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DOI:

[10.18742/pub01-139](https://doi.org/10.18742/pub01-139)

Document Version

Publisher's PDF, also known as Version of record

[Link to publication record in King's Research Portal](#)

Citation for published version (APA):

Esser, A., Hilborn, M., & Steemers, J. (2023). Screen Encounters with Britain - Interim Report Germany: What do young Europeans make of Britain and its digital screen culture?. King's College London.

<https://doi.org/10.18742/pub01-139>

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Screen Encounters with Britain

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

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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 – September 2024

Investigators: Jeanette Steemers (PI), Andrea Esser (Co-I), Matthew Hilborn (PDRA), King's College London

Research Assistants: Marypaz Ventura-Arrieta, Nathalie Klein

Academic partners: Cathrin Bengesser & Pia Majbritt Jensen, Aarhus University, Denmark; Eva Novrup Redvall, University of Copenhagen, Denmark; Susanne Eichner, Film University Babelsberg, Germany; Luca Barra, Università di Bologna, Italy; Berber Hagedoorn, University of Groningen, Netherlands

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?

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 British intermediaries / sales executives: 6
- Roundtable discussions with UK & European partners - 4 / one per market
- Interviews with local intermediaries (buyers, teachers, film festival directors, influencers) - 40 /10 per market

Young audiences

- Online survey in 4 local languages - minimum of 1,200 responses / at least 300 per market
- 5 days of digital diaries & activities - 80-90 participants / at least 20 per market
- Individual 60 min online interviews with stimulus material generated from digital diaries - 40-45 participants selected for demographic variety / at least 10 per market
- Small group interviews with 16-19-yr olds: ~40 participants / 8-12 per market

Research Germany

3 work packages



- Local industry reports for market overview – see references
- VOD catalogue research Germany (Netflix, Amazon Prime Video, ZDF Mediathek)
- Online marketing & promotion of UK content by SVoDs and broadcasters



- 6 interviews with British sales executives
- 10 interviews with local intermediaries / 4 programme buyers & sellers, 3 teachers, 3 film festival directors



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

Data collection: Jan/Mar 2023
Data collection: Mar 2023
Data collection: Mar 2023
Data collection: May/June 2023

2. Germany - the basics



Streaming in Germany

- Germany is an advanced VoD market. Whilst the total consumption of screen content by 14-29 year olds is growing (194 min/day in 2022), this age group's daily average consumption of linear TV is now under 43min.
- 22.7m households subscribed to at least one SVoD streaming service in 2023, representing 55% of households. The average number of paid SVoD subscriptions per household is 3.
- The most popular SVoD service with 16-34 year olds is Netflix, followed by Amazon Prime Video. YouTube, if added, outperforms Amazon including for medium-length content, but drops to third place for British content.
- Local streamers, RTL+, Joyn fare less well with 16-34s.

Historical status of UK screen content

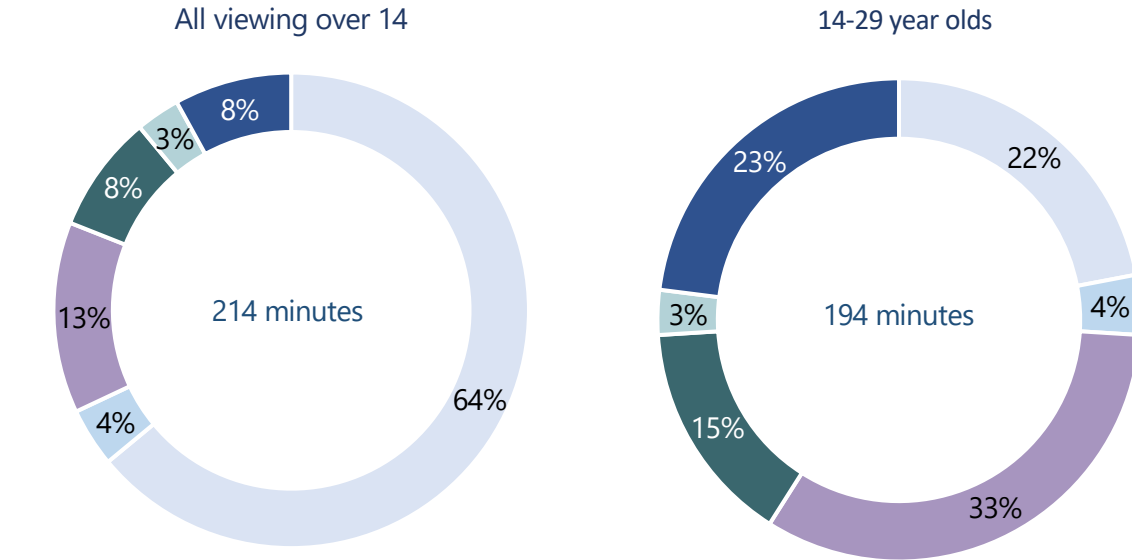
- Germany is the UK's 6th largest export market by value of sales (£86m in 2022) with growth of 49% between 2021-22, which can be attributed to the launch of new VoD services, plus fewer shows from US studios like Disney, which launched its own service in Germany in 2020.
- Traditionally public service broadcasters, ARD and ZDF, acquired most UK content, with a strong focus on crime dramas. Commercial broadcasters, RTL, Sat.1 and ProSieben, and now their affiliated VoD players RTL+ and Joyn, offer UK light entertainment, including factual and reality TV. Today global streamers are the strongest competitors for UK content.

