strategies of the past' (Steemers, 2016: 735), it has been 'reinvented within an online, broadband-enabled transnational, if not global paradigm' (Cunningham and Silver, 2013: 7). Although Pact publishes 'national' export data, further analysis demonstrates the ongoing consolidation and transnationalisation of British

production and distribution (Chalaby, 2022; Doyle et al., 2021; Esser, 2016), which aligns with the transnationalisation of consumption and reception.

It is unclear how much export revenue accrues to content produced in Britain, as UK-based distributors now sell shows from around the world and are themselves subsidiaries of transnational corporations, consolidating in number from 30 to 19 between 2006 and 2025, according to *Broadcast* magazine's annual survey of UK-based distributors (Steemers, 2016: 740; Middleton, 2025). Consolidation reflects the desire to own more intellectual property and production infrastructure because only larger companies can afford to deficit fund scripted drama (Steemers, 2016).

In 2025 the top five TV distributors, led by broadcaster-distributors BBC Studios (with distribution turnover of £402m) and ITV Studios (£399m), accounted for over 90% of UK-based company distribution turnover of £1.7bn (Middleton, 2025: 33). The next two, Banijay Rights (£397m) and Fremantle (£264m), run UK-based distribution offices but are foreign-owned. At the time of writing (February 2026), French-owned Banijay was considering a merger with All3Media (the fifth largest producer-distributor in 2024 with £178m in revenues), owned by US-based RedBird Capital Partners (Franks, 2026). As US and French companies have acquired UK production and distribution entities, the 'sharp distinctions between home-grown and imported product, and between the local and the global' (Torre, 2012: 179) have blurred, making it more difficult to speak of national exports. UK content is now less central to UK-based distributors such as Banijay (86% non-UK), Fremantle (50% non-UK) and Fifth Season (56% non-UK), but not BBC Studios (4% non-UK) (Middleton, 2025). The move towards more non-UK content has been propelled by shortages of UK drama and a decline in first-run commissions by UK terrestrial broadcasters (Steemers, 2016: 743).

Some top 'British' shows are not even included in the *Broadcast* survey or Pact data. Period drama *Downton Abbey* (2010–15), commissioned by ITV, is in fact owned and distributed by NBC Universal, which does not participate in *Broadcast*'s distribution surveys. Costume drama *Bridgerton* (2020–), set in 19th-century Regency Britain, is supported by UK tax credits and filmed in Britain with a large British cast. However, as it was commissioned by Netflix and produced by US production company Shondaland, it is listed on IMDb as a US production. This makes it difficult to determine trade flows and to identify a title's country of origin. For this project, we allowed audience research participants to define what they consider a British title because we wanted to understand their sense of what 'British' means. Consequently, even when a title (e.g., *Bridgerton*) is not classified as British by the industry, these titles still appear throughout the book since research participants identified them as British.

The shift towards transnationalisation is also evident in changes in sales types. Sales of finished programmes (£1.069bn) amounted to 53% of total export revenues of £2.02bn in 2024/25, a decline from 70% in 2019/20 (Pact,

2025: 9). The decline in programme sales has been taken up by international productions (10%–17%), where UK-based companies produce for overseas markets (including British formats) and by some growth in format sales (from 8% to 12%) (Pact, 2025: 9). Sales to broadcasters accounted for 54% of £1,069m in finished programme sales in 2024/25, with VoD library sales, often as multi-territory deals, accounting for 46%, declining from a peak of 53% in 2022/23, when broadcast revenues accounted for 47% (Pact, 2025: 10).

The decline of broadcaster-commissions and distribution advances in the United Kingdom, and the rise of direct commissions by global streamers have implications for both global media flows and the provision of content that serves and reflects the nation, a key mandate of PSBs across Europe. Some industry voices have expressed concerns that the United Kingdom is becoming more of ‘a service industry’ for global platforms like Netflix, which serve transnational rather than British audiences (Featherstone, 2025: Q42). After the 2003 Communications Act, producers were allowed to retain ownership rights from UK broadcaster commissions, leading to the emergence of ‘Super-indie’ producers in the 2010s (Chalaby, 2010; Esser, 2016; Steemers, 2004). However, as SVoDs tend to retain all secondary and international rights, there are now fewer opportunities for UK-based production companies to grow as they did in the past when they licensed titles to British PSBs but retained intellectual property rights.

As the British broadcasting ecology adapts, clear tensions are emerging around targeting transnational audiences with internationally attractive titles that may be less local in flavour, with implications for ‘creative risk-taking and the diversity of UK production and broadcasting’ if key decisions take place outside the United Kingdom (Steemers, 2016: 747). Netflix, Asmar et al. (2025b: 14) argue, ‘risks reducing the complexities of cultural differences to a series of marketable identities, detached from the social, political, and historical contexts that give those identities meaning’. If true, the UK industry’s greater alignment with global streamer strategies reinforces the transnational trajectory of British production, supported by changes in consumption and reception, trends this book intends to document among audiences.

Reconsidering theoretical frameworks around Anglo-American hegemony, cultural and linguistic proximities and soft power

This book seeks to make an original contribution by establishing how young audiences in Europe find, value and interpret British screen content. As we will argue, this has relevance beyond a narrow, parochial British perspective. The book challenges earlier arguments that rejected older theories of Anglo-American imperialism, highlighting instead audience preferences for local or national content, or content from culturally and linguistically proximate

countries (Straubhaar, 1991, 2007). It seeks to move towards a more nuanced understanding of the diverse and multifaceted nature of consumption, exploring the reasons for the growing appeal, at least within the context of Western Europe, of English-language and specifically UK content.

The first thread concerns shift in transnational programme flows across a variety of platforms (broadcast, on-demand) within Western Europe, the most popular of which, Netflix, Prime Video and Disney+, are operated by US global corporations. Although services like Netflix have increased investment in content produced outside the United States, a political economy perspective underlines the persistent imbalance between financially powerful US-owned corporations, supported by the large US domestic market, and their European counterparts, who operate with much smaller catalogues and significantly fewer resources. We situate the United Kingdom's position within older theoretical debates about Anglo-American hegemony (Tunstall, 1977), which have gained renewed traction since the rapid growth of global streamers from the 2010s onwards (Chalaby, 2023, 2025). Within this context, Britain's role has shifted from a complementary niche provider of predominantly public service content to other national broadcasters to one increasingly focused on producing for transnational audiences served by US-owned SVoD platforms.

The second thread, drawing on our extensive audience research, supports this political economy analysis by revealing that the market dominance of US streamers in Europe extends directly to the consumption and reception of content by young audiences. This involves a reappraisal of earlier theorisations about the home advantage of domestic productions, the 'cultural discount' applied to less familiar overseas content (Hoskins and Mirus, 1988: 500), and notions of 'cultural proximity' (Straubhaar, 1991, 2007; Straubhaar et al., 2023), which suggest audiences prefer content from culturally and linguistically proximate markets.

We demonstrate how transnational streaming services and social media platforms are driving a shift towards greater global connectedness. Although global connectedness varies across different groups, Szerszynski and Urry (2002: 476) argue that for younger and more mobile individuals, it 'appears as a cosmopolitan openness to the new and the culturally different (although this too has its limits)'. In television studies, transnational connectedness extending beyond geo-cultural regions has been theorised as shared familiarity with the same genres, themes and values (Straubhaar, 2007; Straubhaar et al., 2023) and, relatedly, in their shared appreciation of transnational content that offers, according to Eichner (2020), 'practical sense making' and 'lifeworld relevance'. In our research, we examine the connectedness of young audiences in Europe by exploring what they value within British genres, including humour and authenticity.

Just as certain life stages and associated themes are universal, so too are human emotions. According to Jensen and Jacobsen (2020b), when characters and their life-worlds are perceived as authentic, this can generate feelings of

‘emotional proximity’ even if content originates from countries considered culturally distant. We argue that growing English language proficiency among the young (Esser and Steemers, 2026) enhances feelings of proximity and connectedness. By highlighting the transnational dimensions of how and why young audiences engage with and appreciate British screen content, this book makes a theoretical contribution to audience studies. Secondly, we suggest a reasserted Anglo-American hegemony, fortified by the market power of large US-owned corporations (Chalaby, 2023) and by English as the most enduring, proximate and accessible ‘language of advantage’ for many young viewers in Europe (Collins, 1989; Esser and Steemers, 2026).

Finally, we consider the wider impact of UK screen productions in the era of global streaming and growing English language proficiency. Firstly, we look at how US streamers, with their focus on Anglophone screen content, impact domestic broadcasters and streamers and why young audiences in Europe prefer the former over the latter. Second, we explore how British screen content contributes to Britain’s soft power. This includes an exploration of how and to what extent screen content shapes young people’s knowledge of and attitudes towards Britain, and how this benefits international relations and the British economy more generally.

Methods and data

This study combines data from four different European countries to pinpoint transnational variables that capture commonalities of motivation for watching British shows among younger audiences as well as market-based differences. This methodology was first developed and evaluated in a Danish pilot project between May and July 2020 (Bengesser et al., 2022).

Findings derive from an online survey (weighted by age and gender), adapted to local contexts and conducted in local languages in Denmark in 2022 ($n = 423$), Germany ($n = 426$) and the Netherlands in 2023 ($n = 409$), and Italy in 2024 ($n = 555$). The survey was designed to appeal to all viewer types, aged 16–34, not just British content fans, and to establish general viewing preferences and practices within and across markets to aid our understanding of how British content fits into audiences’ overall consumption preferences and practices. To capture similarities and differences within as well as across markets, data analysis considered demographics (age, gender, citizenship), native language(s), where people live, whether they have lived abroad, educational attainment, occupational status, self-assessed English language proficiency and visits to the United Kingdom. Localised surveys were self-administered and distributed through schools, universities, clubs and snowball sampling with the assistance of ‘Young Ambassadors’ in each market. This approach, shaped by the practicalities of snowball sampling, meant that survey participation leaned more towards individuals in higher education (HE)

or with an HE background. Among respondents aged 20–24, 86% were in HE, and 81% aged 25–34 were graduates, compared with HE attainment rates of 32% in Italy, 41% in Germany, 51% in Denmark and 55% in the Netherlands (European Commission, 2026). Where possible, this was addressed when recruiting for digital diaries, interviews and focus groups.

The survey was followed by digital diaries, conducted over five days by 102 participants aged 16–34 (20–28 per market). Participants were selected through a screener survey and balanced for age, gender, educational level, consumption frequency of long-form content, occupation and varying levels of interest in both Britain and British content. Diaries documented daily viewing, including: what titles participants watched, on which platform/channel, with whom, how they found out about those titles and the language setting they used (original language, dubbed, subtitled). Diaries also recorded two daily tasks focused on participants' views of British culture, selected British content spanning different genres (using posters and trailers) and where British titles appeared on respondents' favourite VoD home page. Diaries were then used to select 12 interviewees per country (48 in total), also balanced for age, gender, education, occupation and levels of interest in Britain and British content. Online interviews, either in English or local languages, lasted around an hour and were structured, but individualised, using digital diary responses to ascertain individual viewing preferences, practices and motivations. One-to-one interviews were complemented by three to four online focus groups per market (38 participants overall), each lasting 60–90 minutes, to reach harder-to-engage 16–19-year-olds (see Bengesser et al., 2023: 91).

Before each round of audience research, market and industry data were collected to identify key players, VoD penetration and the composition of selected VoD catalogues in each case study. Using the European Audiovisual Observatory's Lumière VoD database of European works, complemented by the JustWatch streaming guide, catalogue research was used to identify British content available in catalogues in each case study (Bengesser et al., 2025). Landing page research over seven days was used to establish where British shows appeared on selected VoD services including Netflix, one public service platform (e.g., RaiPlay, DRTV) and one commercially funded platform (e.g., Videoland, Sky Italia). This was supplemented with tracking of promotional content for British titles on selected social media platforms (Facebook, YouTube, X, Instagram, TikTok) over 30 days.

Fourteen anonymised semi-structured interviews (each lasting around one hour) with English-language teachers (3–5 per market) provided insights into how English is taught in different schools, the role of Britain and British English in teaching, and the extent to which British screen content is used for educational purposes. Fifteen programme buyers from key VoD and broadcasting platforms (3–5 per market) and nine sales executives were interviewed to provide industry perspectives on young audiences. Interviews with 18 festival

organisers/influencers (3–5 per market) provided further insights into viewing. All interviews were transcribed and coded in NVivo according to themes and concepts linked to the research questions outlined above.

Outline of the book

In this chapter, we set out the United Kingdom's position as a longstanding exporter of films and TV programmes and introduced a theoretical re-positioning of transnational content flows in relation both to British productions and screen encounters more generally, which will serve as a thread throughout the book.

In [Chapter Two](#), we offer an overview of viewing contexts, supported by survey, digital diary and interview findings, which suggest a clear preference for US and, subordinately, UK content available on US-owned SVoDs and on video-sharing platforms like YouTube. This allows us to consider change and continuity, including the strong appetite among younger audiences for drama and the diminishing appeal of domestic platforms and public service media. As such, the chapter's findings provide a first indication that theorisations of home advantage, cultural discount and cultural proximity may have lost some of their explanatory power with the advent of streaming.

In [Chapter Three](#), we focus on what UK content is available in European markets, how prominently it is presented on streaming platforms, and how it is discovered by young audiences, engaging with scholarly discussions on availability, prominence and discoverability. We show which British programmes are most known among these audiences and which platforms they appear on. We make a methodological intervention by arguing that catalogue research should be complemented by audience research to reveal not just what is available, promoted and discoverable, but also how this then translates into actual viewing.

In [Chapter Four](#), we explore motivations for watching British content among 16–34-year-olds based on the values and attributes associated with it. By showing that humour and the English language are the strongest motivations, and revealing that authenticity, relevance and relatability are key factors of appeal in contemporary British Netflix shows, the chapter challenges dominant theorisations of transnational programme flows based on notions of linguistic and geo-cultural proximity.

In [Chapter Five](#), from the same theoretical perspective, we shift the analytical focus to domestic content and consider the wider implications for domestic European broadcasters of the shift among young audiences towards global streamers and social media platforms. This involves examining what audiences think about domestic screen content and the reasons for its diminishing appeal.

In [Chapter Six](#), we examine the role of British screen content as a cultural ambassador shaping young people's perceptions of Britain. We

explore how such content supports soft power by building knowledge, generating interest in Britain and encouraging audiences to visit the United Kingdom. In doing so, the chapter contributes to previous transnational audience research focused on the soft power of Japanese, Turkish and South Korean popular culture, while also engaging specifically with debates on British soft power.

Concluding, we summarise empirical findings and key arguments of the SEwB project and elaborate on its theoretical contributions.

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2 Markets matter

Cultural, industry and viewing contexts

Introduction

Global streaming platforms have profoundly reshaped the audiovisual landscape of all four case studies. Netflix entered Denmark in 2012 as part of its Nordic rollout, followed by launches in the Netherlands (2013), Germany (2014) and Italy (2015). Its arrival was soon followed by other global streamers, including Prime Video (Amazon) and Disney+. Within a short period, global streamers became major players in Europe, rapidly expanding their subscriber bases and investing heavily in European content. Their share of spending on European original programming (excluding sports and news) rose from 0% in 2015 to 36% in 2024 (EAO, [2025a](#): 15). Netflix, Prime Video and Disney+ each invested over €2bn in original European content in 2024, together accounting for more than 80% of total global streamer spending on European productions (EAO, [2025a](#): 15).

Yet, the impact of these global actors is also shaped by nationally distinctive historical legacies and contemporary industrial, cultural and regulatory contexts. The mediating role of the state and the influence of historical legacies have long been central to scholarly analyses of earlier phases in the long trajectory of media globalisation and international media flows (e.g., [Flew et al., 2016](#); [Flew and Waisbord, 2015](#)). Similarly, recent scholarship has begun applying these perspectives to the current era of transnational video-on-demand (VoD) ([Bengesser, 2024](#)). Our cross-national comparative study contributes to this new line of research.

Our four case studies were strategically selected to examine if and how different market contexts shape young people's viewing practices, even in countries situated within the same broader regional setting of Western Europe. In this chapter, we elaborate on the rationale for selecting Denmark, Germany, Italy and the Netherlands and provide an overview of their markets, highlighting both differences and similarities. We also address the distinct national histories of British television imports in each country and discuss industry perceptions of the appeal of British content. Finally, we present key findings from the *Screen Encounters with Britain* (SEwB) project on young people's

viewing preferences across these four countries. This chapter sets the stage for more detailed analyses in the following chapters by providing essential historical and contextual background on the rise of global streamers and the circulation of British screen content, and by introducing key empirical findings from the SEwB project.

Market contexts in Denmark, Germany, Italy and the Netherlands

With populations of roughly 6 and 18 million, respectively, Denmark and the Netherlands are small countries (though the Netherlands is the largest of Europe's smaller states). Germany, with around 83 million inhabitants, is Europe's most populous nation, while Italy, with 59 million people, is the fourth-largest (Eurostat, 2024a). Culturally, Denmark and the Netherlands exhibit exceptionally high levels of English-language proficiency (EF EPI, 2024) and share a sense of cultural proximity with the United Kingdom, reinforced by their geographical closeness, as well as with neighbouring countries (Sweden and Norway for Denmark; Germany for the Netherlands). In Denmark, perceptions of linguistic proximity with other Nordic countries have diminished in recent years. According to a study commissioned by the Nordic Council of Ministers (2021), 95% of respondents across the Nordic region considered English easier to understand than other Scandinavian languages. In contrast, cultural ties with the United Kingdom are weaker in Germany and especially in Italy, where English proficiency is also much lower. The 2024 EF English Proficiency Index classed the Netherlands and Denmark as 'very high proficiency' countries (ranked 1st and 7th, respectively); Germany (10th) was described as 'high proficiency', while Italy (46th) was in the 'moderate proficiency' group (EF EPI, 2024). Finally, infrastructural conditions also diverge. While all four countries enjoy high levels of fixed broadband coverage, the availability of high-capacity networks varies. Denmark and the Netherlands are highly connected, though the latter still relies heavily on cable, whereas Denmark has advanced much further in transitioning to high-capacity fibre networks. Germany lags behind in fibre adoption, while Italy shows relatively strong fibre availability but comparatively weak uptake (European Commission, 2025).

These differences in population size, cultural orientation and technological infrastructure shape each country's screen industry and viewing practices, resulting in nationally distinctive features that persist despite the shift from broadcast to on-demand. Table 2.1 summarises the comparative analysis presented so far and further below.

Smaller markets like Denmark and the Netherlands face more constraints on both production and demand (Puppis, 2009; Raats et al., 2016). The pool of capital, talent and expertise for content creation tends to be more limited, while smaller audiences mean lower commercial revenues and public

Table 2.1 Comparative overview of four country case studies

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
<i>General</i>				
1 Population, 2023 (in mill., rounded)	6	18	83	59
2 English language proficiency, 2024	Very high (7th)	Very high (1st)	High (10th)	Moderate (46th)
3 Fixed broadband subscriptions per 100 inhabitants, 2024 (%)	43.6	43.7	46.2	32.5
4 Broadband coverage (very high-capacity network), 2024 (%)	96.8	98.4	77.4	70.7
<i>TV/screen industry</i>				
5 Viewing on TV set daily or almost daily, 2023 (% of individuals aged 15+)	57	58	68	85
6 Usage of VoD streaming, 2022 (% of individuals aged 16–74, at least once in the last 3 months)	89	90	52	67
7 Average no of SVoD subscriptions, 2022	2.2	1.5	1.1	0.8
8 No. of unique titles of TV fiction produced in 2023	33	53	315	79
9 PSM funding, 2021 (in bn. €)	0.5	0.7	8.6	1.8
10 PSM average funding per capita, 2021 (€)	79	40	103	31
11 Language provision for imported content	Subtitles	Subtitles	Dubbing	Dubbing

Sources: 1. Eurostat (2024a); 2. EF EPI (2024); 3. OECD (2026); 4. European Commission (2025: 230); 5. European Commission (2023: 8); 6. Eurostat (2024b); 7. EAO (2024a: 51); 8. EAO (2024a: 19); 9. and 10. Henningsen Consulting and Technopolis Group (2024: 31–2) based on EAO data.

funding, even when per-capita contributions are high. All of this restricts the supply of domestic programmes. Data from the European Audiovisual Observatory (EAO), shown in Table 2.1, illustrate the impact of population size on production. With 315 unique titles of TV fiction produced in 2023, Germany had a clear lead among European countries (EAO, 2024b: 19). Italy ranked 6th with 79 titles, the Netherlands ranked 8th with 53 titles and Denmark ranked 14th with 33. EAO data also show that Germany's two PSBs, ARD and ZDF accounted for over one-third of total public funding revenues in Europe (Henningsen Consulting and Technopolis Group, 2024: 31–2). Italy's RAI (€1.8bn) received more than double the Netherlands' NPO (€0.7bn), despite lower per capita contributions than the Netherlands (see Table 2.1). This is significant, as PSBs

remain key investors in domestic programming (see [Chapter Five](#)). Larger markets with greater production capacity generate more domestic content. A recent EAO study of VoD catalogues in Europe (EAO, 2025b: 10), covering all VoD services (both global and domestic, and both commercial and public), places Germany and Italy among the countries with comparatively high shares of works from European Union (EU) member states (31% and 27%, respectively) in their VoD catalogues. Around half of this content is domestic. By contrast, Denmark and the Netherlands form the next cluster, closer to the European average, with lower shares of EU27 works (22% and 20%), and a smaller proportion of this consisting of domestic content (32% and 27%).

Historical legacies, demographic factors and infrastructural conditions also contribute to national variations in TV and VoD *consumption*, with Italy standing out. In 2023, 85% of viewers in Italy reported watching TV daily or almost daily on a TV set, higher than the EU27 average (74%), Germany (68%), the Netherlands (58%) and Denmark (57%) (see [Table 2.1](#)). Italy's ageing population and historically low levels of newspaper readership have long made it a high TV-consumption country ([Hallin and Mancini, 2004](#)), a pattern that persists today. In 2023, almost 70% of 18–34-year-olds in Italy were living with their parents ([Eurostat, 2024c](#)), rendering family-based linear TV viewing more relevant here than in the other three countries.

While the use of video streaming services has been increasing globally, differences among our four countries likely reflect disparities in digital infrastructure, as noted earlier. Reliable comparative data on streaming usage remain scarce. Survey-based data from Eurostat (see [Table 2.1](#)) indicate that streaming consumption in 2022 was significantly higher in Denmark and the Netherlands than in Germany and Italy. These national differences are further supported by statistics on the average number of subscriptions to SVoD services in 2022 (see [Table 2.1](#)), which were higher in Denmark (2.2) and the Netherlands (1.5) than in Germany (1.1) and Italy (0.8).

Further national variations impacting consumption habits concern language provision for imported content. In Germany and Italy, imports are traditionally dubbed, while in Denmark and the Netherlands, content is typically subtitled. Market size is one factor here; as one German buyer interviewed for this project noted, 'the Danish market is way too small to dub everything, and so they are used to subtitles. Same with the Netherlands' (Buyer 1, Germany). English-language proficiency, however, is equally important, creating a mutually reinforcing dynamic: long-term exposure to subtitles has strengthened proficiency, which in turn has increased their acceptance.

Shifting the focus to *regulatory* conditions, we find a similar picture of national differences against a backdrop of shared contexts. As EU member states, all four countries adhere to the 2018 revision of the EU's Audiovisual Media Services Directive ([García Leiva and Alborno, 2020](#)). Aimed at promoting European works, the updated directive brought VoD services within its scope and introduced mandatory quotas requiring that at least 30% of VoD

catalogues consist of European works and that these works be given prominence. Individual member states may also require VoD services to contribute financially to the production of European content. The implementation of these provisions, however, has been uneven, leading to diverse national approaches and a fragmented regulatory landscape across the EU (Iordache et al., 2022). Importantly for our study, UK productions still count towards the 30% European quota, despite Britain’s withdrawal from the EU. As several TV buyers we interviewed noted, this creates an additional regulatory incentive for European broadcasters and VoD services to acquire British content.

The streaming markets in our four countries share a broadly similar structure, consisting of three main categories of players: US-based global streamers, public service media (PSM) organisations and legacy commercial broadcasters, including both free-to-air and pay-TV groups (see Table 2.2). While there are some variations, for example in the market position of individual global streamers or in the relative prominence of pay-TV versus free-to-air broadcasters in each market, overall similarities prevail. In particular, all four countries also share a strong tradition of PSM, though funding levels and mixes vary. PSM organisations (DR and TV 2 in Denmark, ARD and

Table 2.2 Main broadcasters and streaming services available in Denmark, the Netherlands, Germany and Italy (as of 2023)

	DK	NL	DE	IT
Public service broadcasters	DR, TV2	NPO	ARD, ZDF	RAI
Commercial broadcast groups	TV3	SBS, RTL	RTL ProSieben Sat.1	Mediaset, Sky
Domestic/regional streaming services	DRTV TV2 Play Viaplay Filmstripen C More Viafree YouSee Dansk Filmskat	NPO Start/Plus Viaplay Videoland	RTL+ Joyn WOW (Sky) Magenta TV	RaiPlay Mediaset Infinity Sky Go NOW (Sky)
Global subscription video-on-demand services	Netflix HBO Max Disney+ Discovery+ Apple TV+ Paramount+ Blockbuster Prime Video (via Amazon Germany)	Netflix Prime Video Disney+ HBO Max Apple TV+ Paramount+	Netflix Prime Video Disney+ Apple TV+ Paramount+	Netflix Prime Video Disney+ Apple TV+ Paramount+

Source: Esser et al. (2025)

ZDF in Germany, RAI in Italy and NPO in the Netherlands) continue to hold a strong position in their respective linear television markets, commanding high shares of an increasingly ageing audience. Yet, as our research shows, this strength exists against the backdrop of a long-term decline in linear television viewing, particularly among younger viewers, while the demographic profile of PSM viewers has significantly aged since the arrival of global streamers. While reach across different age groups (typically measured as exposure to a channel over a limited number of minutes within a week or month) remains significant, broadcasters often use reach strategically to conceal declining engagement with linear TV (i.e., reduced overall viewing time). Domestic competitors, including free-to-air commercial broadcasters and pay-TV companies (Viaplay in Denmark; RTL and ProSiebenSat.1 in Germany; Mediaset and Sky in Italy; RTL Nederland and Talpa TV in the Netherlands), face similar challenges and competitive pressures (Chalaby, 2025). Later in this chapter, we show that our audience research confirms that these traditional players are lagging in a streaming market, increasingly dominated by transnational players.

Industry perspectives on the appeal of British screen content

Contemporary viewing of British long-form screen content among young viewers in Europe, now occurring predominantly via streaming services, needs to be understood in the context of a longer history of British television imports on broadcast TV. These patterns are also shaped by industry assumptions about audience preferences and decisions made by TV programme buyers, who act as key intermediaries in determining what travels across borders (Kuipers, 2012; Steemers, 2004). As discussed in Chapter One, the United Kingdom, benefiting from the English language, its sizable market, a strong public service broadcasting (PSB) tradition and an entrepreneurial independent production sector, has long been the world's second-largest exporter of television productions, with Europe representing its largest market outside the United States. In 2024/25, France was the leading European market for UK exports (£130m), followed by Germany (£122m) the Nordics (£120m, including Denmark), Italy (£48m), Spain (£40m) and the Netherlands (£37m), with the Netherlands almost matching Italy despite its smaller market (Pact, 2025: 4). Drawing on industry data and insights from interviews with TV buyers across the four countries, in this section, we explore industry perceptions of young audiences' viewing preferences and the appeal of UK content in each market as buying shifts from domestic broadcasters to streaming platforms.

