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Screen Encounters with Britain

What do young Europeans make of Britain and its digital screen culture?



Arts and
Humanities
Research Council

Final Report
February 2025

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1. About the project

Project title: Screen Encounters with Britain.

What do young Europeans make of Britain and its digital screen culture? (SEwB)

Project funder: Arts & Humanities Research Council (AHRC) [grant number AH/W000113/1]

Period: April 2022 – January 2025

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Industry partners: All3Media, BBC, BBC Studios, BFI, British Council, Pact, HMR International

Research questions

- 1) As viewing practices change, **who** are the young Europeans who watch UK screen content, **what** do they watch (and define as British), and **how do they watch**?
- 2) How do these audiences get to **know about, find & access UK screen productions** across different platforms?
- 3) Why do they seek out British screen productions? What are their **motivations**? And **what role do cultural intermediaries**, including content buyers, online influencers and educators, **play** in their decision to engage with British content?
- 4) What **values & experiences** do young audiences attribute to British screen content and recognise as “British”? (e.g., locations, accents, diversity, creativity)
- 5) How does **screen content influence perceptions of the UK** in the wider context of mediated (e.g., news) and non-mediated experiences (e.g., personal encounters, tourism)?
- 6) How do screen encounters with Britain **impact attitudes & behaviour** towards the UK?

British screen content = how our audiences define it

Research approach

4 case study markets

- **Denmark & the Netherlands** - 2 small markets with comparatively limited domestic programme supply, a notable history of UK screen imports and subtitling, and high English language proficiency
- **Germany & Italy** – 2 large markets with substantial domestic programme supply, with UK screen imports playing a much lesser role, a dubbing tradition and limited experience of subtitles, and markedly lower English language proficiency than the above

3 work packages

Context

- Establishing viewing habits and trends through local industry reports
- Researching local VoD catalogues for availability of UK screen content
- Tracing online marketing & promotion of UK content on the landing pages of 3 key VoD services

Intermediaries

- Interviews with 9 British sales executives
- Roundtable discussions with UK & European partners - 4 / one per market (20 plus participants for each)
- Local intermediary interviews - buyers (15), teachers (14), festival organisers/influencers (18) - 47 / 9-15 per market

Young audiences

- Online survey in 4 local languages - 1,813 responses / 409-555 responses per market
- 5 days of digital diaries & activities - 102 participants / 20-28 per market
- Individual 60 min online interviews with stimulus material generated from digital diaries - 48 participants selected for demographic variety / 12 per market
- Small group interviews with 16-19-year-olds - 38 participants / 8-10 per market

Markets: Watching TV is still important, but SVoDs dominate

- The consumption of 'longform' screen content (>20 min) remains an important form of entertainment for young people (16-34) with three-quarters of respondents in **Denmark, Germany, Italy and the Netherlands** watching daily or 3-5 times a week, mostly for relaxation, comfort and repeat viewing of their favourite US sitcoms.
- Yet in all 4 markets longform content viewing is now dominated by global streamers, foremost Netflix (86%), rather than PSB streaming (43%), local commercial streaming services (25%) or linear TV (15%). Local platforms offer less of the action-adventure, fantasy/sci-fi and comedy-drama genres which younger audiences crave, making them seem less relevant to younger generations.
- Talent shows and reality TV, once staples of domestic platforms, no longer rank highly among 16-34s.

Status: UK ranks 2nd after US

- The UK ranks 2nd after the US as top country of origin among all survey respondents (18% vs 55%) and digital diarists (17% vs 58%). In Italy it came 3rd in the survey (9%) and diaries (5%) after domestic content.
- What has shifted is the visibility of UK shows from sales of crime dramas and documentaries for PSB transmission to younger-skewing comedy, fantasy/sci-fi, romantic and historical drama on SVoDs, genres where the UK was highly ranked by younger viewers in surveys and interviews.
- Even in Germany and Italy which used to air few UK shows, young people talked about Netflix coming-of-age originals like *Sex Education*, *Heartstopper*, period street gang drama, *Peaky Blinders*, *The Crown*

(Netflix) and comedy-drama, *Fleabag* (Prime). Netflix and Prime are the only platforms that really matter when it comes to contemporary UK shows that young people like. Favourite films are largely dominated by Harry Potter and classic rom-coms (*Notting Hill*, *Love Actually*).

- English language proficiency and market are the strongest predictors of viewing UK content. The consumption of UK content is still notably higher in Denmark and the Netherlands than it is in Germany and Italy, but Germany appears to be catching up. Higher educational attainment and age also determine the consumption of UK content.

Availability & discovery: social media drive new discoveries

- SVoDs offer the largest number of UK show titles by far. Netflix is where most UK content is found and remembered. 21% of survey respondents actively search for British content.
- Survey respondents recalled 120 unique titles on Netflix compared to 26 unique titles on public service platforms averaged across 4 countries. Just over half of Netflix UK titles mentioned in the survey appeared on the Netflix home page.
- Streamer recommendations are the most important source of discovery for 16-34s (65%); social media clips (62%) are most important for 16-24s.
- Social media driven by humour is key for discovery, especially for niche comedies like *Derry Girls* and *Cunk on Earth* (both on Netflix) where user-created memes generated buzz, convincing young people to watch.
- Awareness of UK origin may be impeded by lack of labelling by global streamers. Distinguishing between UK and US shows can also be hard, if they are dubbed or have a 'transnational look or feel'.

Motivations: Ease of watching in English & humour are top

- Ease of watching in English, the lingua franca, is top for choosing UK shows across all 4 countries (66%), but ranks 2nd in the Netherlands and Denmark, where British humour ranks top (70% and 68% respectively).
- Interviewees in all countries consistently appreciate British humour in all types of fiction (e.g. *Sex Education*, *After Life*, *Fleabag*) not just comedy, and see this as a missing ingredient in home-grown productions.
- Learning English is the most important motivation for choosing UK content in Italy (65%), which has the lowest English language proficiency. It is also fairly high in Germany (53%), where it ranked 4th, and high for the 16-19s in all 4 countries (47% in DK - 72% in IT).
- Just under half of survey respondents watch UK TV shows & films because they like UK actors, comedians and TV celebrities, but most could only recall the names of internationally renowned stars (e.g. Hugh Grant, Benedict Cumberbatch) and Ricky Gervais, whose prominence on Netflix and social media made him the most named UK talent in interviews.
- UK settings and landscapes are a bigger draw in Germany (58%) and Italy (59%), with a strong association with Harry Potter, and dramas with aristocratic settings (e.g. *The Gentlemen*, *The Crown*).
- Interviews reveal that strong reasons for choosing US and UK shows are perceptions about the lack of relevant domestic content and dislike of domestic drama, particularly in the Netherlands and Germany, where criticism focuses on acting quality, lack of humour and emotional engagement, and a shortage of shows that interest younger audiences.

Values & experiences: humour most mentioned

- 'Humour' is the word most associated with UK shows and films when survey respondents were asked to describe UK content in a few words.
- In all 4 countries, interviewees described British humour with the same words: 'unique,' 'ironic,' 'eccentric,' 'black,' 'subtle,' 'irreverent,' 'intelligent'.
- There is agreement among survey respondents about the realism and authenticity of UK content, which interviewees positively contrasted with US content.
- Nearly half of survey respondents agreed that they can relate to themes and characters in UK content. However, interviews revealed that these perceived values are almost entirely driven by a small number of scripted shows available on SVoDs, including *Sex Education*, *Heartstopper*, *Skins*, *After Life*, *Derry Girls* and *Fleabag*. These type of shows are often seen as more youth-oriented and lacking on domestic platforms.
- Interviewees rarely mentioned diverse casting unprompted and mostly in relation to Netflix shows like *Sex Education* and *Heartstopper*.
- Few survey respondents thought that 'domestic content feels more relevant than British content', ranging from a low 7% and 15% in Germany and the Netherlands respectively, to 25% in Denmark and 31% in Italy. In Denmark and Italy home-grown content also rated higher overall.

Executive summary (continued)

Language settings: A shift towards English language viewing

- Watching in English with English subtitles is the most popular preference among survey respondents in all 4 countries, but Italy has much higher levels of dubbed viewing (40% in the digital diaries).
- Interviews confirmed that dubbing remains the preferred option for most of the population in Italy and Germany (all ages and 16-34s). Yet there is a shift towards English viewing among high school students, those with higher education, and those who want to watch 'the real thing' and never return to dubbed viewing.
- English subtitles are preferred over subtitles in the native language because they match the spoken language, improve English language skills, and can be of better quality than native language subtitling (in Denmark and the Netherlands particularly).
- In all countries there is variation in language settings, depending on multiple factors: language options offered, habit, English language proficiency, personal preferences, mood, content watched, platform used, the level of interest in film / TV series and who they watch with.

Cultural diplomacy & soft power: British screen content clearly benefits the UK

- UK screen content, including well-known 'classics' (e.g. *Harry Potter*, *Notting Hill*), does contribute to knowledge and perceptions of the UK. This influence extends to recent youth-oriented series on SVoDs (e.g. *Heartstopper*, *Sex Education*). This impact occurs alongside school, other media and direct encounters through tourism.

- There is clear evidence that British screen content furthers interest in Britain and its people and positively influences attitudes towards it.
- 'Classics' like *Sherlock*, *Harry Potter* and *Notting Hill* increase the desire to visit the UK, incl. specific locations (e.g. Scotland) and film settings.
- The power of screen content lies in how pictures are interpreted. People know that what they are watching is 'not real', but subconsciously they process these pictures as representations of reality.

The Brexit factor: Anger, sorrow, but mostly indifference

- Around half of survey respondents in the Netherlands, Denmark and Germany changed their views on the UK because of Brexit. In Italy, this was only 29%. Most survey comments were negative. For the rest and for many interviewees Brexit is a distant event that does not affect them.
- Brexit has not impacted the consumption of British films and TV shows. However, industry sources confirmed a decline in coproduction and distribution opportunities with UK partners because the UK no longer benefits from EU funding initiatives
- Teachers in all 4 countries reported that school trips have been affected because of passport requirements. Ireland and Malta have become alternative study destinations. The loss of Erasmus+ funding means that fewer HE students can go to the UK as part of their degree.
- Interest in and positive attitudes towards the UK involve a mix of first-hand experiences (travel, meeting people), the influence of teachers and mediated encounters. It remains to be seen whether film and TV can halt declining interest in Britain as a result of declining first-hand travel and work experiences.

3. Four markets - the basics

Market basics

- The study covers 4 countries with different population sizes: Germany (85m), Italy (59m), the Netherlands (18m) and Denmark (6m).
- English language proficiency is very high in the Netherlands, Denmark and Germany and moderate in Italy. VoD penetration is highest in Denmark and the Netherlands.





Streaming

- Our survey shows that the most popular platform among 16-34s (all countries) for longform content is Netflix, followed by YouTube and Disney+. In individual countries there are some variations after Netflix, which is in unrivalled first position.
- Netflix ranks higher because of the variety and quality of its content, and its user-friendly interface.
- YouTube is valued for ease of access, relaxation, comedy and for alternative content not available on VoD services.
- Although PSB streaming services came joint fourth alongside Prime Video, local services hold less appeal for young audiences than 'omnipresent' global streamers.
- Linear TV is used by 15% of survey respondents and is mainly associated with family viewing or is watched out of habit by the over 30s.
- Young people like watching TV to relax while eating, studying, phone scrolling and for comfort, including repeat viewing of US sitcoms.

Genre preferences – all countries of origin

- Asked to select their top 5 genres, Fantasy/Sci-Fi, Action/Adventure and Comedy/Comedy-Drama are the most popular genres among young people (16-34) in all 4 countries.
- Talent competitions and reality TV, once schedule staples, no longer rank so highly among the genre preferences of 16-34s.





The basics

		 DK	 NL	 DE	 IT
L1	Population, in millions (rounded up)	6	18	85	59
L2	Minutes watched TV per day (2021)	127	154	213	249
L3	Population watching TV on a TV set, daily or almost daily (2023)	57%	58%	68%	85%
L4	Population using online social networks, daily or almost daily (2023)	72%	61%	33%	44%
L5	Public service broadcasters	DR, TV2	NPO	ARD, ZDF, Arte	Rai
L6	Commercial broadcast groups	TV2, TV3	SBS, RTL	RTL, ProSieben	Sky Mediaset
L7	Domestic AV fiction production (2023) in No. of TV films/seasons	33	53	315	79
L8	Domestic AV fiction production (2023) in No. of hours	-	260	2,435	651
L9	Language provision for imported content	subtitles	subtitles	dubbing	dubbing
L10	English language proficiency	very high	very high	very high	moderate

- Denmark (6m) and the Netherlands (18m) have significantly smaller populations than Germany (85m) and Italy (59m).
- In 2021 the European average for daily TV viewing was 220 minutes. Italians watched more (249 min.). They also watched more than Germany (213 min.), and significantly more than the Netherlands (153 min.) and Denmark (127 min.), two more mature digital markets (Vaunet, 2023).
- In 2023 85% in Italy watched TV daily/almost daily on a TV set, higher than the EU27 average (74%), and higher than Germany (68%), the Netherlands (58%) and Denmark (57%) – again reflecting differences in digital maturity (European Commission, 2023: 8).
- All 4 countries have a strong public service broadcasting tradition and well-established commercial broadcasting groups (L5-6), but as this report shows, linear TV viewing is low among young people. Differences in living situations may affect how and what young people view. In 2023 almost 70% of 18-34s in Italy were living with their parents (Eurostat, 2023), rendering linear TV more relevant here than in the other 3 countries.
- Further variations concern the size of domestic fiction production (L7-8) as well as language provision for imported content. In Germany and Italy imports are historically dubbed, in Denmark and the Netherlands content (for adults) is subtitled.
- Dubbing / subtitling impact English language proficiency. The global EF English Proficiency Index 2023 ranked 10 countries as 'very high proficiency', incl. the Netherlands (No. 1), Denmark (No. 4) and Germany (No. 10). Italy was ranked 35th with 'moderate proficiency' (EF EPI, 2023).

Streaming

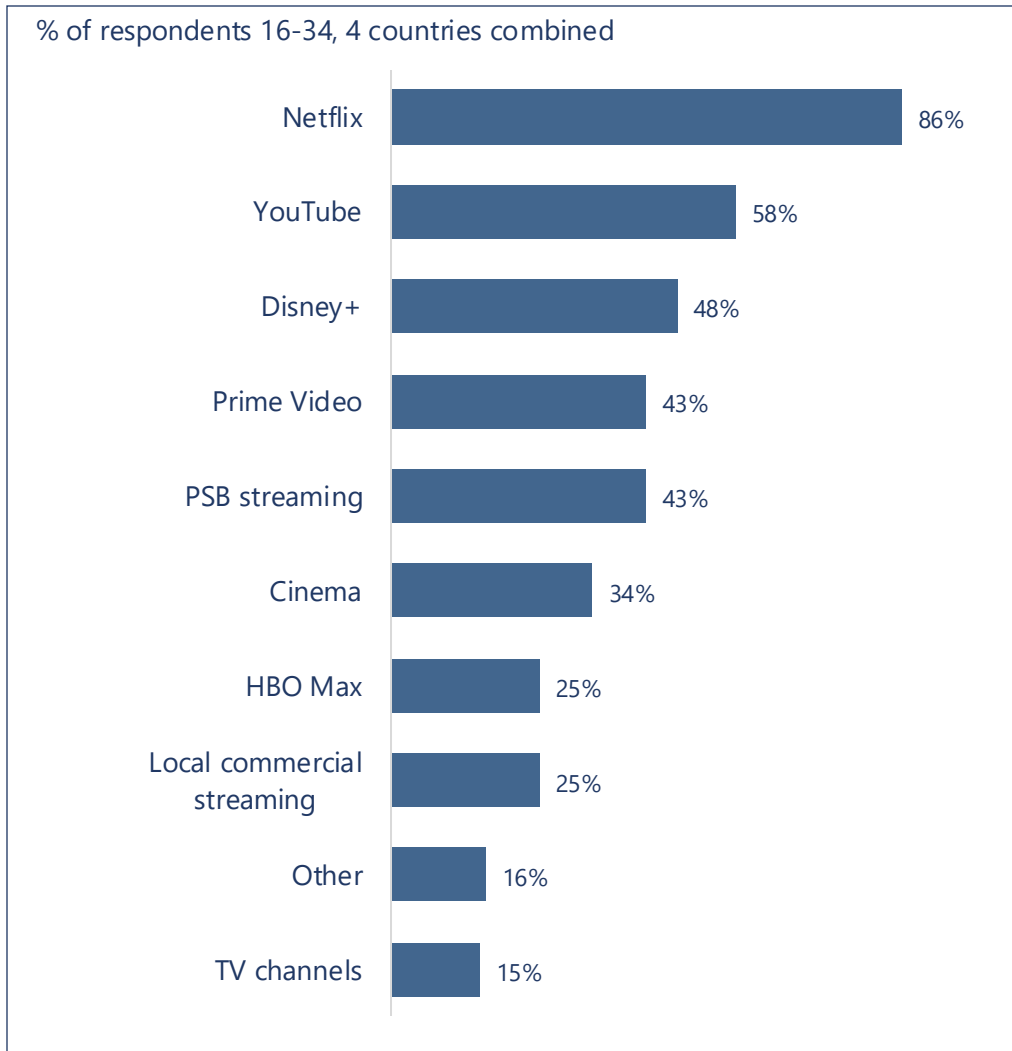
Two highly advanced streaming markets, one latecomer

		 DK	 NL	 DE	 IT
L1	Share of population with FVoD/SVoD subscriptions, in 2022/23	>90% (16-34)	73%	55%	46%
L2	Average number of SVoD subscriptions, in 2022	2.2	1.5	1.1	0.8
L3	Key global SVoDs	Netflix HBO Max Disney+ Discovery+ Apple TV+ Paramount+ Blockbuster	Netflix Prime Video Disney+ HBO Max Apple TV+ Paramount+	Netflix Prime Video Disney+ Apple TV+ Paramount+	Netflix Prime Video Disney+ Apple TV+ Paramount+
L4	Key local/regional VoDs	DRTV TV2 Play Viaplay Filmstripen C More Viafree YouSee Dansk	NPO Start/Plus Viaplay Videoland	Joyn RTL+ WOW Magenta	RaiPlay Sky Go Mediaset Infinity NOW

- Denmark and the Netherlands are highly advanced streaming markets, more advanced than Germany and particularly Italy.
- In Denmark over 90% of 16-34s had VoD subscriptions in 2022/23, compared to 73% of the (total) population in the Netherlands, 55% in Germany and 46% in Italy. This ranking is also reflected in the average No. of SVoD subscriptions in 2022 (L2) (EAO, 2024: 51), which is higher in Denmark and the Netherlands.
- Although Italy lags behind, SVoD subscriptions grew rapidly during the COVID-19 pandemic (IVF, 2023: 2), and content from numerous TV channels has been moved to new VoD services by Disney, Paramount and Discovery, resulting in the closure of over 40 TV channels (CeRTA, 2023: 51).
- Little information exists on each country about attitudes towards piracy. In Italy 42% of adults admit to accessing pirated content and 50% see no harm in the practice (IVF, 2023: 1). SEwB interviews revealed that in the Netherlands it's common practice for young people to search illegal streaming sites if they can't find shows they want to watch. Few interviewees in Germany and Denmark mentioned illegal streaming or the use of VPNs.

Platforms our survey respondents use for 'longform' screen content

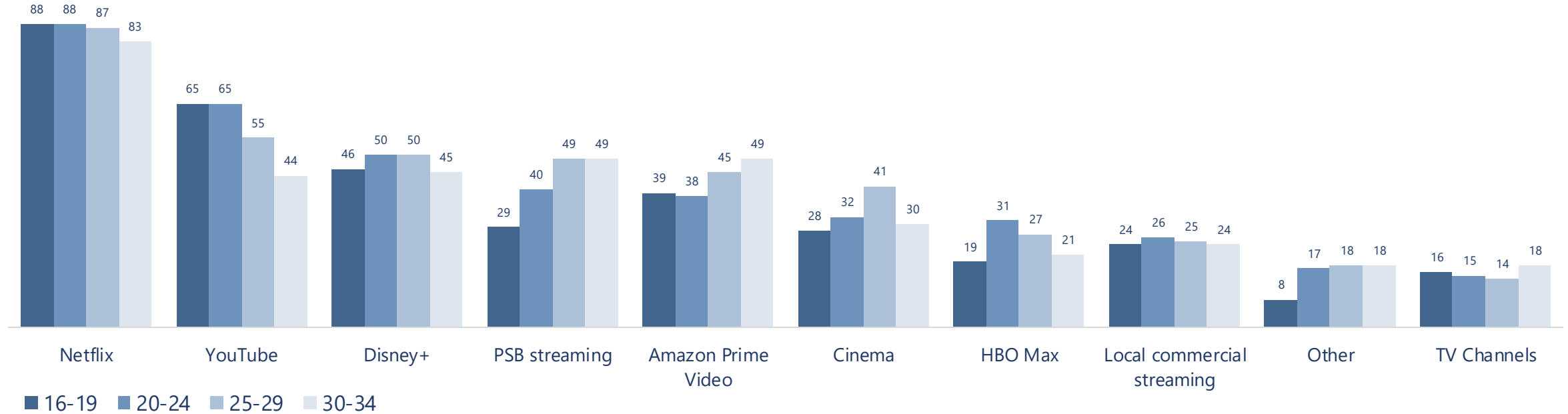
Netflix in unrivalled position



- Responses to our surveys show that the average number of platforms used to watch longform content (defined as >20min) across all 4 countries is 3.9. In Italy and the Netherlands, it is 3.8, in Denmark 4.5 and in Germany 4.7.
- When asked to select all the platforms they use, 86% of respondents aged 16-34 chose Netflix, making it the clear leader. Netflix is also the clear leader in each individual country
- YouTube, which is in second place overall, ranks second in Germany (71%) and the Netherlands (65%), third in Italy (52%), and fifth in Denmark (44%).
- Prime Video (43% combined) is strong in Italy (second with 72%) and Germany (third with 66%), but drops to fourth place overall because Amazon has no online retail business in Denmark. In the Netherlands it ranks fifth (33%).
- Disney+, which launched in 2020, ranks third overall (48%). It is third in Denmark (57%) and the Netherlands (45%), and fourth in Germany (48%) and Italy (43%).
- PSB streaming usage (43% combined) is boosted by Denmark (52%). In Germany and the Netherlands, only around a third reported using PSB streaming services, while in Italy, it was 38%. Digital diaries and interviews revealed that PSB usage is limited
- The cinema was selected by 34% of survey respondents, ahead of local commercial streaming services (25%) and linear TV (15%).
- (HBO) Max (25%) ranks low overall because it is only available in Denmark (65%) and the Netherlands (36%). For more country details see [Interim Report \(IR\) Denmark](#), [IR Germany](#), [IR Netherlands](#) and [IR Italy](#).

Platforms used by survey respondents – by age

% of respondents, by age, 4 countries combined





- Analysed by age, significant variations can be seen for YouTube, PSB streaming, cinema and (HBO) Max.
- YouTube use for longform content drops from 65% among 16-24s and 55% among 25-29s to 44% among 30-34s.
- For PSB streaming, the trend is reversed, with a notable drop among the youngest. Only 29% of 16-19s use PSB streaming services, compared to 40% of 20-24s and 49% of 25-34s
- Cinema ranks highest for 25-29s (41%); Max for 20-24s (31%).
- For local commercial streaming services and TV channels there is less age variation, but notable variations exist between countries.
- In Italy it is 20-29s who use TV channels the most, possibly because many still live at home. In the other countries it's the reverse: the youngest (16-19), who live at home, watch channels with their families, while the oldest (30-34) watch because they grew up watching linear TV.
- In all 4 countries there is comparatively low engagement with linear TV and a strong preference for global over domestic streaming services.


Netflix – the unrivalled No. 1

Liked for variety of content, high quality & user-friendly interface

"the first place goes to Netflix because of the variety of content it offers, even docu-series, I've always liked that platform. And then for me it's also a matter of user experience, meaning that the Netflix platform itself is accommodating, you know? It's easy to use, I can find the things I like, maybe some films are missing [...] but as far as the original content, all in all it satisfies me."
- Matteo, 28 

"I think Netflix is more popular. But on Disney there are just, like, a few series we all watch. But Netflix has more variety for us."
- Annette, 19 

"I will definitely say Netflix, because I think it's more diverse. It has everything on it. It has Danish movies, it is English, British, Japanese, and all that kind of stuff."
- Lene, 17 


"One factor [for favouring Netflix] is of course the content, I really am very satisfied with the content [...] And another great factor for me is the user interface - so the home screen, I think, is very easy and intuitive to use. [...] Amazon is quite bad with what the user interface looks like, and it's not very practicable."
- Didier, 29 

- For popularity and frequency of use, Netflix proved the clear favourite among research participants in all four countries – across surveys, 5-day digital viewing diaries, and interviews.
- Interviewees explained their preference for Netflix because of its user-friendly interface, quality content (see Matteo and Didier left), and variety of choice (Annette, Lene), especially for content 'formed around youth culture' (Jay, DE,17).
- Two German respondents preferred Netflix because all shows are available with the original English soundtrack, unlike many other streaming services in Germany.
- Italy was the only country where several interviewees preferred Prime Video to Netflix. In Italy, Prime Video offers a substantial amount of domestic content, including popular stand-up comedy series *LOL: Chi ride è fuori*, and reality show *Italia Shore*. It is inexpensive as part of the Amazon Prime deal. Since most Italians still prefer to watch dubbed foreign-language content (see slide 74), Italian interviewees, unlike their German counterparts, were not troubled by dubbed versions.
- Disney+ is popular with young people in all 4 countries, but it is no match for Netflix. Interviews revealed that it is seen as a platform for certain US shows, including *How I Met Your Mother* and *Modern Family* (which moved from Netflix to Disney+ in 2022), the *Star Wars* franchise, films and series from the Marvel universe, and Disney's children's classics, which are frequently rewatched for nostalgia and comfort, especially by women.


YouTube

Liked for ease of access, relaxation, comedy and alternative content


"if I really feel like watching a series or something similar, then I would look at Netflix or Amazon Prime. But I usually go to YouTube straight after work because it's just a more relaxing viewing experience. You don't have to concentrate for an hour or two..."

- Markus, 26 


"when I'm alone, I usually watch, like, Italian YouTube stuff, or something which is music-related."

- Gemma, 17 

"It seems like there's an infinite amount of British panel shows! [...] It felt like a whole network, a community of comedians and TV shows that I could get into and follow."

- Thomas, 29 

"I use YouTube more than full series and stuff, I would say. [...] A lot of reviews about shows that I watch. I like watching those a lot. [...] I don't really watch, like, YouTubers. I don't really follow people. It's more, like, video essays [...] a lot of debates."

- Yda, 21 

- In all 4 countries, it is the under-25s who use YouTube the most for watching content lasting longer than 20 minutes (in addition to short-form material).
- YouTube serves as an alternative to satisfy personal tastes not met by VoDs (see Yda left) or because it requires less concentration (Markus). Comedy consistently performs well on YouTube (Thomas).
- Many interviewees in DK, NL and DE referred to YouTube as a platform where they discovered and were recommended content (Yda). They also used it to watch some 'longform' British shows. Younger men in Denmark mentioned *Gordon Ramsay* and *Jeremy Clarkson*. Older Danish men regularly watched highlights or full episodes of panel shows (*Taskmaster*, *Would I Lie to You?*, *8 Out of 10 Cats*).
- Men, but fewer women, in all 4 countries mentioned watching domestic, UK and US stand-up comedians on YouTube. One Italian interviewee noted that watching an Italian stand-up comedian on YouTube was more convenient than accessing his show on the domestic streaming service.
- Many interviewees, especially men, mentioned encountering trailers for UK or US screen content on YouTube. In Italy, there is a stronger focus on Italian-language offerings (music, instructional videos, hobbies), likely due to lower English language proficiency.

Local streaming services hold less appeal

But Denmark and Italy fare better than Germany and the Netherlands

"we do have something called NPO Plus or something. But I rarely ever use it, so I didn't mention it. [...] All I know is I can watch some movies that are also on there - and some I have to pay for, and some I don't. But there's not really stuff on there that I want to watch, you know?"

- Kenny, 19



"with RaiPlay I can say that I've used it several times, but always knowing that a programme I wanted to watch was on there [...] but I've never done any activity like... 'let's see if I can find something to watch on RaiPlay'."

- Gabriele, 23



"I have Netflix right now, and use it mostly. I used to have some other Danish streaming programmes, but after a while I get tired of them because I watched all the stuff that was on there."

- Helle, 17



"I actually used [commercial streamer] Joyn to rewatch series and TV shows that were on TV, but I missed them somehow. [...] since I don't watch TV that often anymore, that's probably also why I don't use Joyn anymore that often as well."


- Fernand, 17





- For many young viewers, especially 16-19s, domestic streaming services, both commercial and public-service, hold little appeal (See slide 13, and quotes on left).
- Even with stronger PSB streaming offers like DRTV and TV2 Play in Denmark or RaiPlay in Italy, the youngest showed little affection for domestic platforms. They claim to use them 'rarely' and only for certain domestic shows. Margherita (27, IT) mentioned using RaiPlay to watch an interview with Fedez, a famous Italian rapper, but did not use it much otherwise.
- Even when producing appealing content, local services still lose out to global platforms. Mario (IT, 17) watched Italian sci-fi series *Noi Siamo Leggenda* [trs. *We are Legend*, 2023], a co-production between Rai, Fabula Pictures and Amazon on Prime Video. Didier (DE, 29) had never seen high-budget German TV dramas *Babylon Berlin* (RTL) and *The Swarm* (ZDF), even though they were heavily promoted.
- Didier mused that for him local streamers "are non-existent as competitors in this area" because global streamers are so "omnipresent".
- However, there are clear age differences. Viewers over 30, who grew up without global streamers, are still in the habit of using domestic streamers and TV channels, at least occasionally.


Linear TV

Only for family viewing and out of habit for the oldest cohort

"No, not so much [Linear TV].
But when we can, yes. I watch
usually with my grandparents
during the lunch or the dinner!"
- Paolo, 17 

"*Wie Is De Mol?* is only once a year
on TV. And *De Slimste Mens (The
Smartest Human)* is only 2 seasons a
year, so they just finished. So I do watch
Dutch TV, and with my family –
occasionally I watch alone – but that's
only TV. No series or something."
- Annette, 19 


"I used to watch some
livestreams every now and again.
But, like, just gaming stuff. Not
really any live broadcast
television."
Lotte, 19 


"I don't actually have a TV signal
in my apartment, Danish
television just isn't really on the
menu, so to speak."
Mads, 27 


- TV channels were used by 15% of respondents across all 4 countries. However, Denmark (7%) lags significantly behind Germany (19%), Italy (18%) and the Netherlands (17%). In Germany (26%) and the Netherlands (23%) 30-34s watch channels the most. In Denmark it is 16-19s (10%), and in Italy it is 20-24s (21%).
- Linear TV has diminishing appeal. For Mads (27) in Denmark (left), TV is from a bygone era. Livia (32) in Germany only watches Netflix now. She used to watch German shows on linear TV, but never fixed her TV set after losing access to these channels.
- Watching linear TV for 16-34s is mainly associated with family viewing. In Italy, this occurs during mealtimes, as all 22 interviewees lived with family or partners. In all 4 countries young people reported watching TV with family sometimes, when visiting, during Christmas, or because they still live at home with family.
- The most frequently mentioned linear TV programmes were domestic entertainment shows such as *Wie is de Mol?* (NPO, Who is the Mole?) in NL and talk shows like *Belve* (Rai 2) in Italy. In Italy, more domestic shows were named because family viewing is still more common.
- Several of the youngest, especially women living at home, mentioned watching classic films or fictional series (usually from the US) with their parents. *Notting Hill* was among UK films mentioned in Germany, Italy and Denmark - a film they know as 'mother's favourite' and one that is shown at least once a year during Christmas.


'Light viewing'

Young people like watching TV whilst eating, studying and for comfort

"I watch it [*The Office US*] while I'm eating, I mean, it's a classic, 20 minutes to prepare food and 20 minutes to eat [...] sometimes at lunch I like to watch things again, maybe I rewatch some episodes..."
- Daniele, 25 

"So maybe in a typical week where, for example, I have a lot of studying to do also, I would rather watch more like sitcoms [*Friends, Big Bang*] or series or shorter formats."
- Emilia, 24 

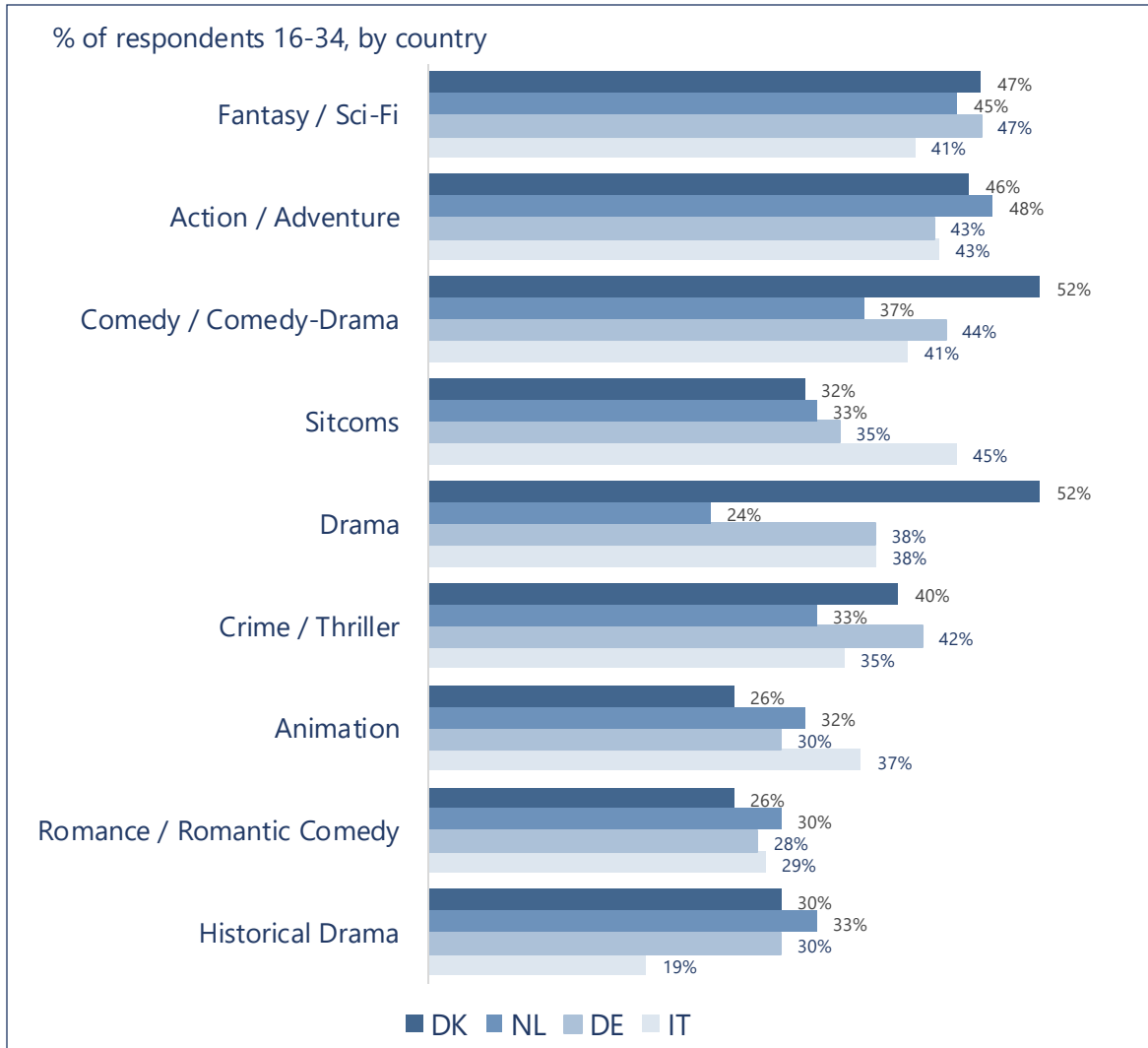
"I do like an 'easy laugh', you know? For instance, with *Modern Family* and whatnot. And I think a lot of that, like, comic relief, easily accessible TV shows are more likely to be American."
- Kirsten, 29 

"sometimes I just like to watch it [*iCarly*, US teen series on Nickelodeon]. I think it's entertaining. It's just mindless entertainment to me."
- Floor, 20 

- Many interviewees reported watching while eating, studying, travelling, phone scrolling or as 'background noise', so favouring content that requires less attention.
- The appeal of US sitcoms, as Daniele (25, left) suggests, lies not only in their humour, but also because they constitute short light viewing with familiar stories and characters that can be watched as stand-alone episodes.
- Another noteworthy habit among interviewees is repeat viewing. Frequently rewatched titles include US series like *Grey's Anatomy* and *How I Met Your Mother*, but also some British films (*Harry Potter*, *Notting Hill*, *Love Actually*) and series (*The End of the F***ing World*, *Sex Education*, *Lovesick*) and the perceived 'British' drama, *Bridgerton*.
- Re-watching was mentioned in relation to 'nostalgia' (Floor, NL, 20), 'favourites' and 'comfort viewing' (Benedetta, IT, 24; Thomas, DK, 29), as a choice when 'not knowing what to watch' (Elisa, IT, 26) or 'not wanting to commit to a new show' (Deja, DE, 25). It is also something they opt for when engaged in something else, like eating (Daniele, IT, 25).