English language proficiency

- Young people in Germany are highly proficient in English. They feel at ease with the language and use it daily, including to watch screen content.

Consumption of screen content in Germany

Daily Share in 2022 in %, plus total minutes



- Scheduled TV channels (e.g. ARD, ZDF, RTL, ProSieben)
- Local Broadcaster Video on Demand Services (e.g. ARD Mediathek, ZDF Mediathek, Joyn)
- Videos/Live streams on Streaming Services (e.g. Netflix, Amazon Prime Video)
- Videos on social media or the internet (e.g. TikTok, Instagram)
- Recorded television programmes.
- Videos on YouTube.

- The consumption of screen content by 14-29 year olds is growing. At 194 min/day, they are getting closer to the population average of 214 min/day (Egger & Rhody, 2022: 432).
- According to research by ARD/ZDF (2022a: 19), 14-29 year olds watch significantly less linear/scheduled TV (22% of the overall consumption of screen content) than the adult population as a whole (64%).
- The other 78% of viewing by 14-29 year olds goes to global streaming services (33%), YouTube videos (23%), social media videos (15%), local VoDs (4%) and recorded TV programmes (3%).
- The quote from Jay (aged 17), which proved typical, shows that those living at home still watch some linear TV, but only when watching with parents. Only one of our 20 interviewees (Sebastian, 32) watches mostly linear TV, because it takes less effort to choose what to watch.

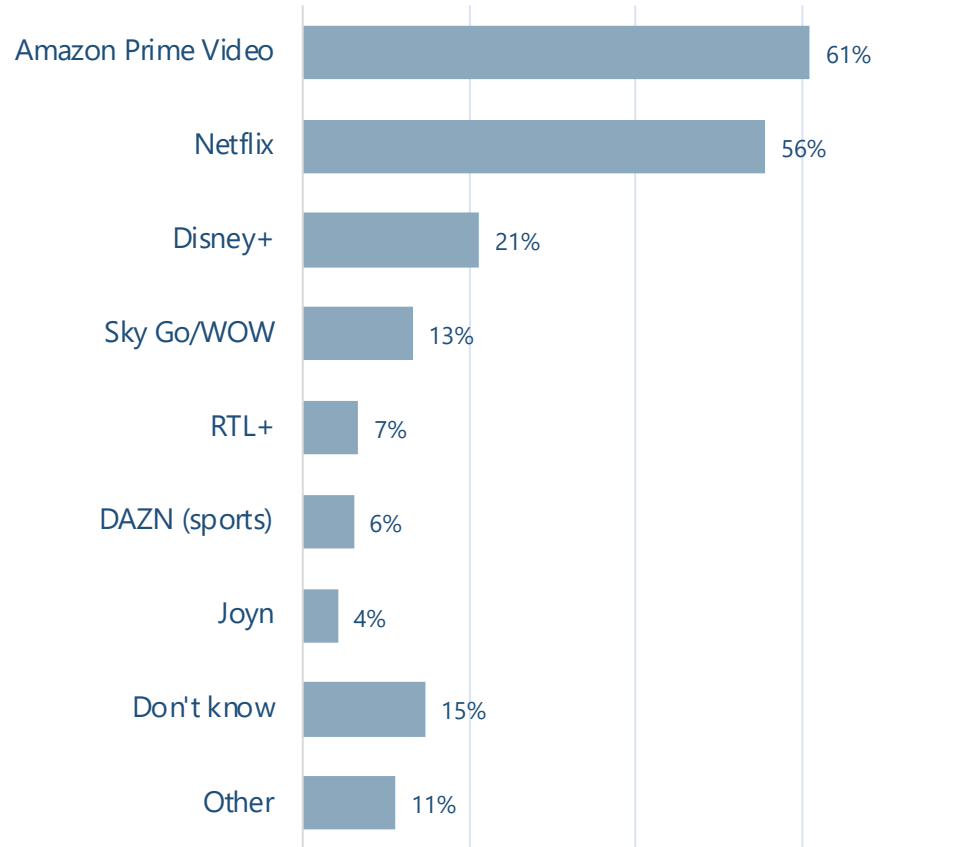
[When streaming] it takes half an hour to decide what we want to watch because there's just so much (...) Linear television makes that first decision for you. I'm quite grateful for that.
- Sebastian, 32