To situate this historically, it is useful, first, to look back two decades to a period when traditional broadcast channels still dominated viewing. Annual statistics from the EAO (2005) shed light on the historical status of British

TV fiction in the four case study markets. In 2004, all four countries imported mostly from the United States (ranging from 61% in the Netherlands to 76% in Denmark). UK fiction imports, mostly from national PSBs and concentrated in crime sub-genres, were strong in the Netherlands (19%), moderately strong in Denmark (8%), and far less significant in Germany (3%) and Italy (2%). In Italy, both French (4%) and German (3%) fiction imports outperformed UK imports (see [Esser et al., 2025: 23](#)).

These historical patterns in European TV imports, dominated by US acquisitions, and at a much greater distance, by UK ones, have persisted since the 1990s ([Steemers, 2004](#)) and are reflected in national variations in familiarity with British films and television. A recent survey conducted for the British Film Institute ([BFI – British Film Institute/Yonder, 2021](#)) illustrates these differences. Focusing on adults aged 18–65, the BFI’s *Perceptions & Engagement Study* found that the United Kingdom ranked second overall in audience familiarity after the United States, though with notable national variations. In the Nordic countries (including Denmark), 35% reported familiarity with British films and 29% with British television, compared with 31% and 27% in the Netherlands. Familiarity was lower in Germany (24% film, 13% TV) and Italy (28% film, 16% TV).

As discussed further in [Chapter Four](#), language is one of the main reasons for the appeal of British content. For many young people in Denmark and the Netherlands, English feels almost like a natural second language. According to several TV buyers we interviewed, this widespread proficiency gives British films and TV shows a competitive edge over productions from countries such as Germany or France, and, perhaps more unexpectedly, in Denmark, even over Nordic content:

[...] we need to have an audience, and the audience in Denmark is very English-savvy. They’re very happy to watch English-language programming with Danish subtitles. But even if we put, you know, the best German show on air with subtitles, they won’t be so happy, and even Swedish and Norwegian. It’s a little complicated. It has to be very strong in its genre. So basically, English language programming is a go, and everything else is almost a no-go.

(PSB buyer 2, DK)

Yes, most of the content we buy for Benelux and Germany is British content. In Germany we dub and in the Netherlands we subtitle. So particularly in the Netherlands, they’re used to hearing English language, and they can understand that [...] versus even if you find an Italian show or Spanish show, particularly in the Netherlands, it doesn’t cut through as well because even though you’ve got the subtitles, the language barrier is sort of there.

(Commercial buyer 2, DE)

Beyond language, TV buyers working for generalist broadcasters in dubbing country Italy noted the poor fit between British TV series and the mainstream television audience because the two countries' television cultures are believed to be too different:

Generally speaking, British content is a bit ... too sophisticated for our audience. So sometimes what is free TV in the UK is perceived as pay-TV edgy shows for the Italian audience. [...] Because English content can be very edgy. Especially if you think of shows coming from maybe BBC Three or Channel 4, from maybe the pay-TV players. But even coming from the free-TV landscape, they can be very bold and very innovative in terms of storytelling. Otherwise they are very traditional. I mean, there's nothing in between.

(Commercial buyer 2, IT)

The persistence and 'stickiness' of industry perceptions over time (even in the face of long-term decline in viewership) is evident in how closely the view cited above echoes those voiced more than two decades ago by Italian TV buyers in a previous academic study conducted by one of this book's authors, who found that 'mainstream audiences' were thought to prefer 'lighter' content that did not look 'particularly English' (Steemers, 2004: 153–4).

In interviews, TV buyers and other cultural intermediaries noted the strengths of British screen content, including high production values and recognisable actors and settings. Combined with the English-language 'advantage' (Collins, 1989), these insights from industry practitioners help explain the United Kingdom's enduring position as the second-largest source of TV imports in Europe after the United States. At the same time, our interviewees stressed that British screen content does not enjoy the same appeal among younger audiences as US productions. Some buyers described UK content as a 'harder sell' for under-30s, noting that while it has a long-standing presence, particularly in genres such as crime and comedy, it is 'more of an acquired taste' and tends to attract 'a relatively older demo' (PSB buyer 2, NL). Others pointed to stylistic factors, emphasising what one Dutch buyer described as the 'theatrical allure' of UK scripted shows, a mode of acting and staging that resonates strongly with older viewers but feels less immediately accessible to younger audiences who have grown up with the 'naturalistic' and highly polished aesthetic of US productions ('everybody looking good, people looking extremely good, stories looking good') (VoD buyer 3, NL). As a buyer for a Nordic operation put it, 'anyone will watch UK content if it is right, but UK content often skews older and is very popular with audience 40 plus' (VoD buyer 3, DK).

Finally, our industry interviews highlighted the profound impact that Netflix's arrival has had on demand for UK content. A UK sales executive

underlined the benefits for British distributors, noting a sharp increase in UK drama sales to Germany:

We used to sell basically one detective series to Germany [...] which is not aimed at this age group. And now I think probably 80% of our dramas in the last year would have sold to Germany.

(UK Sales Executive)

A Danish TV buyer at a legacy broadcaster considered the same market development from the opposite perspective, expressing concerns about the intense competition for younger-skewing British series and the increase in licensing costs:

Well, we've had a really hard time getting access to this kind of high-quality, younger-skewing or young adult series coming from the UK. And I've realised that the competition on these typical younger-skewing series coming from the UK have become more and more fierce over the past few years.

(Buyer 1, DK)

Although not mentioned explicitly, the reference here is clearly to competition from global streamers. In 2024/25, sales to SVoD services accounted for 33% of UK television sales revenues (Pact, 2025: 10). Even though this represented a decline from the 44% peak recorded in 2022/23, largely due to growth in the adjacent advertiser-funded and broadcast-VoD segments, global streamers have emerged in recent years as major buyers of UK screen content in international markets. Across all four of our case-study countries, and especially in Italy and Germany, where British content historically occupied a more limited place in traditional broadcast schedules, the rise of Netflix and other global streaming platforms has significantly expanded the visibility and popularity of UK productions. At the same time, these platforms have driven up licensing costs and made it more difficult for traditional broadcasters to secure youth-oriented programming from British rights holders amid intensifying competition from global streamers, shrinking budgets and ageing audiences. As we shall see in [Chapter Four](#), our own research points to several recent examples of UK shows across genres that have achieved high popularity among young viewers in Europe on Netflix and, to a lesser extent, other streaming services.

In the next section, we begin to present the findings from the SEWB's research project. We start by examining the platform, genre and country-of-origin preferences expressed by young people who participated in the study, before turning in the following chapters to how they discover UK content ([Chapter Three](#)), the values they attribute to it ([Chapter Four](#)), the reasons for the diminishing appeal of domestic content ([Chapter Five](#)), and finally how British screen encounters impact their understanding of Britain and British people ([Chapter Six](#)).

Viewing preferences among young viewers in Europe

Through a survey ($n = 1,813$), followed by digital diaries ($n = 102$) and qualitative interviews with young viewers in Europe aged 16–34 ($n = 86$), the SEwB project identified preferences for long-form screen content among young audiences in our four case-study countries in relation to favourite (1) platforms, (2) genres and (3) countries of origin. Results revealed shared patterns across the four countries, as well as specificities based on factors such as English-language proficiency, market size, and industry strategies. They also highlighted the impact of sub-level demographic factors, notably gender and age (within the broader ‘young people’ demographic).

Platform preferences

Table 2.3 shows survey platform preferences for all four countries. The term ‘platform’ refers either to types of media (‘TV channels’, ‘cinema’) or to individual streaming services (e.g., Netflix, YouTube, RaiPlay in Italy or TV 2 Play in Denmark).

When asked to select all the platforms they use to watch long-form content, Netflix was the top choice in each country, with shares ranging from 82% in

Table 2.3 Platform preferences in Denmark, the Netherlands, Germany and Italy for respondents aged 16–34, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
Netflix	89	86	89	82
YouTube	44	65	71	52
Disney +	57	45	48	43
Prime Video	6	33	66	72
PSM streaming (1)	52	30	30	38
PSM streaming (2)	41	n.a.	34	n.a.
Cinema	29	28	42	37
HBO Max	65	36	n.a.	n.a.
Local commercial streaming (1)	37	16	11	14
Local commercial streaming (2)	n.a.	n.a.	8	10
TV channels	7	17	19	18

Notes: The figures refer to the following domestic streaming platforms: DK: DRTV (PSM1), TV2 Play (PSM2), Viaplay (commercial); NL: NPO (PSM1), Videoland (commercial); DE: ARD Mediathek (PSM1), ZDF Mediathek (PSM2), RTL+ (commercial 1), Joyn (commercial 2); IT: RAI (PSM1), Sky Go (commercial 1), Mediaset Infinity (commercial 2). Less popular commercial streaming services (local and global) were left out of this table.

Source: SEwB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Where do you usually go when you want to watch long-form screen content? Please pick all the options that apply’; 4.5 (DK), 3.8 (NL, IT) and 4.7 (DE) answers per respondent were given on average. Base: All respondents who answered the question, DK n =422, NL n =408, DE n =421, IT n =546.

Italy to 89% in Denmark and Germany. This is consistent with other European studies (see EAO, 2025c; EBU, 2025). There were notable national variations in the popularity of other US-based global streamers. Prime Video (Amazon) ranked second in Italy (72%) and third in Germany (66%), but dropped to fifth in the Netherlands (33%) and last place in Denmark, where Amazon had no online retail business at the time of the research. In Italy, Prime Video's strength may have been boosted by substantial Italian content, including stand-up comedy series *LOL: Chi ride è fuori* (2021–) and reality show *Italia Shore* (2024–), and by its low cost as part of the Amazon Prime deal. YouTube ranked second in Germany (71%) and the Netherlands (65%), but third in Italy (52%), and fifth in Denmark (44%), which has the highest number of SVoD subscriptions (see Table 2.1). HBO Max (25%) was only available in Denmark (65%), where it ranked second, and the Netherlands (36%), where it ranked fourth.

Evidence from the digital diaries closely mirrors the survey findings. Over the five-day observation period, participants reported watching more episodes on Netflix than on any other platform. Netflix's share ranged from 30% (54 episodes) in Denmark to 60% (178 episodes) in Germany, with Italy and the Netherlands falling in between at 33% (94 episodes) and 45% (128 episodes), respectively. Consistent with the survey results, the digital diaries also highlighted national differences in the popularity of other US-based global streaming services, with Disney+ emerging as the second-most-watched platform in Denmark (19% of all episodes watched) and Germany (14%), whereas Prime (Amazon) was more popular in Italy (26%).

Overall, both the survey and the digital diaries provided strong empirical evidence of the dominance of US-owned global platforms, notably Netflix, for watching long-form content among young viewers in Europe. Interviewees explained their preference for Netflix over other global streamers because of its user-friendly interface, high-quality content and variety. Matteo (IT, 28) explained that 'the first place goes to Netflix', because of the 'variety of content it offers', adding that the service feels 'accommodating' and 'easy to use'. Similarly, Lene (DK, 17) emphasised its range, saying she chose Netflix 'because it's more diverse' and 'has everything on it'. For Annette (NL, 19), 'Netflix has more variety for us'. Didier (DE, 29) also stressed both dimensions, noting that he was 'really very satisfied with the content' and that the home screen is 'very easy and intuitive to use'.

Reported usage of domestic PSB streaming services was generally higher than that of commercial ones. PSM streaming, however, was boosted by Denmark (52%). In the other three countries, only around one-third reported using PSM streaming services. Use of PSM streaming services was also skewed towards older respondents: 49% of 25–34-year-olds reported using PSM streamers, compared to only 29% of 16–19-year-olds (Esser et al., 2025: 13).

Interviews and digital viewing diaries shed further light on young people's limited engagement with local streaming services. In Italy, where 38% of survey respondents reported using RaiPlay (the domestic PSM streaming

platform), interviews with 22 viewers revealed it was used only occasionally, mainly for Italian films and specific entertainment shows. Elisa's comment about going to RaiPlay 'only if there is something specific that I want to watch' (Elisa, IT, 26) was typical. RaiPlay accounted for only 10 episodes (4%) viewed during the digital diaries (out of 282), mostly Italian and entertainment shows (Esser et al., 2024: 9). A similar picture of young people using local streaming services rarely, and only for certain domestic shows, emerged from interviews and digital diaries in the other three countries.

The SEWB research also confirmed that very few young people still engage with traditional television. Only between 7% (Denmark) and 19% (Germany) of respondents accessed TV channels, lower than cinema (Table 2.3). Interviews revealed that television viewing is mainly associated with family occasions, especially mealtimes, or maintained out of habit by those over 30 typically for news, long-running domestic shows or major sporting and musical events (see also Chapter Five).

Differences in living arrangements also affect how and what young people view. As noted earlier, in 2023, almost 70% of 18–34-year-olds in Italy were living with their parents (Eurostat, 2024c), rendering linear TV (named by 18% of survey respondents) more relevant here than in Denmark (where only 7% mentioned it). And yet even in Italy, linear TV is a practice that most young people have largely left behind.

Netflix also emerged as the leading platform for accessing *British* content, far ahead of other US streamers. This was consistent across all four countries and age groups. Overall, more than 80% of respondents selected Netflix when asked to name the three most relevant platforms for watching British content (Esser et al., 2025: 33). Cinema ranked as highly as Disney+ (which offered little British content) and ahead of HBO Max (only available in the Netherlands and Denmark). A similar proportion of respondents identified PSM streaming services as relevant for British content, particularly among 30–34-year-olds (30%) (Esser et al., 2025: 33). This figure, averaged across countries, was again boosted by Denmark, where 55% of 30–34-year-olds reported searching for UK content on PSB platforms (Esser et al., 2023: 26). Local commercial streaming services and linear TV channels (around 10% each) play only a minor role, except in the Netherlands. Here, TV channels (selected by 20% of respondents) remain more important, likely because, as noted earlier, British programming has long been a staple of both public service and commercial schedules. These findings, overall, reflect a clear shift. Public service channels, once the primary source of British programming, have ceded that role to global streamers.

Genre preferences

Alongside the marked dominance of global streamers as the primary destination for young viewers, the genres they favour further tilt consumption towards US content (and English-language content overall). In the survey,

respondents were asked to select five genres they ‘like best’ for long-form content. As shown in Table 2.4, the top nine rankings are all scripted genres, with ‘Fantasy/sci-fi’, ‘Comedy/comedy-drama’ and ‘Action/adventure’ taking the three top spots. These are genres in which US streamers have large back catalogues, given their long-standing dominance in high-budget scripted production. This point was echoed in interviews. Paolo (IT, 17), for example, explained that he gravitates towards Hollywood output because ‘there are more Hollywood films that are action than Italian ones’. Similarly, Mark (NL, 24) noted the near absence of domestic alternatives in his preferred genres: ‘the genres I favour, there isn’t any Dutch content. There is no Dutch fantasy content, no Dutch sci-fi content’.

Table 2.4 also shows that ‘reality TV’, ‘talk shows’, ‘talent competitions’ and ‘lifestyle and factual entertainment’, once schedule staples and more likely to be domestic productions, were selected by far fewer respondents overall. However, ‘stand-up comedy’ (23%) and ‘talent competitions’ (17%) resonated more strongly in Italy, while ‘lifestyle and factual entertainment’ (19%) did so in Denmark.

There are notable national variations also within fictional genres, with Italy often standing out as the outlier. ‘Historical drama’ was less popular in Italy (19%) than in the other three countries, where 30–33% of respondents marked it as a favourite, as were ‘documentaries’ (19% vs 28–36%).

Table 2.4 Genre preferences in Denmark, the Netherlands, Germany and Italy for respondents aged 16–34, in %

	<i>All</i>	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
Fantasy / Sci-Fi	45	47	45	47	41
Action / Adventure	45	46	48	43	43
Comedy / Comedy-drama	43	52	37	44	41
Drama	38	52	24	38	38
Crime / thrillers	37	40	33	42	35
Sitcoms	36	32	33	35	45
Animation	31	26	32	30	37
Romance / romantic comedy	28	26	30	28	29
Historical drama	28	30	33	30	19
Documentaries	28	36	31	28	19
Stand-up comedy	16	13	15	12	23
Reality TV	12	15	14	12	7
Talk shows	11	9	12	11	10
Talent competitions	9	9	4	7	17
Lifestyle & factual entertainment	9	19	7	6	3
Other	5	3	8	6	3

Source: SEWB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘What type of screen content do you like best? Select up to five options’; 4.2 answers per respondent (all countries combined) were given on average. Base: All respondents who answered the question: combined $n = 1,811$; $DKn=422$, $NLn=408$, $DEn=426$, $ITn=555$).

Conversely, young viewers in Italy showed a stronger preference for ‘sitcoms’ (45% vs 32–35% elsewhere) and ‘animation’ (37% vs 26–32%). ‘Crime/thrillers’ were more popular in Denmark (40%) and Germany (42%) than in Italy (35%) and the Netherlands (33%).

Pronounced gender variations largely align with conventional gender norms. Women showed clear preferences for ‘romance/romantic comedy’ (47% vs 12% of men), ‘historical drama’ (33% vs 23%) and ‘sitcoms’ (43% vs 31%). Men expressed stronger preferences for ‘action/adventure’ (60% vs 29%), ‘fantasy/Sci-fi’ (55% vs 34%) and ‘animation’ (38% vs 22%). In non-scripted genres, ‘talent competitions’ and ‘lifestyle and factual entertainment’ were more popular among young women (both 13% vs 5% for men), with an even larger gap for ‘reality TV’ (20% vs 5%).

The same question about genre preferences was also asked specifically about British content. Table 2.5 highlights in bold those genres where the United Kingdom performs well, both comparatively (against overall genre preferences) and in absolute terms, including ‘fantasy/Sci-Fi’ ‘comedy/comedy-drama’, ‘romance/romantic comedy’ and ‘historical drama’.

Among fictional genres, survey respondents associated the United Kingdom with ‘sitcoms’ and ‘animation’ the least, both within genre preferences and in absolute terms. UK ‘crime/thrillers’, traditionally a staple of British exports, also performed less well (29%) against this genre in general (37%).

Table 2.5 Genre preferences for respondents aged 16–34: All content vs UK content, in %

	<i>All content</i>	<i>UK content</i>
Fantasy / Sci-Fi	45	50
Action / adventure	45	45
Comedy / comedy-drama	43	63
Drama	38	26
Crime / thrillers	37	29
Sitcoms	36	22
Animation	31	8
Romance / romantic comedy	28	36
Historical drama	28	51
Documentaries	28	24
Stand-up comedy	16	16
Reality TV	12	8
Talk shows	11	8
Talent competitions	9	8
Lifestyle and factual entertainment	9	10

Source: SEwB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Questions: ‘What type of screen content do you like best?’ and ‘Which types of British screen content do you like best? Select up to five options’. Base: All respondents who answered the questions: For all content $n = 1,811$, for UK content $n = 1,533$.

The smallest differential was in the Netherlands (30% vs 33%), a small fiction producer; the largest was in Germany (31% vs 42%), a major (co-) producer of crime series. In the Netherlands and Denmark, UK productions in several non-scripted genres were perceived as slightly superior, likely reflecting greater familiarity with British non-scripted UK content and weaker domestic competition. By contrast, digital diaries and interviews in Italy and Germany suggested that ‘stand-up comedy’, ‘reality TV’, ‘talk shows’ and (in Italy) ‘talent competitions’ remain genres dominated by popular domestic productions.

Country-of-origin preferences

Insights from platform and genre preferences, suggesting the higher profile of US and other English-language content among young viewers in Europe, were corroborated by a survey question asking respondents to name their top three country-of-origin sources of screen content. As shown in Table 2.6, the

Table 2.6 Country of origin preferences in Denmark, the Netherlands, Germany and Italy for respondents aged 16–34, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
USA	91	90	88	91
UK	78	79	63	58
Domestic	80	52	51	75
Japan	5	17	14	15
France	8	2	11	9
Spain	4	3	6	14
South Korea	4	7	7	7
Germany	5	4	n/a	2
Sweden	3	1	5	0
Nordics	2	3	3	1
Italy	2	2	3	n/a
Norway	3	1	1	1
Denmark	n/a	2	1	0
Canada	1	3	2	1
Australia	1	2	2	1
Europe	1	0	1	3
Belgium	0	2	0	0

Note: Countries/regions with 1% or less on average were omitted from this table, with the exception of Belgium, which shares a language with the Netherlands.

Source: SEWB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Which countries (national or international) are your favourite sources when it comes to screen content? Please write your answers starting with your most favourite’. Three fields for ranked responses were provided; 2.9 (DK), 2.8 (NL, IT) and 2.6 (DE) answers per respondent were given on average. Base: All respondents who answered the question, DK n =413, NL n =386, DE n =380, IT n =531.

United States emerged as the leading country of origin by far. Domestic content came second in Denmark (80%) and Italy (75%), but only third in Germany (51%) and the Netherlands (52%), below the United Kingdom, which outperformed other countries by a long distance, excluding national and US productions.

Preferences for other European countries were very low, despite cultural and linguistic proximity. Only 4% of respondents in the Netherlands placed Germany in their top three, and in Denmark, just 8% combined opted for Sweden (3%), Norway (3%) or ‘the Nordics’ (2%). In Italy, Spain and France (14% and 9%) ranked far below the United Kingdom (58%). It is also important to note that Japan and South Korea ranked more highly in all four countries, even though neither would be considered culturally proximate.

British content appeals more to young people in Denmark and in the Netherlands (78% and 79%, respectively) than to young people in Germany (63%) and Italy (58%). This is consistent with industry expectations and historical patterns discussed earlier in the chapter. Another survey question about how often respondents watch UK content confirmed these national differences: 80% of respondents in the Netherlands and 67% in Denmark claimed to watch UK content at least several times a month, compared with 61% in Germany and 56% in Italy (Esser et al., 2025: 28). It is also worth noting evidence of a general upward trend: when asked whether their consumption of British screen content had changed over the past five years, between 35% (Italy) and 43% (Germany) of respondents reported increased viewing, while only 6–10% reported a decrease; most of the rest reported no change, with a small residual indicating uncertainty (see Esser et al., 2025: 29). A final piece of corroborating evidence came from the digital diaries (Esser et al., 2025: 26). Of 1,044 unique episodes entered into 102 digital diaries over five days, 58% were US titles (including co-productions), 17% were UK titles (excluding co-productions) and 2% originated from either Australia, New Zealand or South Africa. In total, 77% of all episodes watched originated from English-language countries. Domestic content accounted for 15%, while only 4% of all episodes were from other European countries and 4% from non-European, non-English-language regions. Viewing of UK content was strongest in Denmark (24% of episodes), followed by Germany (22%) and the Netherlands (16%). In Italy, the share of UK episodes was much lower (5%), ranking behind US and domestic content.

Conclusion

Building on [Chapter One](#), this chapter has further developed the contextual groundwork for the more detailed analysis presented in the remainder of the book. It has first provided a comparative overview of the screen markets across the four case studies. Adopting an analytical perspective attentive to the mediating role of historical legacies and contemporary contexts, the

chapter has highlighted variations in the market impact of global streamers within the shared regional setting of Western Europe. Drawing on interviews with European TV buyers, it has then briefly traced the distinct national histories of British television imports on traditional broadcast channels in the four countries and examined industry views on the current appeal of English-language content (and specifically British content) among young audiences, as viewing shifts from linear television to streaming platforms. Finally, the chapter has provided an overview of key empirical findings on audience preferences from the SEwB project. Drawing on a cross-national survey, digital diaries and qualitative interviews with young viewers in Europe, the chapter has presented new empirical evidence, revealing in particular: (1) the growing dominance of US-owned global platforms among 16–34-year-olds for viewing long-form content; (2) a preference for genres in which the US is particularly strong such as fantasy/Sci-Fi and action/adventure; and (3) the strong US lead in country-of-origin preferences and more broadly English-language content, with British content ranking second after US productions in Germany and the Netherlands and third after US and domestic content in Denmark and Italy. Beginning the task of deeper analysis, [Chapter Three](#) turns to questions of availability and discoverability, examining what British content is available to young audiences in Denmark, the Netherlands, Germany and Italy, and how these audiences encounter it.

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3 Availability, prominence and discovery of British content

Introduction

This chapter examines how young audiences aged 16–34 in Denmark, Germany, Italy and the Netherlands discover British content. The debate around catalogues represents a new frontier in enduring discussions about international media flows, especially the dominance of US/Anglophone content versus domestic content (Bengesser et al., 2025; Lobato et al., 2024). Yet for video-on-demand (VoD) services (more than for traditional television), availability provides only a partial picture unless it is considered alongside prominence and ‘everyday’ viewing practices shaped by ‘industrial, technological and social cultural contexts’ (Johnson et al., 2023: 1628–9). Using methodology developed for the *Screen Encounters with Britain* (SEwB) project (Bengesser et al., 2022; Bengesser et al., 2025), this chapter considers how younger audiences get to know about, find and access UK titles. In doing so, it also addresses what these encounters reveal more generally about availability, prominence and discovery.

We focus on young people’s encounters with long-form content (longer than 20 minutes) on global subscription-funded video-on-demand services (SVoDs) like Netflix, and with local providers (BVoDs – broadcaster video-on-demand) (e.g., RaiPlay in Italy). We consider social media (e.g., Instagram, TikTok) and video-sharing platforms (e.g., YouTube) only insofar as these platforms attract audiences to streamers through trailers, memes and recommendations.

Approaches to catalogues include examination of third-party quantitative data (Lotz et al., 2022), investigation of algorithmic recommender systems (Pajkovic, 2022), analysis of interfaces (Johnson, 2019; Kelly and Sørensen, 2021) and increasingly artificial intelligence (AI) assisted analysis of larger samples (Boisvert and Anctil, 2025). While literature on catalogues and interfaces has grown significantly (Lobato and van Es, 2025), less is known about how audiences find and engage with content, because of restricted access to audience data within closed VoD systems, although this is changing (see Damásio et al., 2025; Frey, 2021; Iordache et al., 2024; Lotz et al., 2025; Pajkovic, 2022; van Es et al., 2025). In their overview of catalogue research,

Lobato et al. (2024: 1332) refer to the ‘wide range of semi-public data including titles, genres, metadata, recommendations, artwork, promos, ads, and interfaces’, which offer insights into the range of and exposure to VoD content, although this reveals less about the dynamics and extent of audience agency. This chapter aims to address this gap by combining findings on the availability of UK content and landing page prominence with exploratory analysis of young audiences’ transnational viewing and search practices.