Genre preferences – all countries of origin

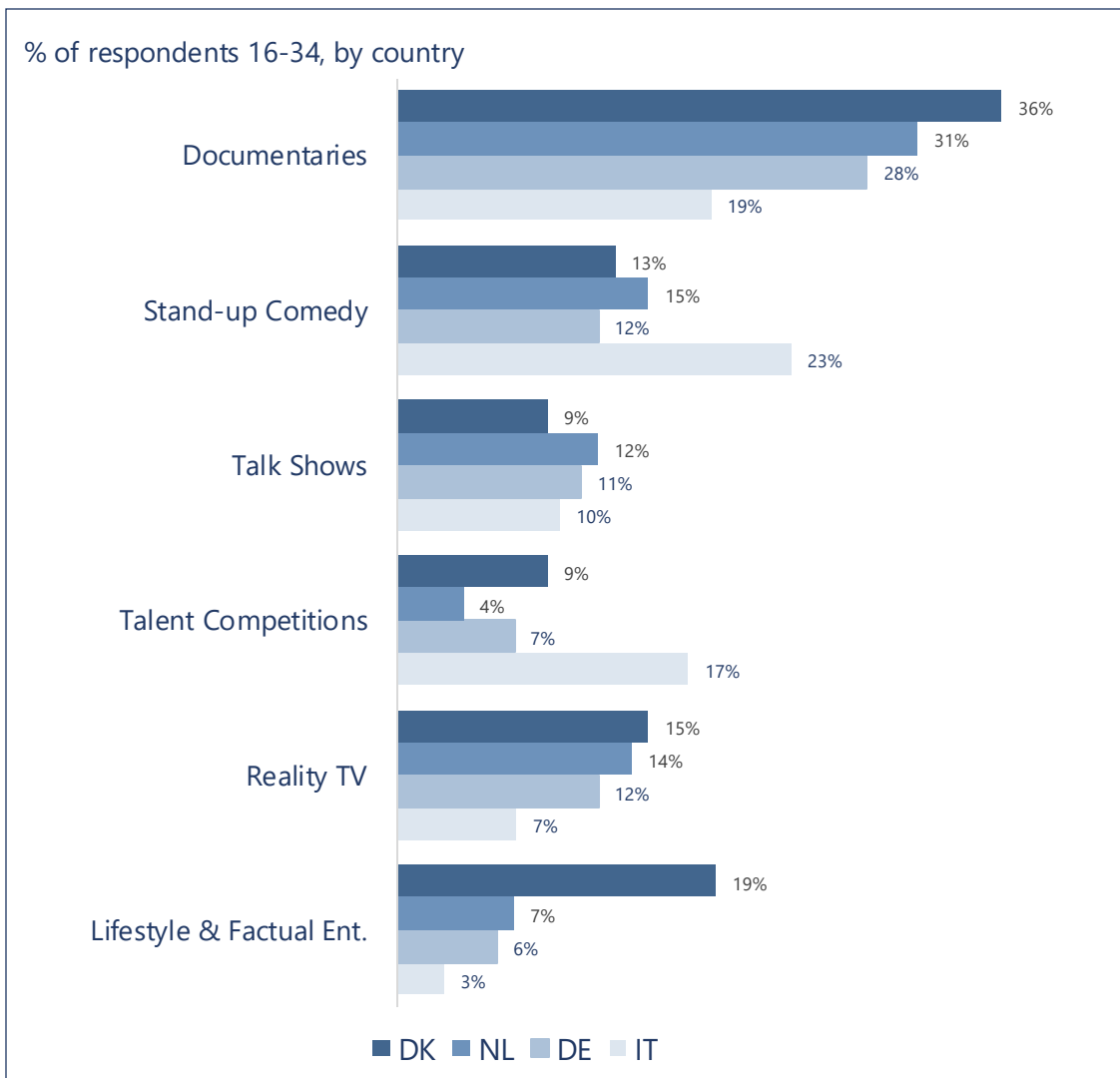
Scripted genres most popular



- When asked to select their top five genres, survey respondents favoured scripted genres (see left) over unscripted genres (next slide).
- Fantasy/Sci-Fi, Action/Adventure and Comedy/Comedy-Drama are the most popular genres among young people (16-34) in all 4 countries (see left). Action/Adventure is especially popular with 16-19s.
- There are significant gender variations. Women showed clear preferences for Romance/Romantic comedy (47% vs 12% of men), Historical Drama (33% vs 23%), and Sitcoms (43% vs 31%).
- Men displayed clear preferences for Action/Adventure (60% vs 29%), Fantasy/Sci-Fi (55% vs 34%) and Animation (38% vs 22%).
- The popularity of animation, which ranges from 26% in Denmark to 37% in Italy, was confirmed in interviews, explaining the high ranking of Japan as a country-of-origin preference (see slide 25).
- Crime/Thrillers were more popular in Denmark (40%) and Germany (42%).
- Historical drama is notably less popular in Italy (19%) than in the other 3 countries, where 30-33% marked it as a favourite.

Genre preferences (continued)

Light entertainment / unscripted content less popular



- Light entertainment / unscripted content proved less popular overall than scripted content.
- Documentaries were the most popular non-scripted genre, but with country variations. In Denmark, 35% of respondents selected documentaries as one of their 5 favourite genres, but only 19% did so in Italy.
- Danish respondents also showed a much stronger preferences for Lifestyle & Factual Entertainment (19%), compared to respondents in Italy (3%), Germany (6%) and the Netherlands (7%).
- In Italy, Stand-up Comedy is the most popular light entertainment genre (23%), ranking higher than in the other 3 countries (12-15%).
- Talent competitions and reality TV, once schedule staples, have fallen out of favour. While 17% of Italian respondents picked talent shows as one of their top 5 genres, these were much less favoured in NL (4%), DE (7%) and DK (9%). Only between 7% (IT) and 15% (DK) of survey respondents picked reality TV.
- Talent Competitions and Lifestyle & Factual Entertainment are more popular with young women (both 13% vs 5% for males). For reality TV the gender gap is even greater (20% vs 5%).
- Age is a strong determinant in some cases. 30-34s favoured documentaries (40%) and talk shows (14%) more than younger age groups.

4. British screen content

Exports, historical familiarity and status of UK content

- SVoDs have become crucial for increasing the visibility of younger-skewing UK content to younger audiences, especially in Italy and Germany, where the volume of UK purchases has been historically low.
- Familiarity with UK film and TV is historically strongest in Denmark and the Netherlands, both in terms of volume and in the variety of scripted and non-scripted shows that are acquired and watched.


Current status of UK content among 16-34s

- Although UK content was consistently selected by survey respondents as one of their top 3 countries of origin for long form content – ahead of domestic content in both the Netherlands and Germany – the popularity of UK content ranks a distant second (18%) to the US (56%) as the top country of origin choice.
- Country of origin preferences were confirmed by episodes viewed as part of digital diaries. These showed the UK ranking second (17%) after the US (58%) (all countries combined), ahead of domestic content (15%), except in Italy (23% domestic vs 5% UK).
- Surveys, digital diaries and interviews revealed that, aside from English-language or domestic programming, little is watched from other countries.
- 80% in the Netherlands and 67% in Denmark watched UK content at least several times a month, confirming greater familiarity, but almost half in Italy (49%) and 40% in Germany watched less than once a month.
- Survey respondents recalled between 479 (NL) and 271 (IT) unique UK TV titles, and between 333 (DE) and 71 (NL) unique film titles. The most mentioned TV titles were available on Netflix (e.g. *Sex Education*, *The Crown*, *Peaky Blinders*), followed by Prime Video. The most mentioned films were older titles (e.g. *Harry Potter*, *Notting Hill*).
- Netflix is the most popular platform for watching UK content (82-83%) by a wide margin.
- Genres where the UK performs particularly well include comedy/comedy drama, historical drama, fantasy/sci-fi and romance/romantic comedy.

UK screen content in Denmark, Germany, Italy and the Netherlands


SVoDs are important for visibility and popularity of UK content in all 4 countries

"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."

- Italian Programme Buyer 2 


"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 

"Anyone will watch UK content if it is right, but UK drama often skews older and is very popular with audiences 40 plus." 

- Danish Buyer

"we haven't found a UK comedy for a long time. I don't know why that is. [...] And young people are really interested in light-hearted comedy, but they will look now, for instance, at very old US series like *Friends*. So that's quite a challenge, I would say."

- Dutch Buyer 2 

- According to Pact's latest UK exports report for 2023/24 (Pact/3Vision, 2024), Germany is now the UK's largest European export market by value (£118m), lagging after the US (£593m) and Australia (£160m), but ahead of the Nordics (£104m), Canada (£89m), France (£81m), the Netherlands (£35m), Spain (£34m), and Italy (£29m).
- Sales to the Netherlands and Denmark, which is included in the Nordics, are comparatively small by value because these are small markets. But in terms of import ranking (next slides) the UK has always taken second place after the US. Programme buyers in both countries note the historically high status of UK content but also admit that these UK shows attract mostly older viewers (see Danish buyer). Two Dutch buyers mentioned a current dearth of good British sitcoms and sketch shows (see bottom left).
- Italy's position behind the other large European markets has been consistent since the 1990s (Stemers, 2004: 44) and this is still the case (Buyer 2, IT), although UK content is doing much better in Italian cinemas (see slides 23 and 27), and now also on global SVoDs.
- In Italy and Germany, the emergence of global SVoDs has changed the visibility and popularity of UK content. The most frequently mentioned UK programmes by survey respondents (16-34) are available on Netflix and Prime Video (see slides 31 and 32), including contemporary UK TV drama (*Sex Education*, *Peaky Blinders*) and continuing interest in classic film franchises (*Harry Potter*, *James Bond*) and film titles (*Notting Hill*, *Bridget Jones' Diary*, *Love Actually*) that are fondly remembered.

Significant variations in familiarity

Viewers in Denmark and the Netherlands more familiar with UK film & TV than in Germany and Italy

Rounded % share of TV fiction imports (2004), by selected countries/regions

	DK	NL	DE	IT
US	76%	61%	72%	63%
GB	8%	19%	3%	2%
AU&NZ	2%	3%	1%	3%
CA	1%	1%	3%	2%
France	2%	0%	3%	4%
Germany	0%	2%	na	3%
Other European	1%	3%	1%	0%
Other non-European (excl. Japan)	0%	1%	0%	3%
European co-pros	0%	2%	5%	4%
Mixed co-pros	2%	4%	4%	5%
Non-European co-pros	7%	4%	4%	3%
Total imports, in hrs	13126	5892	21562	14343
Total imports, in %	100%	100%	95%	92%

Source: SEwB based on EAO (2005, Vol.5: 96)

Familiarity with British film & TV programmes in 2021, adults 18-65

	DK	NL	DE	IT
Familiarity with British film	35%	31%	24%	28%
Familiarity with British TV	29%	27%	13%	16%

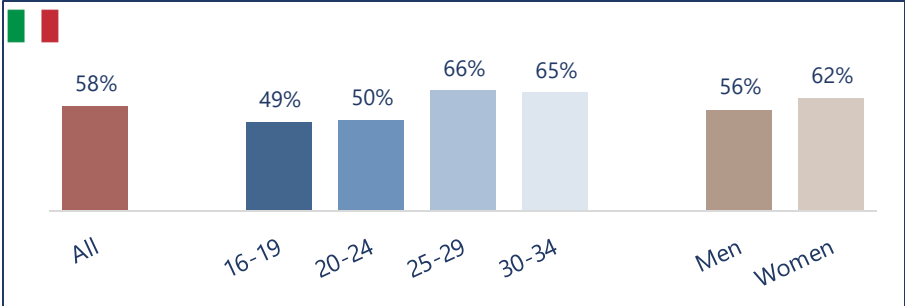
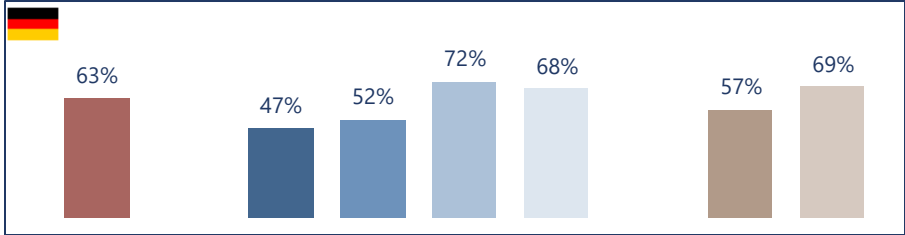
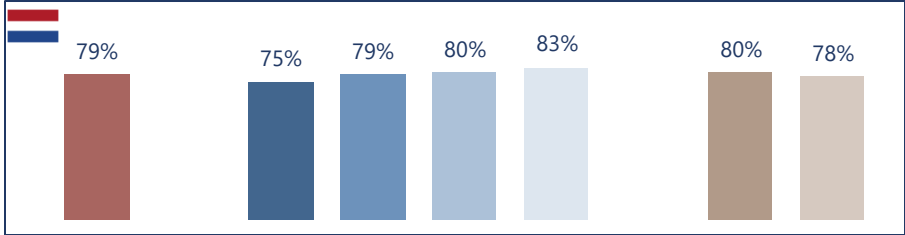
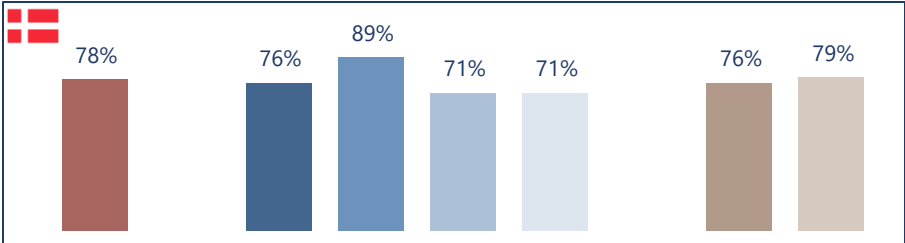
Source: SEwB based on BFI/Yonder (2021a: 6)

- TV fiction import statistics from the European Audiovisual Observatory (EAO) provide insights into the historical status of British TV fiction in each of the 4 case study markets.
- The top table, with import shares from 2004, shows that all 4 countries imported mostly from the US (between 61% and 76%). UK fiction imports were strong in the Netherlands (19%), moderate in Denmark (8%, but clearly in second place), and less significant in Germany (3%) and Italy (2%). In Italy, both French (4%) and German (3%) fiction imports outperformed UK imports. Italy also imported more from non-European countries, including Latin America, and more recently Turkey.
- Variations in familiarity with UK screen content were also evident in the *BFI: International Perceptions & Engagement* study (BFI/Yonder, 2021a), which focused on adults aged 18-65, placing the UK second in terms of familiarity after the US. In the Nordics (including Denmark) 35% of viewers claimed to be familiar with British film, 29% with British TV (BFI/Yonder, 2021b: 6); in the Netherlands 31% with film, 27% with TV (BFI/Yonder, 2021c: 6). Responses in Italy and Germany revealed lower familiarity. In Germany, the share was 24% for film and 13% for TV (BFI/Yonder, 2021d: 6). In Italy it was slightly higher for both film (28%) and TV (16%) (BFI/Yonder 2021e: 6) (see bottom graph).
- While 49% (TV & film) of Nordic respondents, and 42% (TV) and 43% (film) of Dutch respondents in the 2021 BFI study claimed to watch British films and TV at least monthly, this fell to 39% (film) and 27% (TV) in Italy and 38% (film) and 28% (TV) in Germany (BFI/Yonder 2021b, c, d, e: 6).

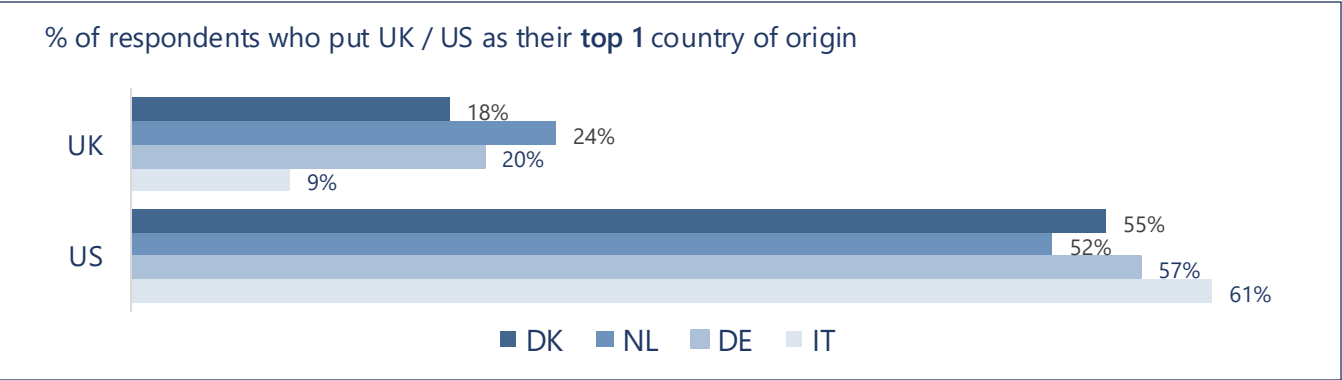
Screen Encounters with Britain - Status of UK screen content

Highest in Denmark and the Netherlands, but significantly behind the US as No. 1 choice

% of respondents who put UK in their top 3 country of origin choices



- When asked to write down their **top 3 country of origin choices** for longform screen content (left), 78% of SEwB survey respondents in Denmark, and 79% in the Netherlands listed the UK in their top 3. In Germany and Italy, the figure was a little lower at 63% and 58% respectively, which is still relatively high.
- Given the comparatively weak history of British TV programmes in Italy, these findings suggest that the status of British TV may be rising among young people, catching up with British film (also see slides 23 and 27).
- There is no clear age pattern across countries. In Germany and Italy, those aged 25-29 and 30-34 were more likely to list the UK in their Top 3 than those aged 16-24. Also, gender differences that are small in DK and NL are more pronounced in DE and IT.
- When considering just the **No. 1 choice** (bottom graph), the UK is clearly second to the US, ranking from 9% (IT) to 24% (NL), compared to 52%-61% who chose the US as No. 1.

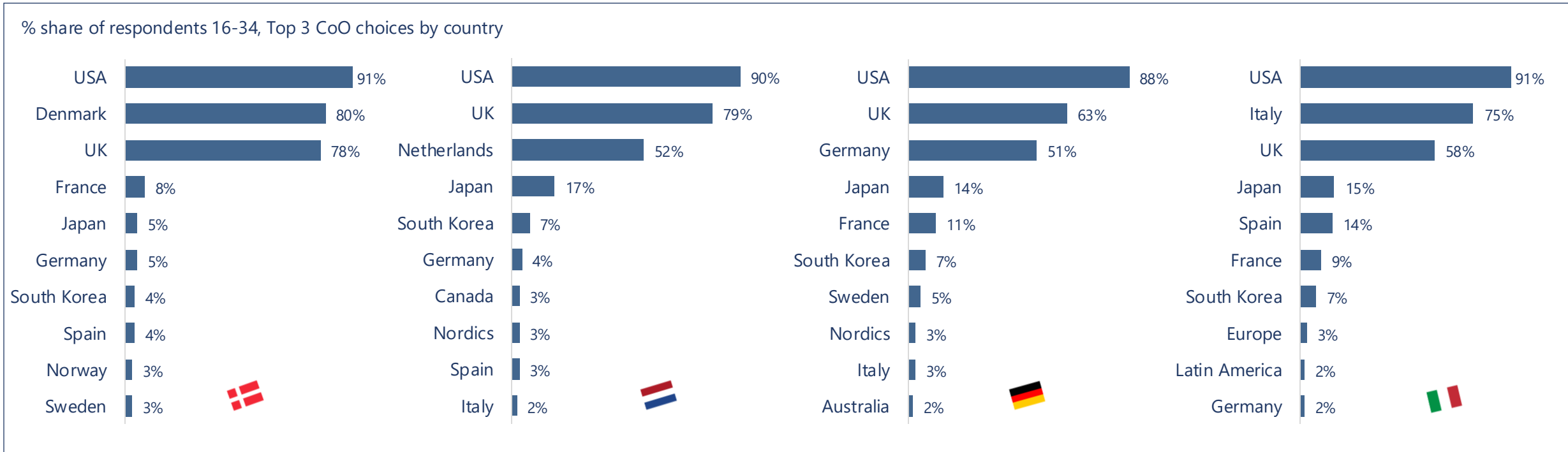


- The UK ranks 3rd as first choice behind domestic content in Italy (9% vs 20%) and Denmark (18% vs 24%) but is ahead of domestic content in Germany (18% v 9%) and the Netherlands (24% vs 13%).

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)" – List 3 only
 Base: All respondents aged 16-34 who answered the question statement (n=1,710; nDK=413; nNL=386; nDE=380; nIT=531). Source: Screen Encounters With Britain. Survey Survey DK, NL, DE, IT.

Country of origin preferences

US content reigns supreme



- Among the top 3 choices, the US was named most often by 91% of survey respondents in Denmark and Italy, 90% in the Netherlands, and 88% in Germany.
- UK content ranked second in the Netherlands (79%) and Germany (63%). In Denmark, it came close to domestic content (78% vs 80%). Italy, with a clear third place for British content (58%), is an outlier.

- Domestic content was the 2nd preference for 75% of Italian respondents, and 80% of Danish respondents, but came 3rd after the UK in NL (52%) and DE (51%).
- In all 4 markets, other countries had much lower shares, with the highest share going to Japan because of the popularity of anime (see genre preferences, slide 30).

Country of origin preferences confirmed by digital diaries


Digital diary entries of programmes watched over 5 days


		All	DK	NL	DE	IT
L1	Number of participants	102	20	28	26	28
L2	Number of unique titles viewed	365	63	111	82	109
L3	Number of episodes viewed	1,044	180	286	296	282
L4	Share of US titles, incl. co-pros with UK and others	51%	49%	50%	49%	56%
L5	Share of UK titles, excl. co-pros with the US	17%	24%	17%	20%	8%
L6	Share of other English-language titles (AU, NZ, SA)	1%	0%	2%	2%	0%
L7	Share of domestic titles	21%	22%	16%	20%	27%
L8	Share of other European titles	4%	2%	5%	6%	4%
L9	Share of other titles	6%	3%	10%	4%	5%
L10	Share of US episodes, incl. co-pros with the UK and others	58%	59%	51%	55%	66%
L11	Share of UK episodes, excl. co-pros with the US	17%	24%	16%	22%	5%
L12	Share of other English-language episodes (Aus, NZ, SA)	2%	0%	1%	7%	0%
L13	Share of domestic episodes	15%	14%	15%	9%	23%
L14	Share of European episodes	4%	2%	9%	3%	2%
L15	Share of other episodes	4%	1%	8%	4%	4%


- 102 Digital Diaries and 86 interviewees confirmed that most viewing comprises US films & TV series followed by UK content, except in Italy, where UK content ranked third, behind domestic content.
- Out of 365 unique titles entered into 102 Digital Diaries over 5 days 51% were US titles (incl. co-pros), 17% were UK titles (excl. co-pros), 1% were titles from either Australia, New Zealand or South Africa (L4-6). In sum, 69% of titles watched originated from English-language countries.
- 21% of titles watched were domestic, only 4% were from other European countries and 6% from 'other countries', i.e. non-European and non-English language (L7-9).
- In terms of the share of episodes watched, the US does even better (58%), the UK share remains the same (17%), and the share of episodes from Australia, New Zealand or South Africa increases to 2%. In total, the consumption of English-language content grows to 77% (L10-12).
- The share of domestic episodes watched decreases to 15% (L13), that of European episodes remains at 4% (L14).
- There are notable country variations. Viewing of UK content was strongest in Denmark (24% of titles / 24% of episodes) and Germany (20% of titles and 22% of episodes), and lowest in Italy (8% of titles and 5% of episodes) (L5, L11).
- Domestic titles performed best in Denmark (22% of titles / 14% of episodes) and Italy (27% of titles / 23% of episodes) (L7, L12). Only in Italy did domestic content rank second to the US.


Country of origin preferences


UK ranking confirmed in industry & audience interviews

"I would say US content is probably the first one, because this is what they expect [...] And then Italian comes next, because we are in Italy. And then I think UK content is probably the third one, because it's probably closer to the US content."
- Programme Buyer 1 

"So it's mainly British-American documentaries that we acquire. And Flemish."
- Programme Buyer 4 

"It's very easy. For us, the rest of the world doesn't really exist. No programming from outside Scandinavia, UK and the US really performs on our channel."
- Danish Programme Buyer 

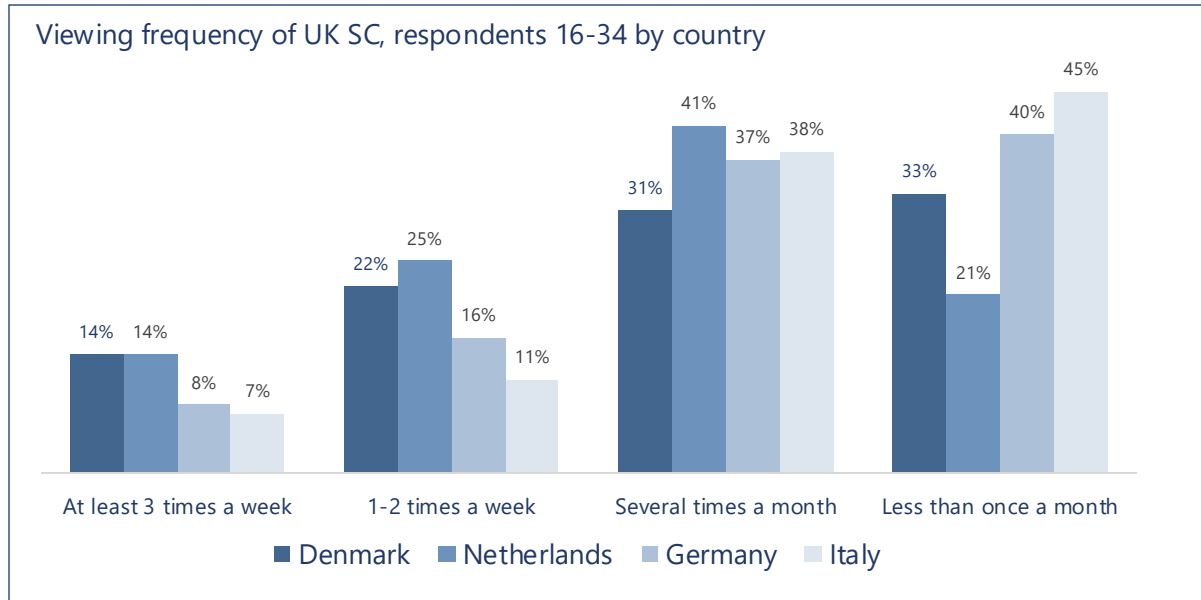
"The English-speaking market is attractive. Next to the US setting, the British setting is the most global from the customer's point of view."
- Chief Distribution Officer, Beta Film 

"demand for tickets and the percentage of theatres' occupancy [suggest that] expectations and interest are slightly below those of American cinema only. [...] The level of expectation and appreciation of British films is higher than for any other European country, as well as from further afield."
- Film Festival Director 1 

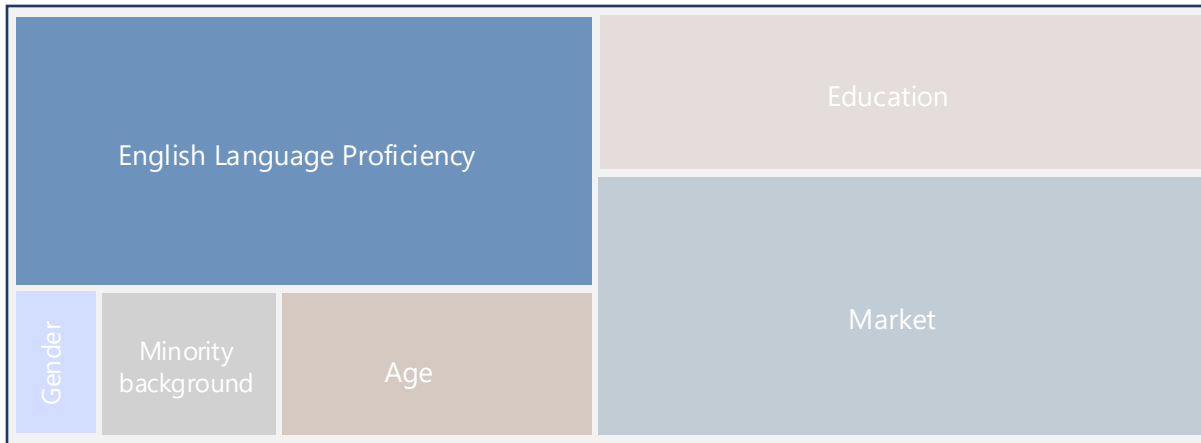
- Interviews with Cultural Intermediaries (see quotes) and young people in all 4 countries confirmed the ranking of UK content after the US.
- According to buyers, audience engagement with French series like *Lupin*, Spanish series *Elite* and *Money Heist*, or Korean series *Squid Game* (all on Netflix) was 'rare', and usually a result of Netflix's recommendations.
- Very few young interviewees were omnivorous viewers, curious to watch content from across the world.

Frequency of UK screen content consumption

Highest in Denmark and the Netherlands



- Survey responses on how often (on average) they watch UK content, revealed that in all countries more than half of respondents (56%-80%) watch UK screen content at least several times a month.
- In line with greater familiarity with UK content, 80% of survey respondents in the Netherlands and 67% in Denmark claim to watch UK content at least several times a month. Almost half of respondents in Italy (49%) and 40% in Germany watch it less than once a month (top graph).
- These responses confirm the higher status and greater familiarity of UK content in Denmark and the Netherlands (slides 23, 25).
- Another strong predictor for viewing frequency is English Language Proficiency (bottom graph – all 4 markets). Those who speak English fluently have a significantly higher consumption frequency than those with medium ('conversational') and low proficiency ('school level or less').
- Educational attainment also plays a role, but to a lesser extent. Those with primary education watch the least. But in this survey's sample these are also the youngest respondents (16-19), and the youngest also have the lowest consumption of longform content in general.
- Respondents with a migration background had a slightly higher consumption of UK screen content but not by much. Gender variations were even smaller.

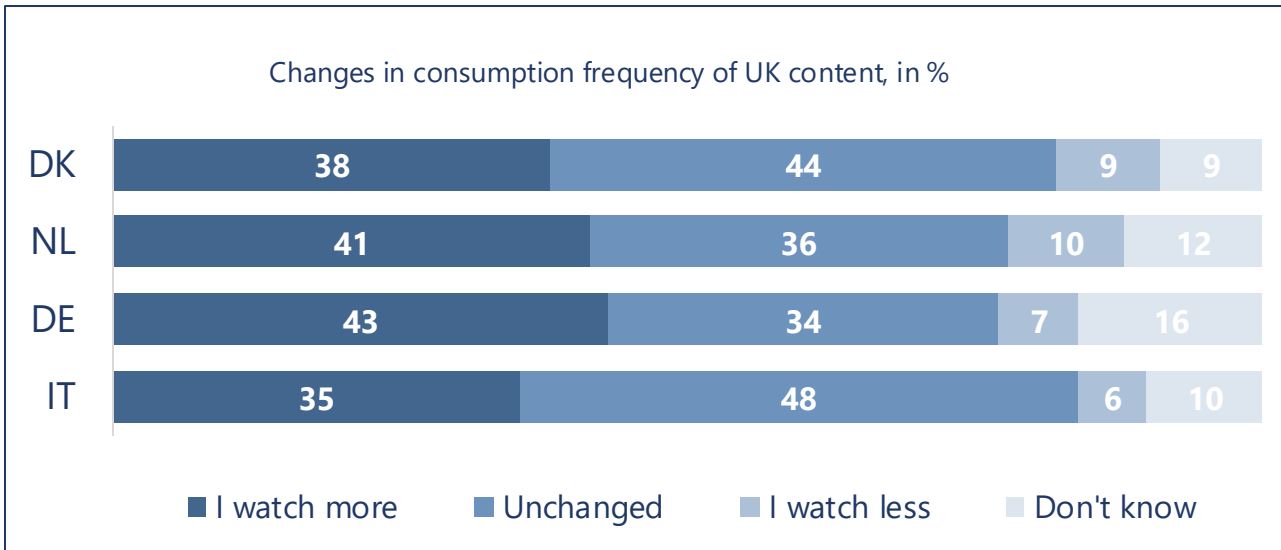


Question "How often do you watch British screen content (on average)?"

Base: All respondents aged 16-34 who answered the questions (n=1,790; nDK=421; nNL=404; nDE=420; nIT=545). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT.

Changes in the consumption frequency of UK content

Positive development overall, with only the oldest cohort in DK showing some decline



- When asked about changes in their consumption of UK content in the last 5 years, between 35% (IT) and 43% (DE) of 16-34s believed they watch more than they used to. 6-10% believed they watch less (top graph).
- In the Netherlands (41%) and Germany (43%) more believe that their consumption has increased. In Denmark (44%) and Italy (48%) more think it has remained the same.
- The greatest increase in consumption is among 16-24s (bottom left table).
- 20% of 30-34s in Denmark and 16% of 25-29s in the Netherlands believe they watch less (bottom right table).
- The most commonly cited reason for 'watching more' is age. Between 47% (DK and NL) and 58% (DE and IT) ticked this reason.