I wouldn't switch on the TV to watch live TV, personally. But if my parents are watching something, then I'll probably just sit down next to them and just enjoy watching it with them. But personally, no.
- Jay, 17

The German streaming market

Advanced, but subject to change

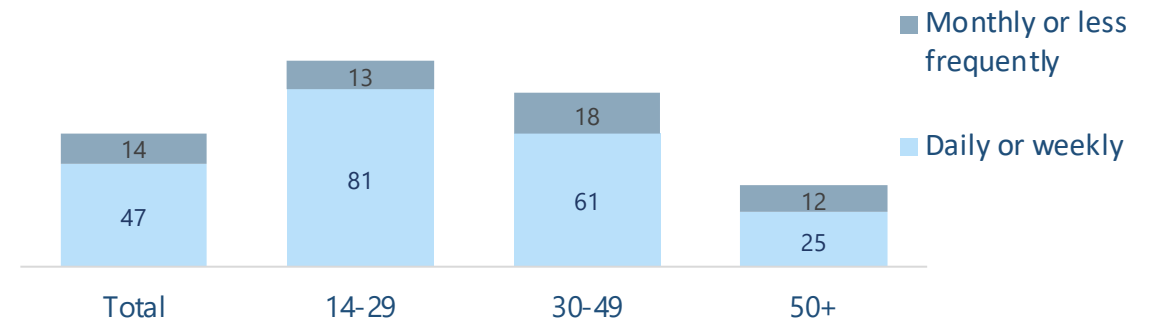
VoD providers used in 2022, % of respondents (n=2503)



Source: W&V, 2023

- 22.7m households subscribed to at least one SVoD streaming service in 2023, representing 55% of households. The average number of paid SVoD subscriptions per household is 3 (Kantar, 2023a).
- Netflix's share of new subscribers fell from 24.4% (Q1 2021) to 12.8% (Q1 2023) (Kantar 2023b), and it is losing subscribers (Kantar, 2023a).
- 84% of 12-19 year olds have access to a paid-for streaming service like Netflix, Amazon Prime Video or Disney+ at home. 54% of 16-19 year olds use Netflix daily or several times a week compared to 47% for YouTube, and 30% for Amazon Prime Video (MPFS, 2022: 6, 36).
- 81% of 14-29 year olds use streaming services daily compared to 47% of adults over 14 (see chart below) (ARD/ZDF, 2022b: 20).

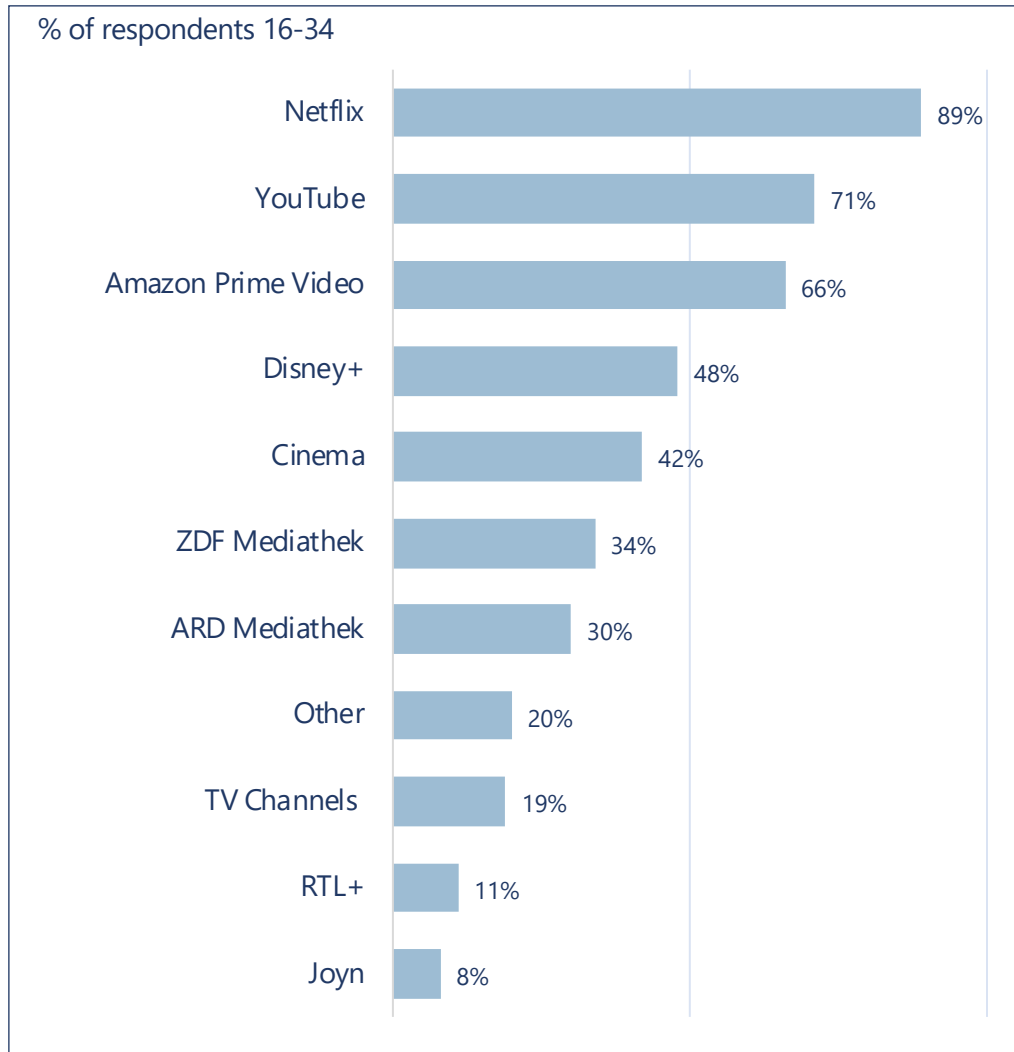
Use of Streaming Services by Age Group (%)