Chapter Two, drawing on SEwB survey data, revealed that VoD services, dominated by Netflix, are the most favoured platforms among young audiences in Europe, with local commercial streamers, public service platforms and linear TV channels trailing by some margin. Chapter Two also confirmed that young audiences have a strong preference for US or English-language content, and for fiction over non-fiction. This dominance of English-language content, which includes British content, raises questions about ‘how presence, prominence and circulation shape probable audience encounters’ (Bengesser et al., 2025: 1511).

Looking through the prism of British content, this chapter seeks to provide insights about availability within catalogues and discoverability on platforms, by adding an audience dimension to demonstrate how young people actually find and decide what to watch. This is achieved through a three-pronged approach that starts with what British content is *available* in VoD catalogues, how it is *presented* on selected VoD interfaces, and finally *how audiences discover and engage* with British content, drawing on SEwB surveys ($n = 1,813$), digital diaries ($n = 102$) and interviews ($n = 86$). Attention then turns to the role of social media in elevating some British content to the forefront of audience attention.

Concluding, the analysis further underscores the distinction between *supply diversity*, what is available within catalogues, *exposure diversity*, the range of content that viewers may encounter and *consumption diversity*, what users actively engage with (Mattis et al., 2022: 3684; see also Napoli, 2011). This is not only shaped by availability, prominence and algorithmic streamer recommendations within VoD interfaces but also shaped by wider influences including recommendations from other people and social media, encompassing dimensions that extend beyond the streaming environment (see also Damásio et al., 2025; Frey, 2021; Johnson et al., 2023; Lobato et al., 2024).

Exploring video-on-demand catalogues

Availability of British content

There is significant availability of British film and television titles within European VoD catalogues. Using the European Audiovisual Observatory’s (EAO) Lumiere VoD database, Bengesser et al. (2025: 1516) estimated that

circa 15,500 unique British first-produced film titles and TV series were circulating across 26 European countries on SVoD, transactional (TVoD) and free services (FVoD) in October 2022. Among our case study markets, the Netherlands (28.4%) and Denmark (31.6%), two smaller subtitling territories, showed higher levels of British first-produced film and TV titles as a proportion of European first-produced content than Germany (21.7%) and Italy (21.9%), two larger dubbing countries, both of which produce more local content (Bengesser et al., 2025: 1517).

EAO data further reveal that Britain has a comparatively high share of *unique TV seasons* in European VoD catalogues, accounting for 90% of the 17% attributed to ‘other European content’, coming after the EU27 and US (both 32%), and other non-European content (19%) (EAO, 2023: 75–76). The United Kingdom also accounts for about three-quarters of the 9% of *unique film titles* attributed to other European countries, after the EU27 (35%), the United States (34%) and other non-European sources (22%) (EAO, 2023: 27). In terms of cumulated presence of all titles in catalogues for each film and TV series, Britain takes a large share of the 10% of ‘Other European content’ in VoD catalogues after the United States (49%) and EU27 (22%) (EAO, 2025a: 22).

For SEwB, EAO data were used to compile a list of British titles to check against landing page research and survey mentions of titles. For manageability, this was narrowed down to three platforms per country. Netflix was selected as the most popular SVoD among survey respondents. PSB platforms were chosen because they were the traditional home of UK content (Stemers, 2004). A third key commercially funded platform was picked to demonstrate further the presence of British content in each market.

Including multiple seasons of the same content across all SVoD, FVoD and TVoD platforms, the Lumiere database recorded approximately 12,000 British titles in the Netherlands and Italy, 14,500 in Denmark and just under 27,000 in Germany during the specified census dates. When multiple seasons are excluded, the number of unique UK titles (including co-productions) is significantly lower. Across four countries in the SEwB study, between 812 (DK) and just over 1,200 unique British titles (NL, DE, IT) were accessible on the three platforms selected for each market (Table 3.1).

Content prominence and promotion

Moving to prominence and discoverability means shifting the focus from what is theoretically available in catalogues towards presentation on VoD landing pages, where content is displayed on interfaces using varying levels of curation, promotion and recommendation (Lobato et al., 2024). Critical readings suggest that VoD interface design limits and directs what audiences

Table 3.1 Estimated numbers of unique UK titles (incl. co-pros) listed in Lumiere on selected VoD platforms in Denmark (DK), the Netherlands (NL), Germany (DE) and Italy (IT)

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
Netflix	567	935	602	745
Commercially funded platform	119	215	599	363
Publicly funded PSM platform	126	59	12	145
Total	812	1,209	1,213	1,253

Notes: The title numbers exclude multiple seasons but include presence on more than one platform. Commercially funded platforms include TV2 Play (DK), Videoland (NL), Prime Video (DE), Now (IT). PSM platforms include DRTV (DK), NPO Start (NL), ZDF Mediathek (DE), RaiPlay (IT).

Source: SEwB analysis of Lumiere census data from 01.04.22 (DK), 01.04.23 (NL), 01.10.22 (DE), 1.10.23 (IT). [Esser et al., 2025](#): 35.

see ([Johnson, 2019](#)), as interfaces foreground certain titles over others, ‘encouraging audiences to watch what is presented to them rather than search the content database themselves’ ([Bengesser et al., 2025](#): 1514). This raises concerns about media flow inequalities and whether platforms like Netflix have too much power ([Davis, 2023](#); [Hesmondhalgh and Lotz, 2020](#)), notwithstanding other factors shaping audience choices.

For SEwB, landing page data for the three selected platforms per country were collected using newly created accounts with personal information limited to age and gender, with no genre preferences. Cookies and browser data were cleared daily. Simultaneously with the survey, daily vertical and horizontal screenshots of each home page plus 7–13 further categories or one-off platform-specific searches were documented over seven days, including a weekend (for methodological detail, see [Bengesser et al., 2025](#)). This dataset provided insights into what British content is prominently presented and therefore discoverable by audiences in the ‘prime space’ ([Bideau, 2020](#); [Bruun and Lassen, 2023](#): 189) of home page decks (top rows) as tiles (thumbnail images of titles).

Despite large numbers of British titles circulating within VoD catalogues, only a small proportion could be easily found on home pages or through more active searches. Across all four countries, a similar number of UK titles (about 200 per country) were found on Netflix, either in the first encounter on the home page, by browsing categories like ‘Top 10 films’ or ‘Popular on Netflix’ or active searches for ‘British Films’ and ‘British Series’ (see [Table 3.2](#)). This suggests that only between 23% (NL) and 37% (DK) of unique UK titles and co-productions available in Netflix’s national catalogues (see [Table 3.1](#)) can be reasonably discovered by audiences. Even fewer titles make it to the home page of Netflix’s catalogue, ranging from 5% (NL) to 9% (DK).

Table 3.2 Estimated numbers of unique UK titles (incl. co-pros) found on Netflix landing pages in Denmark, the Netherlands, Germany and Italy

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
UK titles/co-pros found across ten Netflix categories/searches	207	217	209	208
Including UK titles/co-pros found on Netflix home page only	51	48	42	46

Notes: Screenshots were taken of (1) daily home page including all horizontal decks; (2) daily ‘Top 10 TV’ (excl. Denmark); (3) daily ‘Top 10 films’ (excl. Denmark); (4) Top 10 Programmes (weekly); (5) Top 10 Films (weekly); (6) ‘Popular on Netflix’ (top 25 rows on two days), plus one off documentation for the search terms; (7) ‘British films’; (8) ‘Popular in British Films’; (9) ‘British Programmes’; and (10) ‘Popular in British Programmes’.

Source: SEwB analysis of Netflix landing pages in DK (10–16.09.22), NL (25.09–01.10.23), DE (11–17.03.23), IT (04–10.3.24). [Esser et al., 2025](#): 37.

For smaller public service and commercial catalogues, even fewer UK titles could be found ([Table 3.3](#)), although these sometimes featured prominently at the top of home pages. In sum, despite the availability of thousands of British programmes, only a small proportion of titles ever appear prominently on landing pages, underscoring how availability does not equate to exposure diversity (what viewers encounter).

Table 3.3 Estimated numbers of unique UK titles (incl. co-pros) found on PSM and commercial home pages in Denmark, the Netherlands, Germany and Italy

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
UK titles/co-pros found across PSM categories/searches	NA	69	12	44
Including UK titles/co-pros found on PSM home page only	21	10	5	26
UK titles/co-pros found across Commercial categories/searches	NA	96	168	192
Including UK titles/co-pros found on Commercial home page only	5	32	108	19

Notes: Screenshots were taken of homepages and selected rows/categories specific to each market. PSM platforms include DRTV (DK), NPO Start (NL, 11 categories), ZDF Mediathek (DE, 12 categories), RaiPlay (IT, 13 categories). Commercial platforms include TV2 Play (DK), Videoland (NL, eight categories), Prime Video (DE, seven categories), Now (IT, nine categories).

Source: SEwB analysis of landing pages of PSM and commercial streamers in DK (10–16.09.22), NL (25.09–01.10.23), DE (11–17.03.23), IT (04–10.3.24). Analysis of TV2 Play and DRTV in Denmark was restricted to the daily home page. [Esser et al., 2025](#): 40.

Audience encounters and discoverability

As others have noted, audience routes to finding titles are complex, shaped by the limitations of discoverability, the dominance of US platforms, and varying degrees of active searching (see Damásio et al., 2025; Frey, 2021; Iordache et al., 2024; Johnson et al., 2023). Alongside algorithmic streamer recommendations made prominent in decks and visual thumbnails, other routes include recommendations from friends and family, social media (a mélange of industry and user-generated promotion) and active user searches for specific titles or performers that partly undermine more ‘deterministic’ accounts about the power of streamer algorithms (Lobato et al., 2024: 1340; Lüders and Sundet, 2022). SEwB’s surveys sought to shed light on the discovery process by connecting catalogue research with viewing practices. British titles found on home pages and in other searches were cross-checked against titles remembered and viewed by survey respondents to assess the extent to which prominent positioning on landing pages is reflected in recollections of British titles.

What UK titles are watched and remembered on which platforms?

SEwB survey respondents recalled between 271 (IT) and 479 (NL) unique UK TV titles, and between 71 (NL) and 333 (DE) unique film titles. The top twenty British TV shows are dominated by titles on streaming platforms led by Netflix (see Table 3.4), ranging from 11 out of 20 in Denmark and the Netherlands (55%) to 14 out of 20 in Germany and Italy (70%).

Survey respondents across the four countries remembered similar UK TV titles. Two Netflix originals, *Sex Education* (2019–23) and *The Crown* (2016–23), appeared in the top five recalled shows for all four countries, as did *Sherlock* (2010–17), available on various platforms. *Peaky Blinders* (2013–22) appeared in the top six. Although strikingly similar, there are variations. Respondents in Denmark and the Netherlands, two subtitling countries, recalled titles spanning more genres, including Channel 4’s baking show *Great British Bake Off* (2010–), and comedy panel formats like Channel 4’s *Taskmaster* (2015–). In both countries, this may be attributable to YouTube, which appears to function as a streaming alternative for British comedy and ‘an infinite amount of [UK] panel shows’ (Thomas, DK, 29). The latter includes Channel 4’s ‘highlights from *8 out of 10 Cats Does Countdown*’ and BBC panel shows *QI* (2003–) and *Would I Lie to You?* (2007–). By contrast, the top 20 titles in Germany and Italy were all fiction, with the exception of BBC Studios’ motor-ing format *Top Gear* (2002–22) in Italy.

Respondents recalled about 115 UK series titles on Netflix per country. This contrasts with far fewer TV titles recalled on public service platforms: 6 on Germany’s ZDF Mediathek; 12 on Italy’s RaiPlay; 30 on the Netherlands’

Table 3.4 Top 20 British TV series/shows recalled and watched by survey respondents, ranked by number of mentions

	DK	Platform	NL	Platform	DE	Platform	IT	Platform
1	<i>Sherlock</i> (83)	Various	<i>Sex Education</i> (126)	Netflix	<i>Sherlock</i> (141)	Various	<i>Peaky Blinders</i> (114)	Netflix
2	<i>Peaky Blinders</i> (63)	Netflix	<i>Sherlock</i> (116)	Various	<i>Sex Education</i> (92)	Netflix	<i>Sex Education</i> (109)	Netflix
3	<i>Sex Education</i> (59)	Netflix	<i>The Crown</i> (82)	Netflix	<i>The Crown</i> (67)	Netflix	<i>The Crown</i> (100)	Netflix
4	<i>Downton Abbey</i> (58)	Netflix	<i>Peaky Blinders</i> (75)	Netflix	<i>Doctor Who</i> (63)	Various	<i>Sherlock</i> (77)	Sky/ Prime
5	<i>The Crown</i> (57)	Netflix	<i>Great British Bake Off</i> (73)	NLZiet	<i>Fleabag</i> (62)	Prime	<i>Black Mirror</i> (62)	Netflix
6	<i>Midsomer Murders</i> (51)	DRTV	<i>Doctor Who</i> (70)	Various	<i>Peaky Blinders</i> (52)	Netflix	<i>Bridgerton</i> (57)	Netflix
7	<i>Doctor Who</i> (37)	Prime	<i>Fleabag</i> (66)	Prime	<i>Downton Abbey</i> (49)	Netflix	<i>Skins</i> (50)	Netflix
8	<i>Mr Bean</i> (36)	TV2Play	<i>Heartstopper</i> (64)	Netflix	<i>Skins</i> (49)	Netflix	<i>Fleabag</i> (47)	Prime
9	<i>Bridgerton</i> (35)	Netflix	<i>Black Mirror</i> (61)	Netflix	<i>Mr. Bean</i> (47)	Prime	<i>Downton Abbey</i> (42)	Prime
10	<i>Great British Bake Off</i> (33)	TV2Play	<i>Taskmaster</i> (61)	YouTube	<i>Black Mirror</i> (36)	Netflix	<i>Mr Bean</i> (42)	Prime
11	<i>Black Mirror</i> (33)	Netflix	<i>Downton Abbey</i> (47)	Netflix / NPO	<i>The End of the ****ing World</i> (35)	Netflix	<i>The End of the ****ing World</i> (42)	Netflix
12	<i>The Office</i> (31)	Netflix	<i>Broadchurch</i> (41)	Disney+	<i>Broadchurch</i> (33)	Disney+	<i>The Office</i> (US version) (39)	Netflix
13	<i>Taskmaster</i> (29)	TV2Play	<i>The End of the ****ing World</i> (41)	Netflix	<i>Derry Girls</i> (32)	Netflix	<i>After Life</i> (35)	Netflix
14	<i>Skins</i> (28)	Netflix	<i>Derry Girls</i> (38)	Netflix	<i>Heartstopper</i> (31)	Netflix	<i>Doctor Who</i> (33)	Pluto TV

15	<i>Derry Girls</i> (28)	Netflix	<i>Bridgerton</i> (37)	Netflix	<i>Monty Python's Flying Circus</i> (30)	Netflix	<i>Heartstopper</i> (25)	Netflix
16	<i>Top Boy</i> (27)	Netflix	<i>Killing Eve</i> (37)	Videoland	<i>Misfits</i> (26)	Various	<i>Top Gear</i> (18)	Netflix /Prime
17	<i>Heartstopper</i> (23)	Netflix	<i>Cunk on Earth</i> (36)	Netflix	<i>The Office</i> (UK) (24)	Netflix	<i>One Day</i> (17)	Netflix
18	<i>QI</i> (22)	ALL	<i>Good Omens</i> (36)	Prime	<i>Bridgerton</i> (23)	Netflix	<i>Derry Girls</i> (14)	Netflix
19	<i>Love Island</i> (22)	Viaplay	<i>After Life</i> (34)	Netflix	<i>After Life</i> (22)	Netflix	<i>Game of Thrones</i> (13)	Sky Now
20	<i>Fleabag</i> (20)	Prime	<i>Midsomer Murders</i> (34)	NPO Start	<i>Bodyguard</i> (21)	Netflix	<i>Top Boy</i> (13)	Netflix

Notes: *Bridgerton* (2020–present) is listed as a US production on IMDb, but was attributed to Britain by many respondents, because of British settings and actors; *Game of Thrones* was identified as British, although the United States is the lead production country. It was not always clear whether respondents recalled the British or US version of *The Office*.

Source: SEWB surveys in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Can you tell us the titles of British screen content you have watched? Please list as many titles as you can – current or older.’ Base: All respondents aged 16–34 who answered this question: DK n =370, NL n =376, DE n =377, IT n =448. Esser et al., 2025: 31.

Table 3.5 Top 10 British films recalled and watched by survey respondents, ranked by number of mentions

	DK	NL	DE	IT
1	<i>Harry Potter</i> (102)	<i>Monty Python</i> (15)	<i>Harry Potter</i> (112)	<i>Harry Potter</i> (124)
2	<i>James Bond</i> (64)	<i>James Bond</i> (10)	<i>James Bond</i> (61)	<i>Notting Hill</i> (50)
3	<i>Love Actually</i> (35)	<i>Pride & Prejudice</i> (9)	<i>Pride & Prejudice</i> (39)	<i>The King's Speech</i> (34)
4	<i>Notting Hill</i> (32)	<i>Love Actually</i> (8)	<i>Love Actually</i> (36)	<i>James Bond</i> (27)
5	<i>Kingsman</i> (30)	<i>Kingsman</i> (7)	<i>Notting Hill</i> (30)	<i>Pride and Prejudice</i> (26)
6	<i>Bridget Jones's Diary</i> (27)	<i>Notting Hill</i> (6)	<i>Kingsman</i> (22)	<i>Trainspotting</i> (25)
7	<i>Monty Python</i> (26)	<i>Paddington</i> (6)	<i>The Imitation Game</i> (21)	<i>Dunkirk</i> (22)
8	<i>Dunkirk</i> (19)	<i>Harry Potter</i> (5)	<i>Enola Holmes</i> (18)	<i>Love Actually</i> (22)
9	<i>Fantastic Beasts</i> (18)	<i>Absolutely Fabulous</i> (4)	<i>Fantastic Beasts</i> (18)	<i>Bridget Jones's Diary</i> (19)
10	<i>Hot Fuzz</i> (16)	<i>Bridget Jones's Diary</i> (4)	<i>Paddington</i> (18)	<i>Billy Elliot</i> (16)

Note: The number of film titles listed in NL was much lower than in other markets. This may be due to wording in the Dutch survey.

Source: SEWB surveys in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Can you tell us the titles of British screen content you have watched? Please list as many titles as you can – current or older.’ Base: All respondents aged 16–34 who answered this question: DK n =370, NL n =376, DE n =377, IT n =448. Esser et al., 2025: 32.

NPO Start; and 38 on Denmark’s DRTV. Few of these titles appeared in the top 20, except for the long-running detective series *Midsomer Murders* (1997–), ranking 6th in Denmark and 20th in the Netherlands.

Survey responses for films were dominated by the same older and frequently shown titles, including the *Harry Potter* franchise (2001–11), rom-coms *Notting Hill* (1999) and *Love Actually* (2003) or films watched in school, notably *Pride and Prejudice* (2005). While many feature on SVoDs, they are also widely available on other platforms. Across *all* film and TV titles, *Harry Potter* was the most recalled title in Denmark and Italy, and the top film title in three countries, except the Netherlands (Table 3.5).

Discovery drivers

SEWB surveys showed that while streamer recommendations are the most important source of discovery for British titles among 16–34-year-olds (65%), the decision to view is also strongly shaped by recommendations from friends and family (56%) and social media (52%) (see Table 3.6). Discovery varies by age group. In particular, social media (a mixture of industry and

Table 3.6 Content discovery drivers by age, in %

	All	16–19	20–24	25–29	30–34
Recommendations from the streaming services I use	65	54	67	67	69
Recommendations from friends or family	56	53	52	59	61
Clips and trailers on social media like YouTube, TikTok, Instagram, etc.	52	62	61	49	33
From film and TV reviews in podcasts, blogs, news outlets, etc.	30	18	29	33	36
I look at what is offered on TV channels	11	13	9	9	14
Other (incl. influencers, fan websites, etc.)	6	5	6	4	8

Source: SEWB surveys in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–March 2023), IT (Jan–March 2024). Question: ‘How do you usually find out about the British screen content you watch? (pick max. three options).’ Base: All respondents aged 16–34 who answered this question: Combined $n=1,524$.

user-generated promotion) emerged as the most important source for those aged 16–19 (62%), coming second for those aged 20–24 (61%).

SEWB digital diaries, documenting the actual viewing of 365 unique titles by 102 participants (20–28 participants per country) over five days, confirmed the importance of streamer recommendations (41% IT; 43% NL; 44% DE; 58% DK), followed by recommendations from friends and family (29% DK; 30% DE; 34% NL; 38% IT). Social media recommendations were reported less consistently than in the survey (13% IT; 16% DE; 17% NL; 20% DK), which may be due to the comparatively small viewing sample. However, it may also be an indication that the influence of social media is overestimated because of the stickiness of social media hype surrounding a small number of shows (see below). The small sub-samples within age groups limit any age-related comparisons. Film and TV reviews ranked from 2% in Germany to 18% in Italy. ‘Other’, which has some crossover with social media, ranked from 10% in Germany to 20% in Italy. Finding content on TV channels varied in Germany (9%), Denmark (11%), Italy (16%) and the Netherlands (22%).

Of note, 20–21% of SEWB survey respondents in each market reported actively searching actively for British titles. This was higher among those aged 30–34 (28%) and lower among those aged 16–19 (14%). Active searches tended to focus on specific shows or actors. Netflix, YouTube and social media were named most often for UK content searches, with Netflix proving the most popular access point (82–83%) for survey respondents in all markets.

British actors proved a strong reason for some interviewees to seek out British titles. Gemma (IT, 17) watched the Sherlock Holmes spin-off *Enola Holmes* (2020–26) because it starred Millie Bobby Brown, who she knew

from the Netflix series *Stranger Things* (2016–25). Interest in Netflix's LG-BTQ+ coming-of-age original *Heartstopper* (2022–) was sparked by Max's (DE, 17) prior knowledge of the actors on social media. As he explained, 'before it came out, I think I already followed two of the actors in it [on Instagram], and I already liked those actors'.

However, while 47% of survey respondents reported watching British content because they are fans of British actors, many interviewees could not name British actors they liked. The most mentioned included Hugh Grant, Colin Firth, Keira Knightley and Benedict Cumberbatch, known either from US productions or for their roles in some of the most remembered British films (see Table 3.5). Younger stars such as Tom Holland (*Spider-Man: Homecoming*, 2017) and Florence Pugh (*Little Women*, 2019) were also known from US productions. Cillian Murphy (who is Irish) was named by several interviewees for his leading role in *Peaky Blinders*. Younger stars like Asa Butterfield, Louis Partridge, Aimee Lou Wood and Emma Mackey were known from Netflix's *Sex Education*. In Denmark and the Netherlands, where interviewees were more aware of British reality and entertainment formats, YouTube clips of comedy panel shows (e.g., 8 *Out of 10 Cats Does Countdown*, 2012–), and comedians prompted searches for more content. Anders (DK, 28) noted how YouTube 'led me on to watch David Mitchell. And then on Danish Netflix I watched *Peep Show*'. Similarly, Annette (NL, 19) encountered clips of comedian James Acaster in YouTube memes from *The Great British Bake Off* and *Taskmaster*, before searching further on Netflix.

The role of social media in the discovery of UK content

Digging deeper, interviews revealed that many British titles are discovered through humorous social media clips, supplemented by broader social interactions. YouTube appeared to be more influential among men than women. TikTok was more important for women and younger interviewees aged 16–19; Instagram and Twitter for those aged 20+. Gaming platform Discord was an important source of recommendation for a few younger male interviewees aged 16–19. Thomas (DK, 29) referred to social media 'buzz' for discovering UK drama *Sherwood* (2022), which he 'wouldn't have heard of' otherwise.' Jytte (DK, 25) cited clips from the new *Dr Who* series on her Instagram feed. Lars (DK, 31) spotted a YouTube clip for *Bodyguard* (2018). Gina (IT, 16) was drawn to Netflix's *Heartstopper* by a TikTok video, prompting her to follow the actors on Instagram. For Christian (DK, 18), YouTube's algorithms functioned as 'a trailer or a teaser to some of the bigger formats'. Didier (29, DE) discovered clips of comedians like Ricky Gervais on YouTube before searching further on Netflix.

Maddalena (IT, 19) was typical in outlining how social media functions as a source of discovery:

[...] Sometimes trailers come up, trailers on TikTok, or videos of people talking about a film and then [...] I get curious, and I watch the trailer on YouTube. Then...I don't know, even on Twitter, maybe someone talks about a film.

Social media clips created memorability through repetition and 'buzz'. For Karl (NL, 18), social media like TikTok worked as a reminder of what might be missed:

a lot of times on TikTok you get, like, a very short snippet of a certain movie or show, and then sometimes even shows you've already watched, and you're, like, 'I want to rewatch it!'

Similarly, Lina (DE, 18) recalled how social media posts generated anxiety about missing out and wanting to belong:

I would say there's a bit of pressure there because everyone's like, 'Oh, we watched *Bridgerton*!', for example, or something like that. And if you haven't watched it, it's like, 'Oh my gosh, you have to watch it!'

However, interviewees were acutely aware that social media are also heavily shaped by 'second-order' algorithmic interventions (see Johnson et al., 2023: 1640). For Elisa (IT, 26), TikTok's algorithms showed her 'things that maybe I haven't watched, but which are very much in line with other series I watch, or other films'. Christian (DK, 18) remembered being 'pushed content' on TikTok about celebrities, including chef Gordon Ramsay and *Top Gear* presenter Jeremy Clarkson. Annette (NL, 19) recalled TikTok's 'algorithm thing, so the more you watch [*Taskmaster*] [...] of one thing, the more it appears on your "For You" page'. Emilia (DE, 24), commenting on YouTube, remarked on 'having slipped into some kind of algorithm', where 'I keep having trailers washed in'. If she liked the clip or knew the actor, she would scroll through the comments, before deciding to add it to her 'personal movie list'.

Interviewee accounts of social media discoveries also strongly suggest that it is *other* users' repeated engagement and the 'buzz' they create, often through humorous comments and edits, that prompt younger audiences to explore further, in preference to streamer recommendations or official clips, which were often deemed boring or less trustworthy. For Mette (DK, 19), social media is a 'really major influence' as 'everyone kind of wants to be part of the discussion'. Trust was important for Elodie (NL, 26), who followed accounts 'that

curate the stuff that I know' and for whom it was important to 'have some recommendation from somewhere else' in addition to 'the recommendations that the algorithm gives me'. Selina (IT, 17) claimed social media 'plays a huge role in finding new TV series and films' and for getting 'good references' on platform recommendations. Jamal (DE, 22) used YouTube reviews to establish 'why a show is hyped'. Didier (DE, 29) underscored the significance of user-generated memes on TikTok and Instagram as 'an indicator that this series is worth watching. [...] because people are watching this series, people are loving this series and people are relating to the series in a way that they want to express themselves through memes'.

The process of social media recommendation culminating in viewing was described by Helle (DK, 17), who called TikTok a 'very good platform' to:

find people who have made an edit of all the good scenes from a TV show [...] maybe with a song over it, to give it some drama. Then you can go in the chat function and see all the people talking about it. And often people in the comments section say 'It's a really good show! You have to watch it!', and then you get intrigued, and you find it on your streaming platform.