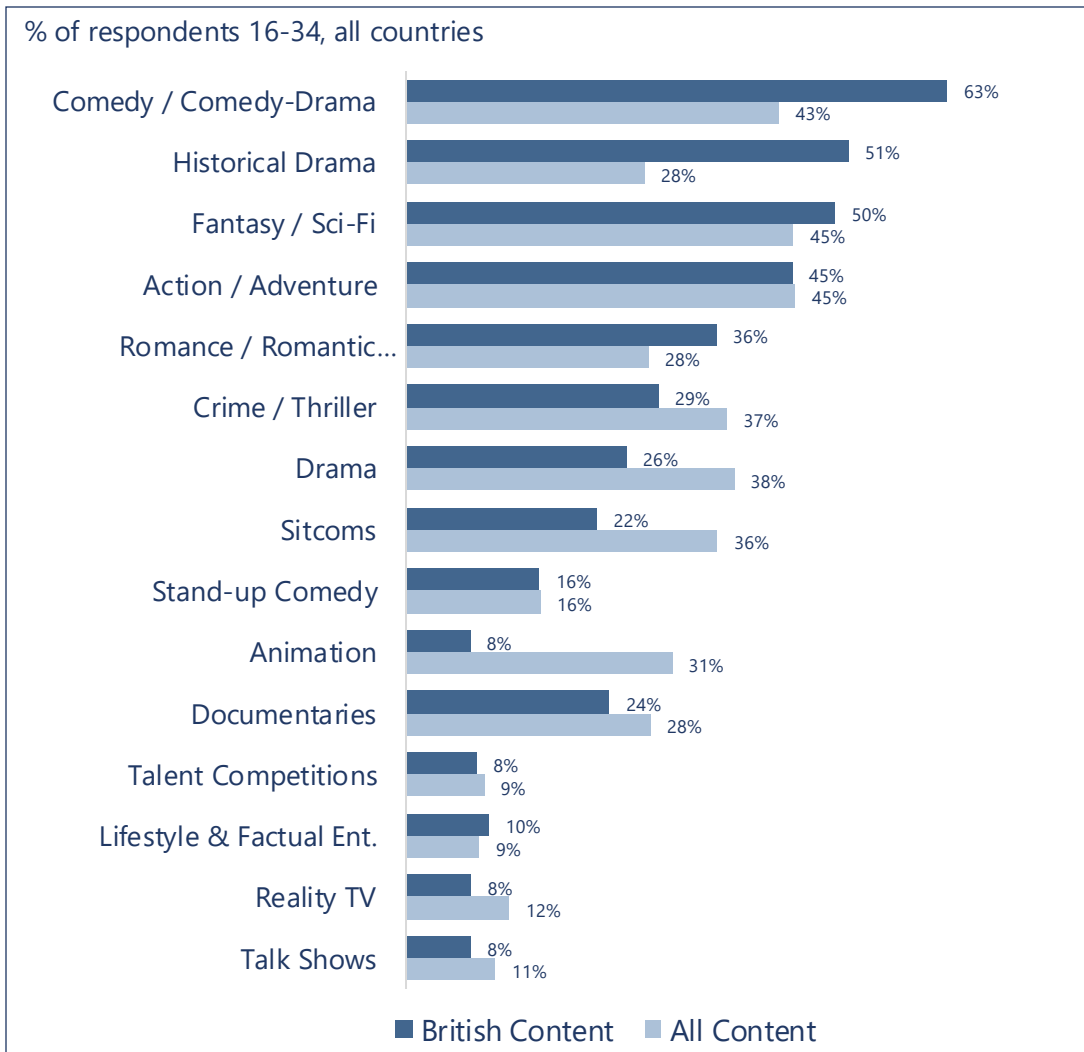
I watch more, in %							I watch less, in %		
	DK	NL	DE	IT		DK	NL	DE	IT
16-19	53	64	48	46	16-19	7	6	7	6
20-24	42	46	52	40	20-24	8	9	4	6
25-29	32	33	40	36	25-29	8	16	9	6
30-34	16	27	35	20	30-34	20	5	8	5

5 most popular explanations for watching more UK content

- 1 As I've gotten older, I have become more used to watching British content
- 2 I watch more screen content in general
- 3 There is more UK content to choose from
- 4 My streaming services recommend UK content to me
- 5 UK content has become better and more interesting

Genre preferences – UK content vs general genres preferences

UK screen content excels in 4 genres



- Genres where the UK performs particularly well include comedy/comedy-drama, historical drama, fantasy/sci-fi and romance/romantic comedy. This applies to all 4 countries combined (see graph), but also for each individual country.
- In the Netherlands and Denmark, UK productions in several non-scripted genres were perceived as slightly superior (see [Interim Report \(IR\) Denmark](#), [IR Germany](#), [IR Netherlands](#) and [IR Italy](#)). These results reflect greater familiarity in NL and DK with non-scripted UK content, as well as weaker domestic competition.
- By comparison digital diaries and interviews in Italy and Germany suggest that documentaries, stand-up comedy, reality TV, talk shows and talent competitions (IT only) are genres dominated by more popular domestic productions.
- UK screen content is least recognised for sitcoms and animation.
- UK crime/thrillers, a staple of UK exports, fare comparatively less well (29%) against this genre in general (37%). The smallest differential was in the Netherlands (30/33), a small fiction producer; the largest in Germany (31/42), a major (co-)producer of popular domestic crime series.

UK TV shows watched and remembered

	All	DK	NL	DE	IT
1 Sherlock	417	83	116	141	77
2 Sex Education	386	59	126	92	109
3 The Crown	306	57	82	67	100
4 Peaky Blinders	304	63	75	52	114
5 Doctor Who	203	37	70	63	33
6 Downton Abbey	196	58	47	49	42
7 Fleabag	195	20	66	62	47
8 Black Mirror	192	33	61	36	62
9 Skins	153	28	26	49	50
10 Bridgerton	152	35	37	23	57
11 Mr. Bean	149	36	24	47	42
12 Heartstopper	143	23	64	31	25
13 The End of the ****ing World	137	19	41	35	42
14 The Office (UK or US)	119	31	25	24	39
14 Derry Girls	112	28	38	32	14
15 After Life	110	19	34	22	35
16 Barnaby (Midsomer Murders)	107	51	34	17	5
17 Broadchurch	97	11	41	33	12
18 Good Omens	69	4	36	17	12
19 Bodyguard	67	13	22	21	11
20 Killing Eve	67	15	37	10	5

TOP 20 TV SERIES/SHOWS BY NO. OF MENTIONS

- When asked what UK TV shows they could remember, 376 Dutch respondents recalled by far the most unique titles (479), followed by 370 Danish respondents (322 titles) and 377 German respondents (309 titles). 448 Italian respondents recalled only 271 TV titles. They also wrote down fewer UK TV titles overall (1,463) compared to 1,601 in Denmark, 1,747 in Germany and 2,558 in the Netherlands.
- The top 20 TV titles (left) were mentioned between 417 (*Sherlock*) and 67 times (*Bodyguard* and *Killing Eve*).
- In all 4 countries UK shows on Netflix (*Sex Education*, *The Crown*, *Peaky Blinders*) are the most watched and remembered.
- Most shows were available across all 4 countries on Netflix, followed by Prime Video. Some were available on more than one platform.
- A few titles were available on public service platforms, but not necessarily as exclusives (*Barnaby/Midsomer Murders*, *Downton Abbey*, *Killing Eve*, *Sherlock*).
- *Bridgerton* (10th, grey in the table) was often identified as British because of its UK settings and UK cast. *The Office* (14th, also grey) was well-known, but interviews revealed that it was mostly the US version that people had seen.
- 50 shows were misidentified in Italy (18%), mostly from the US. In Denmark, the Netherlands and Germany there were fewer misidentifications, and most of those came from less than a handful of individuals.

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 entered titles (n=1,571; excluding responses along the lines of 'no' or 'I'm not sure'). Source: Screen Encounters with Britain. Survey DK, DE, NL, IT.

UK films watched and remembered

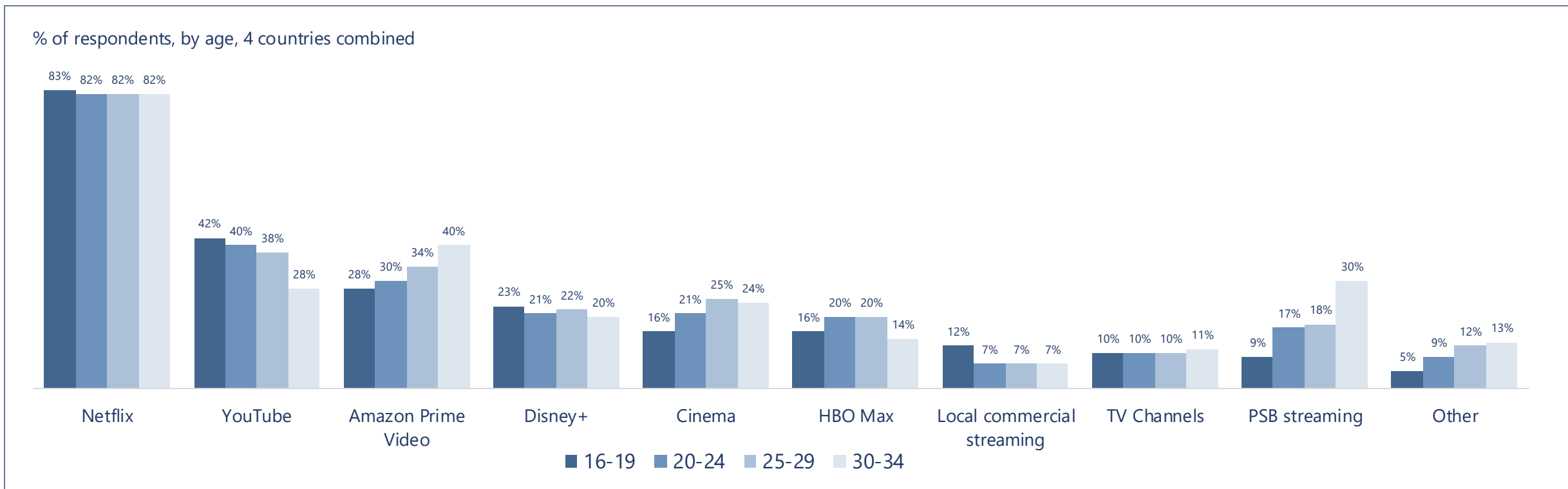
		All	DK	NL	DE	IT
TOP 20 BY NO. OF SURVEY MENTIONS	1 Harry Potter	362	102	24	112	124
	2 James Bond	162	64	10	61	27
	3 Notting Hill	118	32	6	30	50
	4 Love Actually	101	35	8	36	22
	5 Pride and Prejudice	88	14	9	39	26
	6 Monty Python (various)	83	26	21	30	6
	7 Kingsman	72	30	7	22	13
	8 Bridget Jones's Diary	64	27	4	14	19
	9 The King's Speech	63	12	3	14	34
	10 Dunkirk	55	19	2	12	22
	11 The Imitation Game	49	15	1	21	12
	12 Fantastic Beasts	42	18	2	18	4
	13 Trainspotting	44	7	1	11	25
	14 Enola Holmes	41	9	3	18	11
	15 Paddington	41	10	4	18	9
	16 Hot Fuzz	33	16	1	10	6
	17 Billy Elliot	31	6	0	9	16
	18 Johnny English	29	12	2	10	5
	19 The Theory of Everything	29	8	8	4	9
	20 1917	24	5	2	4	13

- Survey respondents in Denmark, Germany and Italy listed around 1,000 UK film titles each. German respondents named the most unique film titles (333), followed by Italy (308), and Denmark (256) and the Netherlands (71).
- In the Netherlands the translation of the survey question may have prompted respondents to think more about TV series than films. However, only 28% of Dutch survey respondents listed the cinema as a favoured platform, just behind Denmark (29%) and significantly behind Italy (37%) and Germany (42%). This may account for lower numbers of film titles mentioned in the Netherlands.
- In Italy, the country with the lowest recall of TV series, UK films received stronger recognition (308 unique film titles) than TV series (271 unique titles). Italy also has the largest offer of UK productions overall, including 1,809 on Prime Video (see slide 35).
- In all 4 countries the top 20 (left) were dominated by older film franchises like *Harry Potter* or *James Bond*, 'classic' romantic comedies like *Notting Hill* and *Love Actually*, broadcast frequently at Christmas, or *Pride & Prejudice*, a common school 'text', especially in Germany and Italy.
- While TV series were dominated by Netflix, films in each country were spread more equally between Netflix and Prime Video, depending on who had the rights.
- Overall, the list suggests that in all countries it is older titles and franchises which are watched and most easily remembered.

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 entered titles (n=1,571; excluding responses along the lines of 'no' or 'I'm not sure'). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT.

Most popular access points for British content

Netflix dominates in all 4 age groups



- Asked to pick the 3 most relevant platforms for watching UK content, Netflix proved the clear No.1 across all 4 age groups (82%-83%).
- YouTube and Prime Video are in second place, with a reversed age order.
- Disney+ (20%-23%) and cinema (16%-25%) are in 3rd place, but Disney+ offers little British screen content.
- Local commercial streaming services and TV channels are less significant for UK content. This is evident in the Top 20 British TV and film titles remembered by survey respondents (slides 31, 32).
- PSB streamers are seen as relevant for UK content, particularly by those aged 30-34 (30%). This percentage, averaged across countries, is boosted by Denmark and the Netherlands where 55% and 32% of 30-34s respectively search for UK content on PSB streaming services.

5. Availability & discovery

Availability

- Between 812 (DK) and 1,253 (IT) unique UK titles were potentially available in all 4 countries across 3 VoD platforms including Netflix, one national public service platform and one further commercial platform.
- In all 4 countries Netflix had by far the largest number of UK show titles of the streaming offers analysed in each country.

Sources of discovery

- Recommendations from streaming services are the most important sources of discovery for 20-34s (67-69%). Social media clips are most important for those aged 16-19 (62%).
- Netflix is where most UK content is found and remembered. Survey respondents recalled between 113 (DK, NL) and 140 (IT) unique titles on Netflix, compared to between 6 (ZDF Mediathek) and 38 (DRTV) titles on public service platforms.
- For all 4 countries comparable numbers of UK titles (200+) were found in Netflix landing page searches across 10 categories. Between 67 (DE) and 79 (NL) of the UK titles mentioned in the survey also appeared on Netflix landing pages.
- Awareness of UK origin can be impeded by lack of labelling by global streamers. Few digital diarists could see a category for 'British film & TV' on their favourite global streamer. Some interviewees found it hard to identify UK shows if they are dubbed or have a 'transnational look or feel'.

The role of social media

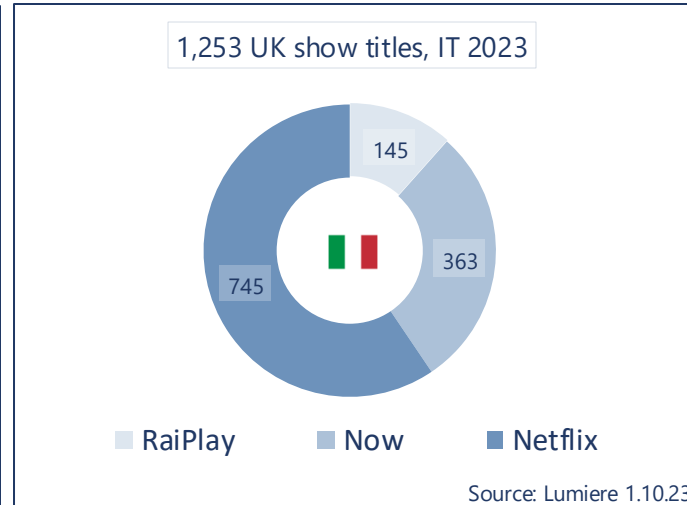
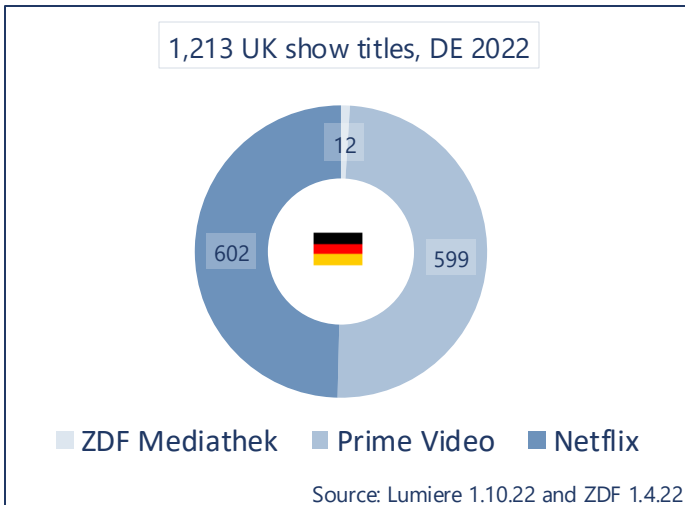
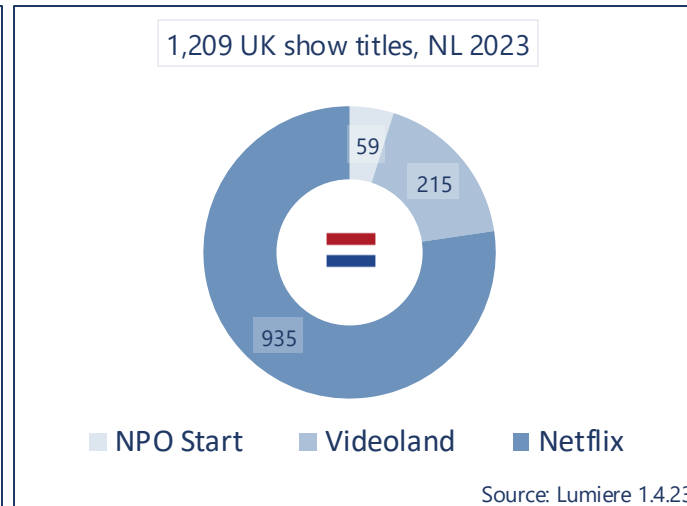
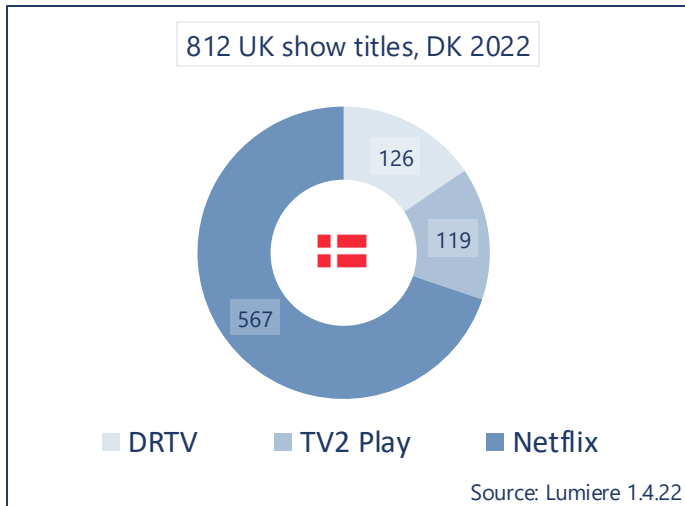
- Social media driven by humour are key for discovery. This is especially true for UK shows such as *Derry Girls*, and *Cunk on Earth* on Netflix where user-created memes rather than streamer promotion, created buzz and convinced young people to watch.

Active searches

- 21% actively search for British content with most using Netflix (38%). A small number of British actors (e.g. Hugh Grant, Millie Bobby Brown) drove searches.

Availability of UK screen content on VoD Services

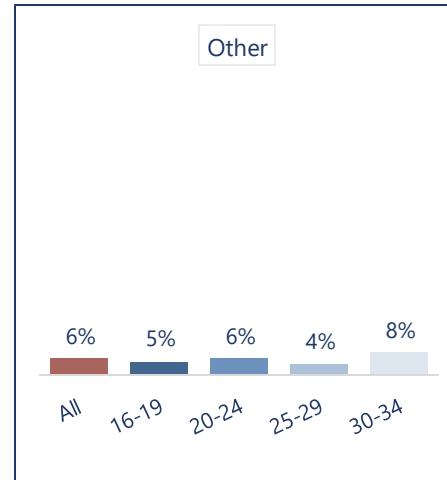
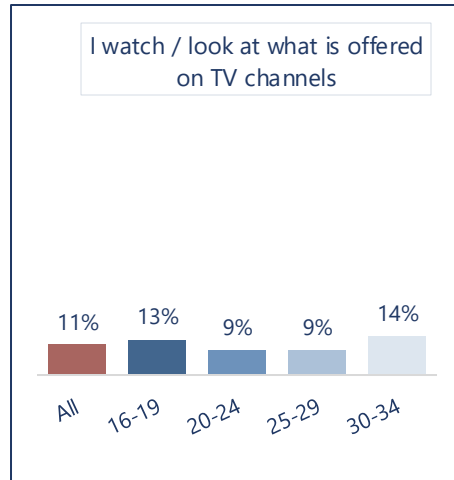
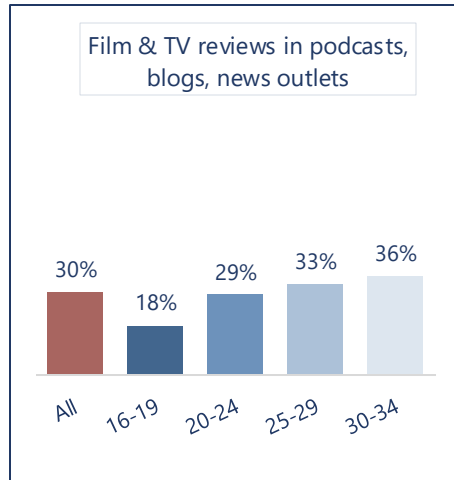
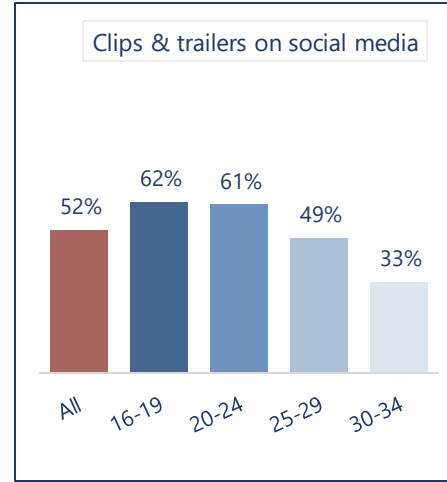
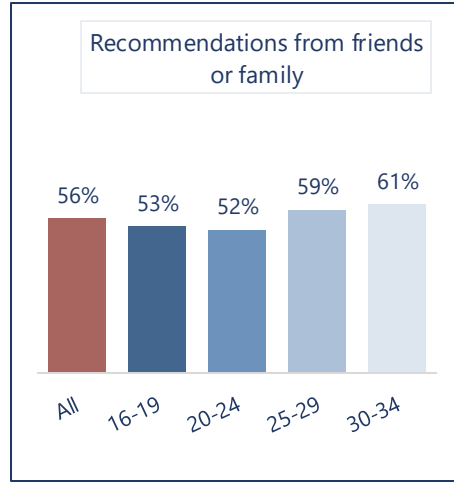
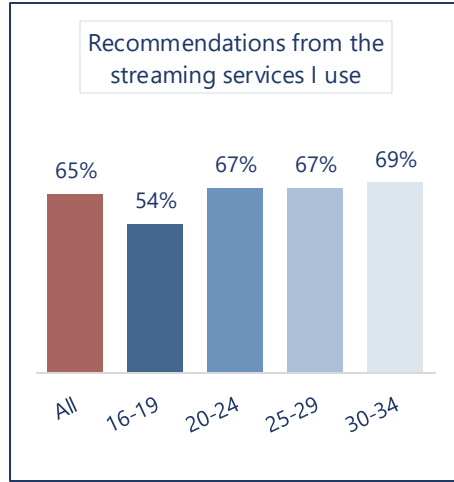
Highest on Netflix in all countries



- Catalogue research based on the Lumiere database (European Audiovisual Observatory) revealed the number of UK titles on each country's VoD services. The graphs to the left show total numbers of UK unique **show titles** (excluding multiple seasons, but including presence on more than one platform), that research participants could have encountered on 3 key streaming services in each of the 4 case study markets.
- In each country we focused on Netflix as the most popular SVoD, plus one commercial streamer (TV2 Play in DK, Videoland in NL, Prime Video in DE, NOW in IT) and one public service platform (DRTV, NPO Start, ZDF Mediathek, RaiPlay).
- In all 4 countries Netflix had the largest numbers of UK show titles among these streaming offers analysed (see left).
- Larger numbers of UK titles (including multiple seasons and co-pros) were found only in Italy, where Prime Video had 1,809 UK productions/co-pros, followed by Netflix (885).
- The data in the graphs were used to approximate and compare title availability against 1) titles promoted on the three services' landing pages, 2) titles displayed in active searches for UK content on each platform, and 3) titles mentioned by participants (for Netflix see slide 40, for all other services see [Interim Report \(IR\) Denmark](#), [IR Germany](#), [IR Netherlands](#) and [IR Italy](#)).

Sources of discovery for UK content





Recommendations from streaming services are most important for 20-34s, from social media for 16-19s



- Survey respondents were asked to pick a maximum of 3 from 8 randomised options on how they discover British content, including fan websites and influencers (here subsumed under 'other').
- Across all countries, recommendations from streaming services were most important for those aged 20-34 (67%-69%), clips & trailers on social media for those aged 16-19 (62%).
- Recommendations from friends and family are important for 56% of respondents (16-34), but slightly more important for those aged 25-29 and 30-34.
- Other factors (bottom graphs) proved less relevant.
- The following slides look at the influence of streamers and social media in more detail.

UK shows found on Netflix landing pages and mentioned in surveys

No. of UK shows found on Netflix landing pages and mentioned in survey

		 DK	 NL	 DE	 IT
L1	Date of Lumiere VoD data	01.04.22	01.04.23	01.10.22	01.10.23
L2	Date of catalogue and LP searches	10-16.09.22	25.09.-1.10.23	11-17.03.23	04-10.03.24
L3	Survey distribution (respondents aged 16-34)	Aug/Sept 22	Aug/Oct 23	Jan/March 23	Jan/March 24
L4	No. of unique UK titles/co-pros present in Netflix catalogue (based on Lumiere VoD, by market)	567	935	602	746
L5	No. of UK titles/co-pros found across 10 Netflix categories and searches (Netflix landing pages - over 7 days)	207	217	209	208
L6	Of which this number of UK Netflix titles were mentioned by survey respondents	77	79	67	72
L7	No. of UK titles/copros found on the Netflix Landing (Home) Page (LP) only (over 7 days)	51	48	42	46
L8	Of which this number of UK Netflix titles were mentioned by survey respondents	27	22	22	25

- For one week before the interviews in each country, the interfaces of Netflix, and two other platforms, were searched for UK screen content using 'pure', newly set up accounts. A vertical Landing Page (LP) screenshot was taken daily, plus screen shots of selected categories (see 3rd bullet point).
- Between 42 (DE) and 51 (DK) UK titles/co-pros were found just on the daily vertical screenshots of Netflix's landing (home) pages for each country (see L7).
- In total between 207 (DK) and (217 NL) UK titles/co-pros were found in both the vertical LP screenshots and in the key categories 'Top 10 TV programmes today', 'Top 10 films today' and 'Popular on Netflix' (top 25 rows), and in the search categories 'British films', 'Popular in British films', 'British programmes' and 'Popular in British programmes.' Additionally, the 'Top 10 Films' and 'Top 10 TV' (all week) were checked on Netflix.com to ensure no promoted UK titles were missed (L5).
- For all 4 countries, comparable numbers of UK titles (200+ shows) (L5) and similar shows were found in these Netflix searches across 10 categories. And similar numbers of UK shows were also found across all 4 countries as part of the first encounter on the 'prime space' (Bruun and Lassen, 2023) of the home landing page (42-51 shows) (L7).
- Survey respondents remembered similar numbers of UK titles/co-pros available at the time on Netflix: Denmark (113), Germany (117), Italy (140) and the Netherlands (113). Between 67 (DE) and 79 (NL) of the UK titles mentioned in the survey appeared on Netflix landing pages in the week analysed (L6). Between 22 (NL and DE) and 27 (DK) of titles mentioned in the survey appeared on the Netflix landing/home page only (L8).

UK titles found on Netflix and mentioned by at least 3 interviewees

UK title mentioned (all countries)	No. people	Found in
Sex Education	20	LP and elsewhere – DE, IT, NL
The Crown	21	LP and elsewhere - IT, DK, NL
Peaky Blinders	18	LP and elsewhere - DE, IT, DK, NL
Heartstopper	9	LP and elsewhere - IT, DE, NL
Cunk on Earth	7	NOT ON LANDING PAGE - DE, NL
Black Mirror	7	LP and elsewhere - DK, NL
Monty Python	5	NOT ON LANDING PAGE - DK, NL
The Gentlemen	4	LP and elsewhere - IT
The Office	4	Popular Now - DK
Downton Abbey	4	LP and elsewhere - DK
Pride & Prejudice	4	LP - IT
Too Hot to Handle	4	LP - NL
After Life	3	LP and elsewhere - DE
Luther (film/TV series)	3	LP and elsewhere - DE
Notting Hill	3	LP and British films - IT
Mr Bean	3	British films & Popular in British films - IT
Bodyguard	3	British TV & Popular in British TV - DK
Skins	3	British programmes, Popular in British programmes - NL

- 86 interviewees in 4 countries mentioned between 25 (DE) and 32 (NL) UK titles/co-pros available on Netflix at the time of the interview.
- Between 15 (IT) and 22 (NL) of these UK titles/co-pros appeared on Netflix landing pages and in specified search categories (see previous slide).
- 18 of these titles were mentioned by at least three interviewees (see table on the left). The top 4 titles either have strong appeal to young audiences (*Sex Education*, *Heartstopper*, *Peaky Blinders*) and/or are heavily promoted across at least three countries (*The Crown*).
- Many UK titles below the top 5 are only mentioned in one country. *Pride and Prejudice* is a popular school text in Italy. *Luther* (DE) and *The Gentlemen* (IT) were being heavily promoted by Netflix on social media (FB, Instagram, TikTok) and in Netflix landing page recommendations at the times the surveys and interviews were conducted (see Appendix).
- Comedy *Cunk on Earth* never appeared on the Netflix Landing/Home page, but was well-known in the Netherlands and Germany, because of social media memes on Instagram and TikTok (see slides 43-44).
- *Monty Python* was mentioned in DK and NL because it has a historical legacy, but did not appear on the Netflix Landing/Home page.

'British TV & film' decks on global SVoDs

Rare or inconspicuous

"No, no, I didn't find anything like that, I mean, I searched and I didn't [have a row for British films and TV]. [...] There was only 'European films'."

- Riccardo, 24



"'British films' or 'British series' they just appear in my normal suggestions, i.e., with 'this might interest you'. These sometimes feature things from stand-up comedians from England, or series or films that were shot in England, or have English producers, or are in English. But I've never actually had it as a separate category."

- Markus, 26



"the thing that I've noticed with British shows, I think it's more of a case of a personality being pushed, instead of it being specifically British. Stuff like *The Grand Tour* and *Clarkson's Farm*..."

- Mads, 27



"It's not always there, but sometimes I do [see a row for British films and TV]. And, well, considering I've watched quite a lot of British shows the past week, I was actually surprised it wasn't there!"

- Kris, 26



- A factor that hampers awareness of British origin is the tendency of global streamers not to differentiate between US and UK productions.
- A digital diary task and interviews revealed that few respondents could see a category for 'British film & TV series' on Netflix (or Prime Video, which a few checked alternatively). Some saw a dedicated row if they were prompted to look, but this appeared far lower down, and most said they'd never noticed it before.
- The Netherlands was where most respondents remembered having seen a row for British content. Upon checking they always found it below row 10. Only Daro (NL, 25) found 'British TV dramas with a BAFTA award' in the 6th row, but he noted that it had "mysteriously climbed up." Kris (NL, 26), on the other hand, could not see a British row at all, despite having watched a lot of UK shows the previous week (see left).
- In all 4 countries, the most noticed origin deck was 'European films' and/or TV series; and some interviewees, who mentioned watching German, French or Spanish films or series on Netflix and Prime Video, remembered seeing decks for productions from these countries.
- Light viewers like Gabriele (23, IT) did not remember ever seeing any origin-labelled decks.

UK titles/co-pros on Public Service streamers

Limited No. of UK title mentions in survey or interviews

Country	Mentions on PSB	UK film and TV titles
Denmark (DRTV)	38	578
Germany (ZDF Mediathek)	6	642
Netherlands (NPO Start/Plus)	36	550
Italy (RaiPlay)	26	579

PSB	No. of interviewees	Title mentioned
NPO Start/Plus	7	First Dates UK (4), Years and Years (1), Endeavour (1), Midsomer Murders (1), Normal People (1), Downton Abbey (1), The Secret Life of 4, 5 and 6 year olds (1)
ZDF Mediathek	1	Midsomer Murders (1)
RaiPlay	1	Normal People (1) – identified as British
DRTV	3	Midsomer Murders (3), A Very British Scandal (1), Sherwood (1)

- Public service broadcasters have traditionally been strong buyers of UK content, but the presence of UK content on public service streaming services' landing/home pages varies.
- During searches of public service streamer landing pages over one week, 12 UK shows were found on the ZDF Mediathek in Germany; 21 on DRTV in Denmark; 44 on RaiPlay in Italy; and 69 on NPO Plus/Start in the Netherlands.
- However, survey respondents listed very few UK shows and films on public service platforms that they remembered, ranging from just 6 on the ZDF Mediathek up to 38 on DRTV (see top table). 6 of the 'UK' titles mentioned in the Italian survey were not British.
- Interviewees mentioned long-running detective series *Midsomer Murders* the most in three countries (NL, DE, DK) (see bottom table).
- In the Netherlands, 22 interviewees mentioned 7 UK titles currently available on NPO Start or NPO Plus, but none appeared in vertical screenshots of the NPO landing page. Only one title, dating show *First Dates UK* (4), was mentioned by more than one interviewee.
- In Germany, only one UK show, *Midsomer Murders*, was mentioned during interviews that appeared on the ZDF Mediathek.
- Interviewees in Italy named 3 UK titles available on RaiPlay. Only one, *Normal People*, set in Ireland, appeared on the RaiPlay landing pages.
- Danish interviewees mentioned 6 UK shows available on DRTV and 3 appeared on the landing pages.

Social media

Key for driving discovery

"[Most important in deciding what to watch is] maybe social media. [...] Sometimes trailers come up, trailers on Tik Tok, 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..."

- Maddalena, 19



"if a series is mentioned a lot in pop culture, like in memes or something like that, it's for me an indicator that this series is worth watching. [...] I think at least 60% of series I've only watched because I saw a meme of it."

- Didier, 29



"YouTube primarily, I think is like a trailer or a teaser to some of the bigger formats. Because a lot of times, if we get introduced by the algorithm to something we can watch, like Gordon Ramsay, then it's like 20 seconds or something..."

- Anders, 28



"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!' [...] I follow some film influencers, but mostly it's my 'For You' page."


- Karl, 18





- According to the survey, social media are clearly an important driver of discovery for both 16-19s (62%) and 20-24s (61%) and a little less so for 25-29s (49%). As the quotes by Maddalena, Didier and Anders (left) suggest, the short snippets encountered there awaken curiosity.
- No social media platform was left out. Interviewees named TikTok, Instagram, Twitter and YouTube. Discord was mentioned by two gamers in the Netherlands and one in Italy.
- Interviews revealed gender- and age-based differences in social media preferences and in the influence each platform had in promoting film and TV series. While YouTube appeared more influential for men than women, TikTok was most influential for the youngest (16-19), and Instagram and Twitter for those aged 20+.
- Several interviewees applauded the highly advanced algorithms of YouTube (men) and TikTok (women) and noted that, as a result they trusted these platforms' recommendations more than those of streaming services.
- Memes and short clips produced by TikTok users create buzz and convince young people to watch a show (Didier and Maddalena, left; also see slides 43-44).


Memes

The power of buzz, humour & memorability

"If a trailer makes me laugh, I usually really want to watch it because that's a good sign."
- Lotte, 19 

"[James Acaster] I encountered him first through a meme of *The Great British Bake Off*. [...] And just that clip - I always remember it."
- Annette, 19 


"TikTok is a very good platform to show TV shows on, and I'll often 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."
- Helle, 17 

"And you also have a few clips on Discord that are funny -like, a certain person saying something as a response to a previous statement. [...] and you're like, 'What is that? Let's look it up real quick!'"
- Kenny, 18 

- Promotion on social media works best when it's humorous. Numerous explicit and implicit comments made during interviews in Denmark, Germany and the Netherlands revealed the importance of funny memes in getting young people interested.
- In contrast, many interviewees in these countries (less so in Italy) complained about the 'long' and 'boring' official trailers encountered on streaming and social media platforms. Helle (left) prefers the 'drama' that user-generated edits add to a show.
- Humour also adds memorability. For example, Annette (left) remembered seeing James Acaster in a clip where he produced a disastrous bake in *The Great British Bake Off*.
- Memes on social media also serve as reminders of films and series young people have been recommended elsewhere but have forgotten. Several interviewees across all 4 countries remarked that they often end up watching things that have been recommended on multiple platforms (social media and streaming platforms) in addition to recommendations from friends and family (see Paolo next slide).

British shows discovered on social media


"I just found a video [of *Heartstopper*] on TikTok, and I was like, 'Oh, what series is this?' And I just went on Netflix and I just loved it.

- Gina, 16 

"*Cunk on Earth*. I saw, like, the highlight clips, I guess, I don't know. But 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!'"

- Derja 25 

"Yes, I found *Peaky Blinders*. Because I saw it on Netflix, but I didn't watch it. And then when I saw some scenes on Instagram Reels, I wanted to watch it."

- Paolo, 17 

"If I scroll Facebook, Instagram and I watch a funny clip [...] that's how I found the Northern Irish show *Derry Girls*."

- Anders, 28 


"I saw *Taskmaster* through TikTok [...] I found it quite funny. And with TikTok, it's, like, an algorithm thing, so the more you watch, of course, of one thing, the more it appears on your 'For You' page. [...] And then I decided to watch the show."