Source: ARD/ZDF Forschungskommission, 2022: 20

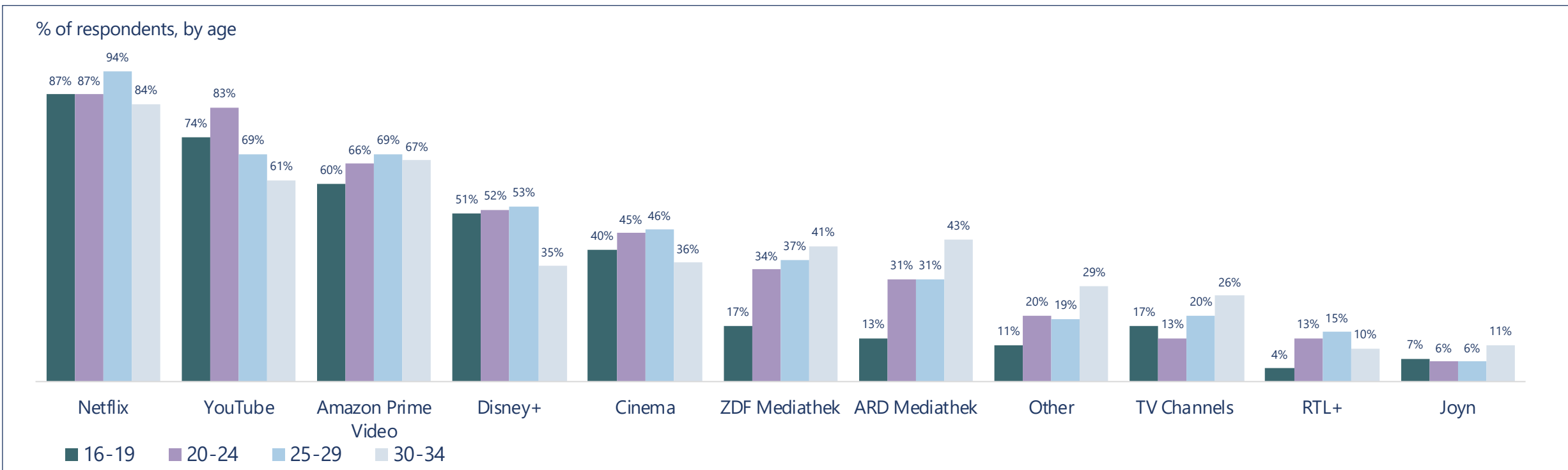
Platforms our survey respondents use for 'longform' screen content

Netflix is the clear favourite



- Our survey responses confirmed the high number of VoD services available to young people (16-34). The average number of viewing options for longform content (> 20min) is 4.7.
- Netflix is the clear No. 1. YouTube is notable for being in 2nd place, reflecting the amount of time that young people spend on this platform (see slide 8).
- Subscriptions for Disney+ have grown steadily since its launch in 2020; driven by the desire to re-watch movies, series and cartoons that subscribers are already familiar with (e.g. *Modern Family*, *How I met Your Mother*), or to gain access to major franchises like the Marvel films.
- Several interviewees noted how they swap VoD services to follow their favourite content: *Modern Family*, *Gossip Girl* and the *Harry Potter* movies.
- Cinema was mentioned by 42% of survey respondents and fares better than the Mediatheken of public service broadcasters ZDF (34%) and ARD (30%). Cinema also outranks linear television (19%) by far.
- Linear TV channels, as interviewees attested, only come into play for football matches, long-running German reality TV shows, or when watching with parents (e.g. the news or German crime series *Tatort*). But with usage by at least 19% of respondents, TV still plays a bigger role than in Denmark (7%), with its more advanced SVoD market and higher English language proficiency.
- RTL+ and Joyn, the streaming services of the commercial broadcasters, perform less well than the public service ARD or ZDF Mediatheken (VoD services).