The strength of social media 'clout' and trust in social media recommendations is such that it can even reverse negative impressions created by official trailers, especially through humour. Derja (DE, 25) cited 'hilarious' user-generated TikTok clips of British show *I May Destroy You* as more important in getting her to watch than official trailers, which 'didn't capture what it was about!', because 'nowadays, the people making the trailers don't know any more what actually captures young people's attention', a sentiment expressed by many interviewees. For Floor (NL, 20), repeated humorous TikTok posts from other users about *Fleabag* sparked interest as 'I wasn't necessarily interested in it at first, but after I was, like, "I'll give it a go"'. For Kenny (NL, 18), 'funny' clips on gaming platform Discord, which generated user responses, made him think 'What is that? Let's look it up real quick!'

Social media appear to be particularly important for humorous titles that may not always appear prominently on VoD home pages. Social media-driven humour, an important reason for choosing British content (Chapter Four), proved key for discovering niche comedy drama *Derry Girls* (2018–22) and mockumentary *Cunk on Earth* (2022) on Netflix.

Although set in Northern Ireland with strong Irish accents, *Derry Girls* appeared consistently in each market's top 20 most recalled and viewed TV shows, ranking 13th in Germany, 14th in the Netherlands, 15th in Denmark, and 18th in Italy (see Table 3.4). This title was never located in extensive searches of Netflix landing pages or searches for British shows during SEwB sampling weeks. Social media clips were key for prompting further searches. Anders (DK, 28) found it as a 'funny clip based on the algorithm' on Facebook

or Instagram, which encouraged him to look it up on Netflix. Hype on TikTok, and the many short clips produced by users, convinced Derja (DE, 25) to watch because:

when I saw the clips on TikTok, just a couple of weeks ago, I was really interested [...] it's mostly fan-made stuff I see and not the trailer. [...] And the fan-made stuff is like 15 seconds or something. But I see the fan-made stuff and if it interests me, then I will watch the trailer.

Similarly, *Cunk on Earth* never appeared on Netflix's home page, although it was located in searches for 'British programmes' in Italy, the Netherlands, and Germany (not in Denmark, where it was released after the survey). It ranked 17th in the Netherlands, 29th in Italy and 37th in Germany among survey respondents. Again, discovery seems largely due to social media memes on Instagram and TikTok. Eduard (NL, 21) discovered it through 'random clips' on social media, prompting him to ask, "Oh, is this a comedy skit, or is this actually real?" And then I searched it up a bit more, and then I just decided to watch it with my girlfriend'. Bart (NL, 17) also caught a 'super funny' clip on TikTok, 'so I watched the entire show'. Similarly, Derja (DE, 25), recounted seeing clips to the point where 'I saw so many of them, and the [TikTok] algorithm knew that I watched one to the end, so they will show me more and more, and then I was interested. And then I said "OK, you know what? I will just watch the show"'.

In summary, younger audiences clearly value social media recommendations from other users, but it is important to recognise the role of what [Johnson et al. \(2023: 1630\)](#) call 'second-order algorithmic recommendations' which determine 'buzz' and make it difficult to disentangle audience agency from streamer/industry recommendations, social media recommendations, and input from friends and family ([Lüders and Sundet, 2022: 348](#)).

Platform algorithms and catalogue recommendations

While the survey provided insights into the perceived relevance of discovery drivers in general, interviews, combined with evidence of titles promoted on landing pages and titles mentioned by survey respondents, confirmed the strong influence of streamer recommendations. The most remembered titles were also the most visible on platform interfaces, but this does not hold for all titles, as suggested in the previous section.

Building on digital diaries, which asked how participants learned about the titles they viewed and which services they accessed, interviewees were asked to describe how they routinely accessed and explored content. Algorithmic streamer recommendations emerged as clearly important for discovery, often

informed by habit and platform features. Lotte (DE,19), referring to Netflix, was fairly typical in stating:

I start off looking at the Top Picks for myself and just scroll through those in its entirety, but if I can't find anything on that, I just look through the categories of shows that I like.

Many interviewees described coming home and turning to their favourite global streamer, usually Netflix, to check and browse personal recommendations, 'scroll down' and then 'swipe from right to left' (Eduard, 21, NL) or to 'check what's new that week' (Elisa, IT, 26). For Didier (DE, 29), this meant thinking about 'Which series are new, which are relevant, which are popular at the moment?' For Alessandro (IT, 34), going to Netflix first was 'out of habit more than anything else [...] not with the idea of watching something specific'. Although some typically visited YouTube first for entertaining short-form content, for long-form content they relied on streamers, like Markus (DE, 26), who remarked: 'if I really feel like watching a series or something similar, then I would look at Netflix or Amazon Prime'. Many mentioned adding titles, often recommended by streamers, but also from friends, social media or their own research to a 'watchlist'. For most, a combination of drivers came into play, including valued interactions with 'real people' (Didier, DE, 29). For example, Anke (DE, 28) was drawn to Netflix's *Sex Education* because it 'was very hyped', 'recommended by Netflix' and because friends 'were talking about it and recommended it'.

About one-third of Netflix titles recalled by survey respondents (between 32% in the Netherlands and 37% in Denmark) also appeared in Netflix searches across the 10 specified categories in the week analysed (see [Table 3.2](#)). Focusing on the home page only, about half of UK titles (45% in the Netherlands to 54% in Italy) were recalled by survey respondents ([Table 3.7](#)). This suggests

Table 3.7 UK shows found on Netflix and recalled by survey respondents

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
UK titles/co-pros on Netflix recalled in survey	113	113	117	140
UK titles/co-pros found across 10 Netflix categories/searches	207	217	209	208
Of which this number were recalled and watched by survey respondents	77 (37%)	79 (32%)	67 (36%)	72 (35%)
UK titles/co-pros found on Netflix Home Page only	51	48	42	46
Of which this number were recalled and watched by survey respondents	27 (52%)	22 (52%)	22 (45%)	25 (54%)

Source: SEwB landing page research in DK (10–16.09.2022), NL (25.09–01.10.2023), DE (11–17.03.2023), IT (01–10.03.2024).

Table 3.8 Top 10 most promoted UK TV seasons on Netflix's Home Page, ranked by number of appearances

	DK	NL	DE	IT
1	The Crown (13)	Sex Education (12)	<i>MH370: the plane that disappeared</i> (12)	<i>The Gentlemen</i> (10)
2	Peaky Blinders (9)	<i>Top Boy</i> (12)	<i>The Last Kingdom</i> (7)	<i>One Piece</i> (7)
3	Downton Abbey (7)	<i>One Piece</i> (7)	Downton Abbey (6)	Peaky Blinders (7)
4	Sex Education (7)	<i>The Last Kingdom</i> (7)	<i>Formula 1: Drive to Survive</i> (6)	Sex Education (7)
5	<i>Formula 1: Drive to Survive</i> (7)	Downton Abbey (7)	<i>Luther</i> (6)	<i>One Day</i> (2024) (7)
6	<i>I am a Killer</i> (7)	<i>Formula 1: Drive to Survive</i> (7)	Peaky Blinders (6)	<i>My life with the Walter Boys</i> (7)
7	<i>Merlin</i> (7)	Heartstopper (7)	The Crown (6)	<i>Fool me Once</i> (7)
8	<i>The Last Kingdom</i> (7)	<i>Inside the World's Toughest Prisons</i> (7)	<i>The Sandman</i> (6)	The Crown (7)
9	<i>The Sandman</i> (6)	Peaky Blinders (7)	<i>Top Boy</i> (6)	<i>Beckham</i> (5)
10	<i>Dated and Related</i> (6)	<i>Who is Erin Carter; Band of Brothers; Who Killed Jill Dando; The Witcher</i> (7)	<i>Lockwood & Co</i> (6)	<i>Formula 1: Drive to survive; The Last Kingdom</i> (4)

Notes: Number of appearances are shown in brackets. Bold titles appeared in the top 20 recalled seasons (see Table 3.4). Excludes children's animation and shows where the United Kingdom is not the lead co-producer.

Source: SEwB landing page research in DK (10–16.09.2022), NL (25.09–01.10.2023), DE (11–17.03.2023), IT (01–10.03.2024).

that titles promoted on the Netflix home page tend to be the most popular UK titles (i.e., the most watched and remembered).

However, frequent appearances on Netflix landing pages do not tell the whole story. While the most frequently mentioned TV series, namely *Peaky Blinders*, *Sex Education*, *Downton Abbey* (2010–15) and *The Crown* (see Table 3.8), were promoted almost daily at the top of the Netflix home page, other heavily promoted UK shows, including documentaries (*MH370*, 2023; *Beckham*, 2023; *Formula 1*, 2019–) hardly featured in survey, digital diary or interview responses, possibly because they were less interesting for this age group or were not recognised as British. This shows that while prominence is strongly related to what is discovered and remembered, it does not apply to all British titles.

Awareness of UK origin can be impeded not only by the transnational look and feel of some shows but also by the lack of streamer labelling. This became evident in a digital diary exercise in which SEwB digital diarists in the Netherlands, Germany and Italy were asked to scroll down their favourite streamer (usually Netflix) to see whether they could locate a category for British film and/or TV. In Germany 81% ($n = 26$) and in Italy 64% ($n = 28$) could not locate a British row. Although 61% in the Netherlands ($n = 28$), the country most familiar with British screen content (see [Chapter Two](#)), could, 71% of these only found it after row ten. Interviews further revealed that if a 'British' category was found, it appeared too far down, below row ten, for respondents to notice. This contrasts with dedicated rows for non-English-language titles from Korea, Scandinavia, Spain and Europe, which interviewees watching shows from these countries remembered seeing frequently.

Conclusion

Analysis of availability within catalogues, and how content is filtered and presented across markets, services and proprietary interfaces, offers some indications of what audiences are likely to encounter, but with many caveats ([Iordache et al., 2025](#)). What content audiences get to see, and whether they engage with it, is shaped greatly by availability, positioning within interfaces and algorithmic recommendations, not only on streaming platforms, but also on social media, both of which are dominated by the US media and tech industry.

Audience research, as argued here, adds a necessary dimension to our knowledge of catalogues by providing insights into how audiences discover what to watch, the extent of their agency, and how these choices relate to algorithmic VoD and social media recommendations. Our research shows that availability and prominence greatly influence the extent to which certain titles are discovered and viewed. Among thousands of British titles, SEwB catalogue and landing page research revealed that only a relatively small number are easily discoverable. On Netflix, for example, about 200 British titles were found on landing pages in each market and about one-third of these were recalled by young survey respondents.

Yet audience routes to discovery are also complex, shaped not only by prominence and algorithms, but also by social media and recommendations from friends and family, underlining the interplay and tensions between algorithms, individual agency and social context. While streamer personalisation and social media algorithms direct viewing to a significant degree, as others have noted, 'viewers usually appreciate or actively seek more information before making decisions' ([Damásio et al., 2025](#): 1584) including from friends and family adding 'nuance to claims about the deterministic power of algorithms to shape viewer behaviour' ([Lobato et al., 2024](#): 1341).

In summary, pathways to discovery are primarily influenced by industrial factors and by what global streamers recommend, as evidenced by the most

remembered UK series titles (see Table 3.4), and the extent to which viewing is shaped by habit, presentation and streamer recommendations. Audiences do exercise agency by searching for and acting upon ‘trusted’ recommendations mediated by ‘real people’ within social circles or from other social media users, even though these recommendations, both ‘real life’ and online, are also embedded within and structured by algorithmic interventions that are difficult to disentangle from audience agency. Our findings suggest that further research is needed on viewing contexts (within the home, with whom), but also, crucially, on the extent to which social media are increasingly influenced by industry players (producers, streamers, social media platforms), seeking to raise visibility and user engagement by co-opting user-generated content. This risks biases both through the remuneration of those who promote content and also through the increasing use of AI, which can work against genuine ‘authentic’ user engagement, something this research has shown young people clearly trust and value.

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4 What appeals to young audiences in Europe about British screen content?

Introduction

While [Chapter Two](#) revealed the unrivalled dominance of US content and English-language viewing among 16–34-year-olds in Denmark, Germany, the Netherlands and Italy, [Chapter Three](#) showed that audiences discover British content and decide what to watch based on a combination of availability, promotion and prominence. Acknowledging that UK content is less central for young audiences than US output, this chapter explores the motivations of young audiences in Europe for seeking out British productions, and the attributes and values they recognise as distinctly ‘British’.

We begin with an overview of how international programme flows were theorised in the past to contextualise this chapter’s transnational approach for understanding young audiences’ viewing motivations and pleasures. The theory exposition reconsiders previous models of ‘geocultural’, ‘cultural linguistic’ ([Straubhaar, 2007](#)) or ‘geo-linguistic’ ([Sinclair et al., 1996](#)) proximity, redefines linguistic proximity by highlighting the proximity young people in Europe feel towards the English language ([Bengesser et al., 2022](#); [Esser and Steemers, 2026](#)) and introduces new transnational conceptualisations that transcend space- and place-bound notions of proximity. These include ‘cosmopolitan proximity’ and ‘emotional proximity’ ([Jensen and Jacobsen, 2020](#)), ‘life-world relevance’ and ‘practical sense making’ ([Eichner, 2020](#)). While not exhaustive explanatory models, they help advance our understanding of how young transnational audiences make sense of British screen productions in times of pervasive media globalisation.

Theory exposition is followed by analysis of *Screen Encounters with Britain* (SEwB) audience data, including surveys ($n = 1813$), digital diaries ($n = 102$) and interviews ($n = 86$), beginning with quantitative survey findings that provide an overview of the factors motivating young viewers to watch British content and the diverse values and attributes they associate with it. The subsequent analysis of digital diaries and interview findings adds further depth about the strongest values and viewing motivations, namely the appeal

of the English language, humour, and in relation to recent youth-oriented shows, available mostly on Netflix, perceptions of quality based on authenticity, relatability and relevance.

Theories of international programme flows

In the broadcast era, when viewing choices were limited to a small number of channels targeting mass audiences, broadcasters in most TV markets relied either on US imports or imports from countries considered culturally, linguistically and geographically close to fill gaps in their schedules (Biltereyst, 1992; Sinclair et al., 1996; Straubhaar, 1991; Varis, 1984). Theorisations aimed at understanding the international appeal of US films and TV fiction concluded that the United States held a competitive advantage because of its market size, large production and marketing budgets, and its commercial approach to screen content (Hoskins and Mirus, 1988). Culturally, US productions were deemed to be more attractive to a broad international audience because of their ‘cultural transparency’, a result of the ‘melting pot’ composition of American society (Olson, 1999).

Countering fears of US cultural imperialism (e.g. Schiller, 1976), audience researchers Liebes and Katz (1990) argued that the reception of US content, such as the popular soap opera *Dallas* (1978–91), varied across disparate ethnic and national audiences due to cultural differences. For instance, while Arab viewers discussed *Dallas*’ moral dilemmas and kinship roles, American audiences highlighted the soap’s entertainment value. Barker and Mathijs (2008) also adopted a ‘national culture’ reception approach in their large-scale international study of *The Lord of the Rings* (2001–03). Both studies were critiqued for a circular argument, which first postulated cultural difference, then used this to explain the findings (Harindranath, 2005; Kuipers and de Kloet, 2009).

Cultural difference and similarity were also central factors in the foundational works of Straubhaar (2007) and Sinclair et al. (1996), who established that TV programme flows across Latin America and Asia were delineated by ‘geo-linguistic’ and ‘geocultural’ spaces. Straubhaar argued that ‘culture defines markets, principally at local, national, regional, and cultural linguistic levels’ (2007: 4) and that audiences prefer national, followed by regional television from culturally proximate neighbouring countries. He acknowledged that ‘(w)ithin the logics of cultural proximity and cultural attraction in cultural-linguistic spaces, many other forces also apply’ (2007: 197), including ‘genre proximity’ (the common structure of melodrama), ‘thematic proximity’ (e.g., themes like upward mobility that appeal in many countries) and ‘value proximity’ (e.g., religious values) (2007: 199–202). He further noted that age, gender and class generate differences in both consumption and reception. Nonetheless, he prioritised cultural identities rooted in space, place and language over these other factors (2007: 227) until later findings (Straubhaar

et al., 2023) led him to foreground a more class-based Bourdieusian theory of cultural capital and distinction.

Trade flows in Europe, meanwhile, were complicated by linguistic and, it was argued, national cultural diversity (De Bens and de Smaele, 2001; Varis, 1984). While US content came to dominate imports in all Western European countries, other imports, including from the United Kingdom, varied (see Esser et al., 2025: 23). British imports, while comparatively high in all our case study countries, were much more prominent in the two smaller countries, Denmark and the Netherlands, which produce comparatively little and watch with subtitles, than in Germany and Italy, which produce more domestically and watch dubbed imports (see Chapters One and Two). As outlined in Chapter One, Britain's comparative success, across Europe as well as globally, used to be explained by longstanding collaboration with US partners (for example on crime thrillers and period drama), the English language, and titles which are not 'recognisably British' such as animation, natural history and formats (Steemers, 2004: 14).

Research on international TV flows and reception has long been underpinned by ideas of national culture, with space-, place- and language-based 'cultural proximity' dominating theorisation of the cross-border appeal particularly of non-US film and television fiction (Adriaens and Biltereyst, 2012; Dhoest, 2013; Ksiazek and Webster, 2008; Trepte, 2008). However, both theoretical critique (Aksoy and Robins, 2000; Athique, 2016; Harindranath, 2005) and changes in the contemporary mediascape suggest a re-examination of the cross-border consumption and reception of screen content is warranted.

A new transnational approach to understanding appeal

While culture clearly matters for the consumption and reception of screen content, it is important to recognise that cultural identification is multifaceted, context-dependent and subject to change over time (Massey, 1994). Globalisation theorists have long argued that simplistic notions of 'national culture' risk essentialising culture by ascribing homogenous, immutable traits to specific populations, often numbering in the tens of millions, while ignoring internal diversity and cultural change (Tomlinson, 1991). Consequently, conceptualisations of 'national audiences' defined by a unified 'national culture' as well as constructions of diasporic audiences caught in between two national cultures (Aksoy and Robins, 2000; Athique, 2016) are also of limited analytical value.

In today's world of ubiquitous global digital communication flows, the national paradigm seems increasingly unsustainable, reinforcing the need to query national culture and national audiences as well as cultural proximity based on geographical closeness. As Tomlinson (1991: 23) contends, place-bound conceptions of culture are indefensible because culture 'is entirely, even definitely, the work of human beings' and hence cannot belong

‘to a region in the sense that flora and fauna are “natural” to it’. We argue that pervasive global communication and the hegemonic role of the English language are forces likely to cause change and therefore warrant attention.

Recent transnational theorisations guide our analysis. First, in considering the role that the English language plays in audiences choosing to watch British content, we draw on our own theorisation (Bengesser et al., 2023; Esser and Steemers, 2026), arguing that content preferences, at least among young people in Europe, are no longer determined by linguistic proximity. Due to its pervasiveness across social media and global streaming platforms, English has become the foreign language that *feels* closest to young people in Europe, superseding languages that are linguistically similar. Widespread familiarity with English also means that content produced in the native language loses a key advantage.

Our analysis of humour, the second strongest value that our research participants attributed to British screen content, explores ideas of ‘cosmopolitan proximity’, introduced to TV audience research by Jensen and Jacobsen (2020) to move beyond explanations of cultural sameness. Drawing on Calhoun (2008), they identify two manifestations of cosmopolitan proximity that help explain transnational consumption and reception. The first is people’s willingness and ability to engage with non-local and unfamiliar cultural influences (stylistic capacity). The second is their ability to sense and appreciate cultural difference (psychological capacity). Jensen and Jacobsen’s explanations, which are relevant to our findings on humour, are reminiscent of Jenkins’ ‘pop cosmopolitanism’, whereby ‘transcultural flows of popular culture inspire new forms of global consciousness and cultural competency’ (2006: 170) that transcend national boundaries.

Our third focus on authenticity, relatability and relevance, values that interviewees frequently cited for specific British productions, builds on Jensen and Jacobsen’s concept of ‘emotional proximity’, linked to ‘universal human emotions and conditions’ (2020: 8). The concept resembles Ang’s (1982) theory of ‘emotional realism’, developed from research with Dutch fans of US soap opera *Dallas*. While Ang argues that fans loved *Dallas* for its characters’ ‘realistic’ emotions, despite recognising the fictional world as unrealistic, Jensen and Jacobsen argue that Danish drama appeals to transnational audiences because they perceive and value both the characters *and* the fictional worlds they inhabit as authentic and realistic. Relatedly, drawing on Weiß’s (2001) concepts of ‘lifeworld relevance’ and ‘practical sense making’, Eichner contends that cross-border audiences relate to Danish TV drama because the stories resonate with their life circumstances and phases, dominant themes in their lives, their attitudes and values (2020: 109–10). These findings, like our own, revive the explanatory power of Straubhaar’s (2007: 195–206) underexplored ‘thematic’ and ‘value’ proximities.

Our transnational framework is not to be understood as an exhaustive interpretative framework. As Ang (1982: 5) points out, transnational popularity is ‘an extremely complex phenomenon’, and there are no simple answers. We chose

the theories above because they make a valuable contribution to our understanding of how young transnational audiences in Europe make sense of British screen productions and advance our theoretical quest to reassess notions of geocultural and geo-linguistic proximity in times of pervasive media globalisation.

Motivations for watching UK content: An overview

Complementing [Chapter Three](#)'s analysis of the availability, prominence and discovery of UK titles on streaming services, we sought to establish personal motivations for engaging with British content, as well as the values and attributes associated with it. To ensure validity, motivations, values and attributes were interrogated multiple times as follows. To avoid prompting, survey respondents were first asked about their general viewing habits and preferences, then invited to list British films and TV shows they had watched, followed by a few words they associated with each title. Across all four countries, 'humour' and related terms, including 'funny', 'fun', 'comedy' and 'irony', were by far the most numerous. Other frequent terms included 'history', 'romance', 'fantasy', 'action', 'crime', 'quality' and 'entertainment'. Later, survey respondents were asked to indicate their agreement with 18 slider-scale statements. First, they were presented with nine possible 'reasons for choosing UK content' ([Table 4.1](#)), followed by nine 'value' statements ([Table 4.2](#)).

Table 4.1 Motivations for choosing UK content in Denmark, the Netherlands, Germany and Italy, ranked by agreement, in %

	<i>All</i>	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
English is easier to follow than other foreign languages	66	63	66	78	57
I like the humour in British content	62	68	70	63	44
I like British characters and their stories	49	52	45	53	45
I am a fan of certain British actors or celebrities	47	46	47	45	50
I enjoy watching British settings, landscapes and people	45	31	34	58	59
It helps me to learn English	43	26	30	53	65
I enjoy learning about British history, events or personalities	41	45	35	41	46
There is a good variety of British content to choose from	40	38	44	37	33
British content is better than content from other countries	31	31	35	26	31

Note: Each statement had a slider scale ranging from 'disagree' to 'agree' (0–100). For the analysis, responses set between 60 and 100 were defined as agreement.

Source: SEWB surveys in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: 'How important to you are the following reasons for choosing British screen content?' Base: All respondents aged 16–34 who used the slider scales: combined $n=1,446-77$; DK $n=345-59$, NL $n=348-71$, DE $n=332-43$, IT $n=402-17$.

Table 4.2 Value statements in Denmark, the Netherlands, Germany and Italy, ranked by agreement, in %

	<i>All</i>	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
British acting is of high quality	66	69	65	71	58
British content feels realistic or authentic	52	57	58	44	45
British content deals with themes I can relate to	43	41	45	41	48
I can relate to it easily because I can identify with the people in it	39	38	40	41	35
British content is intellectually stimulating	38	49	25	32	48
British content deals with topics that are important to young people	35	32	26	38	46
British content appeals because it reflects ethnic diversity and LGBTQ+ communities	30	25	27	33	37
Domestic content feels more relevant than British content	18	20	15	7	31
British fictional content feels gloomy and unpolished	16	30	13	7	11

Source: SEWB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Questions: ‘What do you think about the following statements other people have made about British screen content’ and ‘What do you feel when watching British screen content’? Base: All respondents aged 16–34 who used the slider scales: combined $n=1,507$ –26; $DKn=378$, $NLn=373$ –76, $DEn=342$ –51, $ITn=413$ –22.

The ‘motivation’ statement receiving the most support in all four countries was ‘English is easier to follow than other foreign languages’. Between 57% of respondents in Italy and 78% in Germany agreed. Next came ‘I like the humour in British content’. Humour was the top motivation in the Netherlands (70%) and Denmark (68%) and the second most important in Germany (63%). In Italy, humour ranked only seventh (44%), for reasons which will be explored later.

Statements receiving agreement from approximately half of respondents included ‘I like British characters and their stories’ (45–53%) and ‘I am a fan of certain British actors or celebrities’ (45–50%). Watching UK content because ‘it helps me to learn English’ was most important in Italy (65%) and aligns with differing levels of language proficiency, outstanding in the Netherlands and Denmark, very high in Germany, and moderate in Italy (EF EPI, 2024).

Survey respondents were later asked to indicate their agreement with statements of what others had, factually or purportedly, said about British screen content (Table 4.2). ‘British acting is of high quality’ received the highest agreement in all four countries (58–71%). ‘British content feels realistic or authentic’ was the second highest-ranking value, scoring more highly in Denmark (57%) and the Netherlands (58%), where there is greater exposure to a variety of UK genres, compared to Germany (44%) and Italy (45%), where

viewing of UK content is more limited. Just under half of respondents felt they 'can relate to the themes in UK screen content' (41–48%), with fewer believing they 'can relate to it easily because I can identify with the people in it' (35–41%).

Unexpectedly and importantly from a theoretical perspective, only between 7% (Germany) and 31% (Italy) of respondents felt that 'domestic content feels more relevant than British content'. This is partly due to dissatisfaction with domestic content (see [Chapter Five](#)), a further motivation for watching UK content, uncovered during interviews. However, at least two other factors are relevant for forming this perception. Life-world relevance and practical sense-making offered by recent UK youth-oriented productions like *Sex Education* (2019–23) and *Heartstopper* (2022–24) on Netflix create both relevance and emotional proximity. Linguistically, viewers' daily or near-daily participation in a mediascape dominated by English (particularly on YouTube and TikTok) suggests increasing familiarity with and proficiency in English, which in turn appears to foster feelings of linguistic and cosmopolitan proximity.

The English language – redefining 'linguistic proximity'

Responses to the survey question about the main motivations for choosing British content highlight the twofold importance of the English language: its 'accessibility', which makes content, whether viewed with or without subtitles, easier to follow than other foreign-language programmes, as well as the opportunities British content offers to 'learn English'. Theoretically, this confirms the importance of the linguistic dimension while calling into question earlier arguments about preferences for content in the native language, followed by linguistically proximate content ([Sinclair et al., 1996](#); [Straubhaar, 2007](#)). Calling for a revision of the linguistic proximity argument, we argue that young audiences in Europe rank English-language film and TV fiction above both domestic and linguistically proximate content, and that English *feels* to them like the most proximate foreign language.

The top ranking of Anglophone screen content is evident in both country-of-origin preferences, where the United States comes top and the United Kingdom second in both Germany and the Netherlands (see [Table 2.5](#), [Chapter Two](#)), and in actual viewing recorded in digital diaries where between 71% (in Italy) and 84% (in Germany) of viewed episodes originated from English-language countries (see [Table 4.3](#)).