- Annette, 19 


- Various British TV shows were discovered through social media, including, comedy panel show *Taskmaster* (since 2015), *Doctor Who* (since 1963), *The End of the ****ing World* (2017), the historical gangland drama *Peaky Blinders* (2013), dramedy series *Fleabag* (2016), comedy series *Derry Girls* (2018) set in Northern Ireland, crime series *Bodyguard* (2018), gay teen relationship drama *Heartstopper* (2022), factual parody *Cunk on Earth* (2022), and drama mini-series *I May Destroy You* (2020). The perceived British production, *Bridgerton* (since 2020), was also discovered on social media.
- Interviewee accounts of these discoveries suggest that it's often other social media users and the buzz they create that convinces younger audiences to watch a show. The strength of their 'clout' is such that it can even reverse initial disinterest or negative impressions, created by official trailers.
- As Derja (DE, 25) noted about *Cunk on Earth* (left), it took several encounters to get her interested, but after seeing many funny clips on TikTok she finally decided to watch the show. The same had happened to her with *Derry Girls*.


Origin unawareness

Sometimes it's difficult to know if it's a UK show. Viewers of dubbed shows rarely think about country of origin

"I didn't know that many series I watched were British, like, in fact, *Peaky Blinders* I didn't know, I found out with this interview, with the diary."
- Barbara, 31 

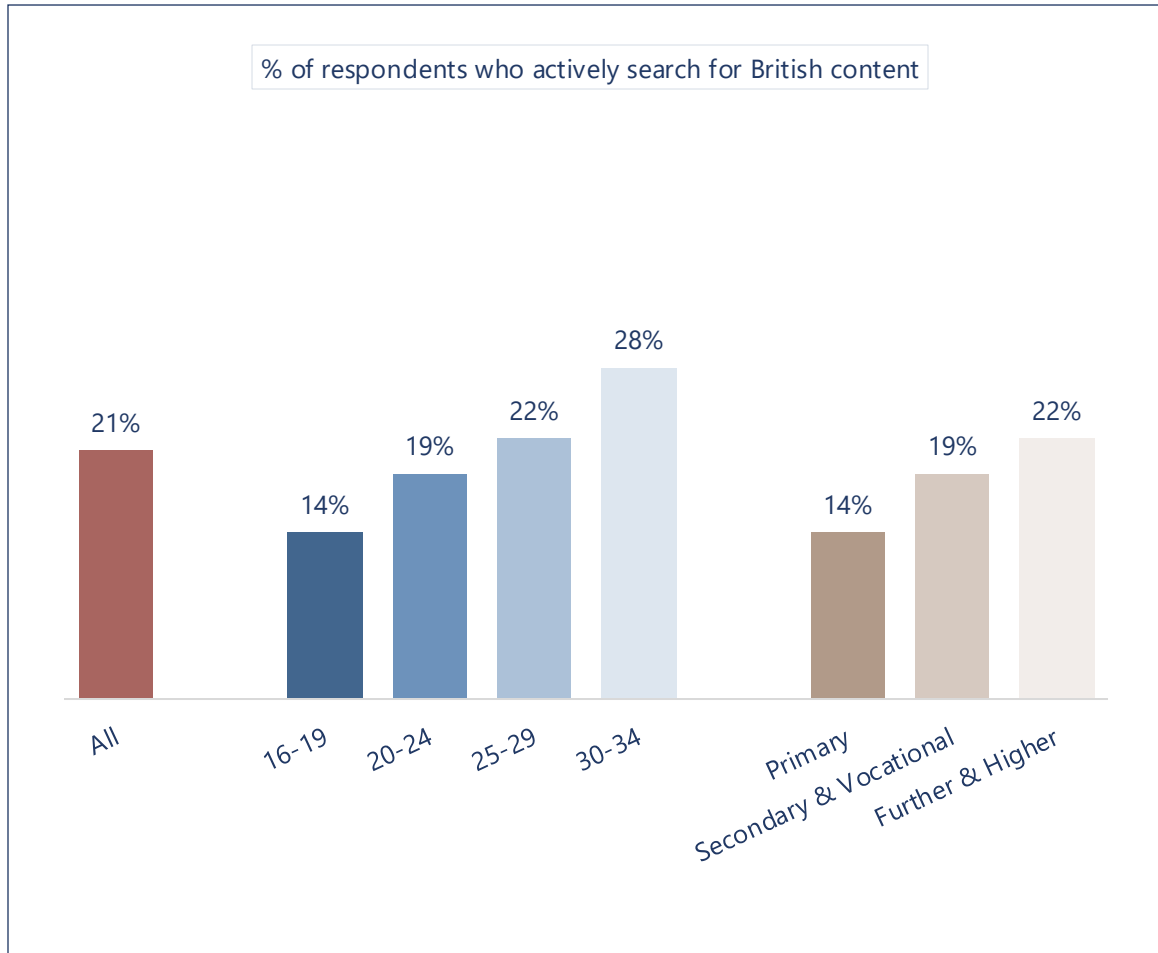
"I'm not aware of whether something is a British or German or a US production."
- Livia, 32 

"I loved it [*Everything Now...*] it was very Americanised [...] I think it was overdramatic, and I usually associate things like that with American television."
- Kris, 26 

"I'm not quite sure if you can call *Sex Education* a British show... it seems like it's sort of British American."
- Lars, 24 

- Viewers who watch dubbed shows, like Livia and Barbara, rarely think about a show's origins or locations. For UK shows, a lack of awareness about their origin can be an issue unless there are clear indicators, including well-known London landmarks (Tower Bridge), actors (Hugh Grant) or the Royal Family (*The Crown*). Barbara did not recognise the historical Birmingham setting of *Peaky Blinders* as British.
- Those who watch shows with the original soundtrack are usually aware of where a show is from, including the UK. Also, those who have visited the UK can generally identify it as the country of origin in most cases.
- Distinguishing between UK and US productions can be challenging in the case of co-productions or those with a 'transnational look and feel' (e.g., *Sex Education* and *Luther*). Such productions lose some of their 'Britishness' and can be harder to identify as British (see Kris and Lars).
- *Bridgerton* with its UK setting and characters/actors, was understandably misidentified as a British production by both survey respondents (see slide 31) and interviewees, even though it is classified as a US production on IMDb.

Active searches for UK screen content



Note: Education status refers to highest educational degree respondents had obtained at the time.

- 21% of survey respondents (all countries) recorded that they 'actively search' for British content. The share was the same for Germany and Italy (both 21%) and close to Denmark and the Netherlands (both 20%).
- The platforms named most often for these searches were Netflix, YouTube and social media.
- There is a clear positive correlation between active searches and age (increasing from 14% of 16-19s to 28% of 30-34s), as well as education (increasing from 14% with primary education to 22% with further and higher education).
- Active searches are usually for specific shows respondents have heard of, seen clips of, or for actors they like and admire (next slide).

British actors & celebrities as drivers

"I watch something because I know the actor or the actress. And yeah, a while ago I watched *Enola Holmes*, and there is Millie Bobby Brown. She is British, I know for sure. And obviously she has a character in *Stranger Things*..."

- Gemma, 17

"especially recognisable actors like the cast from *Harry Potter*... And even with the BBC *Sherlock Holmes*, if I see Benedict Cumberbatch or the actor who plays John somewhere, I recognise them and I think, 'OK, I like those actors. They are in this. I'm gonna watch this.'"

- Lotte, 19

"[UK panel shows] led me on to watch David Mitchell. And then on Danish Netflix I watched *Peep Show*, with him and his partner in crime..."

- Anders, 28

"I follow some actors, and when they have a new movie coming, then I will watch it. [...] Zendaya and Timothée Chalamet, Millie Bobby Brown, Louis Partridge [both British actors in *Enola Holmes*]... those actors."

- Nadine, 16

- For some interviewees British actors are clearly a reason why they search for and watch British productions. These included Hugh Grant, Benedict Cumberbatch, Millie Bobby Brown, Louis Partridge, Emma Mackey, Colin Firth and Ewan McGregor.
- In Denmark and the Netherlands, it is not uncommon for viewers to discover British comedians on panel shows, prompting interest in seeing them in other shows. This is what led Anders (left) to watch David Mitchell in *Peep Show*.
- Jamal (22) in Germany watched *Top Boy* because of the involvement of British rapper, David Orobosa Omoregie (Dave).
- A full list of British actors and TV celebrities named by interviewees as people they know and admire can be found on slide 56. Slides 55 and 57 reveal why they appeal.

6. Motivations

English: a more accessible language

- The ease of watching in English is the top reason for choosing UK content in Germany (78%), and the 2nd most important in Denmark (63%) and the Netherlands (66%). In Italy it ranked lower in 3rd position (57%).
- Learning English is more important in Italy (65%, 1st), and Germany (53%, 4th), two dubbing countries. It ranks last in the Netherlands (30%) and Denmark (26%).

British Humour

- In Denmark (68%) and the Netherlands (70%) humour was the top reason for choosing UK content. In Germany it came 2nd (64%), ahead of Italy (44%), where less UK content is watched, and mostly in dubbed form.
- Respondents appreciate what they see as the unique qualities of 'British humour' and its presence in all fictional genres, not just comedy drama.

Appeal of British actors, comedians and TV celebrities

- While 47% watch UK content because they are fans of 'British actors or celebrities,' named actors or celebrities were not mentioned consistently by name except established international stars.

Enjoyment of British settings, landscapes and people

- 58% in Germany and 59% in Italy choose UK content because they like 'British settings, landscapes and people,' significantly higher than in Denmark (31%) or the Netherlands (34%). Interviews in Germany and Italy suggest appeal is strongly associated with the historical settings of shows like *The Gentlemen* and *The Crown*.

Domestic content and viewer types for UK content

- Interviews revealed that a strong motivational component for watching US and UK content was dislike of domestic fiction, particularly in the Netherlands and Germany.
- Interviews suggest 5 viewer types for UK screen content (slide 61).

Reasons for choosing British content – overview of survey findings


% of respondents who think these reasons are important or very important


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


- Asked to indicate their agreement with 9 possible reasons for choosing UK content on a slider scale (from 1-100), the statement receiving the most support was 'English is easier to follow than other foreign languages.' Between 57% of respondents in Italy and 78% in Germany agreed (60-80) or agreed strongly (80-100).
- The second most popular reason overall was 'I like the humour in British content.' In Denmark and the Netherlands humour was the most popular reason, in Germany the 2nd most popular. In Italy it ranked only 7th, with 44% of respondents agreeing.


- Between 45% and 53% of respondents in each country 'like British characters and their stories' (see next chapter) or consider themselves 'a fan of certain British actors or celebrities' (45%-50%).
- 'I enjoy watching British landscapes, settings and people' achieved high agreement in Italy (59%) and Germany (58%). In the Netherlands (34%) and Denmark (31%) only around a 3rd of respondents agreed.
- The same country discrepancy shows with 'it helps me to learn English', but there are also considerable age differences (see slide 51).
- The following slides look at the key motivations in detail.

English – a more accessible language

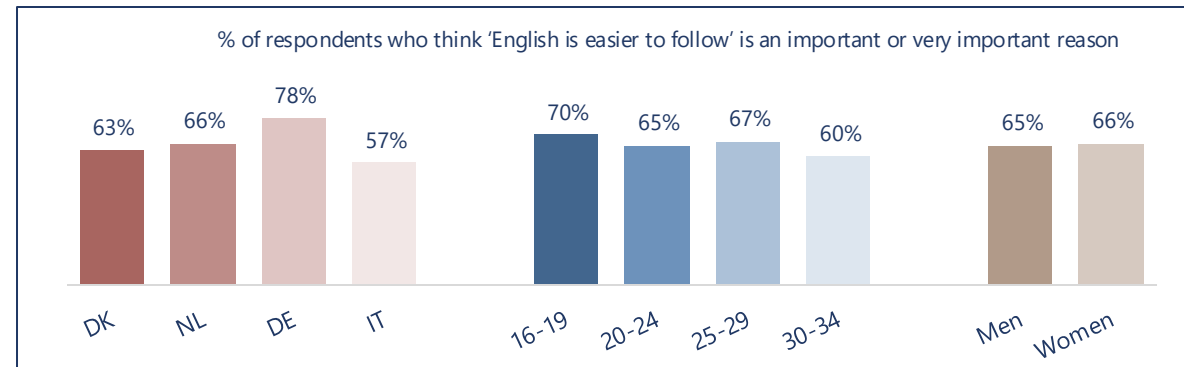
"watching the original language is linked with English-language [...] because I know it better, I feel it more like mine and I like it a lot." 
- Alessandro, 33

"I would prefer content from an English-speaking country because, ironically, even though I can speak to a Norwegian person, and I would kind of understand them, I would have to put in an effort to understand them."
- Kirsten, 29 

"It's not that the other countries are not interesting. I'm sure they are interesting, but there's not a lot of content available very quickly, because the translation is also... 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."
- Derja, 25 

"starting high school, I watched a lot of Netflix, so English came really easy. And so because I watched a lot of English, I can really understand [strong accents]. And like, I've seen some videos of, like, Adele talking really fast. And now I understand those too."
- Bart, 17 

- The ease of watching in English is the top or second most important reason for choosing UK content in Germany (78%), the Netherlands (66%) and Denmark (63%). In Italy it ranked lower in third position (57%).
- Italy's lower (57%) agreement rate can be explained with the fact that most programmes are watched dubbed. Also, English language proficiency is lower than in the other 3 countries.
- High agreement (78%) in Germany makes sense because English language proficiency is high and results in more young people now choosing the original soundtrack than in Italy (slides 75-79). However, unlike viewers in Denmark and the Netherlands young people in Germany are not used to reading subtitles, rendering original spoken dialogue more important.
- Analysed for age, agreement was highest among 16-19s (70%) and lowest among 30-34s (60%). For gender there are no differences.
- In all countries some interviewees expressed a preference for British English, others for American English. British English tends to play a greater role in school and for some, especially in Denmark, it is regarded as superior to American English. American English sounds more familiar, and 'cool' to the youngest, because it's associated with popular sitcoms and series.



Question "How important to you are the following reasons for choosing British screen content?" [please indicate your opinion by extending the bar (0-100)]

Base: All (16-34) who responded to the 'English is easier to follow' statement (n=1,473; nDK=353; nNL=366; nDE=343; nIT=411). Source: Screen Encounters With Britain. Survey DK, NL, DE, IT.

English – a more accessible language

Experts agree on the benefits of English, in linguistic & non-linguistic terms

“Compared to other cinemas, usability is greater thanks to the English language known above all by the younger audience. Often the films are shown in the original language.”
- Film Organisation President



“We do look broadly at other cultures and nations as well, but obviously if it's in English, it's easier, it's accessible.”
- Senior Editor, Film festival



“The English language for the Netherlands audience is so common, you know, with the music and the films and the series. The younger you get, the better you speak English [...] You hear it everywhere, you see it everywhere, so it's not an obstacle, most of the time – for younger audiences.”
- Film Festival Programmer 6



“I would love to find something that works in this target audience, but as we cannot really make them watch Swedish or Norwegian even, it would be a really hard sell for us to try one of these German or French shows.”
- Programme Buyer



“[We present] hundreds of works from Great Britain every year and [...] the audience, mostly young, is able to understand the message conveyed by the images. [...] British music and British culture in general are very successful among young Italians, as well as cinema and audiovisual products in general.”
- Film Organisation President



- Cultural intermediaries also noted how young audiences are more used to English-language productions than other foreign language productions, and how the English language makes it easier for them to attract young people, whether for theatrical release or for television (see quotes on the left).
- ‘Language’ can be understood to include non-linguistic aspects. As the President of an Italian film organisation (below) notes about UK content, young audiences are used to British films and hence ‘able to understand the message conveyed by the images.’ As familiarity is an important aspect of appeal in the consumption and reception of screen content (Iwabuchi, 2002; Esser, 2020), non-linguistic ‘language’ aspects, can also be decisive factors why audiences choose and enjoy English-language productions.

Learning English

Important in DE and IT and for the youngest in DK and NL

"it's a conscious decision I made when I was in school still, to improve my English."
- Jamal, 22



"obviously, watching a product in the original language, in this case in English, also helps me to improve the language, of course it's an aspect that I take into consideration."
- Riccardo, 24



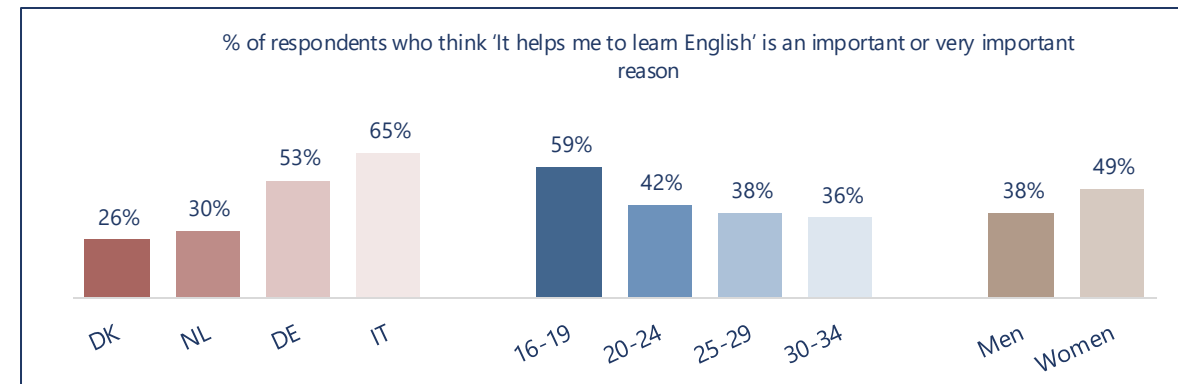
"I did [switch from Dutch to English subtitles] [...] when I started working - so that's, like, 9 or 10 years ago now... just to improve my English."
- Ellen, 33



"I watched a lot of *Friends* growing up, and I think at one point my dad was like, 'Try to watch it with English subtitles, so you'll learn more by watching it.'
- Jytte, 25



- Learning English is only a medium ranking motivation for watching British productions when all 4 countries' survey responses are combined (43%). But it's the most important motivation in Italy (65%), including 47% who agreed strongly. In Germany (53%) it was in joint 4th place (slide 48).
- In Denmark (26%) and the Netherlands (30%) it came last (slide 48), reflecting very high English language proficiency in both countries (See slide 9). As the quotes from Ellen (NL) and Jytte (DK) (left) indicate, language learning still plays a role, but it occurs when the switch is made from native language subtitles to English subtitles.
- Age is also important. For the youngest (16-19) in all 4 countries, learning English was a more important reason for watching UK content than for older age groups. 59% of all 16-19s (combined) agreed, including 47% in Denmark, 55% in the Netherlands, 68% in Germany and 72% in Italy.
- In the survey women (49%) seem more drawn towards UK productions to learn English than men (38%). However, male interviewees, such as Jamal and Riccardo (left), also indicated their desire to improve their English.



Humour

A key motivation for engaging with British screen content

"The humour is a really big part. It's very special [...] probably the main thing I think about when I think about British stuff."
- Per, 25 

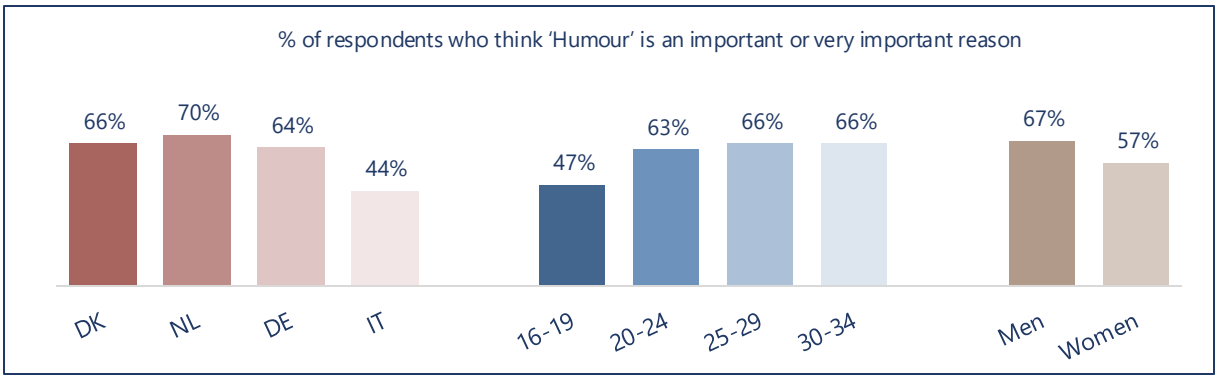
"I am very passionate about irony, the famous British humour that can be seen in films. So that's something I definitely enjoy."
- Benedetta, 24 

"'Humour' is always something I associate with British screen content. I find it funny, humorous."
- Daro, 25 

"'British comedy is extremely funny [...] But, you know, it's more difficult. Also because we dub all the shows...'"
- Programme Buyer 1 

"I really, really love the English humour. It's like one of the best in the world, and you can describe it by saying 'it's English humour.' Everybody knows what English humour is. It's a very dry humour; there's no other country that has their own humour [...] there's no German humour, there's no French humour. It's a very unique thing."
- Didier, 29 


- In Denmark (68%) and the Netherlands (70%) humour was the most important reason for choosing British content (slide 48). In Germany (64%) it came second. Strong appreciation of British humour was confirmed by interviewees in numerous comments underpinned by examples (see next two slides).
- Italy was the outlier, with only 44% of respondents agreeing. This is plausible given that Italians watch fewer UK shows (slides 24-25). A second factor, which makes humour stand out less for Italian audiences is that most watch dubbed shows. Dubbing involves extensive adaptation of humour (see Barra, 2015), which renders 'British' humour less apparent or recognisable.
- More men (67%) than women (58%) appreciate British humour, and appreciation also increases with age (see below) and educational attainment (increasing from 45% with primary education to 66% with higher education).
- But the most decisive factor for appreciating British humour is English language proficiency. Only 18% with self-assessed 'school level proficiency' agreed, compared to 46% with 'conversational' proficiency, and 67% who claimed to be 'fluent in any situation'.





Question "How important to you are the following reasons for choosing British screen content?" [please indicate your opinion by extending the bar (0-100)]
 Base: All (16-34) who responded to the 'humour' statement (n=1,477; nDK =359; nNL=371; nDE=341; nIT=406). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT; Interviews with audiences DK, DE, NL, IT.


'Unique' UK humour

...compares well with US humour, but requires more attention from audiences


 "British humour is cool and sarcastic, more irony than American which is cool."
- Sofia, 18

"American comedies, they are very predictable. So, you can predict most of the jokes and everything. And I think that's not the case for British humoristic formats. [...] I enjoy this strong sarcastic tone that you find, for example, in *The Lobster* or *In Bruges*."
- Emilia, 24 

"Graham Norton interviews... that type of thing. I don't know the word for it. But I don't really like American humour in that way. So more humoristic things, I go to England. [...] More sarcastic, I guess, and honest [...] if I watch Jimmy Fallon or any American sitcom, it's so fake."
- Karl, 18 


"American humour is often a little... I don't even know how to describe it, but it's a little simplistic, or anyway... and on the other hand, I appreciate more English humour, it's a little more subtle, basically."
- Elisa, 26 

- In all 4 countries, interviewees described British humour with the same words: 'unique,' 'ironic,' 'eccentric,' 'black,' 'subtle,' 'irreverent,' 'intelligent'.
- While comparisons with domestic humour were inconclusive, there was a broader consensus across countries that British humour is preferable to American humour. Many described American humour as more 'basic' and 'simplistic' 'less subtle,' and less 'intelligent' than British humour.
- Danish and Dutch interviewees, with their broader experience of UK shows, mentioned many non-fiction examples (see Karl and Annette) and expressed their admiration for the quick-wittedness of UK comedians, including Lee Mack and Graham Norton, among others.
- But Annette's quote also reveals that British humour is understood to require more attention. Humorous American content is 'more easily watchable,' which may explain why US sitcoms are often chosen for comfort viewing.


"it's kind of quickness, wittiness... So I think it's a smarter level of humour - more sophisticated humour than, like, American content. I think that's more easily watchable, while British content does require a bit more of listening and following. Like, *Brooklyn 99*, I can miss a minute or two and it doesn't matter if I missed it. But if I miss something on *Cunk On Earth* or something, I should watch back."
- Annette, 19 


British humour is a key ingredient in UK productions


It makes serious or educational issues entertaining and more engaging

"After Life is really about, you know, depression, coping with loss – and yet in a bit of a humorous way."
- Anders, 28 

"Fleabag springs to mind – which was especially cool because it was both very witty and also very, very dark, in a psychological sense. [...] one of the things that I enjoy a lot about a lot of British screen acting and stuff: that there's a real culture of combining the two, of having funny things happen alongside tragic things."
- Martijn, 27 

"[The End of the ***** World] It's a bit hilarious or a bit of fun as well. It had some humour in it [...] this is much more the kind of series I would watch."
- Michael, 23 

"[Sex Education] it's both funny to watch, and it also teaches you something."
- Gemma, 17 

"[British content has] usually quite a lot of humour in it – obviously not every show, but many shows [...] a contrast to German television, where if you watch a normal show – like, for example, crime drama or something like that – it's very serious. There are no jokes in it. [...] I think it's more enjoyable if you can sometimes laugh about it."
Max, 17 

- Many interviewees noted explicitly and unprompted how they appreciated British humour in fictional stories that viewers would not necessarily always categorise as comedy.
- In *Fleabag*, *Sex Education* and *After Life*, humour was seen as a welcome ingredient in otherwise serious topics. Martijn (top right) was not alone in applauding the 'tragicomic nature' of *Fleabag*. Anders (top left) was not alone in noting the appeal of telling sad stories in a humorous way, as was the case with *After Life* about the death of a spouse.
- Gemma (bottom left) praised *Sex Education* for providing viewers with an opportunity to simultaneously learn and laugh.
- Humour as an ingredient in all kinds of genres and narratives was recognised and applauded in all 4 countries. Several respondents, like Max in Germany (left) complained that domestic productions often lacked humour.

The appeal factor of 'British actors & celebrities'

🇩🇪 "before it [*Heartstopper*] came out I think I already followed two of the actors in it [on Instagram], and I already liked those actors."
 - Max, 17

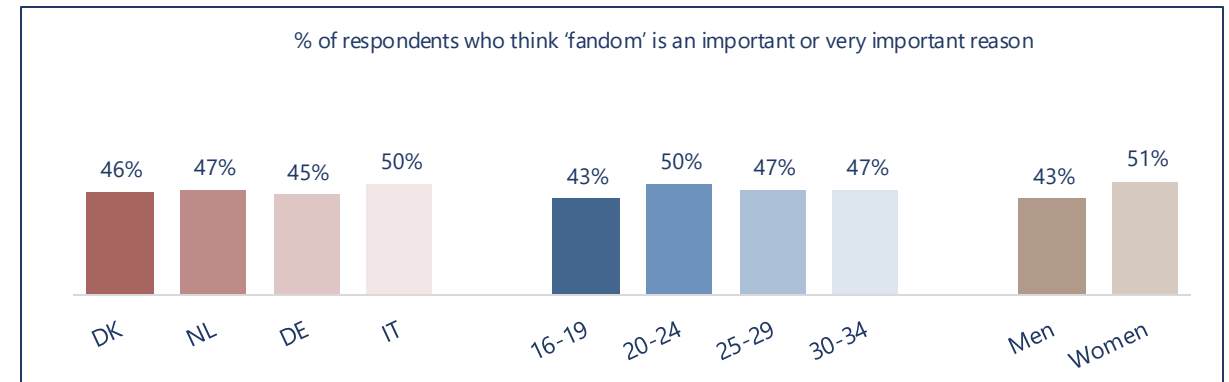
🇩🇪 "there was a time when my girlfriend and I only watched Hugh Grant films."
 - Matteo, 28

🇩🇪 "I prefer British over Danish TV fiction, just because I like a lot of the actors that are on the British scene [...] even if you'd just watched *Harry Potter*, then there's so many brilliant actors and actresses that are in a lot of the British things I find every now and again."
 - Kirsten, 29

🇳🇱 "[James Acaster] I think he's just really funny. He's quite young and I like that personality. It's kind of refreshing, I think."
 - Annette, 19

🇩🇰 "Gordon Ramsay is that big personality that Denmark lacks in the same TV show. And that's what makes the British *Hell's Kitchen* stand out that much."
 - Peter, 17

- Between 46% (DK) and 50% (IT) of survey respondents agreed with the statement 'I am a fan of certain British actors or celebrities' (see graph).
- Danish, Dutch and German respondents named actors from a wide variety of productions, and talked frequently about comedians and other TV celebrities, who they admire for their wit and entertainment skills. Many, like Peter (left), found this talent lacking at home.
- In line with more limited exposure to UK productions, in Italy interviewees spoke fondly about British actors they knew from film & TV classics, especially *Harry Potter* and *Notting Hill*, but named hardly any non-actors.
- A long list of named actors and TV celebrities emerged from audience interviews, but interviewees were not always able to name the actors they liked and saw in British productions.



Question "How important to you are the following reasons for choosing British screen content?" [please indicate your opinion by extending the bar (0-100)]
 Base: All (16-34) who responded to the 'fandom' statement (n= 1451; nDK: 345; nNL: 358; nDE: 337; nIT: 411). Sources: Screen Encounters With Britain. Surveys in Denmark, Netherlands, Germany, Italy; Interviews with audiences.

Named 'British' actors & celebrities

Actors named & No. of people mentioned by

Rowan Atkinson	2
Christian Bale	2
Simon Bird	1
Pierce Brosnan	1
Millie Bobby Brown	3
Asa Butterfield	1
Henry Cavill	1
Olivia Colman	1
Kit Connor	1
Daniel Craig	1
Benedict Cumberbatch	8
John Cleese	1
Steve Coogan	1
Idris Elba	5
Tom Ellis	1
Ralph Fiennes	1
Colin Firth	2
Martin Freeman	3
Ricky Gervais	16
Hugh Grant	8
Rupert Grint	1
Tom Hardy	1
Tom Hiddleston	1


TV celebrities/comedians

James Acaster	4
David Attenborough	2
Richard Ayoade	1
Rob Brydon	1
Jimmy Carr	3
Jeremy Clarkson	4
James Corden	1
Simon Cowell	2
Greg Davies	4
Jay Foreman	4
Stephen Fry	3
Bear Grylls	1
Lee Mack	1
David Mitchell	2
Piers Morgan	1
Graham Norton	3
Jamie Oliver	2
John Oliver	1
Gordon Ramsay	5
Katherine Ryan	1
Harry Styles	1
David Walliams	1
Jack Whitehall	2


- 45 actors were mentioned in interviews across 4 countries, but 27 were only mentioned once. Pierce Brosnan, Cillian Murphy and Andrew Scott were wrongly identified as British. All three are Irish.
- Ricky Gervais was the most mentioned (16) by multiple interviewees in each country. Some knew him as an actor from *The Office* or *After Life*, but many also knew him as a comedian.
- Other actors mentioned 5 or more times included, Hugh Grant (8) and Benedict Cumberbatch (8), both mentioned in all 4 countries, and Idris Elba (5), mentioned in DK, NL and DE.
- Although Phoebe Waller-Bridge was mentioned in name only twice, she received praise as an actor and writer of *Fleabag* from several respondents.
- 23 TV celebrities/comedians (excluding Ricky Gervais) were mentioned across 4 countries, but only one, Gordon Ramsay, was mentioned in Italy. He was also the most named TV celebrity overall (mentioned by 5 people).
- James Acaster, Greg Davies and Jay Foreman were mentioned 4 times each, revealing the appeal of British comedians, including in Germany, where 2 interviewees also mentioned Jimmy Carr.
- Canadian comedian Katherine Ryan, who lives in the UK and features in many British comedy panel shows, was also identified as British.
- *Top Gear* presenter Jeremy Clarkson was mentioned 4 times, but this included 3 interviewees in Denmark where *Top Gear* remains popular.
- Some male interviewees explained how they came across short YouTube clips featuring Jeremy Clarkson in *Top Gear*, and Gordon Ramsay in *Hell's Kitchen* in the early 2020s and found these hilarious. Today, these celebrities appear to be less popular among young men.

British actors

Pushed into the limelight by US (co-)productions, Netflix & social media

 "Definitely actors [appeal], there are some actors who...there is Colin Firth, for example, who is a great reason [for watching], even if, I believe, he is often in American productions. He, for example, is one of my favourite actors in the British scene. As I have already said, Hugh Grant, but mainly for his first classics [...] Maybe Ewan McGregor..."

- Benedetta, 24

 "The actress, Emma Mackey [from *Sex Education*], I don't know the correct pronunciation, anyways it's her, the fact that I like her as an actress, so in this case that's a discriminating factor [for being interested in *Emily*]."

- Margherita, 27

Hendrika (16): Florence Pugh. [...] I think I know her from Marvel movies.

Tamara (16): Me too. And that movie with Harry Styles...

Mareike (16): Yeah. *Don't Worry Darling*.

Tamara: And *Little Women*.



"Florence Pugh, she is still very young, so obviously there's not a tonne of movies or series she's been in. But especially actors who have been in the business for a long time. It's, like, really interesting to go back [to], or for Keira Knightley, this like, *Bend it like Beckham* movie."



- Emilia, 24


- As the quotes on the left suggest, among 16-19s in all countries, and across all age groups in Germany and Italy, British actors tend to become known through US productions or US-UK co-productions that involve US funding and significant marketing budgets. Examples of actors include Hugh Grant, Colin Firth, Ewan McGregor, Keira Knightley and Florence Pugh.
- Netflix is an important platform for new talent. Young British actors named and admired across all countries include, Millie Bobby Brown, Louis Partridge, Emma Mackey, Asa Butterfield, and Kit Connor, many of whom are known through Netflix's youth-oriented series such as *Stranger Things*, *Sex Education* and *Heartstopper* and in films like *Enola Holmes*.
- Ricky Gervais' profile has risen because of *After Life* (2019), comedy specials, *Armageddon* (2023) and *SuperNature* (2022) on Netflix, and his presence on social media.


Appeal factor of 'settings, landscapes & people'


High in Germany & Italy

"With *Downton Abbey*, I liked the setting in the past, with the clothes a little... a different lifestyle from ours, I liked it for that reason and, ok, obviously the plot..."
- Barbara, 31 

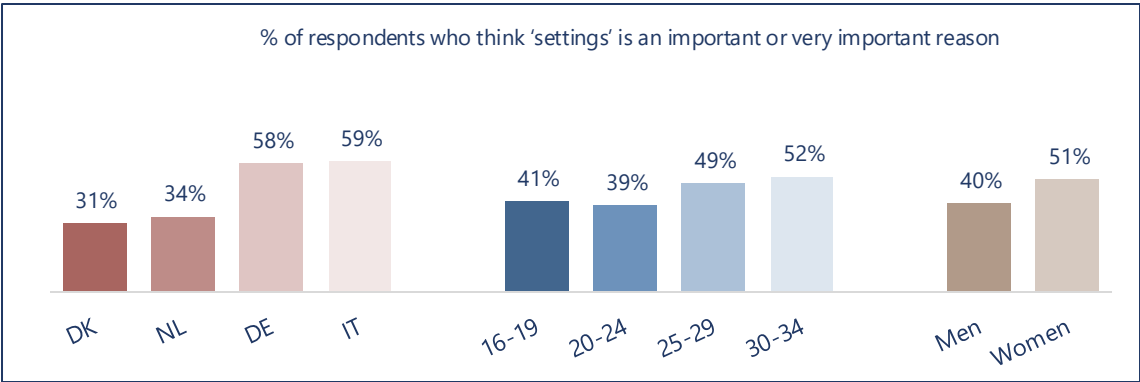
"I really liked the setting [of *The Gentlemen*], this semi-aristocratic context."
- Matteo, 28 

"being able to see British cities, how it works, some details of the schools in England, this type of... in shows that are obviously current, modern, this is another thing I find very interesting and appealing."
- Elisa, 26 

"I've watched other historical dramas from Britain before, for example, *The Theory of Everything*. Or *Enola Holmes*. So more recent examples. So I kind of like the aesthetic of the historic Britain."
- Max, 17 

"[Watching *The Crown*] I remember when Queen Elizabeth and her mum travelled to... I don't know where they travelled, but they travelled through the country. And they showed some very beautiful landscapes, actually. And that was something that I very much enjoyed."
- Fernand, 17 


- 58% and 59% of survey respondents in Germany and Italy respectively agree that British settings, landscapes and people are a reason why they watch British programmes (see graph). This is higher than Denmark (31%) and the Netherlands (34%).
- In all countries, the enjoyment of seeing British settings, landscapes and people is stronger among women (51%) and older viewers (52%).
- Barbara and Matteo (left) in Italy appreciated the upper-class settings of *Downton Abbey* and *The Gentlemen*. Max in Germany appreciated 'the historic Britain' of *Enola Holmes* and *The Theory of Everything*, and Fernand liked 'the beautiful landscapes' in *The Crown*. In both Italy and Germany, the strong appeal of historic settings also tallies with high appreciation of British historical drama (53% IT, 51% DE).
- Elisa (left) voiced her appreciation of the opportunity to see contemporary Britain and how it works, but overall interest in contemporary Britain was mentioned less frequently by other interviewees.