Platforms used by survey respondents – by age



- Analysed by age, significant differences can be seen for YouTube, the ARD and ZDF Mediatheken, and TV channels.
- YouTube use for longform content drops from 74% (16-19) and 83% (20-24) to 61% for the oldest cohort (30-34).
- For the public-service streamers it's the reverse, with a stark drop for the youngest (16-19); only 13% use the ARD Mediathek and 17% the ZDF Mediathek.
- TV channels have the highest use amongst the oldest cohort (26%). The second highest usage is by 16-19 year-olds (17%), many of whom may sometimes still watch TV with their parents.
- 27 additional access points were confirmed by survey respondents for 'other', notably WOW (19 mentions), MUBI (10), Crunchyroll (9), Arte Mediathek (8) and Apple TV (8). The remaining 22 were mentioned by between 1 and 4 respondents only.

The role of Amazon Prime Video

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. And so I really like that because, for example, Amazon is quite bad with what the user interface looks like, and it's not very practicable.

- Didier, 29

The Amazon Prime [Video] subscription comes automatically with your normal Amazon Prime subscription. So I just have it because I have Amazon Prime. And it's not that expensive for students. Four or five Euros, it's not really expensive, so I just have it, but I don't use it a lot.

- Jamal, 22

Amazon Prime is very confusing and its recommendations are always wrong.

- Luisa, 23

(...) on Netflix, they have many more movies and series that you can watch. And they have so many different types of movies and series. And Amazon, it's like, 'Oh, I know that you can stream Gossip Girl there, so I'm going to watch it there!' But it's not like Amazon Prime is my first choice.

- Lina, 18

- Amazon Prime Video is much bigger in Germany than in our first case study, Denmark, where Amazon has no e-commerce business.
- In fact, Amazon Prime Video is Germany's No.1 VoD provider in terms of subscriptions (see slide 9). But in terms of popularity and frequency of use, Netflix proved the clear favourite amongst our research participants, both in the survey (previous slide) and in interviews.
- Interviewees explained their marked preference for Netflix with: it has a much better user interface; it has good quality content '*all of which* is for free' (i.e. included in the one subscription); and its content is 'formed around youth culture' (Jay, 17).
- Two respondents noted that they prefer Netflix because all English movies there are available in English, and because 'everybody is watching' things on Netflix (Mila, 16).
- The quotes on the left illuminate the perception of Amazon Prime Video and its use by 16-34 year olds.

The low popularity of local streaming services

I think the ZDF and ARD Mediathek they are more when I am in a more documentary vibe phase. So, I still consume a lot of their content but also their cropped versions on social media, so they're not longer than 20 minutes.

- Emilia 24

I actually used Joyn to rewatch series and TV shows that were on TV, but I missed them somehow. So that's why I used Joyn quite a lot back then. And since I don't watch TV that often anymore, that's probably also why I don't use Joyn anymore that often as well.