Language settings recorded during the diary phase confirmed the predominant use of English-language soundtracks when viewing English-language episodes. In Denmark (96%), the Netherlands (87%) and Germany (83%) over 80% of viewing of non-domestic films and TV shows took place with the original English soundtrack. In Italy, dubbing (40%) was the preferred mode of viewing among diary participants. However, combined English-language

Table 4.3 Origin of episodes viewed in Denmark, Germany, the Netherlands and Italy, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
Share of US episodes incl. co-pros with the United Kingdom and others	59	51	55	66
Share of UK episodes excl. co-pros with the United States	24	16	22	5
Share of other English-language episodes (Australia, New Zealand)	0	1	7	0
Combined share of English-language episodes	83	68	84	71
Share of domestic episodes	14	15	9	23
Share of European episodes	2	9	3	2
Share of other episodes	1	8	4	4

Source: SEWB digital diaries in DK, NL, DE, NL. Base: 1,044 episodes viewed over five days by 102 digital diary respondents aged 16–34.

viewing, whether with English, native-language or no subtitles, exceeded dubbing, reaching 53% (see [Table 4.4](#)).

Supporting [Chiaro's \(2018: 7\)](#) claim that ‘the English language dominates both the real and the virtual world of the World Wide Web’, teacher interviewees in all four countries emphasised English’s unrivalled status as the top foreign language in schools, and both teachers and young interviewees remarked on the pervasive presence of English in the digital mediascape.

Interviews also illuminated the impact of this on perceptions of linguistic proximity. They revealed that in Denmark, English has come to feel more proximate than Swedish or Norwegian (also see [Chapter Two](#)). Lars (24), like other interviewees from Denmark, prefers English-language content despite the linguistic proximity of Scandinavian languages because he ‘might have

Table 4.4 Language settings for foreign language episodes viewed in Denmark, Germany, the Netherlands and Italy, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
English dubbed into native language	0	0	13	40
English with English subtitles	62	47	30	30
English with native language subtitles	23	21	6	19
English without subtitles	11	19	47	4
Combined English (no subtitles, English-language and native language subtitles)	96	87	83	53
Other language dubbed into English	0	0	0	0
Other language dubbed into native language	0	0	0	0
Other language with English subtitles	1	6	0	1
Other languages with native language subtitles	3	5	4	3
Other language without subtitles	0	2	0	3

Source: SEWB digital diaries in DK, NL, DE, NL. Base: 883 foreign language episodes viewed over five days by 102 digital diary respondents aged 16–34.

to read subtitles more with the Norwegian or Swedish' shows. In the Netherlands, English now seems like a second native language, feeling much more proximate than German, a linguistic cousin of Dutch. Some young people like Kris (26, NL) even 'enjoy speaking English more than I do speaking Dutch.' A buyer (2, NL) confirmed, 'we are very quick to sort of "abandon" our own language. [...] I think in time, the Dutch language might simply disappear, and everybody might be talking English'.

In the two larger countries, Italy and Germany, where dubbed viewing still dominates (Esser et al., 2023b: 26–9, 2024b: 28–31), the status of both English and English language viewing is lower but is gaining ground due to the linguistic accessibility of English, as revealed in the survey (see Table 4.1). Benedetta (24, IT) noted it was common for her and her friends to watch English-language content in the original language, but not content in other foreign languages. Derja (25, DE) felt similarly:

It's not that the other countries are not interesting. I'm sure they are interesting, but [...] you have to translate them. And the British ones, you don't have to necessarily translate them – you can just watch it as it is.

Many interviewees in both Germany and Italy reported watching both dubbed and English-language soundtracks, depending on who they were watching with (Esser et al., 2023b, 2024b).

Interviews confirmed the motivation of 'learning English' for watching English-language content and they confirmed that the market variations in the survey (see Table 4.1) can be accounted for by variations in English-language proficiency. For the youngest (16–19), learning English was a stronger motivation for watching British content than for older age groups. Of note, 59% of all 16–19-year-olds in the survey agreed this was a motivation, including 47% in Denmark, 55% in the Netherlands, 68% in Germany and 72% in Italy. This was also true of those older than 19 in Germany and Italy. For Luisa (23, DE) 'Watching something in English is an easy way for me to practise my English'. For Riccardo (24, IT), it 'helps me to improve the language'. In Denmark and the Netherlands, interviewees mentioned learning English when looking back to their childhood transition from watching dubbed children's content to subtitled content (mostly in English), and later when switching from native language subtitles to English subtitles (for more detail, see Esser et al., 2023a, 2023b, 2024a, 2024b).

Interviews also revealed how the omnipresence of English and English-language content in the digital mediascape gradually impacts media consumption. Lotte (19, DE) illustrated how watching English-language content on YouTube can lead viewers in traditional dubbing countries like Germany to later engage with English-language 'long-form' screen content as well:

Well, it started through the Internet because when I was younger, I wanted to better my English skills, so I started watching some English

Youtubers. And just watching that kind of made me interested in watching more and more and more, and so it got to the point where I just started only consuming English content and basically kind of abandoning the German content.

Her digital diary confirmed that over five days of viewing, she only watched shows from English-speaking countries, doing so in English with English subtitles. Her preference for watching English-language content in English on global streaming platforms was not unusual. In Germany and Italy, significant numbers of young people are watching British or US shows using the original English-language soundtracks (Chiario, 2018: 47; Esser et al., 2023b, 2024b; Schmidt, 2016). In Denmark and the Netherlands, where adult content is not dubbed, interviewees reported a generational shift from watching English-language content with native language subtitles to using English subtitles (Esser et al., 2023a, 2024a).

The English language, we argue, is highly significant for the transnational distribution and consumption of UK content. As Mast et al. (2017) have also argued, English, strengthened by its association with high-quality acting and production values, helps create a self-perpetuating cycle of preferences for Anglophone media. Of course, it is US, not UK, content which dominates Anglophone screen culture, but this dominance also supports the circulation of UK content, which offers its own distinctive values, which are recognised by young audiences across all four countries.

The strong appeal of British humour – a case of ‘cosmopolitan proximity’

The survey revealed the strong appeal of British humour (see Table 4.1), which is closely connected to language. Language proficiency was the most significant variable for the appreciation of British humour, rising from 18% among those who self-assessed their English-language proficiency as ‘school level’ to 46% among those with ‘conversational’ skills, and 67% among those who considered themselves to be ‘fluent in any situation’. Appreciation of British humour also increased with age and educational attainment, evidence that cultural capital plays a significant role in the consumption and reception of humour (see Arning, 2021; Claessens and Dhoest, 2010; Friedman and Kuipers, 2013).

However, the remarkably high appreciation of distinctive British humour also challenges the idea that a ‘nation-based sense of distinctiveness’, recognised by audiences ‘through culture, language and humour’, strongly impacts engagement and reception, rendering culturally distant screen content less pleasurable and meaningful (Tan, 2011: 347). In the following interview analysis, which confirms the strong appeal of British humour, we focus on this undertheorised aspect of transnational appeal, arguing instead that today’s

digital mediascape, dominated by English, produces 'cosmopolitan proximity', which facilitates the circulation of British humour among younger audiences.

Cosmopolitan proximity reveals itself in the significant numbers of young people willing to incorporate what they perceive as 'British humour' into their media consumption (stylistic capacity), as well as in their ability to feel at ease with and appreciate cultural difference within British humour (psychological capacity) (Calhoun, 2008: 431; Jensen and Jacobsen, 2020: 12–15). This applies to both original and translated British humour, as well as unscripted and scripted comedy.

Until recently, 'humour does not travel' was common industry lore (Franks, 2022), reinforced by the purported international 'niche' appeal of British 'oddball' comedy (Steemers, 2004: 13). However, our interview findings reveal that it is not only slapstick comedy (e.g. *Mr. Bean*, 1990–95) that enjoys wide transnational appeal, but other forms as well. Humour, and more specifically 'British humour', was the value mentioned most frequently in relation to British content, and it emerged without prompting. As Per (25, DK) explained: 'The humour is a really big part. It's very special [...] probably the main thing I think about when I think about British stuff'. Interviewees across all countries praised the 'special' and 'unique' nature of 'British humour', repeatedly using the same words: 'ironic', 'eccentric', 'black', 'subtle', 'irreverent' and 'intelligent'. These descriptions are consistent with findings from other audience studies (Claessens and Dhoest, 2010; Friedman and Kuipers, 2013).

Comedy drama including *Fleabag* (2016–19), *Derry Girls* (2018), *After Life* (2019–22), *The Lobster* (2015), *In Bruges* (2008) and the mockumentary *Cunk on Earth* (2022) were mentioned for their clever, sarcastic humour. In Germany, Markus (29, DE), an administrator in health insurance, 'really liked' the Netflix drama *After Life* because of Ricky Gervais' dry and 'very classic British humour'. Lotte (19, DE), a high school student, enjoyed the Channel 4 comedy game show *Taskmaster* (2015) and comedian James Acaster because of his 'kind of flat, but also like really hilarious kind of humour'. Danish and Dutch interviewees, with wider exposure to British shows both online and on television, mentioned several comedy panel shows like *8 Out of 10 Cats* (2005–), with many admiring British comedy talent, including Lee Mack, panellist on *Would I Lie to You?* (2007–) and Graham Norton, host of *The Graham Norton Show* (2007–).

Mirroring survey findings, interviews in Italy showed the weakest association of UK content with humour. One plausible reason is that Italian viewers are the least familiar with British shows (see Chapter Two). Those who expressed a strong appreciation of British humour cited the same reasons as interviewees in the other markets. 'British humour' may also stand out less because Italy has the largest share of young people watching dubbed shows (see Table 4.4). As dubbing involves extensive adaptation of humour (Barra, 2015; Carra, 2009; Chiaro, 2018), it can make 'British humour' less

noticeable. Even so, for 44% of Italian survey participants, British humour was a motivation to watch UK content (see [Table 4.1](#)).

In addition to their appreciation of ‘British humour’, many interviewees also commented favourably on humour as an integral component across all UK genres, not just comedy. Talking about *Derry Girls*, Dutch arts student Karl (18) noted, ‘there’s some very intense episodes, that deal with big themes but still make it kind of funny and sitcom-like. [...] I really like how they did that’. Software developer Martijn (27, NL) remarked that one of the things he enjoys about British productions is ‘a real culture of combining the two; of having funny things happen alongside tragic things’. [Woods \(2016\)](#), who has charted the development of British youth television during the 2000s and early 2010s, supports this perception of drama fused with comedy as a defining feature of British productions, a development shaped by research with UK youth audiences ([Arning, 2021](#); [Hammett, 2021](#)). Many of our interviewees shared the desire for more humorous content, accompanied by a sense that local broadcasters were not doing enough to meet audience demand (see [Chapter Five](#)).

Global streaming platforms and social media offer a solution to the dearth of humour on domestic outlets. Three factors, we believe, are responsible for the remarkable awareness of humorous UK content among young audiences and their strong appreciation and understanding of ‘British humour’. First, British youth-oriented productions are seen as providing something that audiences feel is lacking at home. This is supported by the pervasiveness of humour on social media, heavy use of intertextual references ([Arning, 2021](#): 289), and ‘second-order’ algorithmic interventions ([Chapter Three](#)), which promote humorous British titles on social media. Third, awareness is shaped by the one-way flow of comedy from English-language markets to the rest of the world (both dubbed and subtitled), but rarely in reverse ([Chiaro, 2018](#): 37). As a result, many young people in Europe have come to embrace British comedy, comedy-drama and ‘British humour’ and with this have come to know and appreciate its cultural difference. They have developed cosmopolitan proximity or, perhaps more precisely, Anglophone proximity.

Relevance, relatability, authenticity – ‘emotional proximity’ and ‘practical sensemaking’

The value of authenticity/realism achieved high levels of agreement in the survey, ranking after ‘British acting is of high quality’ (see [Table 4.2](#)). However, acting quality attracted few comments from interviewees (see [Chapter Three](#)), in contrast to authenticity which was frequently linked to relatability and relevance. These three values were particularly evident when interviewees reflected on British programmes they had recently watched. A small number of youth-oriented productions, mostly on Netflix, stood out, revealing strong appeal across all four countries.

'Emotional proximity', enabled by universal human emotions and conditions and by authentic characters and life worlds (Jensen and Jacobsen, 2020), as well as 'lifeworld relevance' and 'practical sense making' (Eichner, 2020), emerged strongly in many statements about the relatability, authenticity and relevance of recent youth-oriented British productions, such as *Sex Education*, *Heartstopper*, *Derry Girls* and *Skins* (2007–13) on Netflix, and *Fleabag* on Prime Video. Interviews demonstrated that these shows reflect young people's life worlds, and the themes and concerns that dominate their lives.

Referring to *Heartstopper*, Gina (16, IT), a high school student, said that 'it's very relatable to everyday experiences' and this was 'the main reason' for her liking the show. Trainee teacher Emilia (24, DE) felt that with *Sex Education* 'it was easy to kind of just fall in love with each character and really enjoy watching how they manage steering through teenagehood'. For economics student Rion (19, IT), *Sex Education* was 'about maturity [...] about kids who are bullied, about how to avoid this'. Masters student Kris (26, NL), who was studying English, concluded that *Sex Education* and *Heartstopper* are 'aimed at helping people understand themselves'. In the words of Eichner (2020) and Weiß (2001), they help young viewers make 'practical sense' of their own lives.

Fleabag, which was applauded for both its quality of writing and 'British humour', also resonated because of the emotional proximity felt by audiences. For Benedetta (24, IT), who had recently graduated, conversations in *Fleabag* 'could easily be conversations I would have'. Daniele (25, IT), an architect, noted: 'In many European cities, you can find this loneliness, this woman, this city, with perhaps messed up relationships, both family and love relationships'. *Derry Girls*, despite being set in 1990s Northern Ireland, evoked a similar response in high school student Tamara (16, NL), who remarked that the female protagonists 'kinda looks like our friend group [...] And I can really relate to, like, what they're doing and stuff'.

Emotional proximity to characters, their conditions and life worlds is strongly underpinned by perceptions of authenticity. Authenticity is 'central to youth identity' (Woods, 2016: 9) because adolescence is a time preoccupied with the search for a true self, and one in which insecurities make emotions intensely felt. Woods (2016: 74) argues that contemporary UK youth television's 'emotionally saturated expressions of melodrama' are one of the elements that lend it authenticity. This was confirmed by Lene (DK, 17), who felt that Danish series 'don't really trigger your emotions, which I like when I'm watching a love story'. This, she added, was why she prefers American and British shows to domestic shows. Similarly, Gina (16, IT) was attracted by the emotions generated by LGBTQ+ relationship drama, *Heartstopper*, and had recommended it 'to a few friends, and one of them got really passionate about it, and so we talk about it all the time'.

Slightly older interviewees also linked authenticity to the sympathetic treatment of sensitive issues and to character depth. Kris (26, NL) praised *Skins*, *Heartstopper* and *Sex Education* for their 'honest view on mental

health' and the 'authentic representation' of LGBTQ+ people. Rosa (26, DK) thought that *I May Destroy You* (2020) was 'really well-made' because the topic of rape was dealt with 'really seriously'. Emilia (24, DE), who is training to become a teacher, was recommended *Heartstopper* by a peer so that she could 'include the topic of sexual diversity in the classroom'.

Additionally, and similar to [Jensen and Jacobsen's \(2020\)](#) findings about the transnational appeal of Danish TV drama, slightly older interviewees praised British productions for their 'realistic' and 'authentic' fictional worlds, especially compared to US drama (see [Woods, 2016](#): 71–86). According to Lars (24, DK) 'more space and time' was 'given over to day-to-day life' in UK drama. Rosa (26, DK) pointed to the different accents that help viewers 'understand the characters', thereby enhancing authenticity. Markus (26, DE) remarked on the role of different British accents in *After Life* for providing an 'authentic' and more 'immersive' experience than German productions, which only use 'standard German', a practice confirmed by [Weissmann \(2025](#): 66–85).

The extent to which cultural specificity can hinder perceptions of relevance and subsequent audience engagement, as previously argued ([Hoskins and Mirus, 1988](#); [Tan, 2011](#)), is difficult to determine. Our findings suggest that while cultural specificity may pose an initial hurdle to viewer engagement, social media hype sparks curiosity and opens a door ([Chapter 3](#)). Once the initial hurdle is overcome, cultural specificity becomes both an authenticity and a diversity bonus ([Fuqua, 2012](#); [Woods, 2016](#)). A change in Netflix's content strategy seems to reflect this insight. Drawing on findings from Netflix trailers, [Asmar et al. \(2025](#): 561) argue that while the streamer originally sought to de-nationalise content to attract transnational audiences (see [Jenner, 2021](#)), recent teen series produced outside the United States seem to indicate an 'emphasis on the culturally specific' at both the narrative and visual level, as Netflix continuously negotiates the local and the global in terms of both production and audience engagement.

All the British shows brought up by interviewees appealed strongly across borders and were perceived as relevant because they have the capacity to generate emotional proximity through authentic characters and life worlds, as well as thematic and value proximities. They offer young viewers opportunities to 'make sense' of their life worlds, while also allowing them to laugh and be entertained. These qualities proved more important than geo-cultural or geo-linguistic similarity.

Conclusion

This chapter aimed to deepen our understanding of the non-industry structural factors that drive young transnational audiences to engage with British shows. While survey findings and digital diaries provided the bigger picture, interviews offered richer insights into the values viewers recognise or feel most strongly about, most notably the benefits of the English language (in terms of both accessibility and

language learning), the appeal of what interviewees perceived as 'British humour' and the fusion of humour and drama in contemporary UK youth-oriented productions. Interviews also revealed perceptions of relevance, relatability and authenticity associated with recent youth shows, most of which are available on Netflix.

We argued that perceptions of relevance and relatability were not determined by national culture and identity, by place-based cultural proximity, or by (science-based) linguistic proximity. Instead, they were determined by 'youth identity' and emotional proximity grounded in authenticity, lifeworld relevance and practical sense-making, or in [Straubhaar's \(2007\)](#) terms, by thematic and value proximity. Where these factors are present, even programmes with a high degree of cultural specificity (e.g. *Derry Girls*, *Fleabag*) can attract young transnational audiences.

We also found that humour in British screen productions resonates strongly with young viewers across all four case studies, although in Italy this was true for a smaller proportion of participants. We argued that its widespread appeal reflects growing (pop) cosmopolitan proximity, in this case determined by the English language. Not only do today's young viewers embrace and appreciate humour across genres as a defining characteristic of British screen content, but they also appreciate what they perceive as the unique and distinctive form of 'British humour'. Rather than hindering transnational consumption and reception, these perceptions of 'cultural distinctiveness' found in 'British humour' were central to the appeal of British productions.

Finally, we argued that the circulation of British screen content is facilitated by the English language, which for many young people in Europe *feels* like the most proximate foreign language, and for some like a 'natural' second language. Consequently, global Anglophone culture is often perceived as more culturally proximate than the screen cultures of neighbouring countries, even those with closely related languages. We would even go so far as to suggest that English has become the language of screen media in countries with very high English language proficiency, such as Denmark and the Netherlands. Traditional dubbing countries such as Germany and Italy are more varied in their viewing practices. However, now that viewers have the option of watching the original soundtrack, significant numbers of young viewers in these countries are opting to watch in English (with or without subtitles), at least some of the time. Consequently, both domestic and geo-linguistic screen cultures are losing some of their linguistic advantages. Like cultural proximity, linguistic proximity can be subjective, and in both cases, perceptions of what feels proximate appear to be changing.

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5 The impact of global streaming on national broadcasters and domestic content

Introduction

Earlier chapters demonstrated a strong preference among young audiences in Europe for global streaming platforms and English-language productions over domestic services and content, with attention paid to the factors underpinning the appeal of British content. Refocusing the analytical lens, this chapter offers a detailed examination of the factors contributing to the diminishing appeal of both domestic services (linear channels and national streaming platforms) and domestic content in our four case study countries.

We argue that the long-term transnational shift in the European television industry (Chalaby, 2009; Esser, 2002), dramatically accelerated by the arrival of global streamers from the 2010s (Lobato, 2019), has significantly reshaped young audiences' perceptions about the relevance and cultural resonance of domestic content in relation to Anglo-American productions. For many young viewers in Europe, for whom English increasingly functions as a de facto second language, and who have grown up immersed in narratives and images originating primarily in the United States and, to a lesser extent, the United Kingdom, 'the domestic' no longer occupies a privileged cultural position. Taken together, the findings of our audience research provide empirical support for theories of cosmopolitanism (Szerszynski and Urry, 2006) and transnationalism (Vertovec, 1999), which conceptualise global media as a form of virtual 'travel' that, along with other modes of global connectivity, has created 'the conditions for a cosmopolitan mode of being-in-the-world' (Szerszynski and Urry, 2006: 115) characterised by new forms of 'nearness' and 'closeness' (see Chapter Four).

This chapter begins by providing a brief historical account of the emergence and resilience of nationally oriented dual public-private television systems in Western Europe during the 1980s and 1990s, when public service monopolies were broken. Despite intensifying transnational forces, these systems remained dominant, at least in terms of viewing and overall cultural impact, through the first decade of the new millennium. However, the arrival of Netflix in the early 2010s, followed by other global streaming platforms,

accelerated the erosion of the national dimension in ownership, service provision (from generalist to thematic channels to streaming platforms), and content. The section that follows reviews current industry trends, showing that national broadcasters, both public and private, continue to play a major role as investors in domestic and European content, despite steadily losing ground to global streaming platforms over the last decade. The second part of the chapter turns to our audience research, shifting the focus from industry to audiences and examining the main reasons why both domestic providers and domestic content perform poorly among young viewers across our four national case studies.

The rise and resilience of Europe's dual public-private TV systems

Until the late 2000s, Western European television systems could be best described as *nationally oriented* dual public-private systems (Iosifidis et al., 2005; Wieten et al., 2000). Private channels, introduced in most Western European countries from the mid-1980s onward, complemented national PSBs that had previously held a state monopoly (Donders et al., 2013). Although the timing and specific modalities of introducing private television varied across countries, as did its impact on PSBs, the resulting dual systems shared a similar structure and 'managed to survive, indeed, even emerge stronger from technological evolutions' throughout the 1990s and early 2000s (Michalis, 2013: 38).

Importantly, while transnational influences gradually became more pronounced over time, the dual system that characterised European television during this period remained fundamentally national, and the transnationalisation process evolved in a non-linear manner. Hollywood movies had long dominated European national box offices, and even during the monopolist phase, PSBs used to air some imports from the United States and other countries (Humphreys, 1996). The arrival of private commercial channels in the 1980s and 1990s, however, led to a dramatic surge in imported programming, mostly from the United States. For newly established commercial channels, acquisitions of Hollywood movies and US TV series represented a cost-effective way of filling their schedules with affordable programming appealing to the young demographic sought by advertisers (Brants and De Bens, 2000: 17–20). In response to growing competitive pressures, PSBs also increased acquisitions and their entertainment output. A 1991 Euromedia study (cited in Humphreys, 1996: 247) found that, averaged across Europe, the commercial sector drew two-thirds of its total supply of movies and just under two-thirds of television series from the United States (whereas average data for PSBs were around half).

However, starting in the second half of the 1990s, as commercial broadcasters became financially stronger, they began to invest more in domestic programming,

signalling a limited reversal in the trend towards the Americanisation of European television. This was partly in response to new EU regulatory requirements mandating that channels licensed in EU member states broadcast a majority of European programming (Micova, 2013). At the same time, it was a commercial strategy as domestic fiction, scheduled in primetime, tended to attract higher ratings than imported content by appealing to a broad audience (De Bens and De Smaele, 2001). In the late 1990s, domestic adaptations of international reality and talent show formats emerged as a highly effective strategy, especially for commercial channels, allowing them to attract (young) viewers with comparatively affordable shows that met EU quotas (Iosifidis et al., 2005: 148–55). From a cultural perspective, TV formats constituted a hybrid form in which national elements nonetheless prevailed over transnational ones (Waisbord, 2004).

Regarding infrastructural development, cable and satellite distribution ushered in a new era of multichannel television from the late 1980s, later reinforced by digitalisation, which significantly expanded network capacity (Papathanassopoulos, 2002). Multi-territory and pan-European channels were distributed via these new networks, while new pay-TV services introduced tiered packages of thematic channels. Many of the most popular among these channels were operated by US media conglomerates such as Disney, Discovery and Time Warner (Chalaby, 2009). Although pay-TV and multichannel expansion had a substantial economic impact on national broadcasters, driving up the cost of sports and film rights, their effect on viewing patterns was less dramatic than anticipated in the early 1990s. The high cost of subscriptions meant that, even in European countries where pay-TV achieved significant penetration, large segments of the population were unable to afford it and continued to rely on free-to-air television. Despite the larger supply of channels, viewing (and advertising revenue) remained concentrated on the main generalist channels (Wieten et al., 2000). Football and blockbuster films served as the primary drivers of pay-TV subscriptions, and while this premium content migrated away from free-to-air television, public service and commercial broadcasters continued to secure high ratings and shape national cultural agendas through domestic fiction, entertainment and adaptations of international formats. Although audiences were fragmented across free-to-air and pay-TV channels, national broadcasters, both public service and commercial, continued to play a central role across all demographics until the arrival of global streamers in the 2010s.

The unravelling of the dual broadcasting model in the streaming era

The last decade has witnessed a dramatic shift away from traditional television, particularly among young audiences, who now spend most of their leisure time on social media and video-sharing sites, such as YouTube and TikTok, as well as on Netflix and other global streamers when engaging with long-form content (EBU, 2025). The dual public-private system that had prevailed in Europe for a quarter of a century, keeping European television

fundamentally national in character, has entered a phase of accelerated decline and is losing its cultural centrality. In Chalaby's words (2025a: 277), US-based platforms are replacing national broadcasters as 'Europe's primary source of entertainment'.

Chalaby (2025b) has examined the economic factors behind this decline. Over the past decade, advertising revenues (the lifeblood of commercial broadcasters) have moved online, to the benefit of big tech firms, and public funding sustaining public service media (PSM) has, at best, stagnated. National broadcasters face a competitive disadvantage compared to global streamers, as they lack the global scale and network effects that benefit the latter. PSM also adopted largely reactive strategies, failing to capitalise on what could have been a first-mover advantage. Although PSM streaming platforms were launched years before Netflix's European entry, it was only after Netflix's rapid adoption that these services underwent significant overhauls, transitioning from experimental and primarily catch-up/archive services to modern, on-demand streaming platforms (D'Arma et al., 2021). By then, Netflix had already secured a considerable first-mover advantage. As discussed in Chapter Two, our survey indicates that PSM streaming services perform relatively better in Italy and particularly in Denmark than in the Netherlands and Germany. Even so, Netflix outperforms PSM services across all four countries among young audiences. The streaming services of commercial broadcasters tend to fare even worse than their PSM counterparts.