Question "How important to you are the following reasons for choosing British screen content?" [please indicate your opinion by extending the bar (0-100)]
Base: All (16-34) who responded to the 'settings' statement (n=1,458; nDK=350; nNL=355; nDE=339; nIT=414). Sources: Screen Encounters With Britain. Survey DK, DE, NL, IT. Interviews with audiences.


Domestic screen content appeals less

A strong motivation to look elsewhere

 "there's [Dutch] Youtubers I watch, but I don't watch Dutch movies. I think they're really cringe."
– Nadine, 16

"I rarely watch something in German, i.e., German-language things or things produced in Germany... because I think that technically they are not that good. There are one or two exceptions, German films that are quite good. But I really tend to focus on the English-speaking world as far as fictional content is concerned."
– Markus, 26 

"the series I'm watching, they mostly trigger your emotions. And I didn't feel like the Danish series mostly do that. The Danish series I have watched don't really trigger your emotions, which I like when I'm watching a love story. That's why I'm watching it in English or British."
– Lene, 17 

"[Italian] TV series it's rare, meaning that generally there are very few that I watch, and I like. Films, yes, I've watched a lot of them, I watch a lot of them, I watch Italian cinema, absolutely."
– Daniele, 25 

- Interviews revealed that a strong motivational component for watching US and UK content is the perception that 'relevant' domestic content is lacking, coupled with a dislike of most available domestic fiction.
- Criticisms focused on low production budgets, acting quality, script-writing, lack of humour and emotional engagement, and perceptions of a shortage of shows in genres and involving themes that interest young people (see left).
- In the Netherlands and Germany criticism was particularly strong, explaining why domestic content came third in the Top 3 country of origin rankings (slide 25). The pervasiveness of these negative evaluations confirms the existence of a wide-spread discourse about the low quality of domestic film and television in these countries. Older interviewees (30-34), who grew up with linear TV, were less critical.
- The youngest (16-19) in Denmark, Germany and the Netherlands were especially damning, often using the word 'cringe' to describe homegrown fiction.
- In Denmark there was some acknowledgement of the quality of Danish crime drama, and some home-grown entertainment, but many felt there are too few productions that appeal to young people.
- In Italy there was less criticism of domestic productions. Italian films are highly regarded, but this extends less to TV fiction (see Daniele left). In Italy domestic entertainment programmes are still popular and watched more frequently than in the other countries, often in the company of friends and family.

Domestic content appeals less (continued)



"Italian TV series are rarely of good quality, unfortunately, in my opinion. However, there are still good films, but it's rare to find something. [...] Italian productions very often lack from an acting point of view, the acting, the dialogues, the characters have no depth and often make choices that are not realistic."

- Margherita, 27



"I don't really like the Danish stuff – Danish programmes – because I think it's kind of cringe in some ways to see my own language being used. But I love Flow [linear] TV shows in Danish, like *Buying Houses Blind* or decorating shows and baking shows. I think it's fine because there's a competition, so there's something else than acting."

- Marcello, 17



"[Dutch] TV programmes can be OK, but the films and series most of the time are just a bit shite. [...] Not really well-made productions, so you see that there's not a big budget. And the acting most of the time is just wooden. You can see they're not big-time actors."

- Karl, 18



"German media is not that good. Netflix is kind of an outlier with this - there were some really, really good Netflix shows from Germany [...] This is quite the mainstream opinion. Many, many people, especially young people, really don't like German entertainment that much."

Max, 17

- In each country there were domestic light entertainment shows that are appreciated, like *Buying Houses Blind* in Denmark, drama series *Oogappels* and reality dating format *B&B Vol Liefde* in the Netherlands or *Germany's Next Top Model*.
- However, reality TV and talent shows no longer have the status they once had (see slide 20), and only a few shows are still being watched.
- Other 'exceptions' of domestic content young viewers appreciate included Dutch documentaries and current affairs, especially by public broadcaster NPO, and in Germany some comedy productions including comedy-drama *Türkisch für Anfänger* (Turkish for Beginners, now repeated on Netflix), and comedy feature films, *Fack ju Göhte* (*Fuck You Goethe*, repeated on Netflix) and *Isi and Ossi* (Netflix original).
- Few survey respondents in Germany (7%) and the Netherlands (15%) thought that 'domestic content feels more relevant than British content'. This was higher in Denmark (25%) and Italy (31%) where home-grown content rated higher overall (see slide 25).

"the genres I favour, there isn't any Dutch content. There is no Dutch fantasy content, no Dutch sci-fi content."

- Mark, 24



5 viewer types for UK content (as part of overall viewing)

UK TV veteran

- ✓ High familiarity with UK productions in all kinds of genres, non-/scripted
- ✓ Likely to be Dutch or Danish
- ✓ High English-language proficiency
- ✓ Has come to equate UK productions with quality
- ✓ Has developed a liking for certain UK actors, presenters and comedians
- ✓ Tends to see UK productions as 'intellectually superior' to US productions
- ✓ Appreciates 'intelligent', 'sarcastic', 'dark,' and 'irreverent' 'British humour'
- ✓ Men more likely to watch UK panel shows, documentaries, in addition to TV fiction
- ✓ Women more likely to be familiar with UK reality TV, lifestyle & talent shows, in addition to (mostly) TV fiction

Film & TV lover

- ✓ Loves watching film & TV fiction and has a discerning eye and taste
- ✓ Country-of-origin interest can be broad, or mostly limited to English-language productions
- ✓ Seeks quality in production value, scripts and acting, and believes this is found in many UK productions (e.g. *Black Mirror*, *Fleabag*, *After Life*)
- ✓ Watches the original language soundtrack to experience 'the real thing' and for greater authenticity
- ✓ Appreciates 'intelligent', 'sarcastic', 'dark,' and 'irreverent' 'British humour'
- ✓ May have low or high familiarity with UK film & TV fiction
- ✓ Quickly comes to reject dubbing, and develops high English-language proficiency (understanding) over time

English learner

- ✓ Uses English-language drama (mostly from the US) on global SVoDs to learn English (sometimes prompted by teachers)
- ✓ Likely to be 16-24, and more likely to be a woman than a man
- ✓ Discovers (recommended) UK productions on global SVoDs, especially Netflix
- ✓ Enjoys some recent youth-oriented UK shows (e.g. *Sex Education*, *Heartstopper*).
- ✓ Values relatable themes and characters; and humour as an essential ingredient in all kinds of narratives (serious, sad, educational)
- ✓ Watches UK drama sometimes, but no UK unscripted shows
- ✓ Those with higher English language proficiency quickly stop watching dubbed content (DE vs IT viewers)

Youth-content seeker

- ✓ Likely to be 16-24, and more likely to be a woman than a man
- ✓ Feels there is little or no domestic youth-oriented content, including 'coming-of-age' drama, or dismisses it as 'cringe'-worthy
- ✓ Watches mostly US drama but loves some recent UK shows (*Sex Education*, *Heartstopper*, *Derry Girls*, *Skins*) which has sparked interested in other UK productions; discovers these on social media
- ✓ Values relatable themes and likeable characters, the use of affect ('allowing her to feel'), and humour as an essential ingredient in all types of storytelling
- ✓ Has grown fond of certain British actors
- ✓ Watches the original soundtrack or dubbed
- ✓ Often unaware that drama is a UK (co-)production

Fan of UK talent

- ✓ Some viewers love and follow one or several UK actors (e.g., Hugh Grant, Benedict Cumberbatch, Emma Mackey, Millie Bobby Brown), comedians (e.g. Ricky Gervais, James Acaster, Jay Foreman) or presenters/celebrities (Graham Norton, Gordon Ramsay, Jay Freeman)
- ✓ Open to all kinds of content featuring these actors
- ✓ Know that they are British, but note that they have seen/discovered them in US productions or UK-US co-productions
- ✓ Some talent (e.g. Phoebe Waller-Bridge and Ricky Gervais) is celebrated for writing and acting skills; while some UK presenters and comedians are appreciated for their wit and authenticity, qualities often seen as missing in domestic talent

7. Values & Attributions

Values & attributions of UK content

- Values that are recognised in UK content overlap with motivations for choosing to watch it. This chapter adds to the previous one by drawing on interviewees' descriptions of UK content, and on opinions from digital diaries, interviews and the survey to identify motivational drivers.
- Humour is the most frequently mentioned characteristic attributed to UK shows and film. Most interviewees found it difficult to sum up the values of UK screen content in general. These values emerged more clearly when they talked about specific shows.

Acting talent & intellectual stimulation

- Most survey respondents believe that 'British acting is of high quality', ranging from 71% in Germany to 58% in Italy, citing mostly globally known actors in interviews.
- The perception that UK content is 'intellectually stimulating' was common only in Denmark and Italy, as evidenced in both the survey and interviews.

Realism, relevance & relatability

- There was higher agreement about the realism and authenticity of UK content in Denmark (57%) and the Netherlands (58%), than in Germany (44%) and Italy (45%).
- Just under half can relate to the themes in UK screen content (41% in Denmark to 48% in Italy), and fewer (32% in Denmark to 46% in Italy) thought that UK content deals with topics relevant to young people. Interviews showed that this was almost entirely driven by comedy-drama available on SVoDs, such as *Sex Education*, *Heartstopper*, *Skins* and *Fleabag*, content that is seen is missing on domestic platforms.

Diversity

- Less than one-third of survey respondents think that UK content appeals because it reflects ethnic diversity and LGBTQ+ communities. Interviewees mentioned it rarely unprompted and mostly in relation to Netflix shows, *Sex Education* and *Heartstopper*.


Values of British screen content

The industry perspective


"British content is definitely one of the best schools of storytelling in the entire media landscape. But it is not easy to find something which is free-TV friendly [...] which is not too old-fashioned. Otherwise, it's pay-tv, very edgy, very high-end, I would say."

- Programme Buyer 2 

"UK content has always been really important as our main driver is excellency."

- Senior Editor, Film Festival 

"something [that] we notice in British content: a humour [...] that just speaks to Danish audiences. There's a blackness to it. And there's irony, But there's a lot of heart too. A matter of being able to joke about the most awful things but bringing people together when you do it."

- Film Festival Programmer 1 

"there's this sort of inherent familiarity that I think Dutch audiences have with particularly British culture, shall we say, that maybe it feels a bit like home."

- Film Festival Programmer 1 

- When asked to describe UK content, both programme buyers and film festival organisers in all 4 countries were complimentary about the quality and strong storytelling of UK productions.
- Many highlighted the appeal of black, ironic humour in UK drama. A Danish film festival programmer (left), like many audience interviewees (slide 54 and 68), commented on the appeal of UK content because it combines dark humour with 'warmth' and 'heart'.
- In Italy, programme buyers agreed but were more cautious about the suitability of UK content for mainstream channels as opposed to subscription services. UK content is seen as either too 'edgy' or 'old-fashioned' (Buyer 2, left). In Italy these views about the niche nature of UK shows have not shifted since the early 2000s (Steemers, 2004).

Audience descriptions of UK screen content

Humour is the most frequently mentioned characteristic

"I associate US programmes with mega-action, explosions, things like that. In the case of English TV series, I associate them more with humour, black humour, irony, situations that are absurd, extreme [...] As for the other things... maybe references to nobility, barons, earls..."

- Alessandro, 33

"British shows are of high production value, high quality. They have a great set of very talented directors, actresses or creative people overall. They have the courage to try new things, to be innovative, to be thinking outside the box..."

- Didier, 29

"it's not that all of those films that I'm thinking of fit that category [kitchen-sink dramas], but it's the first word that comes to mind when I think of British film. But then when it comes to British television, I'm definitely thinking more in line of comedies, black comedies, and the Monty Python-esque sketch shows. Maybe also a more intellectual humour than the American comedy shows."

- Thomas, 29

"the types of stories and art that gets made, it tends to feel a bit more 'real' [than US content], a bit less like we're censoring, less like we're sanding off the ugly parts, as it were, from life and society."

- Martijn, 27

- Men and older interviewees felt more able to describe UK screen content in a few words. The most frequently mentioned association by far was humour (see Alessandro and Thomas). The role of humour was also highlighted in a survey question about words that respondents most associated with UK titles they knew (next slide).
- Other frequently mentioned characteristics included high production values, innovation, talent, both on- and off-screen and historical references to aristocratic and heritage settings.
- Multiple interviewees, like Martijn (left), mentioned a more 'real' look and feel, compared to US content, more 'intellectual humour' (Thomas), more 'self-insightfulness' (Jytte, DK, 25) and narratives and characters that have 'depth' (Margherita, IT, 27).
- However, asked about their motivation for watching UK content, only a third or less of survey respondents (26-35%) agreed with the statement that 'British content is better than content from other countries' (slide 48).
- Most interviewees found it difficult to sum up the values they attribute to UK screen content in general. These values emerged more clearly when they talked about specific shows (see rest of this chapter).

Values & Attributions – overview of survey findings

% of respondents who agree or strongly agree with these statements

	DK	NL	DE	IT
British acting is of high quality	69%	65%	71%	58%
British content feels realistic or authentic	57%	58%	44%	45%
British content deals with themes I can relate to	41%	45%	41%	48%
I can relate to it easily because I can identify with the people in it	38%	40%	41%	35%
British content is intellectually stimulating	49%	25%	32%	48%
It feels familiar because I grew up with British content	42%	42%	31%	25%
British content deals with topics that are important to young people	32%	26%	38%	46%
British content is appealing because it reflects ethnic diversity and LGBT+ communities	25%	27%	33%	37%
I don't really notice whether the content I'm watching is from Britain or the US	26%	12%	15%	24%
Domestic content feels more relevant than British content	20%	15%	7%	31%
British fictional content feels gloomy and unpolished	30%	13%	7%	11%

- 'British acting is of high quality' received the highest agreement in all 4 countries (DK 69%, NL 65%, DE 71%, IT 58%).
- 'British content feels realistic or authentic' also ranked highly. Between 44% (DE) and 58% (NL) of respondents agreed.
- Between 41% (DK, DE) and 48% (IT) agreed with the statement that 'British content deals with themes I can relate to,' but fewer felt that they can identify with the people in it (35%-41%).
- UK content* is 'intellectually stimulating' achieved the highest agreement in Denmark (49%) and Italy (48%), but far less in Germany (32%) and the Netherlands (25%).
- Mirroring findings in Chapter 4 (slide 23), 'familiarity' is felt in Denmark and the Netherlands (42%), but less in Germany (31%) and Italy (25%).
- 'British content deals with topics that are important to young people' achieved the highest agreement in Italy (46%) and Germany (38%).

'High quality acting'

High agreement, helped by global fame and recognition

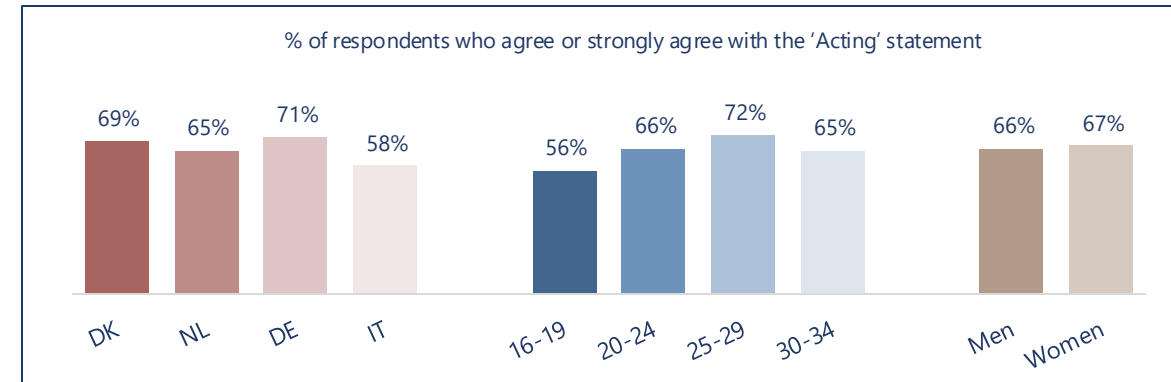
"I think British acting is superior to American acting because there is a lot of shows where the main actor is British, but the show's American for example, like in *Snowfall* [stars Damson Idris]. And [...] there's a show called *The Wire*, and Idris [Elba] is part of that."
- Jamal, 22

"[Phoebe Waller-Bridge] is very good, I think, so...also, I realised, it is difficult for me to understand when a foreign actor is a good actor. Let me explain better, perhaps I understand it better with Italian actors, but in her case, I really like the way she acts."
- Benedetta, 24

"I really like Benedict Cumberbatch in that series [*Sherlock*]. He's an awesome actor. I know him from Marvel as well."
- Katja, 25

"there is a certain theatrical allure to especially UK scripted – a different way of acting, a different way of staging that really appeals to an older demo. But I think everybody under the age of 30 has been so raised with this naturalistic US approach, of everybody looking good [...] that they have difficulty getting to the more... less aesthetic and less fluent UK scripted shows."
- Dutch Programme Buyer 3

- Asked to indicate their agreement with statements others have made about British content, 71% of survey respondents in Germany agreed that UK 'acting is of high quality,' compared to 69% in Denmark, 65% in the Netherlands, and 58% in Italy.
- Interviews provided some insights for why this is so. Most of the frequently cited examples for high quality acting referred to globally known actors such as Hugh Grant, Benedict Cumberbatch and Idris Elba (see also slide 56) who are known from major US productions.
- A Dutch Programme Buyer (left) suggested that young people's preference for a more 'naturalistic US approach' to acting may affect the extent to which they engage with 'less aesthetic and less fluent' UK scripted shows.
- Although some interviewees like Benedetta and Emilia (DE, 24) thought that UK actors were better or 'more authentic' (Emilia DE, 24), they admitted that not being native speakers might impact their evaluation, and that they were maybe more critical of Italian or German actors because they were native speakers.



'Realism & authenticity'

Acknowledged and appreciated

"when I think of *After Life* right now, I would say very humorous, but also emotionally charged and authentic. Also, because I think this whole thing with the accents lets you immerse yourself a bit more in this world. When you watch German films, everyone speaks the same language, speaks German [...] But on British television there is just this diversity. [...] You really notice that a lot of different cultures are 'crashing' into each other and yes, that's why I think it just seems authentic."



- Markus, 26

"What I found in the one with Gordon Ramsay [*Hell's Kitchen*] was obviously a greater authenticity, I mean, everything worked better, however scripted it might have been, etc., but it gave me a much stronger feeling of realism..."



-Matteo, 28

"Day-to-day life is shown and given more space and time. You're more likely to see a morning breakfast as part of a British TV episode than in an American TV show."



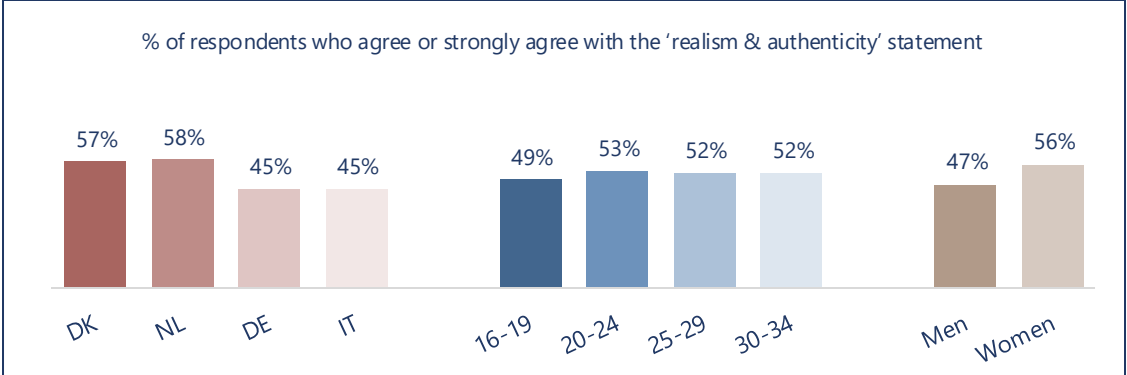
- Lars, 31

"an authentic representation [...] that's what I would expect from British TV shows - if it's obviously contemporary and not, like, a fantasy or science-fiction show. [...] And especially queer-wise, because all the shows that we've talked about the most during this interview are those that have really good queer representation."



- Kris, 26


- 58% of survey respondents in the Netherlands and 57% in Denmark agreed that 'British content feels realistic or authentic,' compared to 45% in both Germany and Italy. This difference may be attributable to the wider viewing experience of Dutch and Danish respondents across non-scripted shows in English as well as scripted shows.
- Unprompted, several interviewees in each country referred to the realism and authenticity of UK drama, especially in comparison to US shows (see Lars), but also to domestic shows (Markus).
- Most interviewees mentioned realism/authenticity in relation to fictional productions, like *Derry Girls*, *Fleabag* and *Sex Education* (season 1 & 2 only) and to their 'relatable characters' (slide 69).
- Matteo (left) remarked on a non-scripted show, *Hell's Kitchen* (UK) with Gordon Ramsay, that he thought felt more 'authentic' than the Italian version, *Hell's Kitchen Italia* on Sky Uno.





Question "What do you think about the following statements other people have made about British content?" [please indicate your opinion by extending the bar (0-100)]
 Base: All (16-34) who responded to the 'realism & authenticity' statement (n=1,518; nDK=378; nNL=375; nDE=346; nIT=419). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT; audience interviews DK, DE, NL, IT.


'Relatable themes'

Underpinned by strong scripts, depth & relatable characters

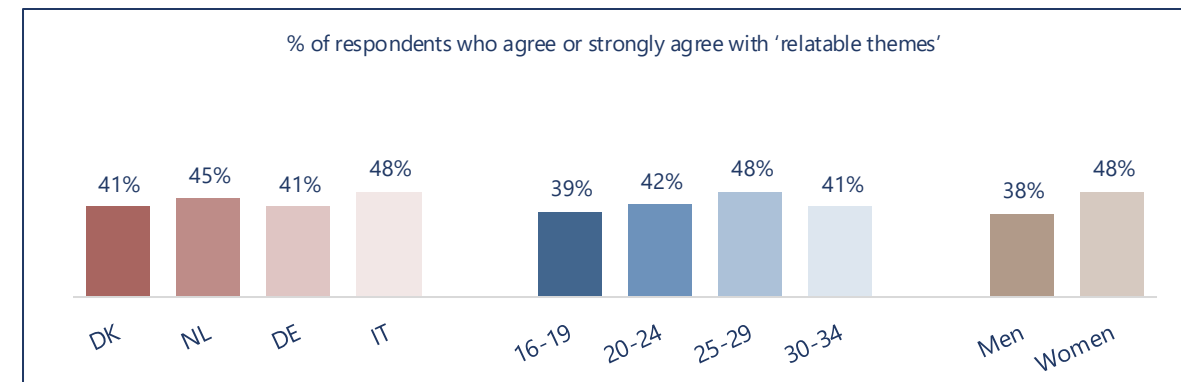
"[*Fleabag*] is relatable because, very generally, in Europe, in many European cities, you can find this loneliness, this woman, this city, with perhaps messed up relationships, both family and love relationships, so in my view, I mean, it's a little gem, as such."
- Daniele, 25 

"The characters [in *Sex Education*], they were kind of quirky. [...] it was easy to kind of just fall in love with each character and really enjoy watching how they manage steering through teenagehood."
- Emilia, 24 

"[*Fleabag*] it's also about topics that interest me: identity, psychology, sexuality, things like this."
- Martijn, 27 

 "with *I May Destroy You*, it was actually a friend of mine who [...] recommended that I watch it. Because she just cried the whole way through because she thought it was that good. And then I watched it [...] it was just really well-made and it took the topic really seriously. And it was also feminist in a way that appealed to me, and I feel like it's often not a boy or a man who saves the woman in British TV series. It's themselves, they changed their own lives and do it better."
- Rosa, 26

- Between 41% (DK and DE) and 48% (IT) agreed with the statement 'British content deals with themes I can relate to.'
- Agreement was highest among the 25-29s (48%), and this was reflected in interviews (see left).
- Agreement was also higher among women (48%) than men (38%).
- Shows named in relation to relatability were applauded for their universal themes (love, sex, loneliness, self-assertion, identity, growing up), for the 'sensitive,' 'honest,' 'realistic' and 'in-depth' ways in which topics were covered, and for 'relatable characters' who were 'believable,' 'likeable' and often 'fun.'
- The shows most applauded in this regard were *Fleabag*, *After Life* and several youth-oriented shows, which links to another statement, 'topics important to young people,' which received the highest agreement among 16-19s (next slide).



'Youth topics'

Shows discovered on social media & Netflix that relate to young people's interests

"in school, you meet, like, a boy. You start to hang out, to spend a lot of time together, and you fall in love. And that's a very sweet story that I personally would enjoy. So that's probably why I also enjoyed *Heartstopper* a lot, yeah."
- Fernand, 17

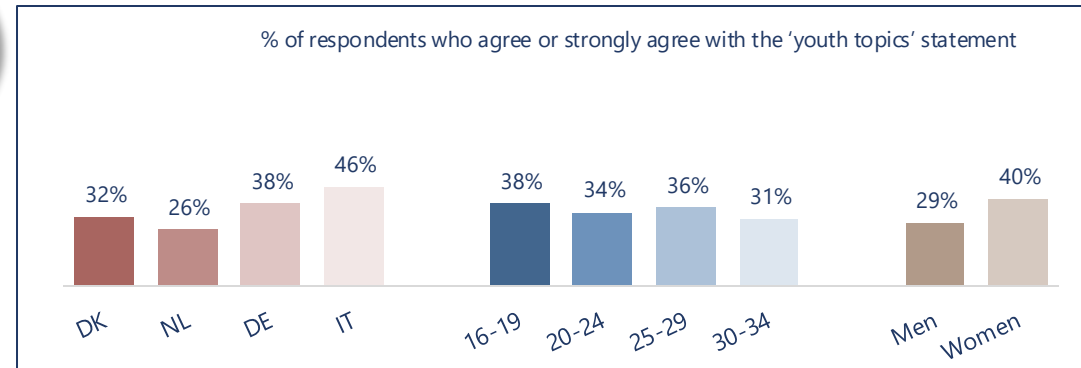
"[*Heartstopper*] It's very relatable to everyday experiences. Yeah, that's the main reason [for liking it]. I suggested it to a few friends, and one of them got really passionate about it, and so we talk about it all the time."
- Gina, 16

"[*Heartstopper* and *Sex Education*] they are based around romance and sex [...] aimed at helping people understand themselves. I don't find that in Dutch shows or movies."
- Kris, 26

Mette (19): "Yeah, I believe that the British take social dilemmas and turn the aspects of the problem in the series in a more respectful way than maybe the Americans do. Yeah. And that's probably why we can, like, relate to it more..."
Hanne (19): "Like in *Skins*, for example, they also have, like, eating disorders..."

"[I like *Derry Girls* because] it kinda looks like our friend group, I think. [...] And I can really relate to, like, what they're like doing and stuff with our friend group."
- Tamara, 16

- The agreement rate for 'British content deals with topics that are important to young people' was highest in Italy (46%), followed by Germany (38%), Denmark (32%) and the Netherlands (26%);
- Among the youngest (16-19), whose experience with UK content is mostly limited to shows on Netflix, agreement is highest (38%).
- In interviews, the same small number of teen-oriented shows (all on Netflix) came up: *Heartstopper*, *Sex Education*, *Derry Girls* and *Skins*. All were 'loved' because of their 'relatable' topics and situations, likeable and relatable characters, and humour.
- Interviewees in Italy, the Netherlands and Germany confirmed that there was not enough domestic youth-oriented drama. Lene from Denmark (17) complained about Danish youth-oriented drama failing to 'trigger your emotions,' unlike imported series.
- *Skins* and *Derry Girls* were well liked (including in Italy) despite their highly specific localities and accents (see slide 80).



Question "What do you think about these statements other people have made about British screen content?" [please indicate your opinion by extending the bar (0-100)]

Base: All (16-34) who responded to the 'youth topics' statement (n=1,516; nDK=378; nNL=375; nDE=346; nIT=417). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT; audience interviews DK, DE, NL, IT.

'Intellectually stimulating'

Common perception only in Denmark & Italy

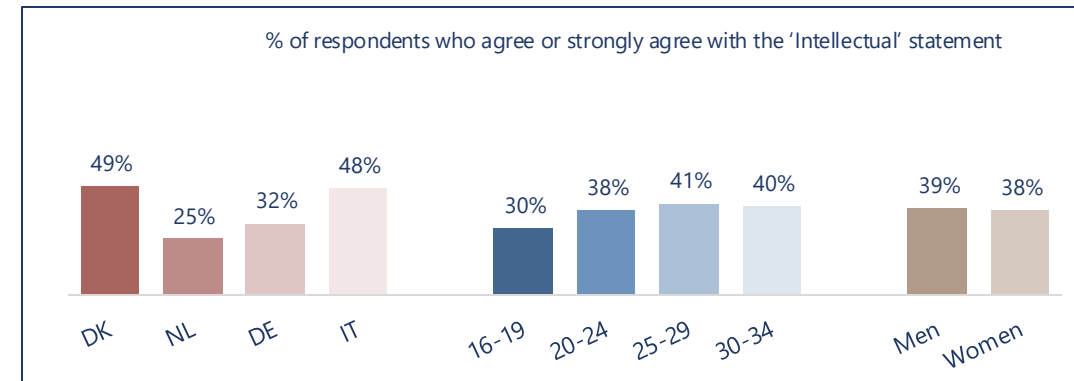
“what I think is really cool about *Black Mirror*, the way that they toy with how technology can impact our worlds and they take it to the extremes, and a lot of the things that they touch upon is something that I've also thought about, and I guess a lot of people have too. For example, the episode where they rate everything...”
- Per, 25

“I really liked the underlying idea [of *Sex Education*], which I think is not very spoken about on TV or in TV series, as it addresses those issues in such a frank and also educational way.”
- Elisa, 26

“Yes, *Minister* is just incredible if you have an interest in politics. I think even to this day it is very relevant. The acting is superb. If you enjoy linguistics a little bit, Humphrey Appleby is unparalleled [...] Yes, *Minister*, the sitcom and the politics is just perfect for me.”
- Anders, 28

“I like British crime and I also like the British action films. I like *James Bond* a lot. Also *The Kingsman*. [...] But the American action films, series they are all very action, action. [...] a lot of cars, a lot of chases, a lot of bombs, a lot of guns. So that's sometimes too much, and I like the more intelligent aspect of it as well. [...] The spy has to figure out some sort of strategy, and that's what I see in the *James Bond* and *The Kingsman*.”
- Katja, 25


- While high shares of survey respondents in Denmark (49%) and Italy (48%) agreed with the statement 'British content is intellectually stimulating,' this was lower in Germany (32%) and the Netherlands (25%).
- In interviews appreciation of 'intelligent' British screen content that makes one think was rare and came mostly from young audiences in Denmark (see left).
- In Italy, the 48% of survey respondents agreeing that British content is 'intellectually stimulating,' matches earlier BFI/Yonder study findings, which found that, 'Intelligence and being cultured are the most distinctive attributes of British film/TV for Italians' (2021e: 15).
- For the head of an Italian film organisation interviewed for this project, the taste for British films was linked to 'distinguishing genres', and Italian programme buyers all remarked on the 'edginess' and 'boldness' of UK content.



'Diversity'

Appreciated by 30% of young viewers


"[*Snowfall*, starring Damson Idris] it's something I relate to, I guess, yeah. Most of the shows I watch have black leads [...] I never saw a German actor in my life – a German black actor in my life - so yeah... That's the reason I'm not really attracted to German TV shows..."

 - Jamal, 22


"I like the fact that they [producers of *Heartstopper*] made something about it, because many people don't see the thing that they're both boys very well."

 - Gina, 16

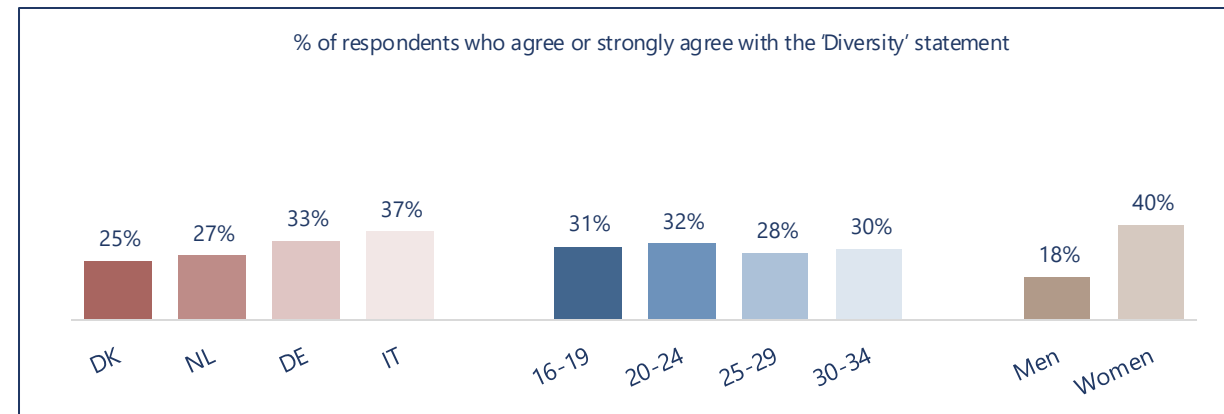
"For example, *Chewing Gum* [...] It's just the things they deal with - it's just on top of that that they're black. And I feel like, if it was a Danish TV series with a black lead character, it wouldn't be recognised that it's different to be a black person than a white person. And I think TV series from the UK do that really well – like, recognise that this is just a person who has these troubles, but it's also a black person, so therefore maybe it's harder to come out of these troubles."

 - Rosa, 26

"I wouldn't say that per se it [diversity] appeals to me. It's more that I don't really care. So if it happens, it's like 'OK'. And if it doesn't happen, it's also just kind of neutral about - it's like, 'OK.'"

 - Eduard, 21

- Less than 1/3 (30%) of all survey respondents (n = 1,509) agreed with the statement, 'British content is appealing because it reflects ethnic diversity and LGBTQ+ communities.' Italy (37%) and Germany (33%) polled higher.
- Appreciation of diversity was much higher among women (40%) than men (18%). Italy showed the highest disparity between women (51%) and men (19%).
- Among interviewees, respondents from an ethnic minority background, such as Jamal and Rosa (see left), often commented on the appeal of ethnic diversity, especially if they liked what they saw in UK shows.
- No one raised diversity unprompted. When asked if they recognised diversity in UK screen content, a handful of respondents in each country answered affirmatively. *Sex Education* was the show named most often across all countries, with interviewees appreciating its open portrayal of relationships. Gina liked *Heartstopper* for its depiction of a gay relationship.
- Diversity was not especially sought out (Eduard). Floor (NL, 20) thought dominant groups might not think very often about diverse representations, a sentiment echoed by several Danish respondents.



Diversity discourse in industry circles

Acknowledges demand & UK 'lead'

"A theme that is definitely preferred by younger generations is LGBTQ titles. And also music titles. And all those films that talk about people's lives – let's say, extreme lives, drug-addicted, or music stars..."



- Film Festival Manager & Theatrical Sales

"British content is very often socially more relevant than other content. [...] it is particularly diverse. It always has been, and it has always addressed diversity before anyone else, before it was mainstream. It's ahead of its time. And obviously that fits perfectly into nowadays environment, and what is talked about and what drives engagement. And in that respect, the younger generation – I mean, diversity is just such a major issue for them."