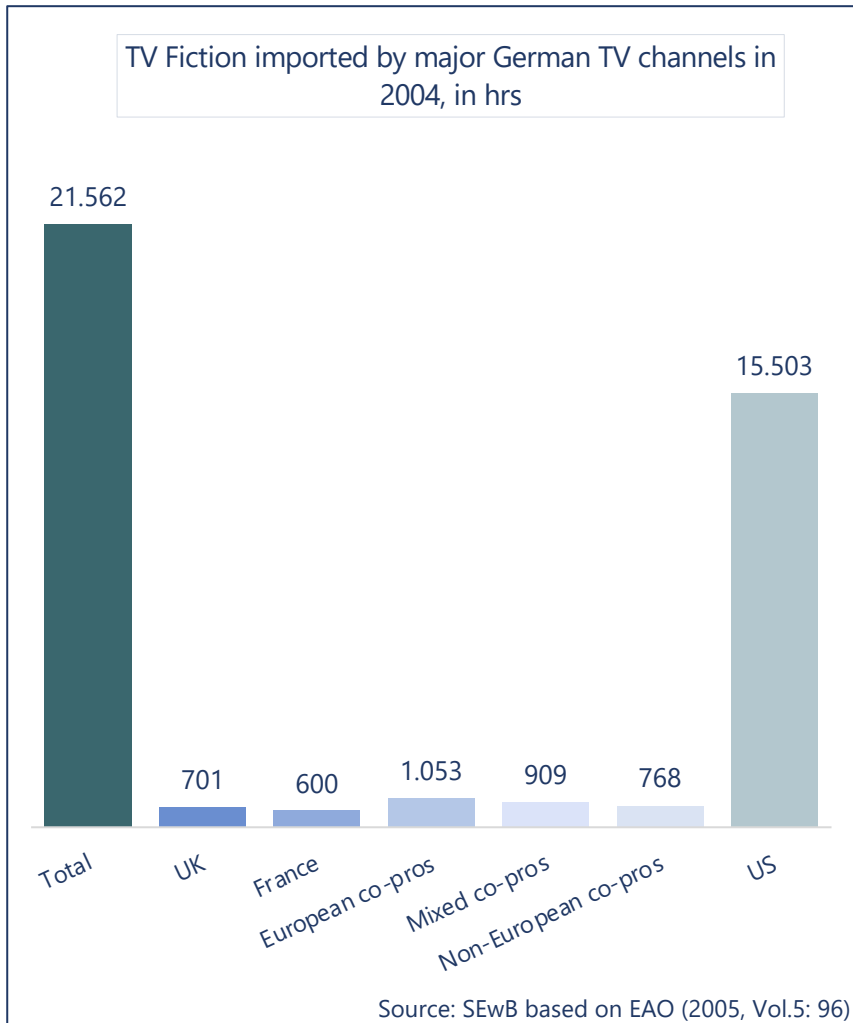
- Fernand, 17

There's like a small barrier or "Hürde" [hurdle] to overcome to put ZDF [Mediathek] on. You know what I mean, like, I wouldn't have it in my mind to put ZDF on right now. I would first look at Netflix, Amazon, Disney and then afterwards ZDF or ARD. Right. (...) I think, I don't have it in my mind when I think about streaming services. It's like I don't even see it as a competitor for my attention, because the others are so omnipresent. Like ZDF and ARD are non-existent as competitors in this area. And I'm not sure why that is, because I know that they exist. I know that they also have a lot of content for me, for my target group. But I don't know why. I cannot explain it.

- Didier, 29

- As shown in slides 10 & 11 and in the quotes here, in the eyes of 16-34 year olds, the Mediatheken of public service broadcasters ZDF and ARD are no competitor for global SVoD services, Netflix, Prime Video and Disney+, and also YouTube. They are used by only around a third of survey respondents and, according to interviewees, very rarely.
- RTL+ (formerly TV Now) and Joyn, the respective streaming services of the private commercial broadcasting groups RTL and ProSiebenSat.1, perform even less well. Only 11% of survey respondents reported using RTL+, with 7% using Joyn. Both services offer free, advertising-financed services, as well as premium (subscription) content.
- One interviewee used RTL+ almost exclusively to watch Premiere League football; two others reported using Joyn 'sometimes' for reality and lifestyle programmes or, like Fernand (17), to catch up with TV shows, but that was more in the past than currently.

History of UK screen content in Germany



- According to Pact's latest UK exports report, Germany remains the UK's 6th largest export market by value of sales after the US (£510m), Australia (£118m), France (£93m), Canada (£92m) and the Nordics (£92m). UK exports to Germany grew by 49% between 2021-22, reaching £86m, up from a low of £58m in 2020/21 and £75m in 2019/20 (Pact/3Vision, 2022).
- Recent growth in UK sales can be attributed to the launch of new VoD platforms, plus fewer shows from US studios like Disney, who have launched their own VoD services in Germany. European rules that require international streamers to reserve 30% of their offering for European content may also have benefited UK sales.
- The *BFI: International Perceptions & Engagement* study (BFI/Yonder, 2021b: 6) showed 24% of the study's respondents in Germany (aged 18-65) claiming 'familiarity' with British film, and 13% with British TV - against global averages of 30% and 24% respectively. This was lower than the 35% (British films) and 29% (British TV) for the Nordics, including Denmark.
- Also, whilst nearly half of Nordic respondents in the BFI study claimed to watch British films and British TV at least monthly, this fell to 38% (film) and 28% (TV) in Germany. 10% of 18-65 year olds in Germany claimed never to watch British film, 24% to never watch British TV (BFI/Yonder 2021b: 6).
- Historically, annual statistics from the European Audiovisual Observatory show that the UK has always been Germany's most important European source of TV fiction imports, followed by France. But it is outranked by co-productions and ranks far behind US imports, as shown in the graph, which displays selected 2004 figures for imported TV fiction broadcast by 9 leading German free-to-air channels at the time. In 2004 the UK's share of fiction imports was 3.25%, compared to shares of between 3.5% and 5% for various types of co-production, and a 72% share for the US (EAO, 2005, Vol.5: 96, 107).

History of UK screen content in Germany

After starting with public service broadcasters, SVoDs emerge as major buyers of UK content in Germany

In the past, it was ARD, ZDF, Sky, ProSiebenSat1 und RTL that were the main drivers of demand in Germany.