The weakening position of national broadcasters in the streaming age is confirmed by the European Audiovisual Observatory (EAO), estimating that in 2023, US companies occupied the top four positions in the ranking of audiovisual groups in Europe by revenues generated in the region (EAO, 2025a: 11). A 'legacy' player, Comcast, owner of the multi-territory Sky pay-TV service, led the pack by a wide margin, with annual revenues of €15.3bn. The next three positions were held by Netflix (a pure streaming service, €8.9bn), Disney (a traditional player that has prioritised streaming in recent years, €8.1bn) and YouTube (€7.3bn). The European revenues of these US companies exceeded those of even the largest national PSM (Germany's ARD and the UK's BBC), major private broadcasting groups (Germany's RTL and the UK's ITV), and leading European pay-TV operators (Canal Plus). By 2023, US streaming and video-sharing platforms accounted for 16% of the top 100 audiovisual groups' European revenues (up from just 3% in 2016), a share rising to just under 40% when US-backed broadcasters are also included. Over the same period (2016–23), the share held by European broadcasters declined from 55% to 45% (EAO, 2025a: 12–15). In 'The Rise and Fall of European Media', Chalaby (2025a) situates the golden age of European broadcasting groups in the 1990s and shows how their period of expansion and regional integration began to unravel in the 2010s, concluding that 'a European media industry has failed to materialize despite sustained policy efforts by the European Union' (2025a: 266).

The implications of these industry trends for the production and circulation of European content are more difficult to assess. Netflix, Disney+ and Prime Video have become major investors in European content. The EAO (2025b: 12–13) estimates that global streamer investment in original European content (excluding news and sports) reached €8.5bn in 2024, representing a 34% share of overall spend (up from just 3% in 2019). Netflix, Disney+ and Prime Video each spent over €2bn on original European content in 2024, together accounting for over 80% of global streamers' spending on European productions (EAO, 2025b: 15). However, their investments are heavily concentrated geographically, with the United Kingdom and Spain accounting together for 58% of the total, at respectively €2.9bn and €2.0bn (EAO, 2025b: 18). Like the United Kingdom, Spain benefits from Spanish being the world's third most spoken language, after Mandarin Chinese and English.

Global streamers' European content is typically licensed, co-financed, or co-produced with local partners, including PSM providers (without often being prominently credited as such). A large proportion of their offer, however, remains of Anglo-American origin. Across Europe, 47% of TV seasons (all presences) available on subscription-based video-on-demand services originated from the United States (EAO, 2025c: 34). Adding UK productions, the share of Anglo-American content can be estimated at almost 60%. Domestic seasons represented only 3%, and content originating from other EU countries 8%. A large share (30%) of TV series originated from non-US/non-European sources, some of which were produced in other English-speaking countries e.g., Canada and Australia (EAO, 2025c: 34). Furthermore, as noted by several authors (e.g., [Idiz et al., 2025](#); [Iordache et al., 2022](#)), the local content that does appear on global streamers is often selected based on its perceived ability to 'travel' and appeal to transnational audiences, in keeping with what [Lotz and Potter \(2022: 688–91\)](#) define as 'placed' stories, globally marketable narratives that stand in contrast to more culturally specific, 'place-based' stories.

Despite global streamers' rapid growth in investments in European content production over the past few years, national broadcasters remain key providers of domestic content. Fostering national identity has always been a central element of the cultural citizenship mandate of PSM (see [Born and Prosser, 2001](#); [Van den Bulck, 2001](#)). This commitment underpins PSM's provision of domestic content, both fiction and entertainment, in line with the historic mission formulated over a century ago by the BBC's first Director-General, John Reith to inform, educate and *entertain* the nation. Beyond supporting PSM's cultural citizenship mission, the promotion of domestic content also serves a more instrumental function in PSM's efforts to secure political support ([D'Arma, 2018](#); [Picard, 2012](#)). As the primary institutional investor in the national television production sector, PSM can position itself as a catalyst for growth in the creative industries through sustained investment in local content (EBU, 2024). For private broadcasters, since the late 1990s, investment in domestic content has become a key differentiation strategy in an increasingly

crowded market, where premium content (Hollywood movies, US TV series and major sporting events) has migrated to pay-TV (Donders et al., 2013).

EAO data show that national broadcasters continue to play a prominent role in supplying domestic content, despite shrinking resources. In 2023, PSM and commercial broadcasters together commissioned 96% of European TV fiction *hours* (39% by PSM and 57% by commercial broadcasters) and 86% of *titles* (55% by PSM and 31% by commercial broadcasters), while global streamers accounted for less than 5% of hours and 14% of titles (EAO, 2024: 29). This highlights a clear divergence between *volume* and *value*. While, as previously discussed, global streamers are now broadly on a par with domestic broadcasters in terms of financial investment in original European content, they remain a relatively minor source in terms of the number of hours and titles commissioned. In terms of spending on original European content (excluding news and sports), EAO (2025b: 15) estimates that the private broadcasting sector combined (including pay-TV) invested €8.8bn, followed closely by global streamers (€8.5bn) and PSM (€7.9bn). This reflects global streamers' stronger focus on fewer higher-budget productions, whereas domestic broadcasters continue to sustain the bulk of European content output, including soap operas and light entertainment. Commercial broadcasters, in particular, build volume with daily, high-output serial drama, while PSM produce more titles.

National broadcasters' capacity to support domestic production is closely linked to population size. In the case of PSM, Germany, with a population of around 83 million and generous funding, is by far the wealthiest country in Europe. A recent European Commission report estimates that German PSM received €8.56bn in public funding in 2021, more than the combined funding of the next three EU countries (Henningsen Consulting and Technopolis Group, 2024: 30). Public contributions in 2021 amounted to €1.82bn in Italy (less than a quarter of German PSM funding), €697m in the Netherlands, and €463m in Denmark. Levels of public funding are a strong indicator of PSM's capacity to support national productions. Germany is by far the leading producer of TV fiction in Europe, both in terms of number of titles (315) and number of hours (2,435) (EAO, 2024: 19–20), with a significant proportion of these productions originating from PSBs, ARD and ZDF. Germany comes second (€4.5bn) after the United Kingdom (€7.3bn) for total spending on European original content (EAO, 2025b: 17), with the United Kingdom producing shorter but higher-budget TV series than Germany (EAO, 2024: 20).

The industry data reviewed in this section, thus, present a complex picture of the availability and circulation of domestic content. On the one hand, global streamers have become significant investors in European production alongside domestic players. Yet for these companies, 'European' largely means the United Kingdom and, to a lesser extent, a small number of major production hubs such as Spain. Their catalogues remain dominated by Anglo-American content. In most European countries, therefore, the supply of domestic content still depends on investment by national broadcasters. Domestic broadcasters'

Table 5.1 Country of origin preferences, top three choices in Denmark, the Netherlands, Germany and Italy for respondents aged 16–34, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
USA	91	90	88	91
UK	78	79	63	58
Domestic	80	52	51	75

Source: SEWB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Which countries (national or international) are your favourite sources when it comes to screen content? Please write your answers starting with your most favourite’. Three fields for ranked responses were provided, 2.9 (DK), 2.8 (NL, IT) and 2.6 (DE) answers per respondent were given on average. Base: All respondents aged 16–34 who answered the question, DK n =413, NL n =386, DE n =380, IT n =531.

ability to sustain domestic production, however, varies widely according to market size and is generally declining, given the financial pressures faced by both public and commercial broadcasters. Against this backdrop, our audience research with young people in Europe, discussed in the next section, reveals that the transnational shift of the streaming era becomes even clearer when we move from questions of availability to actual viewing of domestic content.

Why domestic content fares poorly among young people in Europe

We asked our survey respondents to name the top three countries that produce their favourite screen content. As shown in [Table 5.1](#), domestic programming ranked among the top three choices for 80% of respondents in Denmark and 75% in Italy, placing it second in both countries behind US content (selected by over 90% of respondents). Appreciation for domestic content, however, was significantly lower in Germany (51%) and the Netherlands (52%), where it trailed not only behind US content but also British programming.

When focusing on respondents’ number one choice (see [Table 5.2](#)), the share for domestic content drops even further behind US content: just 24% in

Table 5.2 Country of origin preferences, top first choice in Denmark, the Netherlands, Germany and Italy for respondents aged 16–34, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
USA	55	52	57	61
UK	18	24	20	9
Domestic	24	13	8	20

Source: SEWB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Which countries (national or international) are your favourite sources when it comes to screen content? (most favourite). Base: All respondents aged 16–34 who answered the question, DK n =411, NL n =386, DE n =380, IT n =530.

Denmark and 20% in Italy selected it as their top pick, well behind the United States, chosen by 55% and 61% of respondents, respectively. In Germany (8%) and the Netherlands (13%), domestic content was the top pick of only a small number of respondents. Overall, our survey showed a clear preference for English-language content, primarily from the United States, over domestic programming, though the intensity of this preference varied across the four countries. This was indirectly confirmed through digital diaries. Over a five-day period, 77% of 1,044 episodes watched by research participants were English-language productions, dominated by the United States (58%) and the United Kingdom (17%) (Esser and Steemers, 2026: 25).

These headline findings run counter to long-standing theories suggesting that audiences typically favour domestic television content (e.g., Straubhaar, 2007), while aligning with other recent studies of young people's screen consumption. Investigating Australian teenagers, Potter et al. (2024: 45) found evidence of 'growing engagement with screen stories internationally, facilitated by access to global streaming services and a de-prioritising of Australian content'. Similarly, in their study of 9–17-year-old Danes, Jensen and Mitric (2023: 139) found 'a strong preference for and large consumption of content originating from the US on global streaming platforms' (see also Freudendal et al., 2025; Lüders and Sundet, 2026).

Drawing primarily on qualitative interviews with young viewers, the remainder of this chapter explores the mix of mutually reinforcing factors that help explain why young audiences in these countries tend to prefer US and, to a lesser extent, UK, over domestic screen content. These factors contribute to a self-perpetuating dynamic and a reinforcing cycle of limited exposure and low appreciation for national content (for a similar argument, see Mast et al., 2017).

In unpacking these interrelated dynamics, we remain attentive to national specificities and notable exceptions to predominant patterns, exploring when, where and how young audiences continue (occasionally, if not regularly) to engage with domestic content.

Access and discoverability

Consistent with well-documented industry trends, our research confirms that younger audiences are increasingly moving away from traditional television. As shown in Table 5.3, linear TV channels were selected by approximately only one in five survey respondents in Germany, Italy and the Netherlands as one of their usual destinations for watching long-form screen content, and by less than one in ten in Denmark (7%), the most technologically advanced TV market (see Chapter Two). For Mads (DK, 27), who did not have access to a TV, 'Danish television just isn't really on the menu, so to speak'. Although Lotte (DE, 19) watched 'some livestreams', she did not 'really' watch 'any live broadcast television'. Barbara (IT, 31) admitted to not watching 'classic channels' since 'streaming platforms became popular'. While Daro (NL, 25)

Table 5.3 Use of TV channels in Denmark, the Netherlands, Germany and Italy by age group, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
16–19	10	20	17	17
20–24	10	16	13	21
25–29	4	15	20	18
30–34	2	23	26	15
All	7	17	19	18

Source: SEwB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Where do you usually go when you want to watch such screen content? (Please pick all the options that apply)’; 4.5 (DK), 3.8 (NL, IT) and 4.7 (DE) answers per respondent were given on average. Base: All respondents aged 16–34 who answered the question, DK n =422, NL n =408, DE n =421, IT n =546.

watched news channels on YouTube, he reported not watching ‘TV channels on the TV at all anymore’.

In Germany (26%) and the Netherlands (23%), the 30–34 age group reported watching the most TV. In Italy, it was the 20–24-year-olds (21%), and in Denmark, both the 16–19-year-olds and the 20–24-year-olds (10%). There is no clear pattern (see [Table 5.3](#)). Having grown up in the pre-streaming era, some viewers over 30 were still in the habit of watching sports or major entertainment events on TV channels. Among 16–19-year-olds in particular, linear TV channels were typically used for occasional, and often unengaged, family co-viewing at mealtimes or during Christmas. This may be especially true in Italy, where 15 of 22 interviewees lived with their parents, mirroring the fact that nearly 70% of 18–34-year-olds did so in 2023 ([Eurostat, 2024](#)).

As viewing habits among young audiences continue to shift towards on-demand, our survey confirms the dominance of global streamers over their domestic counterparts. As discussed in [Chapter Two](#), Netflix consistently emerged as a top destination for young viewers across all four countries, followed (with some national variation) by other leading US-based platforms (Prime Video, YouTube and Disney+). [Table 5.4](#) shows that domestic streaming services trailed far behind Netflix. PSM video-on-demand platforms fared comparatively better than their commercial counterparts, although use of PSM streaming services was weighted heavily towards older 30–34-year-olds. Similarly, the digital diaries revealed that only a small proportion of episodes watched by research participants over five days were shown on the main domestic streaming services, less than 5% in Germany, about 10% in Italy and the Netherlands and 14% in Denmark.

Most research participants reported going straight to their favourite streaming service (typically Netflix) when deciding what to view, a finding that aligns with previous studies (e.g., [Johnson et al., 2024](#)). In doing so, they fall out of the habit of using PSM or other local platforms, unless prompted by a specific reason. This pattern emerged clearly from the interviewees. Gabriele

Table 5.4 Use of domestic streaming services vs. Netflix, in %

	DK	NL	DE	IT
Netflix	89	86	89	82
PSM streaming (1)	52	30	30	38
PSM streaming (2)	41	n.a.	34	n.a.
Local commercial streaming (1)	37	16	11	14
Local commercial streaming (2)	n.a.	n.a.	8	10

Note: The figures refer to the following domestic streaming platforms: DK: DRTV (PSM1), TV2 Play (PSM2), Viaplay (commercial); NL: NPO (PSM1), Videoland (commercial); DE: ARD Mediathek (PSM1), ZDF Mediathek (PSM2), RTL+ (commercial 1), Joyn (commercial 2); IT: RaiPlay (PSM1), Sky Go (commercial 1), Mediaset Infinity (commercial 2).

Source: SEwB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: ‘Where do you usually go when you want to watch such screen content? (Please pick all the options that apply)’; 4.5 (DK), 3.8 (NL, IT) and 4.7 (DE) answers per respondent were given on average. Base: All respondents aged 16–34 who answered the question, DK n =422, NL n =408, DE n =421, IT n =546.

(23, IT) reported using RaiPlay several times, ‘but always knowing that a programme I wanted to watch was on there’, rather than just seeking the platform out. For Didier (DE, 29), ZDF and ARD are not even ‘a competitor’ for his attention, ‘because the others [global streamers] are so omnipresent’. Kenny (NL, 19) knew NPO Plus existed in the Netherlands but reported ‘rarely ever using it’.

The more frequently younger viewers use global services to choose what to watch, the less likely they are to encounter domestic content. Some interviewees reported rarely encountering domestic shows because there were not many of them, or they may not be recommended to them: ‘[O]n Netflix, I really only see American or other types of content. And nothing Dutch really gets recommended to me either, so then I don’t really go out of my way to search for Dutch content’ (Eduard, NL, 21).

Quantity and variety

Cementing the position of global streamers, and Netflix in particular, as the default destination for young viewers is the breadth and depth of their offerings. Netflix’s vast range of content across multiple genres often satisfies viewers’ entertainment needs, reducing the incentive to explore alternatives. As one of our interviewees in Germany put it succinctly: ‘On Netflix, they have many more movies and series that you can watch. And they have so many different types of movies and series’ (Lina, DE, 18).

Genre preferences further reinforce the standing of English-language content. The favourite genres were fantasy/Sci-fi, comedy/comedy-drama, action/adventure, precisely those where US platforms have larger catalogues. Yet these are not

genres offered by domestic providers. For Mark (NL, 24), for example, 'There is no Dutch fantasy content, no Dutch sci-fi content. I think to some extent, there are Dutch thrillers and crime series. But those don't interest me, so I don't watch them'. Similarly, Sara (IT, 19) tended to watch mainly US content and never watched Italian shows, because 'They're just comedies that don't make me laugh. [...] I don't think I've ever seen anything of that genre [crime] in Italian'.

Reality TV and talent shows (domestically produced entertainment often promoted as appointment-to-view by domestic outlets) are no longer as popular as they were in the 2000s. This would also explain why younger viewers are less engaged with domestic platforms, even in the Netherlands, a world leader in entertainment formats like *The Voice* (2010–22). As discussed in Chapter Two, non-scripted entertainment genres ranked much lower than fictional content among our survey respondents. Interviews suggested that younger viewers have outgrown these formats, that they watch them less with family members and that appointment-to-view shows no longer fit lifestyles more attuned to on-demand viewing. Kenny (NL, 18) explained that he 'used to watch a lot of reality TV and talent shows', but that 'We're just not the age of that anymore'. For Floor (NL, 20), these are shows 'that you need to follow every single week, but for some reason, I can't really remember to watch those things every single week'.

Although no longer the most favoured genres, reality and talent shows still appeal to some. This was particularly evident in Italy, where more interviewees lived with their parents, and where some Italian entertainment shows appeared repeatedly in digital diaries (e.g., *Pechino Express* [2012–present] on Sky). For example, Maddalena (IT, 19) sometimes watched the game show *L'Eredità* (2002–present) on Rai Uno, 'even if it's a bit 'old'.

The few Interviewees that expressed a liking for non-scripted genres offered various reasons for their preferences, such as a love for a particular genre or for specific shows (prompting them to watch both domestic and American or British versions of the format), as well as motivations relating to escapism, relaxation and sociability. Their appeal also often stems from cultural resonance and familiarity: these genres are transmitted in the local language, feature recognisable local celebrities and generate shared cultural reference points among circles of friends. For Ellen (NL, 33), Dutch reality shows were 'more recognisable' and if 'friends and colleagues are talking about it, [...] then I'm, like, triggered to also watch it'. Similarly, for Helle (DK, 17), if particular shows were being heavily publicised, 'you just watch the Danish one [version] because then you can talk to almost all your friends about it'.

Quality and reliability

As discussed so far, for many young European viewers, Netflix and, to a lesser extent, other global streamers have become the default destination for long-form screen entertainment, offering vast catalogues in favourite

genres dominated by Anglo-American productions. Our study, however, revealed not only limited exposure to domestic services but also, in many cases, an outright dislike of domestic productions. Fiction was frequently criticised for poor acting and weak storytelling compared to US and UK productions and was often seen as less attuned to themes that young audiences find relatable.

Some of our younger interviewees across all four countries struggled to articulate their views, instead expressing their disinterest and dislike for domestic content in a matter-of-fact manner. Hanne (DK, 19) stated bluntly, 'I actually don't watch it [Danish film and TV programmes] that much. It's just not that interesting!' For Mila (DE, 16), 'We [my family] don't watch any German movies or series at all, because my parents and I, we just don't like the stories'.

Others elaborated on the reasons for their dislike. In Denmark, Germany and the Netherlands, domestic fiction was often described, without prompting, with the same English word 'cringe' (or 'cringy'), particularly by those under 25. Helle (DK, 17), for example, expressed a dislike for Danish programmes because 'it's kind of cringe in some ways to see my own language being used'. 'Cringe' (and its variant 'cringy') is in common usage among northern European youth, so much so that it was chosen as Germany's youth word of the year for 2021 (DW, 2021).

Beyond perceiving one's own culture and language as cringeworthy, other frequent criticisms of domestic content revolved around bad acting and script-writing that was not 'always as fleshed out' (Floor, NL, 20) as English-language productions, contributing to a perceived lack of authenticity. This was a factor in Anders (DK, 28) watching 'little Danish TV' because of 'the way they write lines, it's very stiff, and often it seems like they're theatre actors and not TV actors. [...] it's not realistic, the way they talk'. Karl (NL, 18) was even more dismissive about Dutch films and series, which he considered 'just a bit shite. [...] Not really well-made productions, so you see that there's not a big budget'. For Karl, 'the acting most of the time is just wooden. You can see they're not big-time actors and they're not used to doing this'. Similar criticisms were voiced by research participants in Italy, specifically in relation to TV series rather than films. Elisa (IT, 26) found 'the acting to be of a low standard' compared to non-Italian series, which is why she did not watch them. For Margherita (IT, 27), there were concerns that 'the acting, the dialogues, the characters have no depth and often make choices that are not realistic'.

Some respondents acknowledged and even questioned the pervasive discourse among their peers that domestic content is inferior, a narrative that may in turn reinforce individual perceptions. Max (DE, 17), while stating that German media is 'not that good' and that 'young people really don't like German entertainment [including fiction] that much', pointed to 'some really, really good Netflix shows from Germany'. Ellen (NL, 33) disputed that there were no 'good movies in the Netherlands', adding, 'I

think that's not true if you really look into it, but that's a common trend amongst us'.

In Denmark and Italy, certain areas of domestic excellence are recognised. Young viewers in Denmark (especially older interviewees) highlighted crime drama, while in Italy they pointed to feature films and some statement dramas. This is reflected in higher survey rankings for domestic content than in Germany and the Netherlands. For example, Melanie (DK, 23) watched 'lots of drama TV shows' because 'Denmark makes great fiction'; and Daniele (IT, 25) was a fan of Italian cinema. Admittedly, the areas of strength in domestic production identified by our interviewees may also reflect a self-reinforcing dynamic. In Denmark, for example, interviewees' views were likely influenced by the wider public discourse celebrating the high production values of Danish crime dramas in the wake of their international success in the 2010s (see [Waade et al., 2020](#)).

However, overall, domestic content was widely perceived by participants as of inferior quality. Moreover, only a minority of survey respondents across the four countries agreed with the statement 'Danish/Dutch/German/Italian content feels more relevant than British content' ([Table 5.5](#)). Agreement ranged from just 7% in Germany to 31% in Italy, with Denmark (20%) and the Netherlands (15%) in between. The German figure is particularly striking, given the country's status as a European powerhouse in TV fiction production and lower familiarity with British content in Germany compared to Denmark or the Netherlands (see [Chapter Two](#)). Except for Denmark, respondents over 30 were least likely to perceive domestic content as more relevant than British content, while the youngest age group expressed comparatively higher agreement.

The interviews explored why domestic content is often seen as less relevant, with some interviewees noting its weaker engagement with relatable themes. In fact, except for Italy (RAI's *Mare Fuori* [2020–present]), interviewees did not mention any domestic youth-oriented shows. Kris (NL, 26)

Table 5.5 Perceived relevance of domestic content vs. British content, in %

	<i>DK</i>	<i>NL</i>	<i>DE</i>	<i>IT</i>
16–19	23	17	10	40
20–24	18	14	6	38
25–29	19	15	9	29
30–34	24	11	2	18
All	20	15	7	31

Source: SEwB survey in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: 'What do you think about the following statements other people have made about British screen content? [Domestic content feels more relevant than British content]'. The figures indicate the percentages of respondents who 'agree' or 'strongly agree' with the above statement. Base: All respondents aged 16–34 who answered the question, DK n =378, NL n =374, DE n =346, IT n =420.

made direct comparisons between the lack of youth orientation in Dutch fiction and British TV series like *Heartstopper* (2022–24) and *Sex Education* (2019–23), ‘based around romance and sex’ and ‘aimed at helping people understand themselves’, adding: ‘I don’t find that in Dutch shows or movies’.

Finally, although rarely mentioned and only when prompted, some interviewees, particularly from ethnic minority backgrounds, compared domestic content unfavourably with British Netflix series, citing its lack of ethnic and LGBTQ+ representation. Jamal (DE, 22), of African heritage, ‘never saw a German black actor in my life’ and this was why, ‘I’m not really attracted to German TV shows’. Similarly, Rosa (DK, 26), from an ethnic background, commented on the representation of black characters in the British sitcom *Chewing Gum* (2015–17), compared with Danish TV series, where ‘it wouldn’t be recognised that it’s different to be a black person than a white person’. Kris (NL, 26) also commented that ‘there’s a lot of straight sex and romance in Dutch TV shows. And I think British-based and American-based are finally veering more towards queer shows’. The perceived lack of diversity in domestic screen representations feeds into broader perceptions of inauthenticity among interviewees (as noted earlier).

Conclusion

In the first part of the chapter, we traced the historical transformation of European television, arguing that the arrival of global streamers in the 2010s accelerated an already unfolding transnational shift, weakening the position of national broadcasters. Both public and private broadcasters have struggled to keep pace with Netflix and other global streamers, constrained by stagnating budgets and operating in an increasingly competitive environment dominated by large, mostly US-based media, telecommunications and Internet companies. Although Netflix, Disney+ and Prime Video have become major investors in European productions, national broadcasters continue to sustain the bulk of European content output across genres. At first glance, this might seem a desirable scenario for supporters of domestic European content, as global streamers now invest *alongside* domestic broadcasters. However, their European investments are geographically concentrated, primarily in the United Kingdom, followed closely by Spain. It also leaves unresolved the question of how much domestic and European content younger European audiences actually consume as they move away from linear television to on-demand viewing.

Our research has helped provide an answer to this question. Drawing on SEwB survey and interview data, the second part of the chapter revealed little engagement with PSM streaming platforms and other domestic services.

Global streamers (most notably Netflix) have become the default destination for young people seeking long-form screen entertainment. Our research indicates that these viewing habits are becoming increasingly entrenched. Given the dominance of Anglo-American programming on global streaming services, exposure to domestic content is diminishing. The sheer volume of content available on these platforms, especially in popular genres such as action and fantasy, effectively meets most young people's entertainment needs, leaving little incentive to explore PSM and other domestic streamers. These dynamics are further compounded by widespread (and self-reinforcing) perceptions that domestic fictional content is inferior to Anglo-American productions in terms of acting, scripting and storytelling. Perhaps more surprisingly, domestic content is often also judged as less relevant and relatable compared to Anglo-American programming. Our audience research strongly suggests that, with few exceptions, both public and commercial broadcasters are failing to connect with young European audiences through content that is engaging, relevant and reflective of their experiences. These findings have troubling implications for national broadcasters, especially when considering the financial constraints, they face and their competitive disadvantage vis-à-vis global platforms.

Concluding, we argue that a dynamic is emerging in which diminishing engagement with domestic providers reduces young audiences' exposure to domestic productions in favour of Anglo-American content. Inevitably, these shifting patterns of screen encounters among young viewers in Europe are likely to have significant implications for identity formation based on the 'reconstruction of place or locality' (Vertovec, 1999: 448), with identity becoming less anchored in the national (or in geo-linguistically/geo-culturally proximate countries), and instead increasingly shaped by a strengthened Anglo-American culture.

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6 The wider impact of British film and television

A case of soft power?

Introduction

[Chapter Four](#) explored why young people in Europe choose to watch British film and television and which values and attributes they associate with it. This chapter examines how these values and attributes extend beyond the screen, impacting what viewers know and think about Britain, its culture and people and how they engage with the United Kingdom. It also considers how screen encounters interact with other types of encounters, in school and in first-hand experiences of visiting Britain and meeting British people.

Screen encounters, we argue, play a crucial role in the mix of encounters shaping young people's opinions of and attitudes towards Britain. Films and TV programmes build knowledge, challenge (and sometimes reinforce) stereotypes, raise interest in the country, and sometimes inspire viewers to visit, study or work there. They may also help counter negative perceptions linked to the UK leaving the EU, feelings that were particularly prevalent among those aged 25–34 in the *Screen Encounters with Britain* (SEwB) study. We contend that popular UK screen content acts as an impactful cultural ambassador because of the 'twofoldedness of viewing' (Plantinga, 2013). According to this theory, viewers know that what they are watching is 'not real' but subconsciously process screen portrayals as representations of reality.