- Senior Editor, Film Festival

"About three weeks ago we had a work seminar where we discussed diversity, and we circled a lot around the BBC's policy and what they do and the way that Britain is certainly a few steps ahead of us in that sense. [...] I wouldn't say that we have been in situations where we have acquired British content for this reason specifically but I will definitely say that it's a great inspiration to see what you're doing..."



- Programme Buyer

"British series, I would, say they are really organically inclusive. In a big show like *Silent Witness* you'll find a woman in a wheelchair or a deaf person, but also a completely mixed cast with Asians etc. And I think that's really one of the qualities of UK drama which we very much appreciate: the fact that it's already so really normal that there is this mixed cast."



- Programme Buyer 2

- In all countries, cultural intermediaries working in film thought that young audiences appreciate diverse, especially LGBTQ+ representations on screen. Two Italian film festival managers noted how young people (including film juries made up of young adults in their early 20s and festival audiences) tend to 'gravitate' towards such content.
- A Senior Editor of a Film Festival in Germany (left) thought that diversity is a 'major issue' for young people and that the UK has 'addressed diversity before anyone else.'
- Buyers for television and streaming services also recognise how Britain is 'pushing for diversity', and how inclusive casting has become 'really normal' in UK films and TV shows (Dutch Programme Buyer 2). A Danish programme buyer (left) noted that they had looked to the BBC for inspiration.
- However, for small screen executives, (ethnic) diversity was not a key reason for purchasing UK content. Buyer 2 in the Netherlands pointed out that ethnic diversity in the Netherlands is different from the UK, something that was also noted in Germany. Danish buyers said it was not a reason why they buy UK programmes.

8. Language settings

How

- Watching in English with English subtitles is the most popular preference among survey respondents in Denmark (59%), the Netherlands (69%), Germany and even Italy (both 53%). Dubbing ranked highest in Italy (33%).
- Digital diary entries confirmed Italy has by far the highest percentage of dubbed viewing (40%) ahead of Germany (13%), and that watching in English (with or without subtitles) proved the most popular option in all 4 countries.

Contextual factors

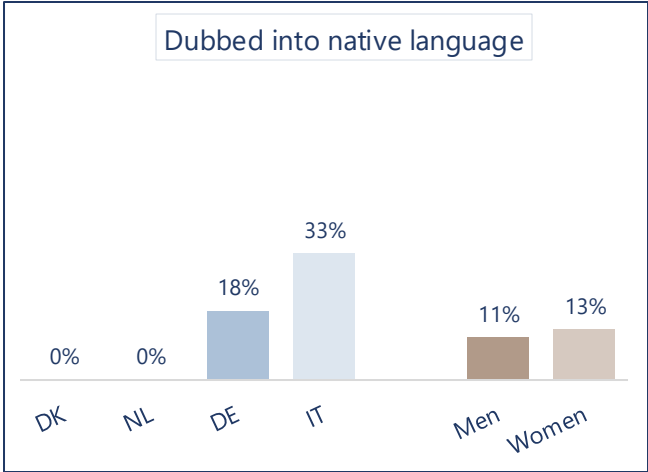
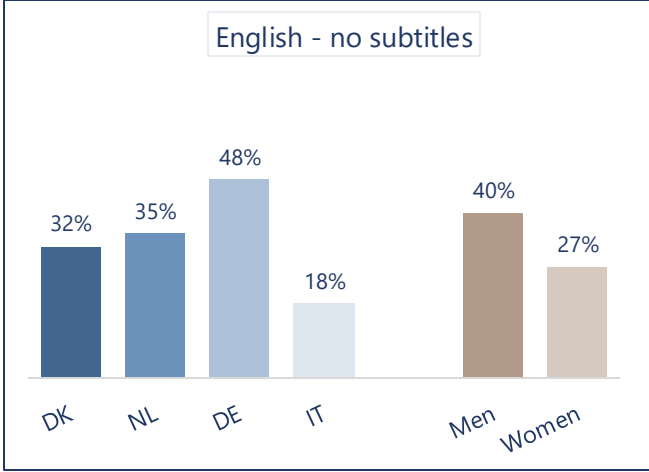
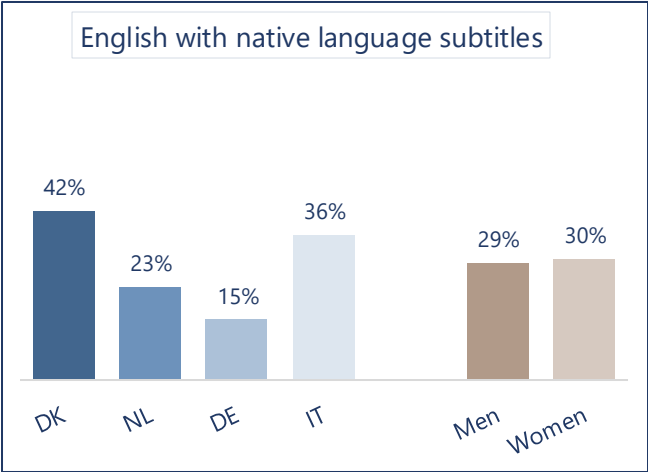
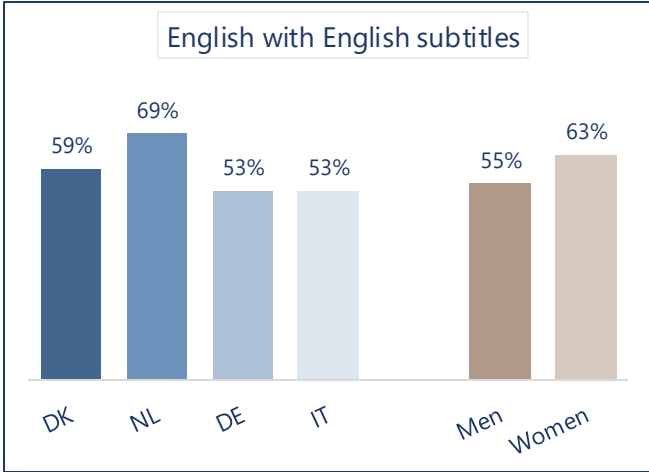
- Language settings depend on habit, English language proficiency, personal preference, mood, content watched, the platform used, the option to change language settings, and the specific interests in watching particular films or TV programmes (e.g. re-watching for either nostalgic reasons or to learn English).
- For interviewees in Italy and Germany dubbed content is often viewed in the cinema or with friends and family members who are less proficient in English.
- English subtitles are preferred because they match the spoken language, help improve English language skills, or if native language subtitling is thought to be poor.

Shift towards English language viewing

- Greater use of SVoDs and social media has accelerated the shift to English language viewing in Italy and Germany, with teachers encouraging viewing in English.
- However, interviewees in both Germany and Italy confirmed that dubbing remains the preferred option for the majority of the population. English language viewing is more prevalent among those studying English in secondary school, with a higher education background, who need to speak English professionally, or because they love watching films and TV series and want 'the real thing.'
- Once viewers with sufficient English-language proficiency have experienced 'the real thing,' few want to turn back to dubbed viewing.

Preferred language setting

English language proficiency and history of language settings determine preferences







- Asked about preferred language settings when watching UK screen content (max. 2 choices), survey responses revealed significant variety, reflecting different levels of English language proficiency and varying experiences with subtitled viewing.
- Subtitling countries Denmark and the Netherlands had the highest preference for English subtitles and an English language soundtrack (59% and 69% respectively). Italy, a dubbing country with moderate English language proficiency, had comparatively high shares for native language subtitles (36%) and dubbing (33%). Its share of watching without subtitles was comparatively low (18%).
- In Germany, also a dubbing country, preferences for watching with German subtitles (15%) were much lower than in Italy (36%), while preferences for no subtitles were much higher (48%). This reflects higher English language proficiency than Italy. Higher preferences for 'no subtitles' (48%), compared to DK (32%) and NL (35%) is a result of German viewers' limited experience with subtitles and of reading them.
- The youngest (16-19) in all 4 countries have the highest preference for 'no subtitles' compared to other age groups (not shown). This could be the result of weaker reading abilities (as some teachers suggested) or genre preferences (action/adventure, fantasy/sci-fi and animation).
- Genre preferences might also explain gender variation with 'no subtitles' (40% for men vs 27% for women). While men prefer action/adventure, fantasy/sci-fi and animation, women prefer genres where dialogue is more important, such as romance/romantic comedy, historical drama, sitcoms (slide 19).

Question "When you watch British screen content, which language options do you prefer? [2 max]
 Base: All respondents aged 16-34 who answered the question (n=1,537, 1.3 settings named on average; nDK=377; nNL=379; nDE=354; nIT=427). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT.

Preferred language setting - confirmed in digital diaries


Digital diary entries for language settings of non-domestic films / TV episodes watched over 5 days


		 DK	 NL	 DE	 IT
L1	Number of participants	20	28	26	28
L2	Number of foreign language episodes viewed	158	243	262	220
L3	English dubbed into native language	0%	0%	13%	40%
L4	English with English subtitles	62%	47%	30%	30%
L5	English with native language subtitles	23%	21%	6%	19%
L6	English without subtitles	11%	19%	47%	4%
L7	Other language dubbed into English	0%	0%	0%	0%
L8	Other language dubbed into native language	0%	0%	0%	0%
L9	Other language with English subtitles	1%	6%	0%	1%
L10	Other language with native language subtitles	3%	5%	4%	3%
L11	Other language without subtitles	0%	2%	0%	3%


- Industry interviewees in Italy and Germany warned that survey findings were impaired by social desirability. However, they also acknowledged that attitudes toward subtitles and watching the original soundtrack were changing among younger viewers.
- Digital diary entries for foreign language films / TV episodes watched over the course of 5 days confirmed survey findings for preferred language settings in each country.
- Italy was the country with the highest share of dubbed viewing (40%), compared to 13% in Germany and 0% in both Denmark and the Netherlands (L3). Italy also had the lowest share for viewing without subtitles.
- In all countries, watching in English (L4-6), with English subtitles, native language subtitles or without subtitles surpassed dubbed viewing.
- Watching the original English soundtrack with English subtitles was most common among participants in Denmark (62%) and the Netherlands (47%), followed by Italy and Germany (30% each)
- Participants in Germany watched mostly the original English language soundtrack but without subtitles (47%).
- Non-English language titles (L7-11) were watched in all kinds of ways, depending on the language settings offered, relevant language skills and personal preferences.

Language settings vary in all 4 countries


...depending on many different factors


 "I usually prefer Italian language because I want to pay more attention to the film, and once I watched the film with the Italian language, occasionally I rewatch in the English version."
- Piero, 17

 "I have friends that love watching films, who have a huge interest in films and stuff, and they prefer to watch in original; and those friends who are not that interested, who watch it like leisure or also operating with the smartphones in between, they watch it dubbed."
- Didier, 29

 "[subtitles] In Dutch or in English. But I always have the subtitles on. [...] It depends a bit on my mood. [...] And if I see that the translation is not good. Usually it's good, but if I see that it's not good, then I would switch to English. [...] And then on the NPO app, normally you don't have any choice. It's only Dutch subtitles."
- Thijs, 33

"I watch most movies from America [...] in German. But when I think, 'Yeah, I can watch it in English', I watch it in English. But that's not often. [...] I often forget that, yeah, I can watch it in English..."
- Nele, 16

 "[Subtitles] I think it's distracting."
- Yda, 21

 "For me it varies a little bit. It depends on what I'm watching. Like, when I'm watching reality, or just, like, YouTube videos or something, I'm not watching with subtitles. Whereas if I'm watching like a series or a movie, I usually have subtitles on."
- Marianne, 19

- In all 4 countries there is variation in language settings, depending on many factors: language options offered, habit, English language proficiency, personal preferences, mood, content watched, the platform used, and the level of interest in film / TV series (see quotes)
- Even in Denmark and the Netherlands where dubbing is rare, there was a huge variety of habits and preferences. Some even keep subtitling on when watching Danish shows.
- In Italy, all interviewees have family and friends who watch everything dubbed into Italian because of insufficient English language skills. At the same time, everybody knows of people, or is part of a group of people, who watch in English, always or sometimes. Piero (as well as Benedetta), mentioned that they sometimes opt for the original soundtrack when re-watching shows.
- In Germany, comments were similar to those in Italy, but many more interviewees preferred to watch the original English language soundtrack, some with English language subtitles, some with German subtitles, some without. Their settings vary depending on whether options are available, mood/tiredness and platform. Many now watch their favourite US sitcoms only in English. Others, like, Nele, forget that they now have the option to switch to English on VoD platforms.

Context also impacts language settings



"With my dad and his girlfriend, we usually just, like, watch maybe TV in Italian. But with my mum, I watch just movies in the original language. Also, my little brother is, like, 2 years old, and he's just started learning how to talk. So we're trying to make him watch as many English films as we can, so that maybe he could learn somehow how to speak a little bit of the language."

- Gina, 16



"when I watch with my parents, I will watch American or British movies in German, so that they can also understand. But if I was alone, or if I watched them with my friends, we would watch it typically in the original language."

- Derja, 25



"When it's available, I almost always choose the English subtitles, but in the cinema it will always be the Danish ones. Just because that's what's available."

- Thomas, 29



"Well, it depends. If I watch the series by myself, with all my attention devoted to the series, I put on English subtitles [...] But if I'm doing anything else at the same moment, I tend to put on Dutch subtitles. Because when I then take a look at the screen, I can process the words faster."

- Annette, 19

- The context in which viewing takes place causes variation, particularly when viewing with others.
- When watching with friends or family members who are less proficient in English, young people in Germany and Italy will watch the dubbed show. In Denmark and the Netherlands, they will opt for native language rather than English subtitles (see quotes).
- About a quarter of Italian interviewees said that they prefer to watch in English when alone, but that they often watch dubbed shows with family members or partners.
- Another factor is whether they are engaged in something else while watching. Annette, like many others, puts on subtitles (usually in Dutch) when undertaking other tasks alongside viewing.
- Films in Italian and German cinemas are still mostly dubbed. However, Italians like Gabriele (23) and Benedetta (24) will sometimes watch original language versions in the cinema if these are available.
- In Denmark and the Netherlands, cinemas offer Danish or Dutch subtitles to reach a larger audience (see Thomas).
- Only those who watch exclusively dubbed content (a few interviewees in Italy only) experience no variation. Most young people are used to multiple language options.

English subtitles are preferred by many

For multiple reasons

"Danish subtitles are usually very incorrect to what is actually being said – the subtitles don't match what they say, and it annoys me."
– Melanie, 23



"I had watched *Ripley* in the original language with Italian subtitles because my partner wanted Italian subtitles, when in fact I would have put English subtitles on because when I decide to watch a series or a film in English, I like to practice the language, so I prefer English subtitles."
– Alessandro, 33



"I watched *Squid Game* with English subtitles – they're better than the Danish, because there's more money in English translation than in Danish translation."
– Thomas, 29



"listening to language, and also reading what they are actually saying, I think that's simply how it's helping me to develop my English."
– Fernand, 17



"most of my peers, most of them have gone to university, and they speak English fluently, and they will also prefer to watch usually with English subtitles on. And then I have a couple of friends who, like me, sort of turn them off if they feel like they can and otherwise have them on. And then for people who are less fluent, they'll have Dutch subtitles on. Like my parents, and people like that."
– Martijn, 27



- Most interviewees, like survey participants (slide 75) prefer English language subtitles, and there are many reasons for this.
- Several interviewees in Denmark like Melanie and Thomas felt that Danish subtitles were not accurate and 'don't match what's being said'. Thijs (33) in the Netherlands switches from Dutch to English subtitles if he thinks the Dutch subtitles are not good enough (see slide 77).
- In Italy and Germany, many interviewees said they prefer English subtitles because it helps them learn English.
- However, choosing English language subtitles depends on different factors. According to Martijn in the Netherlands, it's a matter of English language proficiency and 'people who are less fluent in English' prefer Dutch subtitles. This applies to older generations everywhere, and more people of all ages in Italy than in the other 3 countries.

Strong accents

Mixed reactions




"I enjoy things more when they have a funny or at least a different accent. *I, Daniel Blake*, is set in one of these northernmost English cities, and it brings a lot of atmosphere to the movie..."
- Lars, 31




Tamara (16): "Well, I think it's fine [the accents in *Derry Girls*]. I can understand them, most of the time. But then I have the English subtitles, and then I know what they're saying."
Lara (16): "I think the accent makes it look funnier."




"I do have *Peaky Blinders* on my watch list. I started it. But I think you have to take some time at first. Because I would like to watch it in English, precisely because of the accents. But of course, that also makes it a bit more complicated with the accents, because they speak with a heavy accent."
- Markus, 26

"the accent [in *Derry Girls*] is quite strange for me because I'm not really used to hearing Northern Irish English, but it's not really a criterion for not wanting to watch it. [...] It also makes it kind of special."
- Max, 17 

"[A strong accent would put me off] because I'll have to concentrate more and it wasn't that relaxing."
- Luisa, 23 

- All interviewees said they needed subtitles for strong, unfamiliar accents. Those who normally prefer to watch without subtitles will then switch on subtitling.
- Most said they do not mind strong accents and that it would not deter them from watching. Quite the opposite, several interviewees said they found accents 'funny' (Lars, Lara), that accents make the show 'special' (Max), create 'atmosphere' (Lars) and enhance its authenticity.
- However, Markus (bottom) also admitted that he hadn't watched *Peaky Blinders* yet because it required more effort due to the 'heavy accent.' Luisa said a 'strong accent' would put her off, and a Danish Film Festival director (below) reported negative reactions from audiences if they have difficulties understanding a British accent.
- Karl (NL, 18) found watching *Derry Girls* and *Peaky Blinders* 'a bit rough at times,' but wrote in his diary that 'I really liked *Cunk on Earth*, *Fleabag*, and *Derry Girls*. They are very funny to me, and I see it as good entertainment. I like it so much that I've rewatched all three of the shows a couple of times.'

"Accents really affect our audiences a lot. Yeah. And I think, just because American content takes up so much space in our cultural sphere, we do get reactions sometimes with the British content that they don't understand it if there's an accent."
- Film Festival director 

The beginning of a shift towards English language viewing?

Signs of change in Germany & Italy

"[I watch] in English with subtitles [...] when I was younger, I used to watch it directly in Italian, but since I began to despise dubbing in some cases and to appreciate, instead, in the vast majority of cases, watching content as it was initially filmed [...] Because I think it's more real."
– Riccardo, 24



"When Netflix and all these streaming platforms came up, you could actually, like, choose the option to watch in English [...] everyone who's pretty fluent in English watches it in English."
– Luisa, 23



"[My friends] all watch things in the original language now [...] This change has been widely felt."
– Daniele, 25



"when I was younger and I had only taken English for a couple of years, I of course watched everything with dub. And then through time... especially if I watch English YouTube content [...] I can only watch it in that way, and that kind of got me used to just hearing everything in English. And I decided, OK, and then when I went back to watching dubbed stuff in cinemas, it just annoyed me because I thought 'That's not what they sound like! I saw that actor in a different movie – they don't sound like that!'"
– Lotte, 19



"Well in my family all [watch] dubbed, so all Italian anyway. In my circle [of friends] I think there's a good mix, half the people watch it dubbed, half watch it in the original language, with Italian subtitles I think."
– Alessandro, 33



- In the two dubbing countries, Germany and Italy, there are clear signs of change among young people with high English language proficiency, and those who wish to improve their English.
- In Germany, most respondents reported that for their parents' generation it was 'completely utopian to watch in English' (Sebastian, 32). But all eighteen 16-29s plus one of the two 30-34s claimed to watch either always or at least sometimes in English. When asked to estimate how many of their friends, acquaintances and fellow students watch English-language productions in English, answers ranged from 10% to 50%.
- In Italy most interviewees claimed to watch in English at least sometimes, and nearly half to watch mostly in English when on their own. For those with a background in higher education, like Riccardo, Daniele and Alessandro (left), watching in English appears to be a growing trend. However, as in Germany, this is not yet the case for the majority of the population.
- Respondents in both countries appreciated the ability to watch in English, made possible by SVoDs. They noted that their English has improved by watching content in English and, also through their daily encounters on the internet and on social media.
- Several interviewees in both countries mentioned that their teachers encouraged them to watch in English to improve their language skills. They also noted that once they have experienced 'the real thing', there is no turning back (Riccardo, Lotte).

9. Cultural diplomacy & soft power

UK screen content's wider impact

- UK screen content does contribute to knowledge and perceptions of the UK. This is often shaped by well-known 'classics' (e.g. *Harry Potter*, *Notting Hill*), but increasingly also extends to more recent youth-oriented series on SVoDs (e.g. *Heartstopper*, *Sex Education*).
- However, for many interviewees in Italy and Germany, school is still more influential than the media in shaping representations of the UK. An emphasis on classic literature, royalty and history in school can reinforce stereotypical images of Britain.
- In Denmark and the Netherlands, school is also important but is less of an influence. Frequent consumption of British media and culture is seen as more influential. Young people in these countries also have many direct encounters with Britain through travel, and in the case of the Netherlands through encounters with UK tourists.

Cultural diplomacy & soft power

- There is clear evidence that British screen content contributes to knowledge about the UK, furthers interest in Britain and its people, and positively influences attitudes towards it.
- Titles like *Sherlock*, *Harry Potter* and *Notting Hill* not only further interest in the UK, but also increase the desire to visit the UK, including specific locations (e.g. Scotland) and film settings.
- The research provides limited evidence that watching British films and TV shows generates interest in other UK cultural products.
- The power of screen content lies in how pictures are interpreted. People know that what they are watching is 'not real', but subconsciously they process these pictures as representations of reality. This is also true for people with more extensive knowledge and experience of the places and people depicted.

Opinions on Britain

% of respondents who agree or strongly agree with these statements

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

- When asked to indicate their agreement with 9 opinion statements about the UK* on a slider scale (from 1-100), the statement receiving the most support across countries was 'I like the British sense of humour.' Between 45% of respondents in Italy and 72% in the Netherlands agreed (60-80) or agreed strongly (80-100). These results are almost identical to those for humour as a motivation for watching UK content (slide 48).
- Three other statements had high agreement scores: 'Britain is an appealing tourist destination' (51%-64%); 'I like British music, fashion, sport, literature, etc. (54%-60%); and 'I like that Britain is a diverse, multicultural country' (50%-69%).
- Less than half of respondents agreed with the remaining 4 statements, but there were some interesting differences. While around half of respondents in Denmark, the Netherlands and Germany agreed that Brexit had changed their attitude towards the UK, only 29% in Italy felt the same.
- More Italian respondents agreed that 'Britain is an appealing place for work and study' (56%, compared to 33% in Denmark). At the same time Italy had the lowest agreement by far for 'British culture feels similar to domestic culture' (6%, compared to 25% in Denmark and 23% in the Netherlands).


Question "What do you think about Britain as a country?" [please indicate your opinion by extending the bar (0-100)] – average rating, all respondents.


Base: All respondents aged 16-34 who answered the question with randomised statements (n= 1,646-1,654). Source: Screen Encounters With Britain. Survey DK, DE, NL, IT.


* 'Britain' was used in the survey instead of 'UK' because this is what's commonly used across Europe. The 'United Kingdom' is not a term that's used or well understood, and few people know the difference.


Traditional, stereotypical images of Britain

School is formative and (still) influential in Italy and Germany

 "I learned a lot at middle school, because our teacher, in the 3rd year, taught us many things about Great Britain. For example, we studied what to visit, or the food, or the stereotypes, or the geography of England."
- Mario, 17

"I feel like when you learn English in Dutch high schools, you tend to watch quite stereotypical stuff, I guess - so you see London a lot, and then the politeness of the people walking through London, and the Royals..."
 - Elodie, 26


"When I first learned about British culture it was all about the Royals and elegance and everyone is so polite and stuff and, the teachers preached that all of my career in school, so I think that was very influential."
 - Luisa, 23


 "I feel lucky because it's more appealing to learn about this stuff when you have something like Netflix to teach, which is very appealing, yeah. More fun that way."
- Christian, 18


- When asked about where their knowledge of the UK comes from, most interviewees in Italy and Germany highlighted school. Much of what they remembered learning conforms to stereotypical, traditional images (see Mario and Luisa).
- In Italy, teachers in academically-oriented high schools noted that their emphasis is on classic British literature and history, although this is not the case in vocational schools. In Germany, teaching was more varied, with the US also playing an important role. However, the curriculum is highly prescriptive, giving teachers few opportunities to introduce their own topical materials.
- In the Netherlands, centrally set school tests focus on standard British English and promote specific images of the UK, rarely using clips from the US. This was confirmed by Elodie (left), who remembered watching 'quite stereotypical stuff'. In Denmark, teachers have greater freedom to choose their own teaching materials, focusing on the UK or the US, and on classic or contemporary literature, depending on their preferences. One Danish teacher in a school with a cinema used *Peaky Blinders* to teach British history and regions, and *Top Boy* to address multiculturalism.
- Young people in both Denmark and the Netherlands have many more encounters with the UK outside of school, including interactions with UK film, TV, music, books and sports, as well as trips to the UK. In the Netherlands, the presence of many UK tourists also influences perceptions.
- There were significant differences in first-hand exposure to the UK through travel. 56% of survey respondents in Italy had visited the UK, compared to 69% in Germany, 73% in Denmark and 80% in the Netherlands.


Influence of UK screen content

Can be felt in all countries

 "perhaps the most important one is *Pride and Prejudice*, because it's the one that came out much before everything else [...] whereas *The Crown* and *Sex Education* are relatively recent, so I can say that I already had a fairly constructed idea [of the UK]. So, I would say, yes, all the films, the Regency and also books [...] perhaps some romantic things have stuck with me, even though they are from time ago."
- Selina, 17

 "[*The Graham Norton Show*] is where you get to see English people or how they behave. [...] I really love that humour - that is something I really like. And I think that this played a huge role in my mind making a picture of British people, yeah."
- Didier, 29

"when I think of British culture, I immediately think of the things I know from television. [...] Well like, the traditions. Yeah. When you go to the UK, most of the time, it's just like here. [...] And people behave just like we do. But this image [of tradition] is very strong."
- Thijs, 33 

"I think it's also important to understand this class element [...] especially the panel shows have really made that clear for me. Lee Mack, the working-class guy who has great chemistry with David Mitchell, who's much more traditional. I don't know if you'd say 'posh' or 'higher class' [...] that's very foreign to Danes because we like to think of ourselves as being very, very equal."
- Anders, 28, 
referring to *Would I Lie to You?*

- In Denmark and the Netherlands, extensive and frequent engagement with UK screen content meant that media exposure was consistently named as the principal source of knowledge about the UK. Interviewees drew on a wide range of content, including scripted and non-scripted, historical and contemporary content (see Anders and Thijs).
- In Germany, a wide range of fictional titles influenced interviewees' perceptions of the UK, including *Harry Potter*, *Notting Hill*, *Outlander*, *James Bond*, *Midsomer Murders*, *Sherlock*, *Bridget Jones*, *After Life* and *Mr. Bean*, among others. Several respondents also mentioned non-scripted content. Didier (left) and Markus (26), referred to the 'diverse society' reflected in *Britain's Got Talent*, while Derja (28) said Jamie Oliver's shows, which she'd 'grown up with,' influenced her image of the UK.
- Italian interviewees acknowledged the impact of both media and cultural encounters on their perceptions of the UK. However, their comments were more general in nature. When screen content was mentioned, it was often in passing alongside other cultural influences, such as literature, biographies, music, social media and politics.
- Although screen content influences young Italians' perception of the UK as strongly as others, this influence is attributable to a small number of titles with a historical, romantic and/or fantastical focus.

Screen content's potential for cultural diplomacy

Creating 'allure' & raising knowledge

"[I read *Harry Potter* when] in primary school more or less; then all the films came out, so yes, that is a big part of my allure for Britain, we can say."

- Elisa, 26



"[My perception of the UK was shaped by] mostly the media world: the movies, the way that the Queen and everything is portrayed in shows – for example, *Heartstopper*. [...] I think for the idols, mostly Olivia Colman, Graham Norton, and then some others like Benedict Cumberbatch and some more A-list celebs that are really down-to-earth (or at least they look like they're down-to-earth). And then they're so charismatic, and you really want to be friends with them."

- Karl, 18



"a lot of the television shows that I have watched are further away from the kind of stereotypes that you hear when people talk about Britain. Because it shows that it's not just a country directed towards... it is a monarchy, but that's not everything about Britain. And that it's not just... There's just nice people over there, they can cook and stuff like that."

- Lotte, 19



"*Scoop* [2024, a drama about Prince Andrew on Netflix] I saw that one among the recommended ones, so I started it [...] I learned a lot about the history, which is very interesting."

- Maddalena, 19



"when we were in Edinburgh we went to the Royal Palace, Holyrood. And I think because of that show [*The Crown*], it made me enjoy the visit on a different level."

- Anders, 28



- Where UK film and TV programmes generate positive opinions and attitudes about the UK, they contribute positively to cultural diplomacy and soft power.
- Cultural diplomacy commonly refers to *deliberate attempts* to shape attitudes about people, places, institutions and goods, usually in an international context. While UK screen content does not deliberately aim to shape attitudes about the UK, findings from all 4 countries suggest that screen content can be an effective, if unintentional, tool for raising knowledge about the UK and for creating or reinforcing positive feelings towards it.
- Elisa's comment about the 'allure' created by *Harry Potter* (books and films), reiterated by many interviewees across Italy, is testament to that. *Harry Potter* also still had many fans in Germany, who revelled in their memories and, like interviewees in Italy, equated *Harry Potter* with the UK. Few acknowledged or cared that this fantastical world bears little resemblance to the real, contemporary UK.
- Many other comments, like those to the left, revealed that young audiences felt they 'learn a lot' about UK history, cities and landscapes, as well as contemporary UK life from the screen.
- Karl's quote shows how screen encounters with UK actors and presenters can lead to admiration for British people. Lotte's comment suggests that UK shows can counter stereotypes, a point made by others, both explicitly and implicitly.
- Finally, Anders' quote reveals how seeing things on screen can enhance later real-life encounters.

Furthering interest in the UK

Viewing raises questions, creates curiosity and makes viewers look things up and go to Britain

"[*Outlander*] sometimes it encouraged me to, like, Google specific battles that took place and see, like, 'Oh, where exactly is that in Scotland?'"
- Emilia, 24



"Well, to be honest, part of the reason why I chose to move to London [for 6 months] was because of all the British TV content that I was consuming at the time. And that was both fiction and a lot of comedy content."
-Thomas, 29



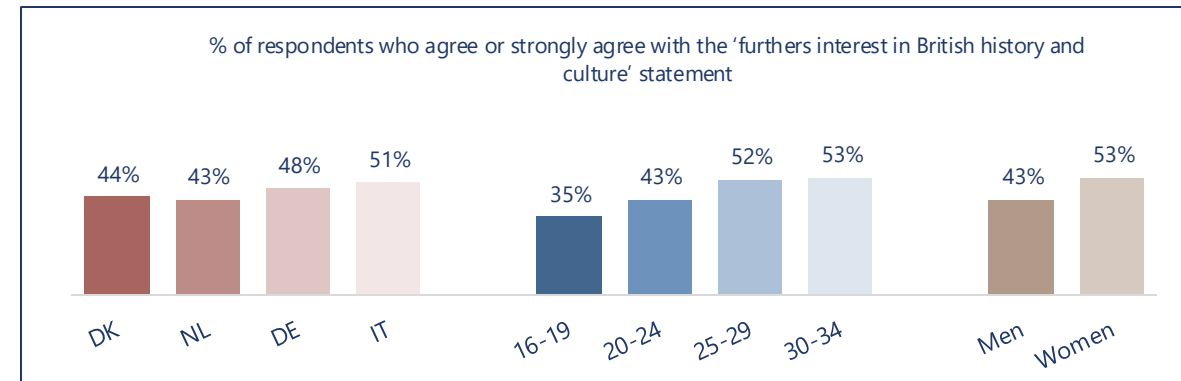
"*Doctor Who* was one of the first proper long shows that I got into, where I would really binge-watch something, which I had not really done until *Doctor Who* came along. And your previous questions had made me realise that that was a large influence on how I view British culture and my enthusiasm to interact with it."
- Martijn, 27



"*Mary Poppins* has shaped my ideas, because I've watched it dozens of times [...] I would see, I don't know, St Paul's and therefore I would fantasise about St Paul's, I would search how St Paul's looked like...you know, stuff like that, I would search London, etc."
- Riccardo, 24



- As interview comments and survey results show, screen content has significant potential to raise interest in the UK.
- In Italy, 51% of survey respondents, agreed with the statement that UK screen content 'furthers my interest in British history and culture more generally'. This is slightly higher than in Germany (48%), Denmark (44%) and the Netherlands (43%),
- Agreement was higher among older (25-34) respondents (52-53%), and also among women (53%) across all 4 countries
- In Italy, historical films and TV shows were perceived as particularly interesting and worthy of further online research, likely due to the emphasis on historical education in schools. In Germany, many interviewees mentioned beautiful landscapes, especially in Scotland, which featured prominently in one school class's textbook as the focus of English lessons.



The soft power of UK screen content

Strong impact on wanting to visit the UK

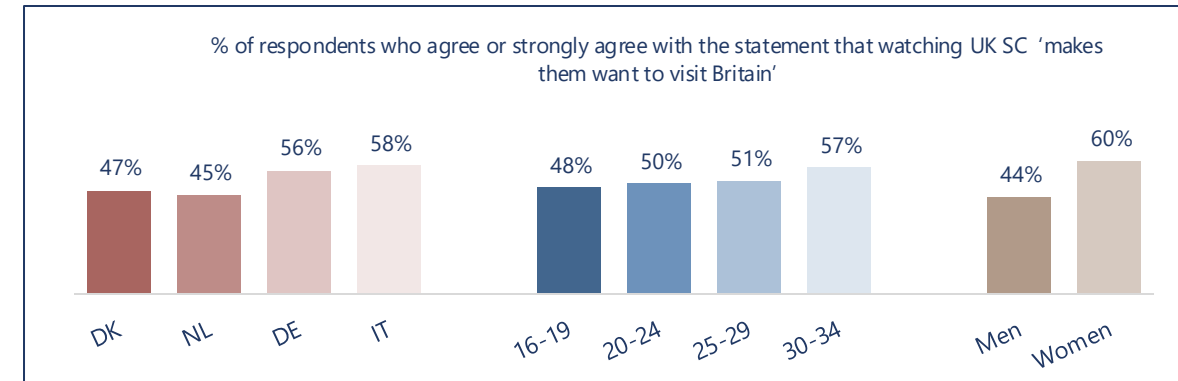
“After watching *Broadchurch*, I just want to go to the Dorset coast, because they keep filming there. Or the Scottish Highlands. They always do these wild scenic shots – they make me want to go, they give me wanderlust.”
- Jytte, 25

“I will like to return, because I saw London when I went, but I would like to visit the coast. Because I see the setting in films like *Little Women*, and I’m curious to see settings different from the city of London.”
- Cecilia, 17

“I really wanna visit the cliffs at the coast. I think they’re on Scotland. [...] I haven’t come across those in TV shows, but it’s more, like, you see them in documentaries [...] a nature documentary: *Planet Earth*, but it was narrated by David Attenborough. [...] on National Geographic they have historical documentaries [...] I was like, ‘OK, yes, I really want to see the history of Britain, and then also the museums’.”
- Kris, 26


“We would love to be there. We would love to see all the sights. We would love to see the villages, the landscape, the houses. Like Highclere Castle.”
– Founder and organiser of a German Facebook group for lovers of UK TV & Film


- There is strong evidence that UK screen content contributes to UK ‘soft power’, often referred to as the construction of the nation brand. This, in turn, has political and economic impacts by asserting status, boosting exports, and attracting tourism and investment.
- 58% of survey respondents in Italy and 56% in Germany believe that watching UK content makes them want to visit the UK. In Denmark (47%), and the Netherlands (45%), which are geographically and culturally more proximate to the UK, the figure is a little lower..
- The share of women at 60% is markedly higher than men (44%). Older respondents (30-34) also believe more strongly (57%) that watching UK content makes them want to visit Britain. Interviews (left) show that British films and TV shows also Inspire younger people to visit the UK.
- Interviewees in Italy showed a particularly strong interest in visiting film locations (next slide).