- Jens Richter, CEO of International, Fremantle

Public service broadcasters are still important to us, but when they really want something, the SVoDs can pay more (...) 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

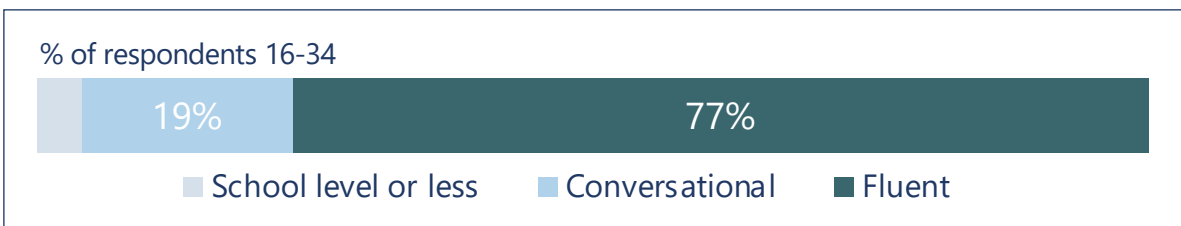
The English-speaking market is attractive. Next to the US setting, the British setting is the most global from the customer's point of view.

- Oliver Bachert, Chief Distribution Officer, Beta Film

- Traditionally it was public service broadcasters, ARD and ZDF, that acquired most British content, with a strong focus on crime dramas, such as the long running *Inspector Barnaby* (*Midsomer Murders*), which still airs today on ZDF, and also on Amazon Prime Video.
- It was the arrival of commercial broadcasters RTL, Sat.1 and ProSieben in the 1980s, and their affiliated VoD players RTL+ and Joyn in recent years, that opened up avenues for UK reality and light entertainment, as well as factual (food, home & living, body modification, true crime, dating shows, 'blue light shows' etc.) aimed at younger male and female audiences.
- Both the UK original and the German adaptation of *The Great British Bake Off* (Sat.1) are aired by Sieben. One Entertainment platforms, and Joyn has long-running commitments to shows featuring celebrity chefs Jamie Oliver and Gordon Ramsay, who are widely known in Germany. RTL+ has aired some UK crime dramas such as *Line of Duty* and *Angela Black*.
- However, the most frequently mentioned UK programmes by our survey respondents (16-34) are available on global SVoDs Netflix and Prime Video (see slides 24 & 25). This confirms young people's preference for global streamers, but also the appeal of contemporary UK TV drama (*Sherlock*, *Sex Education*, *Peaky Blinders*) and the continuing interest in classic film franchises (*Harry Potter*, *James Bond*) and film titles (*Love Actually*).

English language proficiency

Very high in Germany and amongst our survey respondents



I often search for the topic that I'm interested in. And then I watch the videos that come up (...) it doesn't matter if it's German or English.

- Mila, 16

Teachers tell us, like, 'Over the holidays, watch movies and series in English, so your English gets better'.

- Lina, 18

They're surrounded by English all day long anyways, and it [English as a core A-Level subject] doesn't feel superfluous.

- Teacher 3

Overall, the language proficiency and the interest in the English language has increased over the last years.

- Teacher 2

- English language proficiency in Germany is high. In the global EF English Proficiency Index 2022, Germany ranks No. 10 out of 13 countries classified as having 'very high proficiency.' The Netherlands is No. 1, Denmark No. 5 (EF EPI, 2022).
- Since 2005 children begin to learn English in primary school. A shift from teaching grammar to listening and speaking has improved English language proficiency. (News4Teachers, 2016)
- According to interviewed teachers and head teachers, the most popular 'Leistungskurs' (A-Level) subject amongst 16-18 year olds is English. Teachers also reported that Leistungskurs students are very used to writing and presenting papers in English.
- Asked to self-assess their English language proficiency on a slider scale, 77% of survey respondents claimed to be fluent (see graph); 17 of our 20 interviewees volunteered to be interviewed in English.
- In 2016, a YouGov survey found that 27% of 18-24 year olds watch funny series mostly or always in English, 22% funny films. Results differed depending on respondents' school qualification: Across all ages, 18% of those with Abitur (A-Levels/IB) claimed to watch funny series mostly in English, but only 6-8% of respondents with Haupt- or Realschulabschluss (GCSE/IGCSE) did. (Schmidt, 2016)
- 50% of young people in Germany have a qualification for HE entry (Datenportal BMBF, 2023).

3. British screen content



Current status amongst 16-34s

- UK screen content plays a notable role for young people in Germany, both in terms of country of origin preferences and consumption frequency. Most survey respondents claim to watch UK content several times a month (37%).
- Interviews revealed that many, particularly 16-19 year-olds, have difficulties telling whether a show is British or not.
- 16-19s are less familiar with UK screen content than 20-34s. Like Denmark, consumption of UK content in Germany increases with age.
- 77% of participants (16-34) estimate that their consumption of UK screen content has grown over the past 5 years (43%) or remained the same (34%).