UK screen content's function as a (mostly unintended) cultural ambassador for Britain raises questions about its potential as a tool for soft power. In simple terms, soft power refers to a nation's ability to influence others through attraction and persuasion rather than coercion. It involves communicating values that are seen as defining the nation and appealing to people in other countries. Increasingly, this happens through popular culture, including film and television ([Grincheva, 2024](#)).

Britain, with its well-established and diverse cultural sector, has also come to recognise the soft power potential of its popular culture. Since the 2010s, creative industries have been repeatedly highlighted in UK soft power discourse ([Higson, 2020](#)). However, while countries like Japan, South Korea and Turkey developed financial and institutional strategies during the early

2000s to harness popular entertainment as a soft power tool (Iwabuchi, 2015; Jeong et al., 2017; Kaptan and Tutucu, 2021; Khan and Rohn, 2020), British policymakers largely limited themselves to mentioning film and television as soft power assets. In early 2025, the British government put soft power on the agenda once more, launching the ‘UK Soft Power Council’ and signalling its desire to develop a more strategic approach. The latter, we argue, requires recognising that soft power depends not only on the message but also on how it is received. Little is known, though, about how UK screen content impacts audiences’ understanding of and attitudes towards Britain. The aim of this chapter is to fill this knowledge gap, focusing on young audiences aged 16–34 in Denmark, Germany, the Netherlands and Italy.

The chapter begins by defining soft power and related concepts like cultural diplomacy and public diplomacy. It then offers a brief discussion of South Korea and Turkey, two very different countries deliberately and effectively employing popular entertainment as a soft power tool. Next, we outline Britain’s history of managing international relations through cultural and public diplomacy and the Labour government’s revived efforts in 2025 to strengthen and broaden the United Kingdom’s soft power. In the empirical second part, we analyse the audience data of the SEwB study, beginning with survey participants’ ($n = 1,813$) thoughts about Britain, including Brexit. Then, we draw on data from digital diaries ($n = 102$) and interviews ($n = 86$) to identify the key sources that shape young people’s ideas of Britain. Finally, we examine three distinct ways in which UK screen entertainment contributes to soft power: first, by generating and deepening knowledge; second, by creating interest and allure; and third, by promoting tourism and supporting the wider economy. The conclusion addresses concerns about using popular entertainment as a soft power tool.

Theorising soft power

According to Nye (1990), soft power is about projecting the attractiveness of a country’s culture to gain competitive advantages over other nations. Nye coined the concept in the post-Cold War context to separate out the co-optive ‘soft power’ of the United States from its economic carrots and military sticks or ‘command power’. The United States had soft power, Nye argued, because of the international appeal of its ideas and values, reflected in its culture, ideology and institutions. Noting the global appeal of US popular culture, he proposed that the United States should manage its international relations by using its soft power alongside its command power.

Nye’s idea of soft power gained global traction, leading to many interpretations and the lack of a universally accepted definition. The concept has also been criticised for its entanglement with related notions, including ‘cultural diplomacy’ and ‘public diplomacy’ (Ang et al., 2015). Broadly speaking, all three

concepts refer to a government's deliberate attempts to influence the opinions and attitudes of other nations. 'Cultural diplomacy', the oldest term, initially referred to targeting 'elite', diplomatic circles with cultural, mostly 'high art' performances and exhibitions. After the Second World War, many governments moved towards 'public diplomacy', targeting whole populations. Common 20th-century tools of public diplomacy included humanitarian assistance, language teaching programmes and arts diplomacy (e.g., artistic exchanges, exhibitions). International news broadcasters like The Voice of America and the BBC World Service became public diplomacy mainstays of large, powerful nations (Clarke, 2020; Grincheva, 2024; Khan and Rohn, 2020).

In the early 21st century, globalisation and digital communication sparked renewed interest in soft power (Clarke, 2020; Iwabuchi, 2015). Firstly, globalisation intensified competition between nation-states while increasing transnational flows of people, products, money, technology and media appeared to diminish the power of nation-states. In response, efforts involving 'nation branding' grew (Aronczyk, 2013; Higson, 2020). Secondly, digitalisation enabled media content to multiply and transcend borders more easily and more frequently, strengthening the media's influence on what we know about other countries and how we feel about them.

Popular culture in particular attained global prominence through digitalisation and social media (Goff, 2013; Jeong et al., 2017; Kraidy and Al-Ghazzi, 2013), giving it an unrivalled capacity for public diplomacy. Goff (2013) contends that popular culture can be a 'double-edged sword', though. While it can reach wide audiences, provide access to other cultures and potentially counter negative perceptions, its commercial nature poses risks as images that project the nation in popular culture might not align with what governments want to see projected (see Algan and Kaptan, 2021; Khan and Rohn, 2020).

Liberal governments exercise (some) control by deciding what types of cultural outputs to support. Japan and South Korea are early examples of liberal governments actively and successfully promoting popular culture to project appealing images internationally (Iwabuchi, 2015; Jeong et al., 2017; Kaptan and Tutucu, 2021). Authoritarian Turkey also harnessed 'pop culture diplomacy' effectively during the early 21st century (Khan and Rohn, 2020; Kraidy and Al-Ghazzi, 2013). We briefly examine the cases of South Korea and Turkey before turning to the UK government's announcement in 2025 of a new strategy aimed at better harnessing the United Kingdom's soft power assets, including popular culture.

Popular culture as a tool of soft power

South Korea exemplifies a liberal democracy intervening to exploit popular culture's soft power. In the late 1990s, its drama and pop music both experienced unexpected success across Asia, creating the so-called 'Korean

Wave' (*Hallyu*). The government took notice and decided to use *Hallyu* to communicate a favourable image of the nation across Asia and beyond. For this purpose, it intensified state support and intervention in the late 2000s, including, among other things, adding the prefix 'K' 'to all sorts of cultural products, ranging from TV dramas to food to cosmetics to pop music' (Jeong et al., 2017: 2289), utilising K-pop idols as diplomats (Shafie, 2025) and buying K-dramas for gratuitous international distribution (Kaptan and Tutucu, 2021: 204). Today, K-bands like *BTS*, with universal themes about coming of age and finding oneself, have fans worldwide. In the United States, *BTS* had six No. 1 albums on the Billboard 200 charts (Billboard, 2025). Black comedy *Parasite* (2019) won four Oscars, the dystopian thriller *Squid Game* (2021–15) occupies the top three rankings (for seasons 1–3) among Netflix's 'all-time top non-English shows' (Netflix, 2025), and romantic K-dramas reach large transnational audiences, including in the United States and Europe (Lee, 2018).

Turkey is also a prominent example of a government, albeit an authoritarian one, realising the value of popular culture for public diplomacy. In the early 2000s, the Turkish TV industry began exporting high-budget, stylish melodramas, known as *Dizi* ('series' or 'soap opera' in English), which rapidly found success in TV markets as diverse as Chile, Kazakhstan and the Arab region. The governing Justice and Development Party (AKP), although deeming some of the characters' behaviour too liberal, recognised the series' political and economic importance and began providing financial and logistical aid to the industry (Khan and Rohn, 2020; Kraidy and Al-Ghazzi, 2013). Today, Turkey is the third-largest exporter of television content after the United States and the United Kingdom, with 800 million viewers spread over more than 170 countries (World Content Market, 2025).

Audience research on the impact of Turkish and South Korean pop culture lends support to their soft power capacities. *Dizi* have had a strong geo-political and socio-cultural impact in the Arab world (Khan and Rohn, 2020; Kraidy and Al-Ghazzi, 2013). Before the rise in popularity of *Dizi*, Turkey was viewed negatively in many Arab countries because of 400 years of Ottoman rule, early 20th-century nationalism and secularisation, which included banning the Arabic alphabet and Turkey's joining NATO in the latter half of the 20th century. Turkish drama played a significant role in reshaping views among Arab audiences who began to see Turkey as a possible model for the region, a country that successfully combines Islam with democracy (Kraidy and Al-Ghazzi, 2013: 18). *Dizi* also generated a strong economic impact by boosting tourism, especially from Arab and South Asian countries (Khan and Rohn, 2020).

Similarly, K-Pop and K-Drama generated measurable geo-political impact. Kaptan and Tutucu's (2021: 200) overview of studies from around the world shows how, for example, in Iran, Hyundai overtook Japanese Toyota, which previously had an 80% share of imported cars. Travel to Korea and

demand for Korean language courses increased, as did young Iranians' interest in Korean martial arts. Israel saw a sharp increase in people learning Korean and students taking Korean Studies (Kaptan and Tutucu, 2021: 201). In Indonesia, Korean food and cosmetics became fashionable; the number of Indonesian tourists visiting South Korea quadrupled between 2005 and 2012 (Jeong et al., 2017: 2294).

British soft power

Global soft power indices reveal that the United Kingdom consistently ranks second or third after the United States (BrandFinance, 2024; Portland Communications, 2020). Since the Second World War, the United Kingdom has spread its cultural and political influence primarily through arts diplomacy, English language teaching programmes (both via the British Council), news (through the BBC World Service), educational scholarships and development aid. The United Kingdom, Grincheva (2024: 181) argues, also benefits from English as 'the lingua franca of diplomacy', facilitating global communication through a shared language. Moreover, language expresses national identity and is a key transmitter of cultural messages. As such, it has 'always been understood as a vehicle for spreading cultural and political influence' (Grincheva, 2024: 181).

Britain's historically high global standing may partly explain why the country has been less proactive than others in investing in soft power and developing a strategy for the 21st century (Holden, 2013; UK Parliament, 2025). Nonetheless, Higson (2020) reveals how from 2010 onwards, a succession of Conservative-led governments strongly influenced the United Kingdom's evolving soft power discourse. In keeping with neoliberal ideology, this involved focusing on economic gains and, like Korea and Turkey, co-opting commercial forces in the United Kingdom's 'creative industries'. Both strategies were evident in the pre-Brexit 2011 launch of the GREAT campaign, aimed at driving 'economic growth by encouraging foreign citizens to visit, study, trade, invest, live and work in the UK' (<https://greatcampaign.com>). The Bond film franchise was exploited under the slogan 'Bond is GREAT Britain' (Higson, 2020: 211). At the same time, the neoliberal emphasis on reducing state funding led to demands for cuts at Britain's two long-standing and world-renowned public diplomacy institutions, the British Council and the BBC World Service (Halliday, 2010; Rivera, 2015: 28–33). It also intensified pressure on the cultural sector to increase private investment, philanthropy and earned income, shifting its 'mixed economy model' further towards non-government funding (DCMS, 2016: 49–57).

The British Council defended itself by highlighting the significance of its 'cultural relations' work for UK soft power (Holden, 2013), and in subsequent years, more British institutions seeking to secure government funding

joined the soft power debate. A 2015 report commissioned by the British Film Institute (BFI) argued that film is a ‘major generator of soft power’ (Olsberg-SPI, 2015: 1–2), contributing to tourism and diplomatic value by fostering interest and trust in the UK. In 2023, post Brexit and amid mounting financial pressures, a broad range of British institutions and commercial enterprises launched the UK Soft Power Group, ‘to amplify the voice of the soft power sector and increase its centrality to Government strategic planning’ (UK Soft Power Group, 2025). The group brings together the British Council, national cultural institutions, including the BFI and the British Library, and commercial enterprises, such as the Premier League and Ascot Racecourse.

In January 2025, a new Labour government set up the UK Soft Power Council, bringing together ‘experts from across culture, sport, the creative industries and geopolitics’, tasked with identifying areas to work with government to advance British economic growth and security objectives (GovUK, 2025a). In the same month, on announcing a parliamentary inquiry into ‘the extent and effectiveness of the UK’s soft power’, Dame Emily Thornberry MP, Chair of the Foreign Affairs Committee, noted the United Kingdom could ‘not afford to be complacent’ when countries like China, Russia and India were building up their soft power and filling ‘gaps left by the United Kingdom and other like-minded countries’ (UK Parliament, 2025).

In sum, Britain’s creative industries have increasingly positioned themselves and been identified by successive governments as producers and distributors of soft power assets. Actively promoting this image to secure state support, they have joined forces with the legacy public diplomacy institution, the British Council. However, simply producing popular cultural products is not enough. The capacity to win the hearts and minds of international audiences also depends on how these outputs are received and how this translates into opinions of and attitudes towards Britain. The remainder of this chapter sheds light on this.

What young people in Europe think about (post-Brexit) Britain

The SEWB survey allowed us to collect spontaneous responses about what young people in Europe think about the United Kingdom, its culture and citizens, and to what extent Brexit has impacted their views. For this purpose, respondents were presented with statements about Britain and asked to indicate their level of agreement on a slider scale. The results confirm Britain’s enduring soft power, the appeal of its culture and its attraction as a destination for travel, study or work (see Table 6.1).

British humour emerged as the most appealing value in young people’s eyes (see Chapter Four for humour in UK screen content). Between 45% of respondents

Table 6.1 Opinions on Britain in Denmark, the Netherlands, Germany and Italy, ranked by agreement, in %

	All	DK	NL	DE	IT
I like the British sense of humour	61	66	72	63	45
Britain is an appealing tourist destination	58	53	61	51	64
I like British music, fashion, sport, literature, etc.	58	59	60	54	59
I like that Britain is a diverse, multicultural country	57	56	50	52	69
Brexit has changed my attitude to Britain	46	52	49	54	29
I am very interested in Britain as a country	45	37	45	52	46
Britain is an appealing place for work and study	42	33	37	43	56
British culture feels similar to domestic culture	18	25	23	19	6

Note: Each statement had a slider scale ranging from 'disagree' to 'agree' (0–100). For the analysis, responses set between 60 and 100 were defined as agreement.

Source: SEWB surveys in DK (Sept–Oct 2022), NL (Sept–Oct 2023), DE (Jan–Mar 2023), IT (Jan–March 2024). Question: 'What do you think about Britain as a country?' Base: All respondents aged 16–34 who used the slider scales: combined $n=1,640$ – $1,654$; DK $n=378$, NL $n=372$ – 376 , DE $n=349$ – 353 , IT $n=545$ – 547 .

in Italy and 72% in the Netherlands agreed with the statement 'I like the British sense of humour'. Two further culture-related statements received firm agreement in all countries, namely 'I like British music, fashion, sport, literature, etc.' (54–60%) and 'I like that Britain is a diverse, multicultural country' (50–69%). Between 51% and 64% consider Britain to be 'an appealing tourist destination'. Just under half (45%) of combined respondents claimed to be 'very interested in Britain as a country' and felt that 'Britain is an appealing place for work or study' (42%). Less than a quarter agreed that 'British culture feels similar to domestic culture' (only 6% in Italy).

Asked about whether Brexit has changed their attitude towards Britain, around half in Denmark, the Netherlands and Germany agreed, compared to only 29% in Italy. The combined 46% of respondents who indicated a change were invited to elaborate in an open-text box, to which 766 (42%) responded. Comments revealed that changes in attitude were overwhelmingly negative. Common sentiments included a growing distance between the United Kingdom and the European Union, difficulties of working or studying in the United Kingdom, and feeling less welcome and inclined to visit. Only 27 respondents expressed positive sentiments, including the reassurance that Brexit has not diminished their interest in British culture, people or history. A small number expressed sympathy for young people in Britain who reportedly voted against Brexit. Fewer than a handful expressed positive views about the United Kingdom asserting its sovereignty from the EU.

Where their knowledge of the United Kingdom comes from

Interviews provided insights into the various sources influencing young people's ideas about the United Kingdom and how they relate. The most frequently mentioned sources included English lessons in school, British film and television and other cultural outputs, most notably music and football, as well as personal encounters. News was named less often. Naturally, the significance of each source varies between individuals, but it also varies across countries. Interviewees in Germany and Italy consistently cited school as their primary source of knowledge about the United Kingdom, whereas interviewees in Denmark and the Netherlands identified media as their most influential source.

When recalling English lessons in school, much of what interviewees, particularly in Italy and Germany but also in the Netherlands, remembered learning conforms to stereotypical and traditional images of Britain. For example, Mario (17, IT) recalled how 'we studied what to visit, or the food, or the stereotypes, or the geography of England'. Luisa (23, DE) remarked that when she 'first learned about British culture it was all about the Royals and elegance and everyone is so polite'. Her account was mirrored by Elodie (26) in the Netherlands. However, most respondents in Denmark and the Netherlands barely mentioned school as a knowledge source.

Interviewees in all countries identified British media and other cultural outputs as major influences, albeit to varying degrees. In the Netherlands and Denmark, the two smaller markets with limited domestic TV production and higher English-language proficiency, British literature, theatre, football, film and a wide range of TV genres are widely consumed and highly pervasive. Consequently, the media, and particularly television, were consistently cited as the principal source of knowledge. As Thijs (33, NL) remarked, 'when I think of British culture, I immediately think of the things I know from television'.

Elodie (26, NL) underlined the importance of television in shaping her ideas about Britain when growing up. She remembered celebrity chef Jamie Oliver cooking in school kitchens (*Jamie Oliver's School Dinners*, 2005) and seeing 'what high schools look like', while the romantic film comedy *Love Actually* (2003) gave her a 'broad sense of people living in different parts of the UK'. Although these impressions were 'obviously very stereotypical', they 'kind of influenced the first images I had'. In Denmark, the four youngest male interviewees (aged 16–19) all grew up with Jeremy Clarkson, host of motoring show *Top Gear* (2002–22), and celebrity chef Gordon Ramsay, watching both on social media and TV because they are 'fun'.

In Germany and Italy, fewer interviewees reported engaging with British literature or regularly watching UK films in cinemas. British film and TV on television and streaming platforms were acknowledged as shaping

impressions of Britain. However, the range of genres mentioned was narrower than in Denmark and the Netherlands, and the number of titles mentioned during interviews was lower. In both countries, film franchises like Harry Potter (2001–11) and James Bond (1962–2021), older romantic comedies like *Notting Hill* (1999) and *Bridget Jones* (2001–) and the eponymous *Mr. Bean* (films and TV series) were most frequently mentioned as shaping impressions of Britain.

In Germany, other frequently mentioned shows were *Sherlock* (2010–), *Outlander* (2014–; a US production partly set in Scotland), and long-running crime series *Midsomer Murders* (1997–), which was typically watched with family members. Contemporary drama on Netflix, including *After Life* (2019–22), *Fleabag* (2016–19) and *Derry Girls* (2018–22), also received a handful of mentions. Derja (28, DE) highlighted the influence of Jamie Oliver's cooking shows, while Markus (26, DE) remembered noticing the 'diverse society' in *Britain's Got Talent* (2007–).

In Italy, in addition to older film classics (see above), interviewees frequently mentioned historical films as sources of knowledge about the United Kingdom (*The King's Speech*, 2010; *Dunkirk*, 2017), as well as adaptations of classic novels by Jane Austen and Charlotte Brontë. Interviews with both teachers and young people revealed that this reflects the Italian (classical higher) school curriculum, which emphasises classic literature and history. This (limited) selection supports existing ideas about the United Kingdom that are somewhat old-fashioned and stereotypical, and yet largely positive.

Finally, for many interviewees, personal encounters complement other knowledge sources, sometimes confirming existing ideas, adding nuance, or challenging them. Some interviewees in the Netherlands remarked that certain onscreen depictions, such as those in reality show *Ex on the Beach* (2014–), 'where you have those British girls with, like, long lashes and long hair and long nails' (Ellen, 33), aligned with negative impressions of British tourists in the Netherlands. Conversely, screen entertainment may project an appealing image of Britain, which is later questioned by personal encounters or political developments. Martijn (27, NL), who lived in Manchester the year after the Brexit referendum, felt that UK films and television portrayed a country that felt different from his experience of living in Britain: 'the image that is shown to the rest of the world, through the movies and TV and arts and music, is far more left-wing and progressive than I think politically the UK leans'.

The dialectical relationship between these different sources, each offering a range of (more or less) diverse images, means that the influence of popular UK screen content on perceptions of Britain among young people in Europe cannot be isolated with precision. Nonetheless, interviews suggest that it overall exerts a strong impact in three ways: generating knowledge about the country, creating interest and allure, and as a result supporting the wider economy by encouraging people to visit. The following will explore these in turn.

The role of screen content in generating knowledge about the United Kingdom

According to Jeong et al.'s research (2017) on Indonesian audiences of K-drama and K-pop, one of the most obvious ways in which soft power occurs is by generating knowledge of a country. Our findings support this. Interviewees who were not well acquainted with Britain felt that they learned about history, cities, landscapes and contemporary life through their engagement with British shows. Maddalena (19, IT), who watched *Scoop* (2024), a scandal-driven drama about a UK royal family member, previously known as Prince Andrew, said she 'learned a lot about the history' of Britain. Elisa (26, IT) found UK shows with contemporary settings 'very interesting and appealing' because they allowed her 'to see British cities, how it works, some details of the schools in England'. Lotte (19, DE) discovered from watching British television shows that the monarchy is 'not everything about Britain. [...] There's just nice people over there; they can cook and stuff like that'.

Rosa (26, DK) felt that 'with every TV series I know Britain more'. *This Is England* (2006), a coming-of-age film about a boy joining a gang and drifting to the far-right, showed her 'a part of the UK that I hadn't seen before'. Anders (28, DK) felt that he came to 'really understand' the British class system because of watching the comedy panel show *Would I Lie to You?* (2007–) with 'Lee Mack, the working-class guy', and David Mitchell, 'who's much more "posh" or "higher class"'. Christian (18, DK) remarked how screen entertainment made learning about the United Kingdom more interesting. Recalling his teacher showing crime dramas *Peaky Blinders* (2013–22) and *Top Boy* (2011–), he felt 'lucky because it's more appealing to learn about this stuff when you have something like Netflix to teach'.

Young audiences themselves attribute significant influence to screen portrayals, believing that British programmes offer 'a good representation of the British culture, therefore the lifestyle, the decor, the streets, even clothing' (Gabriele, 23, IT). One aspect supporting this impression is the perception that UK screen content is realistic and authentic (see [Chapter Four](#)). However, several comments also revealed that screen images can be perceived as representations of 'reality', even if they lack realism. In Italy, the country with the least first-hand experience of the United Kingdom, several interviewees mentioned Mr. Bean and Harry Potter when asked about their knowledge of the United Kingdom, without questioning the representational value of these titles. In Germany, Derja (25, DE), who has been to London and reportedly watches British content at least once a week, still associated 'looking like a gentleman and being dressed nice' with Britain. She believed this was due 'solely because of James Bond'.

Only 5 out of 86 interviewees commented on the fictional nature of what they watch and perceive as reflecting the 'real' Britain, with three stressing that there is always something to learn. Barbara (31, IT), speaking about the

British royal saga *The Crown* (2016–23), remarked, ‘Maybe it’s fictionalised’, ‘but in the end it’s their history that I didn’t know, I learned several things through the series’. Emilia (24, DE), acknowledging that historical fantasy *Outlander* is fictional, felt it nonetheless offered ‘a slight insight into what was happening’ in 18th-century Scotland. For Kris (26, NL), British television revealed how British people ‘communicate, how they are’, adding: ‘Maybe I’m completely [...] not on the right track here. But to me those shows tell me what British people are mostly like’.

Plantinga’s (2013: 98) theory of the ‘twofoldedness of viewing’ explains why this perception of screen fiction representing reality is so strong and pervasive. The theory posits a paradoxical process, whereby audiences are aware that what they are watching is ‘not real’ and yet process what they see as real. Screen encounters imprint images on viewers’ minds of what Britain and British people are (really) like, blending with first-hand experiences and other mediated images encountered in school, news, music, football and social media. Frequent, simple or striking images stick most strongly.

Creating interest and allure

Attraction, a key feature of soft power, was also evident. Interviewees noted how their engagement with British screen content raises their ‘interest in the country’ and creates ‘allure’, and at least three of the positive values associated with British screen content and screen talent, humour, relatability and the English language (see [Chapter Four](#)), appear to translate into positive feelings towards the United Kingdom.

Examples of raising interest include Barbara (31, IT), who ‘went on to read the exact, complete history’ of the royal family on Wikipedia after watching *The Crown*. Alessandro (33, IT) researched Britain’s aristocratic system on Wikipedia while watching the Netflix series *The Gentlemen* (2023). Ferdinand (17, DE) commented, ‘those beautiful landscapes ... and London with its beautiful sightseeing [...] and then combined with some series I watched, and I guess that made the whole interest’.

Sci-fi series *Doctor Who* (1963–) ‘was a large influence’ on Martijn’s (27, NL) ‘enthusiasm to interact’ with the UK, and for Elisa (26, IT), both the Harry Potter books and the film franchise played a large part in creating ‘allure for Britain’. Didier (29, DE), who engages regularly with British culture and media, thought that ‘BBC series are often very pioneering, which then get copied a lot, or which have the cultural impact’. He concluded that ‘England or Britain is a country which seems very sympathetic’ and that he ‘would love to go there again’.

British screen celebrities, too, evoke feelings of attraction. Karl (18, NL), who named Olivia Colman, Graham Norton and Benedict Cumberbatch as his UK ‘idols’, said, ‘they’re so charismatic, and you really want to be friends

with them'. Michael (23, DK), who watched every episode of motoring show *Top Gear*, 'was quite fond of Jeremy Clarkson'. Annette (19, NL) felt that comedian James Acaster, whom she discovered in a YouTube clip from *The Great British Bake Off* (2019), is 'really funny. He's quite young and I like his personality'. Max (17, DE) followed four of the actors in the coming-of-age romantic comedy-drama *Heartstopper* (2022) on Instagram. Everyone was aware that the individuals they named were British. Screen celebrities, thus, clearly function as cultural ambassadors.

The English language in screen media is also a significant attraction. English is by far the most popular foreign language among young people in Europe, who come across it on a daily or near-daily basis on social media, YouTube and streaming platforms, increasingly so even in Germany and Italy (see [Chapters Two](#) and [Four](#)). Some interviewees in the Netherlands and Denmark, for whom English has effectively become a second language, even prefer it to their own native language for media consumption. Kenny (18, NL) 'only watch[es] English now', having grown out of watching Dutch Youtubers. Lene (17, DK) dislikes Danish screen content 'because it is cringe and it's our own language [...] the English one is just better'. Relating language and British culture specifically, Daniele (25, IT) remarked it was 'quite a permeating culture, in terms of the input we get from social media, even just by speaking English', which supports [Grincheva's \(2024: 181\)](#) argument about the importance of the English language 'as a vehicle for spreading cultural and political influence' (see also [Holden, 2013](#)).

Finally, on-screen humour plays an important role in attracting young audiences and fostering positive feelings towards the United Kingdom (see [Table 6.1](#)). [Chapter Four](#) revealed how both the unique quality of 'British humour' and humour embedded across various genres, including drama, are seen as defining characteristics of British screen content and are a key factor motivating young people to engage with it. Since young people have more screen encounters than first-hand experiences with Britain, we must assume that the humour in UK screen productions is what most strongly shapes their perceptions of 'British humour'. Niels (18, DK) commented that British shows 'tell us that the British have the same kind of humour that we do, that the British are great people'. He elaborated:

As a country, I believe – and in this we're very representative for our generation – it is the screen content that is most important for our perception of Britain. And then you go there, and you see the similarities and you experience the culture that you've seen through your iPad. And then it's connected, and you feel more welcome...