The soft power of UK screen content


Visiting film locations

 "Notting Hill is an iconic movie. It is often shown on television during the Christmas vacations [...] when I was in London, I visited the Notting Hill district and Portobello Road. [...] I only went there to see the iconic shop with the poster of Julia Roberts."
- Maddalena, 19, DD & interview

"The *Harry Potter* saga is always a big hit. People not only read the articles, but, according to my data, also book tours and experiences about the saga while traveling - Harry Potter tours in Edinburgh and London, Harry Potter train in Scotland..."
- Italian Travel Blogger 

 "When we went to London then we also went to see 221 Baker Street."
- Alessandro, 33

"I went to the UK because a really old friend was travelling [...] the first thing I came to watch was *Sherlock Holmes'* house in Baker Street."
- Piero, 17 

 "I've seen, of course, *Sherlock*, and I saw Baker Street, and I obviously also went there when we visited London because it was just on my bucket list of places I had to see! And I also want to one day visit the places where the *Harry Potter* movies were filmed, because that also seems very interesting to me, because I know you can visit a lot of those places."
- Lotte, 19

- Seven out of 22 interviewees in Italy mentioned having visited or wanting to visit film locations related to *Harry Potter*, *Sherlock* and *Notting Hill*.
- In contrast, in Germany and Denmark, only one interviewee in each country mentioned interest in film locations (Baker Street and 'Harry Potter sites' respectively). No one in the Netherlands mentioned film locations.
- An Italian Travel Blogger (see left), who created a travel blog, Martinaway.com in 2013 to reach people interested in travel, film and TV series, confirms the strong interest Italians have in film settings and tours. With posts and tips about places they have visited, they mainly reach Italian readers (90%), 48% of whom were aged 18-34 in 2023.

The soft power of UK screen content

Limited evidence that UK content creates interest in other UK cultural products

“one of our neighbours, her kid, who is 13 years old, is a huge fan of *Peaky Blinders*. And it's insane. He has everything of the *Peaky Blinders*.”
– Daro, 25

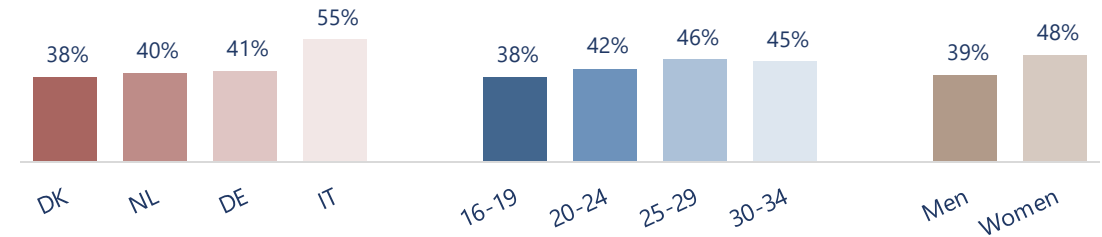
“I just really, really love Phoebe Waller-Bridge. I really love her style and her writing that she does so much herself. I'm going to see the *Fleabag* theatre production soon – in the closing Forum. So I'm just a big fan of hers.”
– Karl, 18

“it was just someone [on TikTok] talking about differences in the show [*Fleabag*] and the play, and I was, like, 'Oh, I didn't know there was a play'. So I really wanted to watch the play as well...”
– Floor, 20

“it's quite a permeating culture, in terms of the input we get from social media, even just by speaking English...”
– Daniele, 25

- In addition to screen content's positive impact on travel to the UK including to film locations, it also has the potential to increase young viewers' interest in other British cultural products.
- Agreement was highest in Italy (55%), among older respondents aged 25-34, and among women (48%). However, specific examples were barely cited in interviews, except in the Netherlands (see left).
- Daro's story about *Peaky Blinders*' fandom came up in the interview in relation to another context: many young people in the Netherlands and Germany apparently dress up as *Peaky Blinders* during carnival festivities.
- A comment by Daniele in Italy (bottom) was more general but instructive: The advantage of the English language means that British culture effortlessly permeates other cultures and is appropriated by them. Implicit in this is the consumption of commercial products and increased revenues.

% of respondents who agree or strongly agree with the statement that watching UK SC 'furthers my interest in other British cultural products like music, fashion, literature, etc.'



Fictional images of the UK

...imprinted as images of 'the real UK'

"the message that I got several times from British programmes is a good representation of the British culture, therefore the lifestyle, the decor, the streets, even clothing, which in some cases are more historical."

- Gabriele, 23



"the monarchy, the royal family, it's a whole world, unfamiliar to me, to many of us, so I enjoyed seeing a bit of those aspects [in *The Crown*], even a bit of true history, all in all, yes, maybe it's fictionalised, but in the end it's their history that I didn't know, I learned several things through the series."

- Barbara, 31



"I think the people - how they communicate, how they are... And I think that's why they represent British people. Maybe I'm completely, you know, not on the right track here. But to me those shows tell me what British people are mostly like."

- Kris, 26



"*Harry Potter*, it's just the way the British houses are - when I see them, I think it's very British. [...] And the way they behave or talk - it's just something that I associate with Britain. [...] also with *James Bond*, for example, the way that, for example, a suit - like in *The Kingsman*, you also see Brits in suits [...] looking like a gentleman and being dressed nice - I associate that with Great Britain."

- Derja, 25



- Screen content's potential to contribute to cultural diplomacy and soft power lies in how pictures are interpreted. People know that what they are watching is 'not real' (Barbara, Kris). Nonetheless they process what they see as real (Gabriele, Derja)- a paradox that Plantinga (2013: 98) calls the 'twofoldedness of viewing'.
- Of the 22 interviewees in Italy, only two (see Barbara left) noted the fictional nature of what they had watched and perceived as 'real', and no one questioned the screen portrayals of Britain they had come across. Even *Harry Potter* and *Mr. Bean* were seen as representative.
- Such fantasy and slapstick examples were named less often by interviewees in the other 3 countries when asked about the sources of their knowledge and images of the UK. Even so, Derja, who has been to London and claims to watch UK content 1-2 times a week, demonstrates that broader and first-hand experiences do not overwrite strong images gained from (even) fantastical representations.
- The 'twofoldedness' of viewing means that even viewers with alternative, including contradictory images tend not to question what they see unless explicitly questioned about it.
- In all 4 countries, interviews and digital diary tasks revealed the significant power of stereotypes created and perpetuated on screen and elsewhere.

10. The Brexit factor

Brexit comments

- A little more than half of survey respondents in Germany (54%), and Denmark (52%) and nearly half (49%) in NL, changed their views on the UK because of Brexit. In Italy, this was only 29%.
- Survey responses mostly reveal a sense of increasing distance between the UK and the EU, and realisation that Brexit limits work and study opportunities.
- In interviews some expressed disappointment with Brexit, but for others it seemed like a distant event that did not affect them personally.

Potential impact on consumption of UK films & TV shows

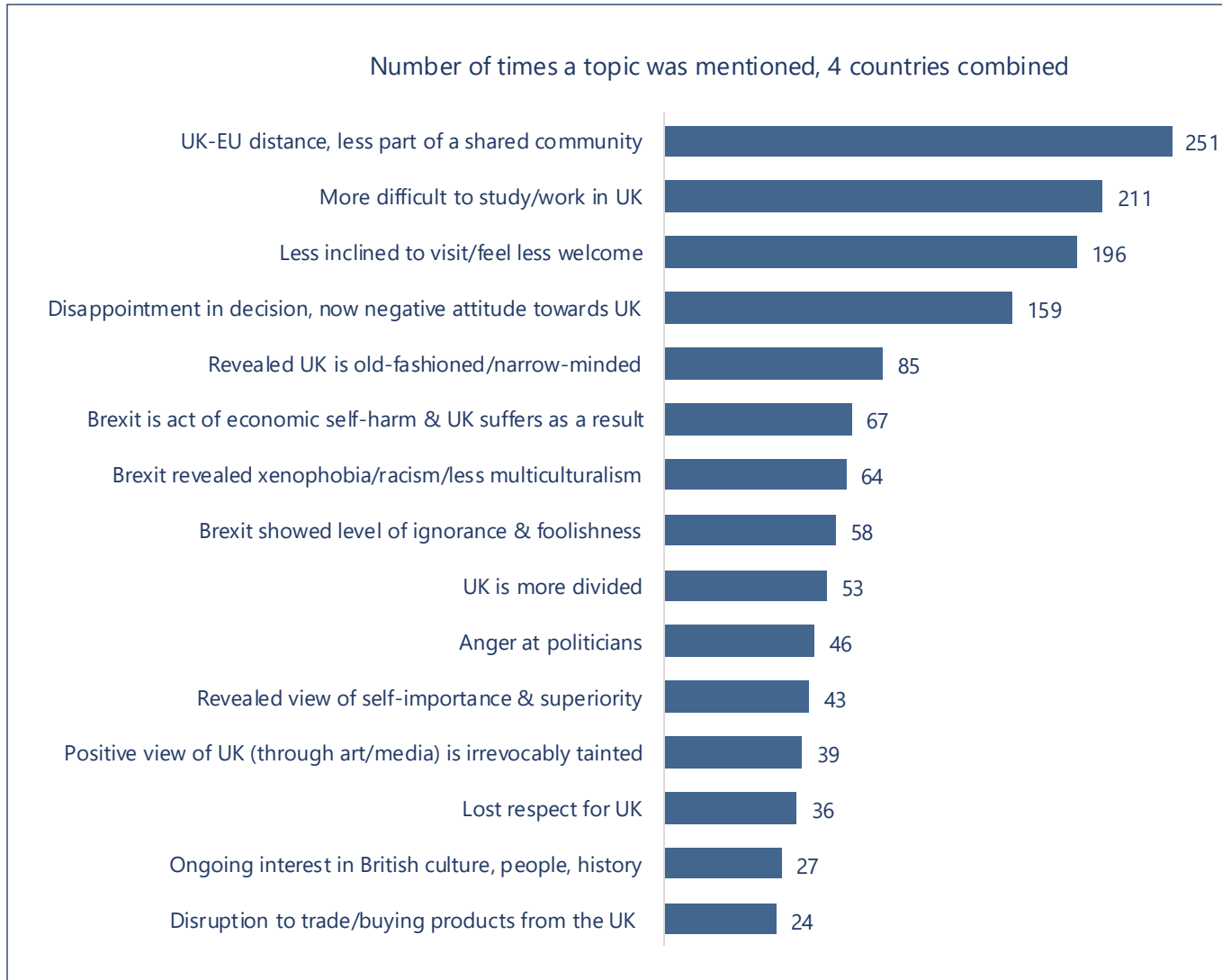
- Across all countries, there was no evidence from young audiences that Brexit has had an adverse effect on the consumption of British films and TV shows.
- But industry sources confirmed a decline in coproduction and distribution opportunities with UK partners because the UK no longer benefits from EU funding initiatives.

Other consequences & potential implications

- The most consequential effects of Brexit relate to difficulties in visiting the UK.
- Teachers in all 4 countries reported that school trips to the UK have become more difficult because of the need for passports. Ireland and Malta have become alternative study destinations. The loss of Erasmus+ funding means that fewer HE students can go to the UK as part of their degree.
- Private travel, is adversely affected because of the increased costs and hassle of obtaining a passport.
- Interest in and positive attitudes towards the UK involve a mix of first-hand experiences, such as travel, meeting people, and the influence of teachers. They also involve mediated encounters including film and TV programmes. It remains to be seen whether interest in Britain and British culture will decrease as a result of declining first-hand experiences, and whether film and TV shows can partially compensate for this.

Opinions on Brexit

Mostly negative from less than half who said Brexit had impacted their opinion of the UK



- A little more than half of survey respondents in Germany (54%), and Denmark (52%) and nearly half (49%) in NL, changed their views on the UK because of Brexit. In Italy, this was only 29%.
- Survey respondents who agreed that Brexit had changed their attitude were given the opportunity to explain this change in an open-text follow-up question. The responses are summarised in the graph, representing data from all four countries.
- The strongest sentiment was a growing distance between the UK and the EU (251 comments). It was the most mentioned point in Denmark (42 comments), Germany (66), and Italy (79), and the third most mentioned in the Netherlands (64).
- In the Netherlands, the highest proportion of comments related to the difficulties of working or studying in the UK (72). This came second in Italy (66), and third in Germany (49) and Denmark (24).
- Feeling 'less inclined to visit the UK and/or feel less welcome' (196) was the second most noted issue in NL (64), DE (65), and DK (27), and the third in Italy (40). Increased travel costs were also mentioned repeatedly during interviews (see slide 97).
- Comments in DK, DE, and NL from those who changed their attitude on the UK were mostly negative. However, 27 stated that Brexit did not diminish their interest in the UK. Some expressed sympathy for those who had voted against Brexit, reflected in various statements, including 'the UK is more divided.' In Italy, a few comments positively asserted UK sovereignty from the EU.
- Disruption to trade or finding it harder to buy UK products was mentioned by 24 (16 in DK, 8 in DE).

Brexit

Anger, disappointment, puzzlement, sorrow, but mostly indifference



"I remember seeing one of *The Who* band members complaining about how expensive it was to go on tour in Europe because they had to pay all sorts of extra fees to travel through with equipment. And he was for Brexit. And I have a very strong feeling of, like, you voted for this! It's your own damn fault!"
- Lars, 31



"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."
- Karl, 18



"I would say no. Because... but maybe because I didn't have a direct experience, I mean, I didn't...I've never imagined myself moving to England and so I don't know, it didn't affect me that much, it didn't involve me directly, let's say."
- Margherita, 27




"I know that a lot of especially younger British people were against Brexit, but they couldn't vote at that time, but also the whole political process around Brexit was very... Yeah, it just seemed very chaotic and not well organised. So I often thought 'British people. What the hell are you doing there?'"
- Anke, 28


- Survey results were mirrored in interviews. While some expressed negative feelings about Brexit, including anger and disappointment (Lars), puzzlement (Karl, Anke), and sorrow, in Italy there were fewer negative statements and most felt that their opinion had not changed.
- In all countries, older interviewees and those interested in politics were more likely to express unfavourable views on Brexit.
- For most younger interviewees, particularly those aged 16-24, Brexit seemed like a distant event, and they were not entirely clear about why it happened or its impact.
- For many of the youngest, as well as many Italians across all four age groups, Brexit did not impact them personally. Consequently, they did not care much about it and had little to say about it either (see Margherita).


Brexit consequences for UK content distribution & consumption

None at first sight

"Brexit itself has no influence on either the expectations or the liking of British films, despite the fact that the large majority of young Europeans share a negative opinion of it."
- Film Festival Director 1 

"So far, no [consequences]. Because I only need to get my hands on the film, and the film will be sent digitally, and there's no restriction there. And if somebody needs to travel, and they can't (because of Brexit, for instance – I'm just giving you an example), then we could still screen the film."
- Programmer, Film Festival 6 


"there was no real impact like everyone feared when Brexit happened, that it will be more difficult"
- Programme Buyer 3 


"I don't think I'll be watching fewer British movies or fewer series because of Brexit."
- Lars, 31 


- Across all countries, there was no evidence that Brexit had an adverse effect on the consumption of UK screen content. Comments like those by Lars were common. In Italy, two interviewees working in the film festival business also expressed their belief that Brexit had no influence.
- Some programme buyers and UK sales executives expressed fear that future EU regulations might tighten to exclude the UK from European quotas but acknowledged that this has not yet happened.
- Survey findings also support that there is no current effect on consumption, as respondents reported no perceived changes in their viewing of UK content over the past five years (see slide 29).
- Most programme buyers for TV channels and SVoDs, as well as some film festival organisers, did not see Brexit as an issue. However, others noted negative consequences in film production and distribution (next slide).


...but some do mention Brexit consequences


for production, distribution & consumption

 "we have been receiving less and less films produced in the United Kingdom as many non-British filmmakers moved out from the UK after Brexit, and British filmmakers have become more isolated in terms of distribution."
- Film Festival Founder & Director

 "The interests in co-producing with the UK are declining drastically unless there is a very big US potential, and then the value, the added value of working with the UK is that it is a good bridge with the US. [...] But the direct co-production between a European country and the UK is less motivating now because of Brexit. So the EU funding is not relevant anymore here."
- Artistic Director, Film Festival

 "the number of UK films is lesser since a couple of years, rather than the past, because of the public subsidy from the European government. [...] The fact that the UK is not considered a European country, that affects a lot. Because if I have to choose among 2 titles, I do prefer a German title, just because it gives me points for the application to the film fund for European things. [...] the more different countries we have, the more money will come to the festival."
- Film Festival Manager & Theatrical Sales

 "Due to Brexit, many people don't buy as many UK DVD/Blu-Rays as previously. Before I used to search specifically for UK content on Amazon.uk, but I gave up because the price will double in import tax."
- Film Festival Director

 "if you order something in England, you sometimes pay customs on it, i.e., more customs than before or more shipping costs."
- Markus, 26

- A few interviewees working in film festivals pointed out negative changes that are already being felt. These included non-UK film makers leaving the UK, and UK filmmakers losing distribution opportunities because they no longer benefit from EU funding (see left).
- The artistic director of a Dutch film festival said that 'interests in co-producing with the UK are declining drastically.' A Danish film festival director noted that sales of UK DVDs/Blue-Rays were declining due to import tax 'doubling prices.' This was also observed by Markus, a German interviewee, who noted the higher costs of purchasing items from the UK online.
- UK film tourism might also be adversely impacted. Many interviewees mentioned travel hurdles such as the need for a passport and the higher costs of visiting the UK (see next slide). Given the generally high interest in visiting the UK, including the desire of many Italians to see film sets, these hurdles may negatively affect income generated from film tourism and tourism more generally.

Adverse effects on travel – educational & private

As educational trips decline, other EU countries have become alternative study destinations



"very few students have a passport, and families don't want to pay for the document. This is quite expensive because it is €150 for one passport, and so they also say 'We don't have the chance to travel so often, so we don't see the point of having this passport when we can travel all over Europe without it'. [...] So for example, this year in March, I will have to go to Ireland with my class."

- Teacher 1

"in my [HE] English programme, we have to go to an English-speaking country for at least six, no, three months. It's much more expensive, and also so much harder, ever since Brexit started, because there is no more Erasmus funding, obviously. So basically, your only options in Europe are going to either Ireland or Malta."



- Emilia, 24

"Previously we would have gone on excursions in the second year where we would go to London or to Cambridge. But because of Brexit, it has become a bit more complex for us to travel with young people if they're not Danish citizens. So we are directing our travels to Dublin for instance instead, so it has also sort of created a new path in our travel habits."



- Teacher 2

- Significant post-Brexit effects impact visits to the UK, particularly for short-term school trips, studying or working.
- Teachers in all 4 countries felt the UK is now a more difficult option for secondary school visits due to the extra expense of getting a passport. Although the UK was previously the most favoured destination for English study trips, school students are now going to other English-speaking EU countries, such as Ireland and Malta, instead.
- Another factor reducing educational stays is that the UK is no longer a participant in the Erasmus+ programme. The future effects might be even more significant as the European Erasmus+ budget for 2021-2028 has nearly doubled to EUR 26.2bn.
- The long-term effects of fewer educational visits are hard to gauge, but unlike earlier generations, young people will have fewer opportunities for unmediated experiences of the UK.
- Multiple interviewees remarked that it was harder to travel to the UK for private travel due to increased costs, including the expense of getting a passport. Some, like Annette (below), reported abandoning their plans upon realising that they, or their friends did not have a passport.



"I was planning to go to the UK this year, but they aren't in the EU anymore, so it's hard for a few of my friends. They have had to buy a passport to go to the UK. I have one, but they didn't have one. So we passed on that..."

- Annette, 19

Possible long-term Brexit effects

"I still would like to go there, but obviously it's now harder than before, so [...] there are also other countries that I would like to visit and now obviously they are easier than Britain to visit, so I visit them first."



- Max, 17

"in regards to studying in UK, that definitely has impacted me because I used to consider maybe going to Oxford or something, and now I've completely rejected that idea because I don't really feel [like] dealing with the paperwork."



- Eduard, 21

"I don't hate them [the British], I want to stress this, although [...] doing this project, I've thought about it...I realised there is a bit of hatred towards the British people [amongst young Italians] in general. [...] I guess, because, for example, in my generation people were...but even thirty-year-olds...I mean, going to the United Kingdom was considered almost a must-do, now this has changed."



- Benedetta, 24

"I work in a supermarket and we can send packages. So this guy came in and he wants to send the package to Britain, and we had to fill out the full customs form..."



- Bart, 17

- Interest in and positive attitudes towards the UK involve a mix of first-hand experiences, such as travel, meeting people, and the influence of teachers. They also involve mediated encounters with news and cultural products, including film and television programmes.
- Whether interest in the UK and British culture will decrease due to declining first-hand travel experiences remains to be seen.
- Findings from this research suggest that young people's interest in UK screen content remains strong (see slide 29).
- Film and TV shows may partially compensate for declining first-hand experiences. However, they can also perpetuate fantasy and stereotypical representations (e.g., *Harry Potter*, *Mr. Bean*, *The Crown*), which have a strong and lasting impact on the images that young people have of the UK.

"We had the British Council in many different cities [...] and Great Britain cut the money. They no longer had the money, or didn't want to spend much money any longer. So they only had one British Council in Berlin."



- Founder and organiser of a German Facebook group for lovers of UK TV & Film

11. Appendix

A – Methodology / Research participants

B – References

C – List of illustrations

A1 - 3 work packages per country

CONTEXT (WP1)

Data collection: Jun 22 – Dec 22

- Local industry reports for market overview/trends (see references)
- VoD catalogue and landing page research (Netflix, DRTV, TV 2 Play)
- Online marketing & promotion of UK content by 6 VoD services

Data collection: Nov 22 – May 23

- Local industry reports (see references)
- VOD catalogue research (Netflix, Prime Video, ZDF Mediathek)
- Online marketing & promotion of UK content on 6 VoD services

Data collection: Jun 23 – Nov 23

- Local industry reports (see references)
- VOD catalogue research (Netflix, NPO, Videoland)
- Online marketing & promotion of UK content on 6 VoD services

Data collection: Nov 23 – Jun 24

- Local industry reports (see references)
- VOD catalogue research (Netflix, NOW, RaiPlay)
- Online marketing & promotion of UK content on 6 VoD services

CULTURAL INTERMEDIARIES (WP2)

Data collection: Aug 22 – Jan 23

- 10 interviews with local intermediaries (4 programme buyers, 3 teachers, 3 film festival organisers)

Data collection: Dec 22 – Jun 23

- 10 interviews with local intermediaries (4 programme buyers & sellers, 3 teachers, 3 film festival organisers)

Data collection: Jun 23 – Dec 23

- 15 interviews with local intermediaries (4 programme buyers, 5 teachers, 6 cultural representatives)

Data collection: Nov 23 – Jun 24

- 13 interviews with local intermediaries (4 programme buyers, 3 teachers, 6 cultural representatives)

Data collection: Jun 22 – Feb 23

- Interviews with 9 UK sales executives

YOUNG AUDIENCES (WP3)

Data collection: Aug 22 – Jan 23

- 423 valid survey responses
- 20 digital diary participants
- 12 individual online interviews
- 4 small group interviews / 10 participants (16-19)

Data collection: Jan - Jun 23

- 426 valid survey responses
- 26 digital diary participants
- 12 individual online interviews
- 3 small group interviews / 8 participants (16-19)

Data collection: Aug - Oct 23

- 409 valid survey responses
- 28 digital diary participants
- 12 individual online interviews
- 3 small group interviews / 10 participants (16-19)

Data collection: Dec 23 - Apr 24

- 555 valid survey responses
- 28 digital diary participants
- 12 individual online interviews
- 3 small group interviews / 10 participants (16-19)

A2 - The survey

Ethical clearance reference number: MRA-21/22-26374 - King's College London

**Do you like watching content on television, online and in cinemas?
If so, then this survey is for you.**

We would like to invite you to participate in this small research project about where, how and what young people in Germany like to watch. Before you decide whether you want to take part, it is important for you to understand why the research is being done and what your participation will involve.

You are being invited to participate because **you live in Germany** and are **aged between 16 and 34 inclusive**. If you agree to take part you will complete the survey **anonymously**. The survey will ask you questions about the type of screen content you watch and about British content.

The survey will take you approximately **15 minutes** to complete.

Participation is entirely voluntary. Choosing not to take part will not disadvantage you in any way. If you choose to take part, you will be asked to provide your consent below. Clicking on the following link will open the information sheet in a new window. To return to the survey, please close the window.

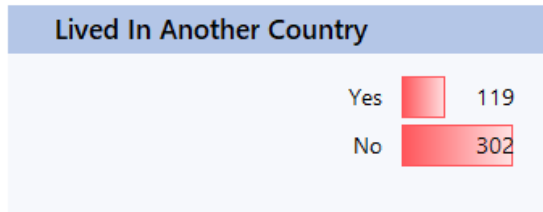
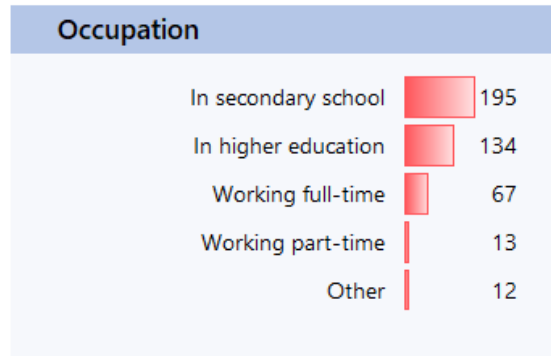
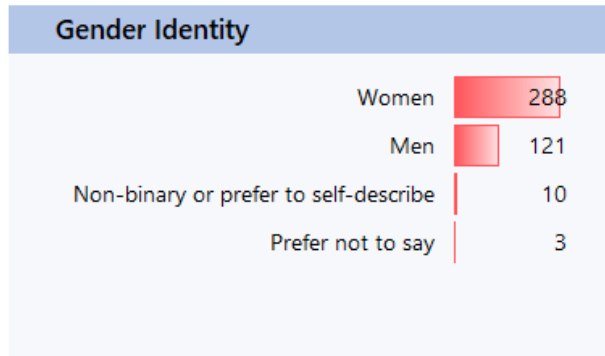
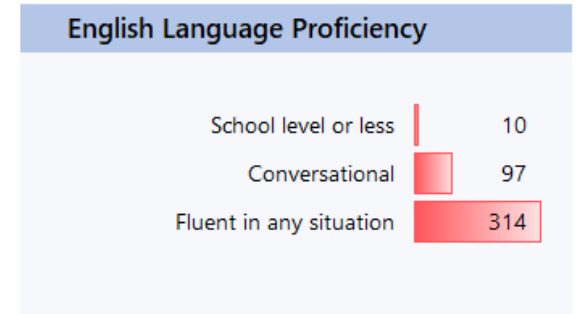
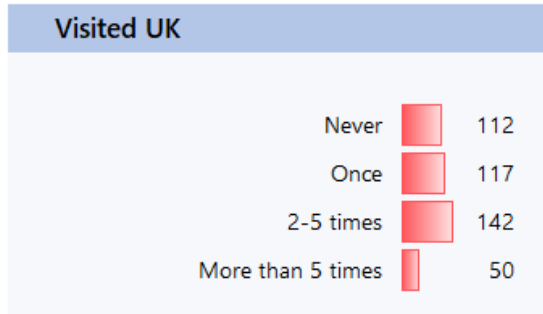
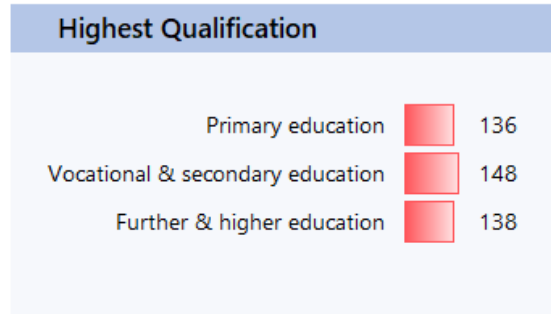
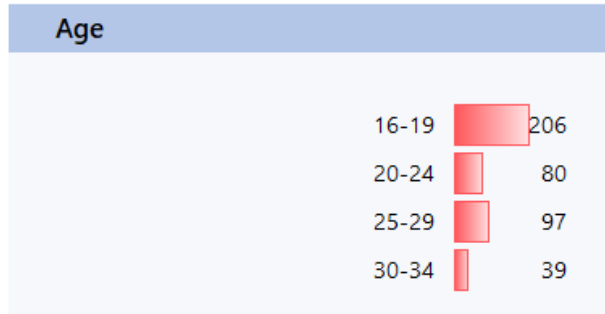
[Full information for participants](#)

I have read and understood the information provided and I agree to take part in this research project.

Yes

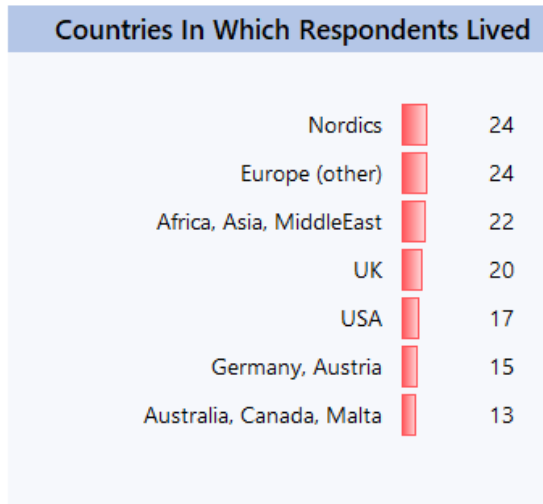
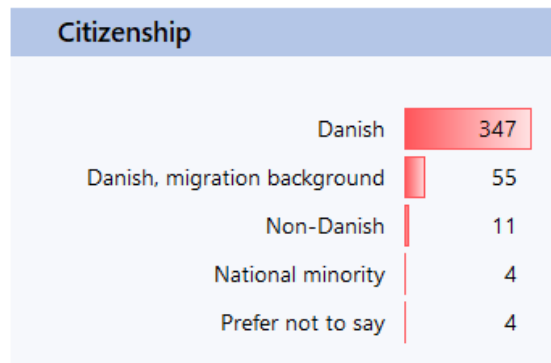
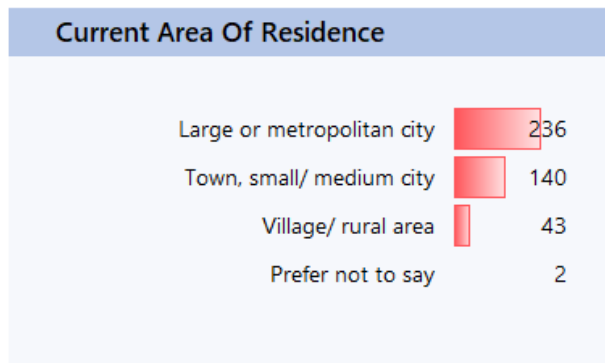
- For the self-administered survey we used Qualtrics software.
- The survey was promoted and designed to attract all types of viewers, not just UK fans, and to establish general viewing habits and preferences in context, rather than focusing solely on the consumption and reception of UK content.
- To ensure participation from individuals with varying levels of English language proficiency, the survey was translated into local languages (Danish, German, Dutch, Italian). Care was taken to ensure that the terminology would be easily and equally understood across all markets.
- One challenge was the use of 'UK'. In all 4 case study countries, the term 'United Kingdom' is not commonly used or understood. Instead, local words for 'Britain' are used to refer to both Britain and the UK. So we opted to use these terms. Genres were kept deliberately broad and easy to understand across countries, complemented by both US and domestic examples.
- To ensure the widest possible socio-economic spread among those aged 16-34, the 4 surveys were distributed online and via QR code through schools (including those with a vocational orientation), clubs, universities, young ambassadors (who were tasked with targeting different socio-economic groups), and snowball sampling.
- After submitting the survey, respondents were invited to register their interest for participating in the qualitative research by completing a screener survey (see slide 108).
- We received a total of 1,813 valid responses, including 423 from Denmark in 2022, 426 from Germany and 409 from the Netherlands in 2023, and 555 from Italy in 2024.

A3 - Key demographics for the Denmark survey

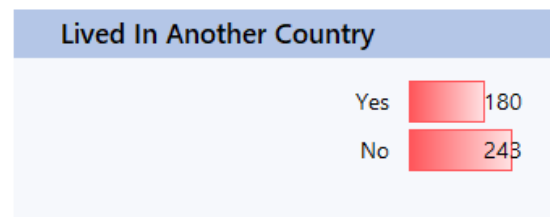
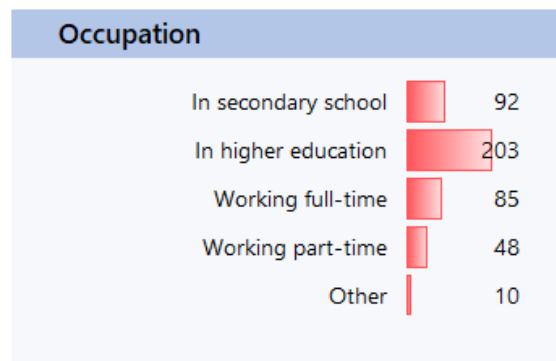
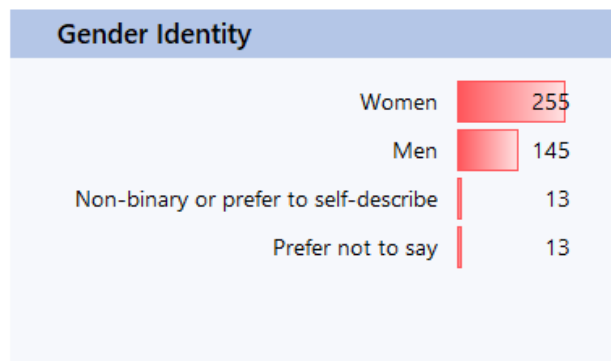
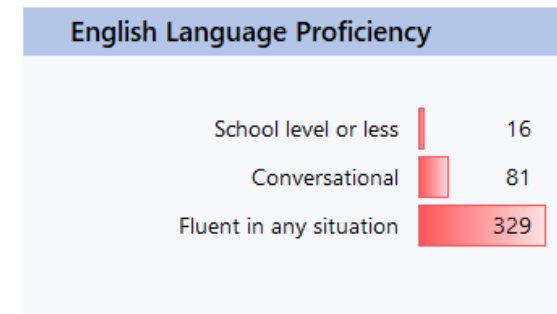
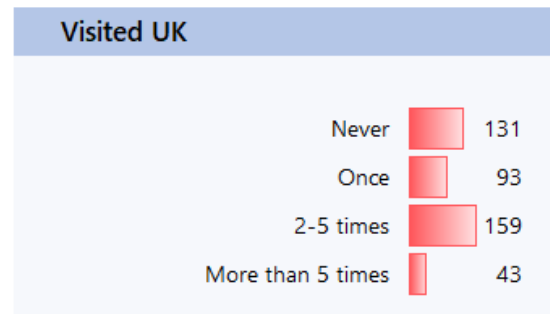
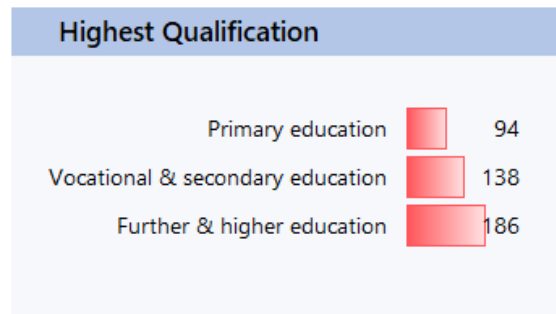
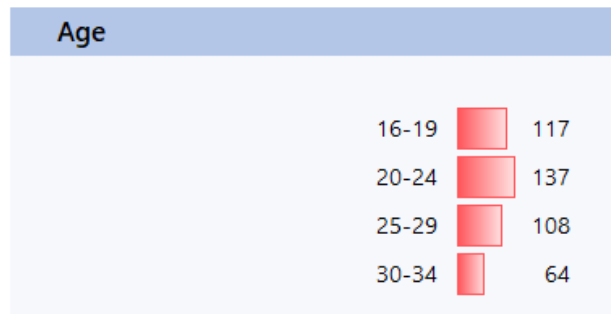


ELP – Further evidence

- According to the EF English Proficiency Index (2023), Denmark ranked No. 4 globally in the 'very high proficiency' band.
- According to a 2021 study commissioned by the Nordic Council of Ministers, 95% of respondents across the Nordic region agreed that English is easier to understand than other Scandinavian languages. Nearly two-thirds agreed that it is sometimes easier to express themselves in English than in their native language
- A film festival director interviewed said, "English is our natural second language."
- A Danish programme buyer said, "The audience in Denmark is very English-savvy. They're very happy to watch English-language programming with Danish subtitles."
- A teacher of English said: "When they study in higher education in Denmark [...] most of the material will be in English."