This transfer of values was also evident in Jeong et al.'s (2017: 2301) research with Indonesian audiences whose consumption of K-drama and K-pop led them to associate 'Koreanness with creativity, technological development,

fun, and aesthetic advance'. However, it should be noted that not all screen portrayals of the United Kingdom translate into increased appeal for the country. As discussed above, among respondents in Denmark and the Netherlands with broader experience of UK TV genres (and often more first-hand UK experience), a more diverse image of the United Kingdom was evident, including negative perceptions. As Goff (2013) notes, commercial popular culture may not always project the nation in ways conducive to a government's soft power ambitions.

The wider economic impact of screen content (and Brexit)

Finally, we consider the wider economic benefits of widespread perceptions of Britain as an appealing destination among young people in Europe, shaped by their consumption and reception of British screen entertainment.

The survey provided a first indication that UK screen content makes viewers 'want to visit the UK': agreement was highest in Italy (58%) and Germany (56%), and slightly lower in Denmark (47%) and the Netherlands (45%) (see Table 6.1). Interviews provided further evidence and confirmed national variations, with more examples from Italy and Germany than from Denmark and the Netherlands. Alessandro (33, IT) noted how watching *Sherlock* made him 'want to go back to London'. Jytte (25, DK) recounted wanting 'to go to the Dorset coast' after watching thriller *Broadchurch* (2013–17), and Kris (26, NL) became interested in British museums, which she encountered in documentaries on National Geographic. Moreover, she remembered wanting to visit the Scottish coast because she had seen it in the nature documentary *Planet Earth* (2006).

Scotland proved particularly popular in Germany because of a combination of screen encounters and knowledge gained at school, which reinforced each other. Teachers and young interviewees both noted that Scotland features prominently in German high school textbooks, and several interviewees expressed a desire to visit Scotland because of the landscapes depicted in the popular historical fantasy series *Outlander*.

Interviewees in Italy stood out for expressing a particularly strong interest in visiting UK film locations. Seven out of 22 interviewees in Italy mentioned having visited or wanting to visit film locations related to Harry Potter, *Sherlock* and *Notting Hill*. The latter is shown every Christmas in Italy as well as in other countries. Maddalena (19, IT), who visited Portobello Road in Notting Hill in London, 'only went there to see the iconic shop with the poster of Julia Roberts'. Piero (17, IT) said that when he visited London with a friend 'the first thing I came to watch was Sherlock Holmes' house in Baker Street'.

Travel tourism, however, may not be the only soft power effect of UK screen content. Thomas (29, DK) went to study in the UK partly 'because

of all the British TV content [...] both fiction and a lot of comedy content' he had been watching. While he was the only interviewee to mention this explicitly, his experience is unlikely to be unique. More notably, interviewees in all countries remarked how Brexit had dampened their plans to study in the United Kingdom. As Karl's (18, NL) said:

I used to have a very 'big' idea of England, and then Brexit happened, and then there was so much negative media about England. And then it kind of went downhill a bit [...] because I did not know, 'Do I like it now?' Or 'Do I want to go there or do I not?' Because people say you shouldn't, because it's so expensive and it's not in the European Union anymore.

Benedetta (24, IT) recounted how participating in this research and reflecting on Britain had made her realise that Brexit caused 'a bit of hatred towards the British people' among the young Italians she knows. Among her generation and slightly older peers, she said, 'going to the United Kingdom was considered almost a must-do, now this has changed'.

In addition to the negative feelings associated with Brexit, interviewees in all countries remarked on the increased costs and bureaucracy resulting from Brexit. Many recounted how both had led them to abort private travel plans to the United Kingdom. The same was true for educational visits. Eduard (21, NL) 'used to consider maybe going to Oxford' but now 'completely rejected that idea' because the required paperwork had put him off. Emilia (24, DE) noted the much-reduced opportunities to study in the United Kingdom 'because there is no more Erasmus funding', although this will be reversed with the United Kingdom joining the Erasmus+ scheme in 2027 (GovUK, 2025b). Teachers in all four countries reported the United Kingdom was now a more difficult option for secondary school visits because of the extra expense of obtaining a passport. The Brexit effect may explain the comparatively low agreement with the statement 'Britain is an attractive study and work destination' (see Table 6.1).

Conclusion

In this chapter, we argued that the distinctive narratives and aesthetics of British landscapes, cities, people and the English language in British screen content produce knowledge, meaning and imagery that audiences equate with the real Britain. Consequently, screen content has the capacity to generate soft power, regardless of whether it is intended to serve such a purpose. Our findings suggest three soft power effects on young people: increasing knowledge of Britain, creating interest and allure and encouraging young people to visit, study and work in the United Kingdom, thereby benefiting the wider economy.

Furthermore, we argued that popular UK screen content may be a particularly potent cultural ambassador for young people because of the positive values and attributes they associate with it, including the English language, relatable screen talent, humour and attractive locations. We also proposed that screen content's soft power capacity is strong because of the way fictional images of the United Kingdom are imprinted as images of 'the real UK', a phenomenon explained by Plantinga's (2013) concept of the 'twofoldedness of viewing', whereby viewers process screen portrayals as representations of 'reality' despite knowing that they are fictional.

This chapter has also shown that opinions and attitudes towards the United Kingdom are shaped by a mix of screen encounters, other cultural influences, teachers, political developments such as Brexit and first-hand experiences from travel and educational visits. Unlike earlier generations in Europe, today's young may have fewer opportunities for unmediated experiences of the United Kingdom, suggesting that post-Brexit, the role of UK film and television in enhancing the country's soft power in Europe is gaining in relevance. In fact, because of the dominance of English-language screen content, we may see a circular dynamic at work, whereby positive attitudes towards Britain resulting from screen encounters in turn make British films and TV more appealing, creating a virtuous circle that benefits UK public diplomacy as well as the United Kingdom's screen industries.

To conclude, it is important to address some caveats: First, popular culture represents one-way communication, but dialogue and exchange are arguably better suited for improving international relations (Ang et al., 2015; Iwabuchi, 2015). In fact, Britain's legacy soft power institutions, the BBC World Service and even more so the British Council, are more geared towards dialogue than cultural projection. However, this should not discount popular culture altogether. It can reach much wider audiences, particularly among the young, and initiate interest (Goff, 2013).

Secondly, as argued by Higson (2020: 218), 'branding exercises often produce and recirculate the most familiar, and therefore most stereotypical, images of a nation'. Production is not the focus of this book, but our audience findings reveal that the circulation and consumption of British film and television are highly varied. The accounts offered by some viewers in Italy appear to support Higson's concern that people who watch only the most well-known productions, often UK-US co-productions (e.g., *James Bond*, *The Crown*, *The Gentlemen*), retain a rather narrow and stereotypical (if positive) image of an older, often aristocratic Britain. However, almost all interviewees in Denmark and the Netherlands drew on a broad range of British titles, resulting in a much more diverse view of the United Kingdom (mostly positive but at times negative); and in Germany, which, like Italy, has less exposure to UK content historically, several interviewees recounted new (positive) images gained from British screen content, including from UK youth-oriented

drama *Derry Girls* and *Heartstopper* and UK entertainment *British Bake Off* and *Britain's Got Talent*.

As Higson (2020: 217) notes, a further concern is that, to appeal to global audiences, British screen producers and government initiatives supporting them must 'look beyond a parochial sense of Britishness', as exemplified by James Bond. Higson fears that this kind of global outlook risks the loss of narratives and imagery that resonate mainly with British audiences. Our research, however, has found that some shows deeply rooted in British culture, including *Derry Girls* (commissioned by public service broadcaster Channel 4) and *Fleabag* (a co-production involving BBC Three and Amazon Studios), do resonate with transnational audiences. These audiences may be smaller than those for less culturally specific shows like *Sex Education*, but they are still sizeable. They comprise a varied mix of desirable consumers of UK screen content as well as targets for public diplomacy, including young viewers craving youth-oriented shows, viewers who are already very familiar with British programmes (as in Denmark and the Netherlands) and discerning viewers, characterised by an above-average interest in long-form screen content and/or higher levels of educational attainment.

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7 Conclusion

Repositioning British screen content within a transnational viewing environment

The *Screen Encounters with Britain* (SEwB) research project on the consumption of British long-form content among young people in Europe was conducted between 2022 and 2025 following a period of profound transformations in the screen industries over the preceding 15 years. Most notably, this period saw the arrival and rapid expansion of US-based global streaming services, led by Netflix, and their growing centrality within European screen industries and markets. Against this backdrop, Britain's position as a producer and exporter of English-language content is characterised by both continuities and significant changes, as discussed in the book's opening chapter.

The United Kingdom's position as the second-largest exporter of screen content in Europe, at some distance behind the United States, remains unchanged. One of our young research participants, Didier from Germany, aptly captured long-held views among TV buyers in Europe that the United Kingdom produces 'high-quality' but, compared with more mainstream US productions, more niche content, appealing to audiences with specialised tastes:

You have this main market, USA, where the best of the best are [...] then you have the UK market, which is like the fine wine [...] it has very high production value and high quality but it's not the same size. [...] it's like this very, very great little brother. [...].

(Didier, 29, DE)

While little has changed in respect of Britain's status as the second-largest exporter of screen content, recent years have seen it reposition from a supplier of content primarily for national platforms, including public service media (PSM), for a generalist audience, to being a supplier of transnational content for global streaming platforms. Its position vis-à-vis the United States remains central in any discussion of the circulation of British content, based on a shared language and increasing collaboration in production and distribution.

Britain is still subordinate to the United States as a content provider but is now more closely aligned to a transnational streaming market, dominated by US subscription video-on-demand (SVoD) services such as Netflix, both in terms of production and distribution. Growing investment by US SVoDs in British content has helped expand the 'Anglosphere', opening new outlets for British productions, but has also made it even more difficult to separate pure British endeavours, because of US investment in high-end drama and the multitude of British performers appearing in US titles.

Britain has long been seen as complementary to the United States, as a junior partner (Tunstall, 1977), within a dominant Anglophone culture, long influenced by American commercial models, programming forms and policy approaches (Steemers, 2004: 11–4). Often characterised as a purveyor of 'niche' high culture in the form of stereotypical costume drama, quirky comedies and documentaries aimed at elite audiences, even then there were concerns that emulation of US genres, formats and policy risked hollowing out what made British television distinctive internationally, as well as meaningful to domestic audiences, with implications for what gets produced and exported, and the degree to which British content becomes tied to a narrow or idealised representation of Britain. Similar concerns continue to be voiced nowadays, with transnational 'British' titles on Netflix and other global streaming services appearing to be shaped by strategies adopted by US platforms seeking to maximise global reach, which can influence how 'Britishness' is presented and perceived.

Yet, our research, focusing on young audiences aged 16–34 in Denmark, Germany, the Netherlands and Italy, showed that most young research participants were able to distinguish between British and US productions, reflected in the number of British titles they recalled in the survey and the extent to which interviewees were able to talk about British titles they had seen. Apart from the settings, the key unifying feature of British content was 'British humour', which was not regarded as alienating, but as distinctive and attractive. For many, humour is what sets British content apart from US productions. Moreover, British content is seen as 'a bit more "real"', authentic and even 'sophisticated' (Daniele, 25, IT).

Our research also showed that the most frequently watched and remembered titles among younger viewers in Europe are no longer limited to iconic or enduring crime series (e.g., *Sherlock*, *Midsomer Murders*), portrayals of the British aristocracy (*Downton Abbey*) or the uniquely British sci-fi series *Doctor Who*. It now includes youth-oriented dramas (e.g., *Sex Education*, *Heartstopper*), new representations of female protagonists (*Fleabag*, *Derry Girls*), British comedians (Ricky Gervais), comedy panel shows (*Taskmaster*), more contemporary depictions of British royalty (*The Crown*, *Scoop*) and even US re-interpretations of costume dramas set in the United Kingdom (*Bridgerton*). All are available for transnational viewing, mostly on Netflix, and variously display elements of 'Britishness'. Capturing this mix of continuity and

change, our research also revealed that, for many young people, older export hits, including Harry Potter and James Bond, romcoms *Notting Hill* and *Love Actually*, slapstick comedy *Mr Bean* and literary adaptations such as *Pride and Prejudice* were part of growing up. This is how many young people in Europe get to know about Britain, and while for some these screen encounters, or what is remembered of them, remain central in shaping fairly stereotypical imagery of Britain, a surprisingly large and seemingly growing number of participants revealed a much wider range of encounters and, thus, broader influences on their perceptions of Britain.

Main findings

A core aim of the book was to provide new empirical evidence from young audiences in different European contexts to help explain how recent developments are shaping the transnational consumption and reception of television. One major finding was the extent to which global streaming, combined with the unique advantage of the English language, has reinforced Anglo-American hegemony.

Chapter Two showed how longstanding historical legacies and the dominance of domestic programming in Denmark, Germany, the Netherlands and Italy are giving way to increased viewing of English-language content on global streaming platforms, where audiences have access to far more titles and fictional genres than national providers can offer. Findings from the SEwB audience survey, supported by interviews and digital diaries, showed a strong preference among 16–34-year-olds for US-owned global platforms and for fantasy/sci-fi and action-adventure titles, all genres where the United States is particularly strong. Our research also demonstrated a clear US lead in country-of-origin preferences. In the survey, the United Kingdom ranked second in Germany and the Netherlands, ahead of domestic content. In Denmark, it ranked just behind domestic content, with the United States in clear first place. In Italy, the United Kingdom was in clear third place, after the United States and Italian content. Overall, content from English-language countries dominates, which challenges previous theories based on both the advantages of domestic content and linguistic proximity.

Chapter Three revealed that what audiences choose to view is strongly influenced by availability within catalogues, visibility on platform interfaces, algorithmic recommendations and the habits viewers form across streaming services and social media, both of which are dominated by US companies. In relation specifically to British content, availability, prominence and algorithms strongly influence what young audiences find. For example, although hundreds of British titles are available on Netflix, only around 200 could be easily found on the home page or through categorical searches. Surveys, digital diaries and interviews laid bare the complexity of discovery. Audiences

exercise some agency by seeking out trusted recommendations from friends, family and ‘real people’ on social media. Yet these recommendations are difficult to disentangle from algorithmic recommendations and humorous teasers strategically placed on social media for user circulation, highlighting the necessity for more research into how industry-generated teasers and algorithms undermine audience agency.

Building on earlier findings in the book about how much British content young audiences watch and how they discover it, [Chapter Four](#) explored why they choose to engage with it. Survey and interview findings revealed the two core values young viewers associate with UK content: the accessibility and language-learning benefits of English, and the appeal of humour. Young research participants also appreciated contemporary youth-oriented shows for their relevance, relatability and authenticity. Interviews revealed that this relevance and relatability are not rooted in cultural proximity, but rather in feelings of emotional proximity. *Sex Education*, *Fleabag*, *Heartstopper* and *Derry Girls* are meaningful transnationally because their themes and values resonate with youth identity. ‘British humour’ stood out as a key attraction for young viewers in Denmark, the Netherlands, Germany and somewhat less in Italy. Though perceived as culturally distinctive, participants found the ‘special’ and ‘unique’ British humour attractive, rather than alienating. Moreover, they praised the persistent use of humour within drama, something they miss in domestic content. We argue that this ability to appreciate and engage with British humour reflects a cosmopolitan proximity among young audiences, underpinned by their English-language proficiency and proximity *felt* towards the English language. This, we argue, also helps explain the broader popularity of British content and why it is often preferred to productions from linguistically proximate neighbours, and often, even to domestic content. Many young people in Europe today consider English as their ‘natural’ second language and as the ‘natural language of screen content’. Even in dubbing countries such as Germany and Italy, many young people reported watching in English, with or without subtitles, weakening the linguistic advantage of domestic media and increasing the disadvantage of screen content from non-English language countries.

[Chapter Five](#) addressed the limited appeal of domestic content and platforms, showing how global streamers have accelerated the shift towards transnational consumption, largely of English-language content, and away from domestic offerings. This shift challenges previous assumptions about the home advantage of domestic media, and further undermines the relevance of PSM. Although public and commercial broadcasters still produce the majority of European output, they struggle to compete with global platforms, whose budgets for high-quality drama and market power exceed their own. While Netflix, Disney+ and Prime Video have become major investors in European high-end drama, their investments are geographically heavily concentrated in the United Kingdom and, secondarily, in Spain, countries

with two of the world's most widely spoken languages. Survey, digital diary and interview data confirmed that young audiences in our study engage very little with PSM streaming platforms and other domestic services, as global streamers (first and foremost, Netflix) have become the default destination for long-form entertainment. As these platforms are dominated by Anglo-American productions, exposure to domestic content is limited. The sheer volume of English-language content in popular genres such as action and fantasy on streaming platforms satisfies most entertainment needs, and there is little incentive to seek out domestic alternatives. This trend is reinforced by widespread perceptions that domestic productions are inferior in terms of acting, scripts, production values and storytelling (including humour), and therefore less relevant, authentic and relatable than Anglo-American titles. The inevitable conclusion is that European providers are failing to connect with younger audiences, which compounds their financial challenges and competitive disadvantages vis-à-vis global platforms. This has potential implications for cultural identification among young people in Europe. The evidence presented in this book points towards culturalisation less anchored in national or geo-linguistic and geo-cultural proximate cultures, and increasingly shaped by an ever-strengthening Anglo-American screen culture, reinforced by the high status of English.

Chapter Six argued that the distinctive narratives and imagery of British screen content strongly shape how young audiences in Europe imagine Britain, demonstrating how screen encounters generate soft power. We identified three main soft power effects among our respondents: (1) increased knowledge about Britain; (2) heightened interest and appeal; and (3) a resulting increase in the desire to visit Britain, with potential wider economic benefits. We contend that British screen content may be especially influential because young people associate it with globally renowned yet relatable actors, humour and attractive locations, as well as with the English language, which they either consider their second language or wish to improve. Soft power is further strengthened by viewers' tendency to regard fictional portrayals as representations of reality, even though they are known to be fictional. We also showed how these perceptions blend with those shaped by school, family and personal encounters and are influenced by major political developments such as Brexit. As fewer young people from Europe gain first-hand experience of studying or working in Britain post-Brexit, screen media may become a more significant soft-power tool. Yet there are limits. Popular culture is a one-way form of communication, and the push by global streamers and UK producers to appeal to transnational audiences may risk reinforcing narrow or stereotypical images abroad. However, this is not the case for young audiences in Europe encountering a wider range of British content, including culturally specific programmes like *Derry Girls* and *Fleabag*. Although rooted in British humour, culture, politics and history, our research showed that these shows still resonated with sizeable young transnational audiences.

Cultural and language proximity revisited

A central aim of the book was to chart what young audiences in Europe watch, given the vast array of content offered by global streaming services. The audience survey, digital diaries and interviews revealed overwhelming consumption of English-language content, primarily from the United States, and, at a distance, from the United Kingdom. Another significant shift concerns the language-setting choices of young audiences. While audiences in Denmark and the Netherlands have grown up watching content in English, this habit is also growing in Germany and Italy, two countries where many young viewers are opting to watch with the original soundtrack.

In the age of streaming, earlier theories suggesting audiences prefer domestic content, followed by culturally or linguistically proximate content from geographically close neighbours or geo-linguistic regions (Straubhaar, 1991, 2007, Sinclair et al. 1996), appear to have lost validity. That is certainly the case among young audiences in our four European case study markets. Our survey findings showed a clear preference for long-form US content, followed at a distance by domestic content in Denmark and Italy, and by British content in the Netherlands and Germany, ranked above domestic content and well ahead of linguistically proximate European neighbours (see [Chapter Two](#)). While young people's preferences for US scripted content reflect a longstanding trend, this is now reinforced by a marked shift away from domestic reality and talent shows, which boosted domestic broadcasters in the 2000s and 2010s ([Chapter Two](#)). Besides, young people tend to hold critical views of domestic drama ([Chapter Five](#)), and domestic provision pales in comparison with the much broader choice of content from the Anglo-American sphere in genres such as action and fantasy that are especially important to young people. For those with an interest in animation, Japan is a key country of origin ([Chapter Two](#)).

The weak appeal of both domestic content and content from neighbouring countries with similar languages, we have argued, coincides with the growing significance of English as the 'language of advantage' (Collins, 1989), a previously under-explored factor in viewing, strengthened by the ubiquity of English on social media, streaming platforms and in schools. This is reflected in the near-universal consumption of original English-language soundtracks in the Netherlands and Denmark, often with English subtitles, as well as growing use of original soundtrack options in dubbing countries Germany and Italy, among those wishing to improve their English and watch 'the real thing'. Our research points strongly towards a generational shift towards viewing in English. In Denmark and the Netherlands, this shift is from watching with native language subtitles to watching with English-language subtitles. In Italy and Germany, our research revealed a shift (particularly pronounced in Germany) from watching dubbed content to viewing the original soundtrack. While this

does not extend to all young people, or even the majority, it is clear that there is no going back to dubbed viewing for those who have switched to English.

The low ranking of domestic content by interviewees across all four countries, combined with their positive associations between English and high-quality content, reinforces the argument made by Mast et al. (2017) of a self-perpetuating cycle of English-language dominance across SVoD platforms and social media, entrenching perceptions that English-language content is best. In Chapter Six, we further hypothesised a virtuous circle for British screen content, whereby its widespread appreciation (due to its high production values and the English-language advantage) generates soft power benefits that may foster more positive attitudes towards Britain, and, in turn, further reinforce interest in British screen content.

If young audiences in Europe are mostly watching English-language content from the United States and secondarily from the United Kingdom, how should this be theorised from an audience perspective? Our transnational analytical approach aimed to advance understanding by highlighting three under-explored aspects that concern changing sensibilities or perceived proximities in an increasingly connected world, one in which global social media and streaming platforms play a very significant role for young people.

The first and most important aspect is language. We argued that ‘linguistic proximity’ should be redefined away from scientific categorisation towards what young people *feel* is proximate, and towards what feels ‘natural’ in relation to screen consumption. Chapters Two and Four showed that nowadays young people in Denmark prefer English-language and British screen content over languages and screen content from neighbouring Norway and Sweden, although Danish is linguistically much closer to these countries. For them, and similarly for young people in the Netherlands and Germany, as well as in Nordic neighbour Sweden (Cunningham and Paulsrud, 2026), English is the most proximate foreign language and the language that feels natural for screen content. We hypothesise that this is likely to be also true for other European countries, thirteen of which were categorised by the EF English Proficiency Index in 2025 as having ‘very high’ English-language proficiency, with a further ten rated as ‘high proficiency’. Italy, in the ‘moderate’ proficiency category together with Spain, is thus an outlier in Europe (EF EPI, 2026).

A second aspect is what we described as ‘cosmopolitan proximity’. Drawing on Jensen and Jacobsen (2020), we argued that cosmopolitan proximity reveals itself in the significant numbers of young people willing to incorporate ‘British humour’ into their media consumption, as well as in their ability to feel at ease with and appreciate the cultural difference that finds expression within ‘British humour’. Although this stands in clear contrast to earlier theories centred on cultural and (scientific) linguistic proximity, the role of the English language in the widespread appeal of British humour suggests that, for most young people in Europe, this form of ‘cosmopolitan proximity’ may, in practice, remain mostly confined to Anglophone proximity. Finally, our

third transnational theoretical lens, ‘emotional proximity’ (Jensen and Jacobsen, 2020), is focused on human traits and concerns, here expressed through youth identity. We argued that the themes and emotions that define this life-stage, creating relatability and relevance across borders, are more important than presumed national or geo-cultural proximity.

Overall, our findings challenge earlier theories explaining the transnational appeal of non-US content by mobilising the concepts of cultural and linguistic proximity (the latter narrowly defined in scientific terms). What emerged clearly from our research is that how young people define ‘home’ and relate to content is not primarily determined by national borders, but increasingly by transnational interactions (see Esser and Steemers, 2026) and global taste communities (Asmar et al., 2025).

However, while the era of transnational streaming may be fostering transnational sensibilities, it simultaneously reinforces power inequalities, giving US-owned streaming platforms and production powerhouses unrivalled advantages in shaping screen production, distribution and ultimately consumption. Our findings, revealing strong preferences for Anglo-American and specifically US content, indirectly lend support to interpretations of US hegemony in global screen markets rooted in political economy analyses, emphasising structural factors such as larger market size allowing higher production and marketing budgets, vertical integration of production and distribution, as well as the advantage of the English language.

Finally, our transnational analytical lens is not meant to dismiss the role of the nation. Paradoxically, current transnationalising trends strengthen perceptions of the nation. In a globalised world, where governments actively brand the nation to gain soft power (see Chapter Six) and marketeers exploit nation branding for commercial purposes, cultural intermediaries and audiences use the nation as a marker of distinction, quality and authenticity. In short, the nation matters, not despite transnationalisation in production, distribution and consumption, but because of it, just as cultural identity is not a victim of globalisation, but a product of it. This is why, as reflected in our audience research, individuals continue to recognise nationality, both their own and that of others, and continue to identify nation-defining characteristics (such as ‘British humour’) even amid ongoing transnationalisation and increasing global connectivity.

Methodological limitations and future research

We began this conclusion by assessing the status of UK content in the age of global streaming. We also questioned whether young audiences still prefer domestic content, followed by content that is linguistically and culturally proximate, and considered whether a new theoretical perspective is necessary to redefine cultural and linguistic proximity. While this book does not

provide all the answers, the empirical evidence it has collected from young audiences in the form of a survey, viewing diaries and interviews in four case study countries in Europe advances ongoing discussions about transnational media flows by suggesting that English-language content is highly important to those aged 16–34 in these countries.

No research project is without limitations. As acknowledged in [Chapter One](#), the snowball sampling used for the survey resulted in respondents being more highly educated than the population at large. This was addressed by ensuring the participation of young people without a higher education background and from a variety of socio-economic groups in digital diaries, interviews and focus groups. While there are clear indications that cultural capital, most notably English-language proficiency, affects the consumption of British screen content, a more targeted research design than ours would be required to investigate this issue in greater depth. Our approach, spanning four countries with different educational systems and a diverse sample of participants aged 16–34 from varying socio-demographic backgrounds, was too broad to offer deeper insights into the role of cultural capital and distinction. Our study, however, did reveal the complexity and diversity of viewing practices and preferences in the age of global streaming, cautioning against simplistic categorisations of young audiences.

Future research should expand both the scope and methodology of our study. To capture viewing trends and the complexity of viewing practices, researchers need to explore new methods for examining audience engagement across multiple platforms, including qualitative approaches, complemented by production and policy-focused perspectives. The findings emphasise the importance of revisiting conceptualisations of linguistic and cultural proximity and home advantage. More empirical research is needed from other European countries and beyond Europe to provide insight into how younger generations define ‘home’ in relation to screen content, and the extent to which it encompasses elements that are both transnational and culturally specific, e.g., humour. Finally, there are strong grounds for examining consumption of long-form content alongside short-form content on social media, recognising both the role of social media as a discovery channel for long-form content (something that emerged strongly from the SEwB research) and as a major source of screen time in its own right.

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