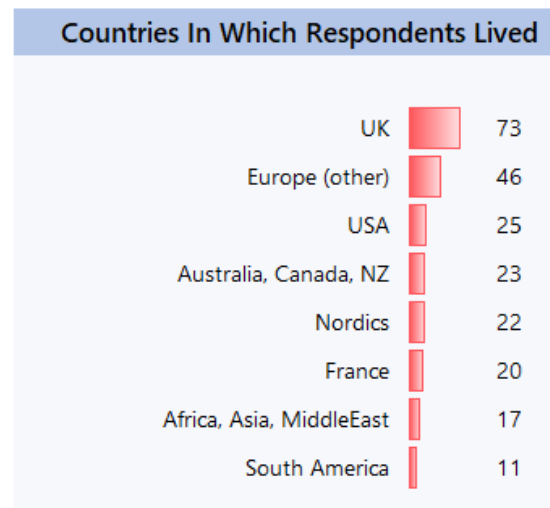
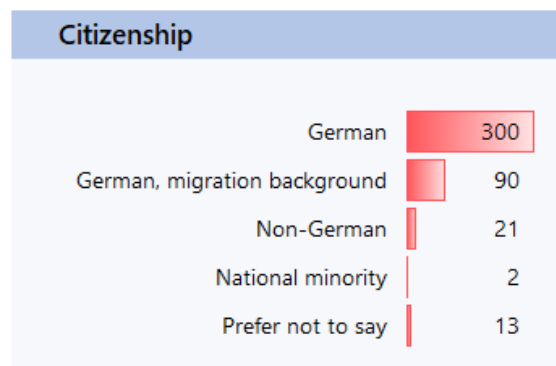
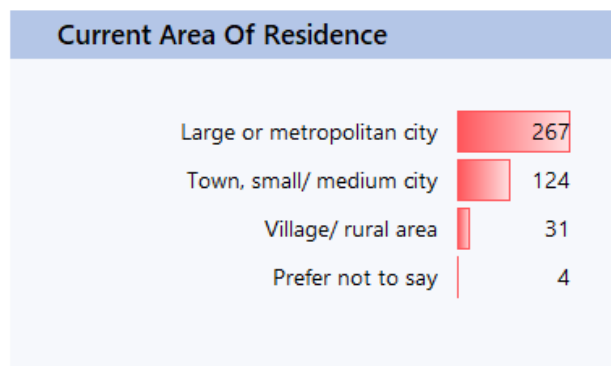


A4 - Key demographics for the Germany survey

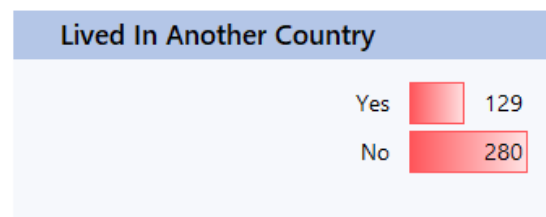
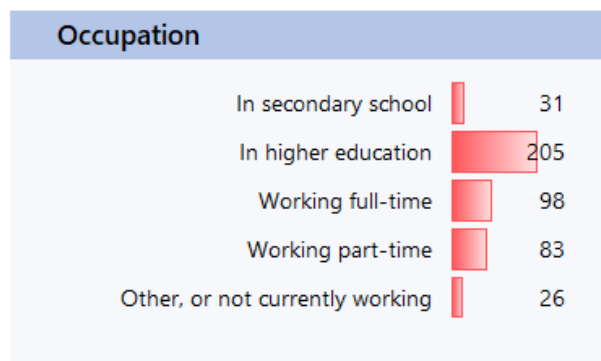
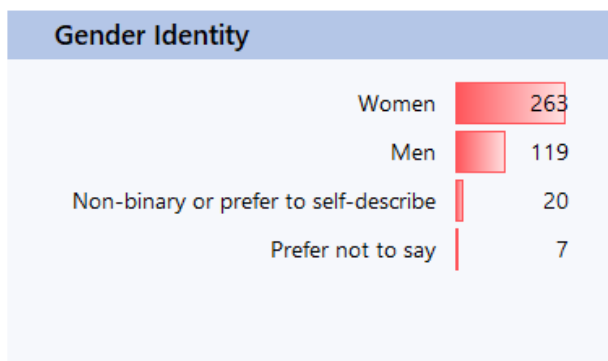
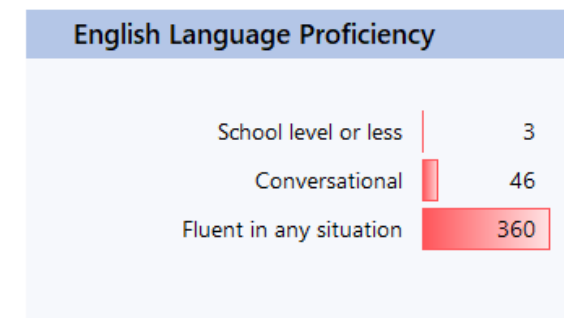
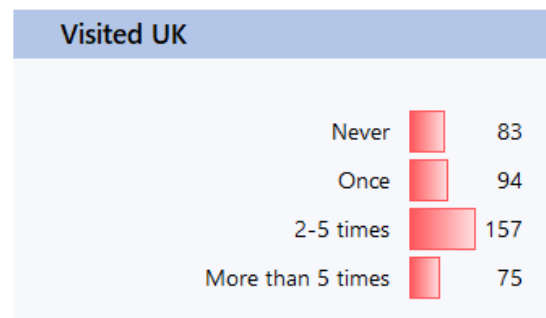
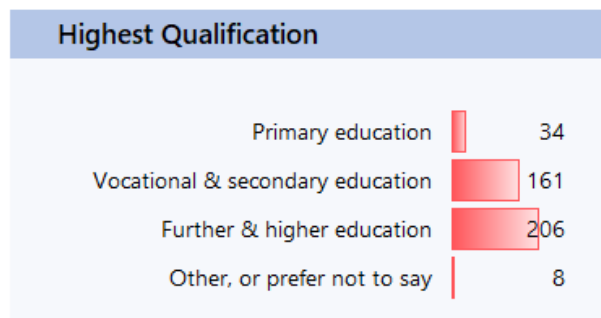
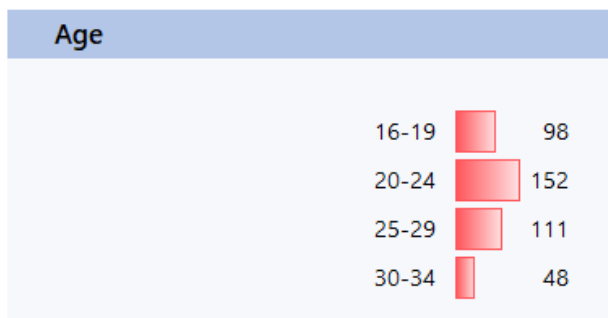


ELP – Further evidence

- According to the EF English Proficiency Index (2023), Germany ranks No. 10 globally in the 'very high proficiency' band.
- Since 2005 children have been learning English in primary school. A shift from teaching grammar to listening/speaking has improved language proficiency. (News4Teachers, 2016)
- According to interviewed teachers, the most popular 'Leistungskurs' (A-Level) subject among 16-18s is English. Teachers also reported that Leistungskurs students are very used to writing and presenting papers in English.
- Teachers said, "They're surrounded by English all day long anyways" and "English helps people to be successful and to find their way in the world. Hence the desire to learn [...] we don't have to fight much to get them to make an effort. English is very, very highly regarded."

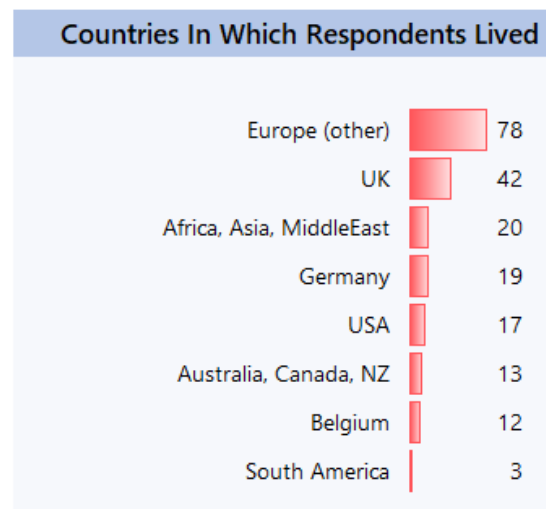
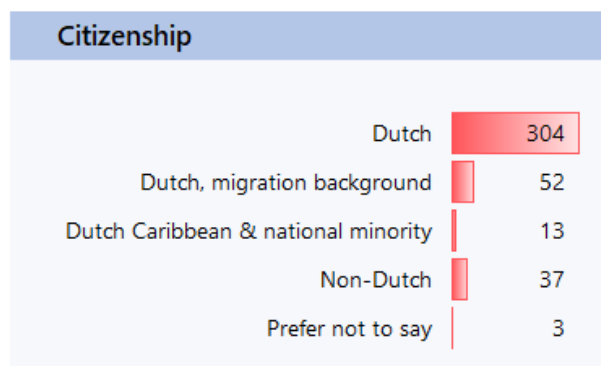
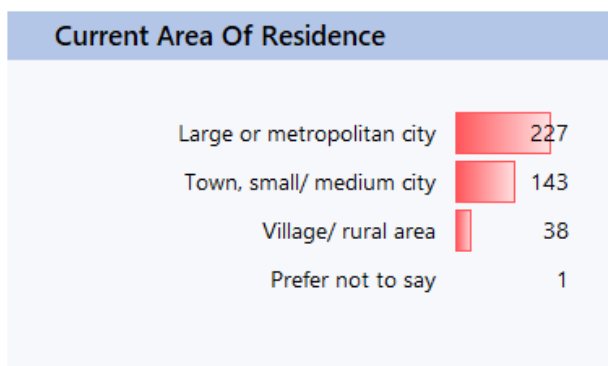


A5 - Key demographics for the Netherlands survey

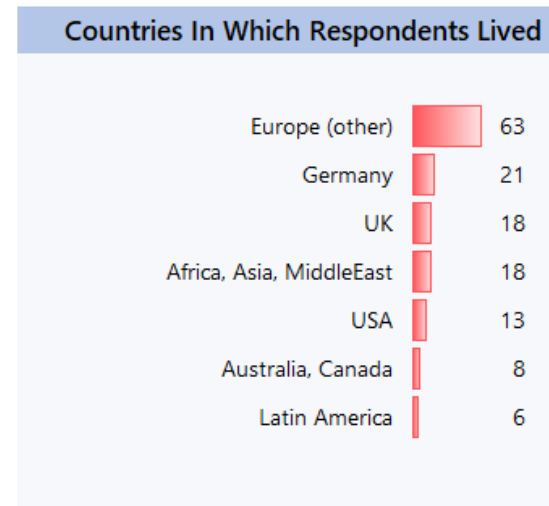
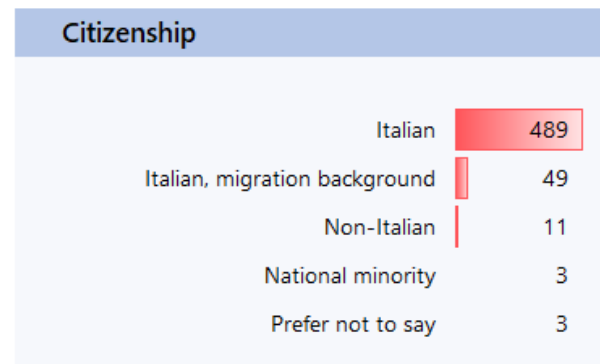
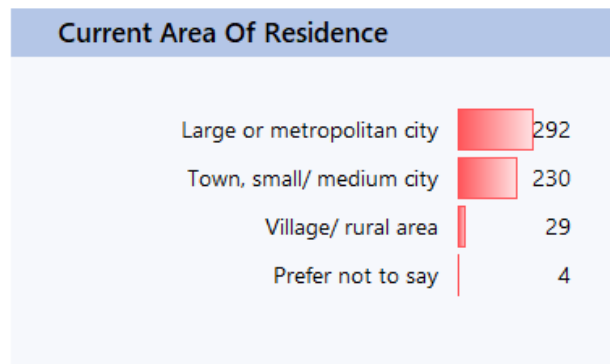
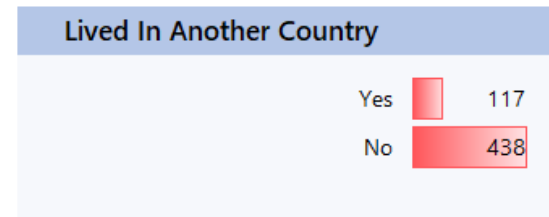
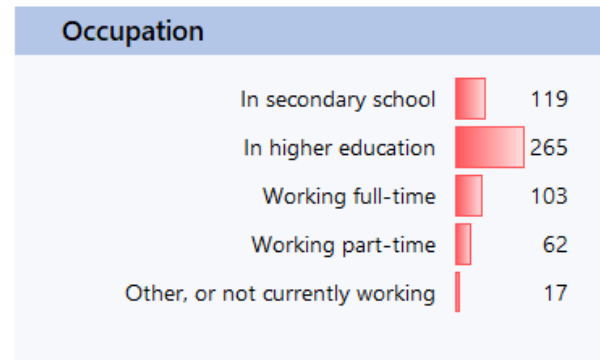
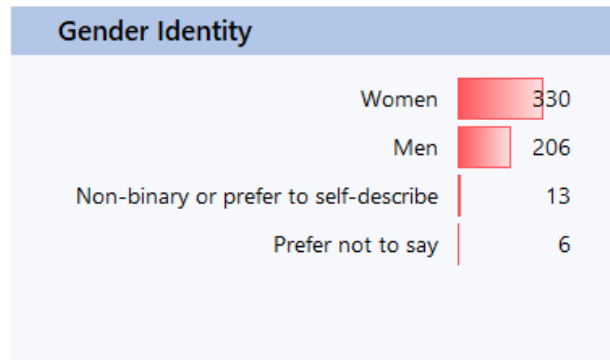
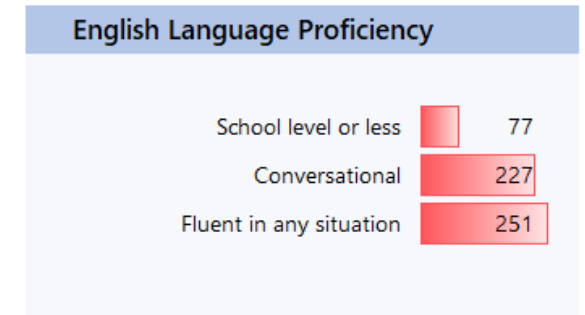
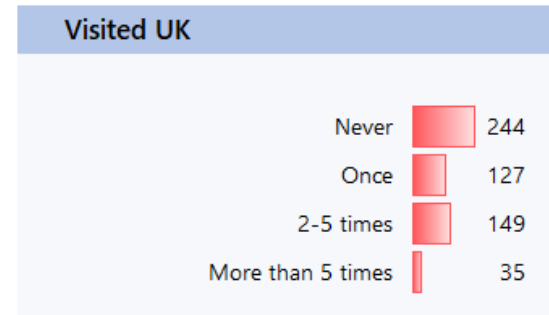
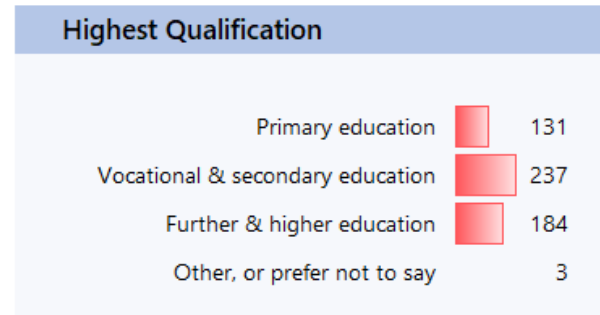
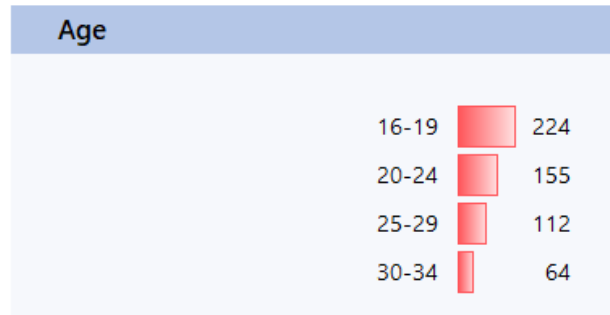


ELP – Further evidence

- According to the EF English Proficiency Index (2023), the Netherlands ranked No. 1 globally in the 'very high proficiency' band.
- English is taught both in primary and secondary school.
- A teacher remarked: "a lot of the professors are non-Dutch-speaking themselves. Also, when it comes to international business, why would you teach that in Dutch when you need to know the terms in English."
- A programme buyer said, "we are very quick to sort of 'abandon' our own language. Of course, if you listen to Dutch quite often, there are many words already from English. And especially younger people will simply use the English words and not even bother finding a Dutch version of the word anymore."
- Another cultural intermediary said, "The younger you get, the better you speak English [...] Because it's everywhere! All the music we listen to, all the series we watch..."



A6 - Key demographics for the Italy survey



- ### ELP – Further evidence
- According to the EF English Proficiency Index (2023), Italy was in the 'moderate proficiency' band; No. 35 globally. This is considerably lower than the Netherlands (No. 1), Denmark (No. 4) and Germany (No. 10), which are all classified as 'very high proficiency'. Ranks 13-30 are 'high proficiency' (EF EPI, 2023).
 - From 14-19 those in academic secondary schools (Liceo) focus on literature (e.g. Shakespeare, Dickens, Beowulf, Jane Austen), history and British English. Those in technical or vocational schools engage more with vocationally relevant English.
 - A teacher said: "they're all often scared of English because they're not exposed to English so much as students of other countries..."
 - Programme buyers said: "unfortunately, in my country, the audience still prefers to watch things with the dubbing [...] that generation that you are studying, I think they are more inclined to watch original-language content. No. 2: "it's growing, but it's still a very, very small portion."

A7 – Survey weighting table for individual markets (example Italy)

Gender and Age Distribution (Italy Survey)

Count			
	Female	Male	Total
16 - 19	131	86	217
20 - 24	101	43	144
25 - 29	66	45	111
30 - 34	32	32	64
25 - 34	98	77	175
Total	330	206	536

% of grand total			
	Female	Male	Total
16 - 19	24%	16%	40%
20 - 24	19%	8%	27%
25 - 29	12%	8%	21%
30 - 34	6%	6%	12%
25 - 34	18%	14%	33%
Total	62%	38%	100%

Ratio Sample vs Population			
	Female	Male	Total
16 - 19	2,6734	1,6717	2,1603
20 - 24	1,5201	0,5880	1,0318
25 - 29	1,0028	0,6318	0,8099
30 - 34	0,4043	0,4010	0,4027
25 - 34	0,6761	0,5098	0,5912
Total	1,2673	0,7475	1,0000

Sex and Age Distribution Italian Population
(Q1 2023, numbers taken from national TAM system, run by Nielsen)

Count			
Count	Female	Male	Total
16 - 19	1.038.316	1.090.097	2.128.413
20 - 24	1.407.840	1.549.500	2.957.340
25 - 29	1.394.637	1.509.324	2.903.961
30 - 34	1.676.936	1.690.828	3.367.764
25 - 34	3.071.573	3.200.152	6.271.725
Total	5.517.729	5.839.749	11.357.478

% of grand total			
	Female	Male	Total
16 - 19	9%	10%	19%
20 - 24	12%	14%	26%
25 - 29	12%	13%	26%
30 - 34	15%	15%	30%
25 - 34	27%	28%	55%
Total	49%	51%	100%

Weight (= 1/ratio)	
	Weight
Female 16-19	0,3741
Female 20-24	0,6578
Female 25-34	1,4792
Male 16-19	0,5982
Male 20-24	1,7006
Male 25-34	1,9614

- Due to our survey methodology, the sample is skewed towards certain demographic groups.
- Women are overrepresented because they were more willing to participate than men. The number of 30-34 year-olds was also lower - as was the case in Denmark, Germany and the Netherlands.
- To mitigate the imbalances, we applied a weight to each respondent, adjusting their survey responses either up or down. This approach provides a more accurate representation of different age and gender groups in Italy.
- We applied weights only for age and self-identified gender, our main demographic variables.
- We determined the weights by comparing age and gender distributions in our sample to the official age and sex statistics of the Italian population. This comparison produced a ratio that indicates how much the sample distribution differs from the population.
- The weight is a factor that adjusts the skewed proportions of the sample to align with the population. Example: 24% (F16-19 Sample) x 0.3741 (weight) = 9% (F16-19 Population)
- To avoid giving the smaller 30-34 age group too much influence in the aggregated results, we decided to use only three age groups for weighting: 16-19, 20-24, and 25-34.
- For weightings for the other 3 countries see [Interim Report \(IR\) Denmark](#), [IR Germany](#), and [IR Netherlands](#).

A8 – Market weights for combined (4-country) survey data

Sample sizes across markets

Market	Respondents	Weight
IT	555	0.8162
DK	422	1.0735
NL	409	1.1076
DE	426	1.0634
TOTAL	1,812	
AVERAGE	453	


- We aimed to achieve survey sample sizes of 300 to 500 respondents during six-week field phases in each of the four markets..
- We achieved a minimum sample size of 409 in the Netherlands and a maximum of 555 in Italy, providing enough respondents in each market to conduct our analyses.
- However, across all four markets, the different sample sizes would have biased the results towards the outlier market, Italy.
- To avoid this, we applied weights to down-weight the Italian responses and up-weight the responses from the other markets.
- The weights were derived by comparing the sample size in each market to the theoretical average sample size, based on a total of 1,812 respondents across four markets.
- It's important to note that these market weights did not alter the results or the weighting in each individual market; they were only applied to the total calculations across all four markets.

A9 - Digital diary & activities (samples English version)

Screen Encounters with Britain

Digital Diary - Day 1

Please complete towards end of day



There are 3 tasks

1. Please note down **all titles of films & TV shows you've watched today** (only those longer than 20 min.) and some detail on how you watched.
2. Reflect on people and things that represent **the United Kingdom** to you.
3. Watch and rate a short **film trailer**.

My Viewing Day

Please note down all films & TV shows of 20+ minutes duration that you've watched today.

To add a film or TV programme, simply answer the questions that follow. Each time you have finished with one title, you will get the option to enter another, until you've recorded all items watched.

OK, let's start

I haven't watched anything today

How did you watch this?
Please tick all the options that apply



- English + Danish subtitles
- English - no subtitles
- English + English subtitles
- Dubbed into Danish
- Other, please specify

Today's trailers

Finally, we'd like to show you short trailers for two British dramas.

Please watch the trailers, then click on the stars below the videos to indicate your level of interest in these shows:

- ☐ = Would definitely not watch
- ★ = Unlikely to watch
- ★★ = It is interesting
- ★★★ = Would definitely watch



In all countries combined

621 respondents filled out a short screener survey after completing the main survey to indicate their interest in participating in 5 days of digital diaries & activities (DD).

The screener survey provided contact details and key demographic data, as well as some project-relevant personal information.

102 respondents completed the DDs: in English in Denmark and the Netherlands, and in German and Italian in Germany and Italy. Respondents were selected for a variety of demographics (age, gender, occupation) and personal factors related to the UK (international experience, frequency of UK screen consumption, self-proclaimed interest in the UK on a slider scale from 0-100).

48 (12 per country) were selected after completing the DD to participate in a 60-minute one-to-one online interview. Each interview followed the same guiding questions but was personalised using stimulus material generated from the digital diaries.

A10 - List of 22 interviewees Denmark

Pseudonym	Age	Gender	Occupation	Living Situation	Self-reported frequency of watching longform screen content	Self-reported frequency of watching British longform screen content	Self-reported interest in UK (out of 100)	Citizenship	Experience of living abroad	Countries lived in	Visit to UK
Anders	28	m	Student HE	with partner	almost daily	3-5 times a week	100	Danish	Yes	Ireland	Yes
Per	25	m	Student HE	with friends/flatmates	3-5 times a week	Several times a month	84	Danish	Yes	USA	Yes
Katja	25	f	Student HE	with partner	almost daily	Less than once a month	28	Danish w mig background	Yes	Germany	Yes
Michael	23	m	Works FT	with partner	almost daily	3-5 times a week	82	Dual Danish-British citizenship	No		Yes
Jytte	25	f	Works FT	with friends/flatmates	almost daily	1-2 times a week	100	Danish	No		Yes
Kirsten	29	f	Works FT	with partner	1-2 times a week	1-2 times a week	95	Danish	Yes	China	Yes
Lars	24	m	Student HE	with friends/flatmates	almost daily	1-2 times a week	57	Danish	No		Yes
Melanie	23	f	Student HE	with friends/flatmates	almost daily	Less than once a month	82	Danish	Yes	USA	Yes
Rosa	26	f	Works FT	with friends/flatmates	3-5 times a week	Several times a month	8	Danish w mig background	Yes	China, Germany	Yes
Mads	27	m	Student HE	on his own	1-2 times a week	Several times a month	54	Danish	No		Yes
Sofia	18	f	Sec. school student	with parents	3-5 times a week	Several times a month	66	Danish	No		Yes
Thomas	29	m	Works FT	with partner	3-5 times a week	Several times a month	73	Danish	Yes	UK, Canda, Czech Republic	Yes
Camilla	18	f	Sec. school student	With parent(s)	1-2 times a week	Several times a month	64	Danish	No		Yes
Christian	18	m	Sec. school student	With parent(s)	3-5 times a week	1-2 times a week	35	Danish	No		Yes
Mette	19	f	Sec. school student	With parent(s)	Almost daily	3-5 times a week	82	Danish	No		Yes
Niels	18	m	Sec. school student	With parent(s)	Almost daily	3-5 times a week	84	Danish	No		Yes
Hanne	19	f	Sec. school student	With parent(s)	3-5 times a week	Several times a month	76	Danish w mig background	No		Yes
Marianne	19	f	Sec. school student	With parent(s)	3-5 times a week	1-2 times a week	74	Danish	No		Yes
Helle	17	f	Sec. school student	With parent(s)	3-5 times a week	3-5 times a week	74	Danish w mig background	No		Yes
Jasper	17	m	Sec. school student	With parent(s)	Almost daily	Less than once a month	26	Danish	No		Yes
Lene	17	m	Sec. school student	With parent(s)	Almost daily	Almost daily	17	Danish	No		No
Peter	17	m	Sec. school student	With parent(s)	Almost daily	1-2 times a week	23	Danish w mig background	No		Yes

12 x 60 min interviews
6 women
6 men
aged 18-29

Selected from a screener survey, and following digital diaries.

4 x 50-75 min focus groups

6 women
4 men
aged 17-19

Selected from a screener survey.

A11 - List of 20 interviewees Germany

Pseudonym	Age	Gender	Occupation	Living Situation	Self-reported frequency of watching longform screen content	Self-reported frequency of watching British longform screen content	Self-reported interest in UK (out of 100)	Citizenship	Experience of living abroad	Countries lived in	Visit to UK
Didier	29	m	Student HE	With friends/flatmates	Almost daily	3-5 times a week	83	German w mig history	Yes	Northern Ireland	Yes
Markus	26	m	Works FT	On his own	Almost daily	1-2 times a week	78	German	No		No
Anke	28	f	Works FT	On her own	3-5 times a week	Less than once a month	34	German	Yes	Australia, Oman, Jordan	Yes
Fernand	17	m	Sec. school student	With parent(s)	1-2 times a week	Several times a month	100	German	No		No
Lotte	19	f	Sec. school student	With parent(s)	Almost daily	Almost daily	81	German	No		Yes
Derja	25	f	Student HE	With parent(s)	Almost daily	1-2 times a week	100	German w mig history	Yes	USA	Yes
Luisa	23	f	Student HE	On her own	Several times a month	Several times a year	32	German	Yes	UK	Yes
Sebastian	32	m	Works FT	With partner	Almost daily	Several times a year	43	German	Yes	Sweden	Yes
Livia	32	f	Maternity leave	With partner + child(ren)	Almost daily	Several times a year	17	German w mig history	No		Yes
Jamal	22	m	Student HE	On his own	Almost daily	Several times a year	9	German w mig history	No		Yes
Emilia	24	f	Student HE	With partner	Almost daily	Several times a month	85	German	Yes	France, UK	Yes
Max	17	m	Sec. school student	With parent(s)	3-5 times a week	Several times a month	72	German	No		No
Sofia	16	f	Sec. school student	With parent(s)	Almost daily	Several times a month	100	German	No		Yes
Lenny	16	m	Sec. school student	With parent(s)	3-5 times a week	Only a few times a year	26	German	No		Yes
Nele	16	f	Sec. school student	With parent(s)	Almost daily	Several times a month	65	German	No		Yes
Mila	16	f	Sec. school student	With parent(s)	1-2 times a week	Less than once a month	68	German w mig history	No		Yes
Julia	17	f	Sec. school student	With parent(s)	Almost daily	Less than once a month	80	German w mig history	No		No
Lina	18	f	Sec. school student	With parent(s)	Almost daily	Several times a month	42	German	No		Yes
Evelina	17	f	Sec. school student	With parent(s)	1-2 times a week	Only a few times a year	31	German w mig history	No		No
Jay	17	m	Sec. school student	With parent(s)	Almost daily	Less than once a month	36	German w mig history	Yes	UK, Costa Rica	Yes

12 x 60 min interviews

6 women
6 men
aged 17-32

Selected from a screener survey, and following digital diaries.

3 x 50-90 min focus groups

6 women
2 men
aged 16-18

Selected from a screener survey

A12 - List of 22 interviewees Netherlands

Pseudonym	Age	Gender	Occupation	Living situation	Self-reported frequency of watching longform screen content	Self-reported frequency of watching British longform screen content	Self-reported interest in UK (out of 100)	Citizenship	Experience of living abroad	Countries lived in	Visit to UK
Ellen	33	F	Works in Marketing	With partner	1-2 times a week	Less than once a month	24	Dutch	Yes	China, Turkey	Yes
Thijs	33	M	Works as a Programmer	On his own	3-5 times a week	Several times a month	77	Dutch	No		Yes
Kris	26	NB	Student - English	On her own	Almost Daily	3-5 times a week	80	Dutch	Yes	Curaçao, US, Sweden	Yes
Elodie	26	F	Works as a Teacher	With partner	1-2 times a week	1-2 times a week	65	Dutch w mig history	Yes	US, Belgium	Yes
Martijn	27	M	Works as a software engineer	With friends/flatmates	3-5 times a week	1-2 times a week	83	Dutch	Yes	UK, USA	Yes
Daro	25	M	Student - Dutch language	On his own	Almost Daily	Several times a month	60	Dutch w mig history	No		Yes
Eduard	21	M	Student - Biological Sciences	With partner	Almost Daily	Several times a month	68	Dutch w mig history	Yes	Aruba	No
Mark	24	M	Student - Museum/Heritage	On his own	3-5 times a week	Several times a month	60	Dutch	No		Yes
Yda	21	F	Student - Media	With friends/flatmates	Almost Daily	1-2 times a week	20	Dutch	No		No
Floor	20	F	Student - English	With friends/flatmates	Almost Daily	Several times a month	73	Nat. minority - Friesian	No		Yes
Annette	19	F	Student - Dutch language	With parents	Almost Daily	3-5 times a week	57	Dutch w mig history	No		No
Karl	18	M	Student - Arts, Culture	With parents	Almost Daily	3-5 times a week	93	Dutch	No		Yes
Yasmine	16	F	Sec. school student	With parents	1-2 times a week	Less than once a month	22	Dutch w mig history	No		No
Mareike	16	F	Sec. school student	With parents	1-2 times a week	Several times a month	55	Dutch	No		No
Hendrika	16	F	Sec. school student	With parents	3-5 times a week	Several times a month	56	Dutch	No		No
Lara	16	F	Sec. school student	With parents	Almost Daily	Less than once a month	39	Dutch	No		No
Tamara	16	F	Sec. school student	With parents	3-5 times a week	Less than once a month	60	Dutch	No		No
Bart	17	M	Sec. school student	With parents	Almost Daily	3-5 times a week	40	Dutch	No		No
Nadine	16	F	Sec. school student	With parents	Almost Daily	A few times a year	10	Dutch	No		Yes
Eva	16	F	Sec. school student	With parents	Almost Daily	Several times a month	80	Dutch	No		Yes
Kenny	18	M	Sec. school student	With parents	Almost Daily	A few times a year	32	Dutch	No		Yes
Kai	18	M	Sec. school student	With parents	Almost Daily	A few times a year	32	Dutch	No		No

12 x 60 min interviews

5 women
6 men
1 non-binary
aged 18-33

Selected from a screener survey, and following digital diaries.

3 x 50-90 min focus groups

7 women
3 men
aged 16-18

Selected from a screener survey.

A13 - List of 22 interviewees Italy

Pseudonym	Age	Gender	Occupation	Living Situation	Self-reported frequency of watching longform screen content	Self-reported frequency of watching British longform screen content	Self-reported interest in UK (out of 100)	Citizenship	Experience of living abroad	Countries lived	Visit to UK
Alessandro	34	m	Freelancer	With Partner	1-2 times a week	Several times a month	77	Italian	No		Yes
Barbara	33	f	Works FT	With Partner	Almost daily	1-2 times a week	53	Italian	No		Yes
Matteo	28	m	Student HE	With Partner	Almost daily	Almost daily	100	Italian	Yes	France	Yes
Elisa	26	f	Looking for work	With parent(s)	Almost daily	Several times a month	91	Italian	No		Yes
Margherita	27	f	Works PT	With Partner	Almost daily	Several times a month	48	Italian w mig history	No		Yes
Daniele	25	m	Works FT	With parent(s)	1-2 times a week	Several times a month	16	Italian	Yes	Spain, Germany	Yes
Riccardo	24	m	Student HE	With friends/flatmates	3-5 times a week	Several times a month	53	Italian	NO		Yes
Gabriele	23	m	Student HE	With parents/flatmates	1-2 times a week	Less than once a month	72	Italian	No		No
Benedetta	24	f	Looking for work	With parent(s)	Almost daily	Several times a month	51	Italian	No		Yes
Maddalena	19	f	Student HE	With parent(s)	Almost daily	1-2 times a week	73	Italian	No		Yes
Sara	19	f	Student HE	With parent(s)	Almost daily	1-2 times a week	82	Italian	No		Yes
Rion	19	m	Student HE	With parent(s)	Several times a month	Less than once a month	54	Italian w mig history	No		No
Gemma	17	f	Sec. school student	With parent(s)	1-2 times a week	Several times a month	42	Italian	No		No
Carla	17	f	Sec. school student	With parent(s)	1-2 times a week	Several times a month	53	Italian	No		Yes
Mario	17	m	Sec. school student	With parent(s)	Less than once a month	Almost Daily	51	Italian	No		No
Marcello	17	m	Sec. school student	With parent(s)	3-5 times a week	1-2 times a week	62	Italian	No		No
Piero	17	m	Sec. school student	With parent(s)	3-5 times a week	Several times a month	78	Italian	No		Yes
Gina	16	f	Sec. school student	With parent(s)	Several times a month	Less than once a month	56	Italian w mig history	No		No
Veronica	17	f	Sec. school student	With parent(s)	Almost Daily	Less than once a month	72	Italian	No		No
Selina	17	f	Sec. school student	With parent(s)	Several times a month	Several times a month	72	Italian w mig history	No		No
Cecilia	17	f	Sec. school student	With parent(s)	3-5 times a week	Less than once a month	55	Italian	No		Yes
Paolo	17	m	Sec. school student	With parent(s)	Almost Daily	Several times a month	54	Italian	No		No

12 x 60 min interviews
6 women
6 men
aged 19-34
Selected from a screener survey, and following digital diaries.

3 x 50-90 min focus groups
6 women
4 men
aged 16-17
Selected from a screener survey.

B - References

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Data Statement

The data supporting this report has been deposited in the King's Open Research Data Repository at 10.18742/22153928 with an access embargo until 30 September 2025. Earlier sharing will be considered on request.

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