What

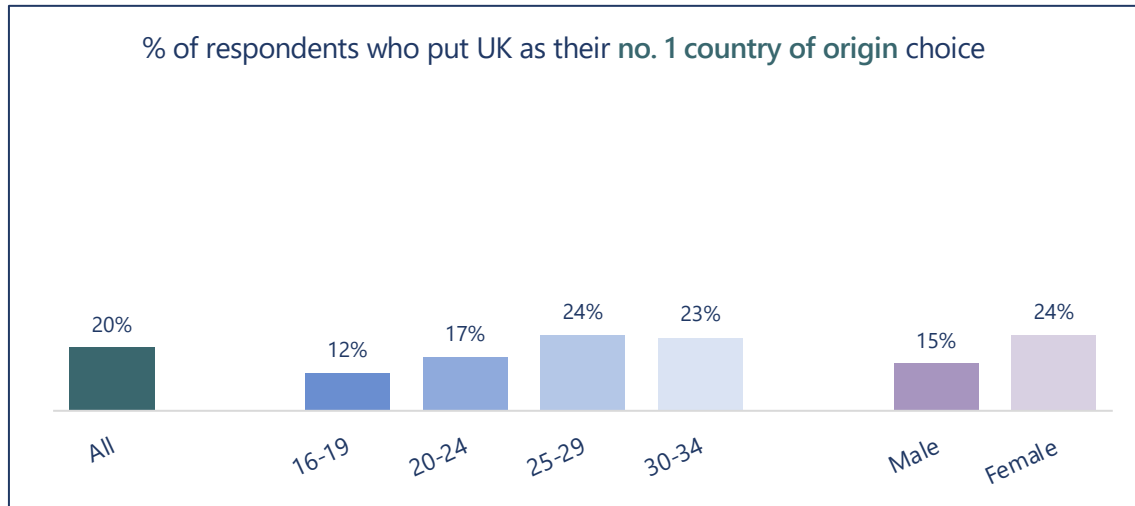
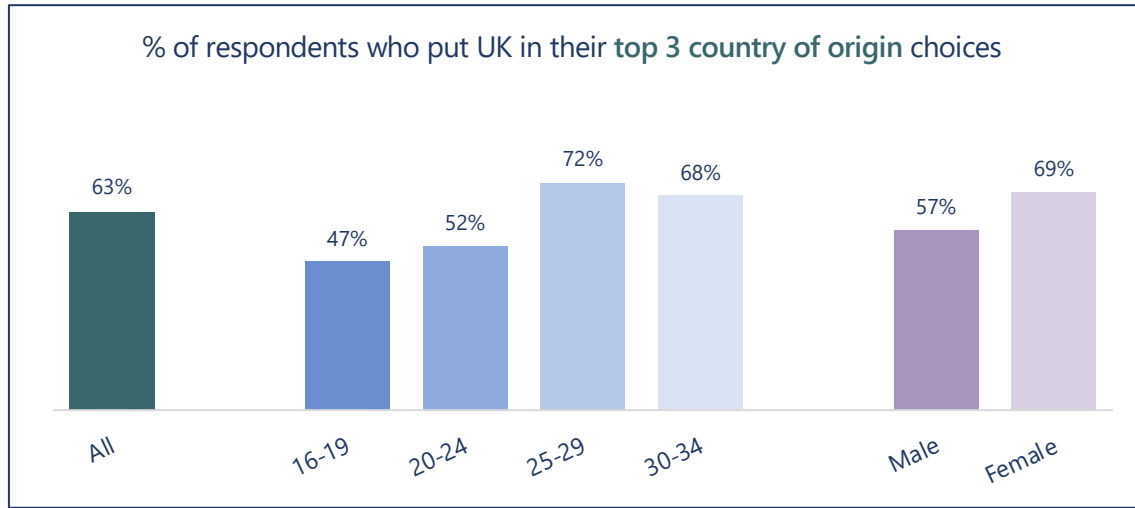
- 16-34s consume many genres as well as individual UK shows. In total, survey respondents remembered 309 unique series titles and 333 film titles.
- Genres where the UK is seen to do particularly well include: comedy/comedy drama, historical drama, action/adventure, fantasy/sci-fi and romance/romantic comedy.
- Regardless of genre and origin, young people seem to prefer comforting content. They want something to help them relax and to make them laugh. This is also a reason why re-watching favourite shows is quite common.

How

- Most prefer to watch in English with English subtitles, closely followed by watching in English without subtitles. A trend for watching in English is visible, but the picture is highly complex and diverse.
- Mirroring VoD preferences, Netflix is the most popular access point for UK fare.

Status of UK screen content

High overall, increases with age

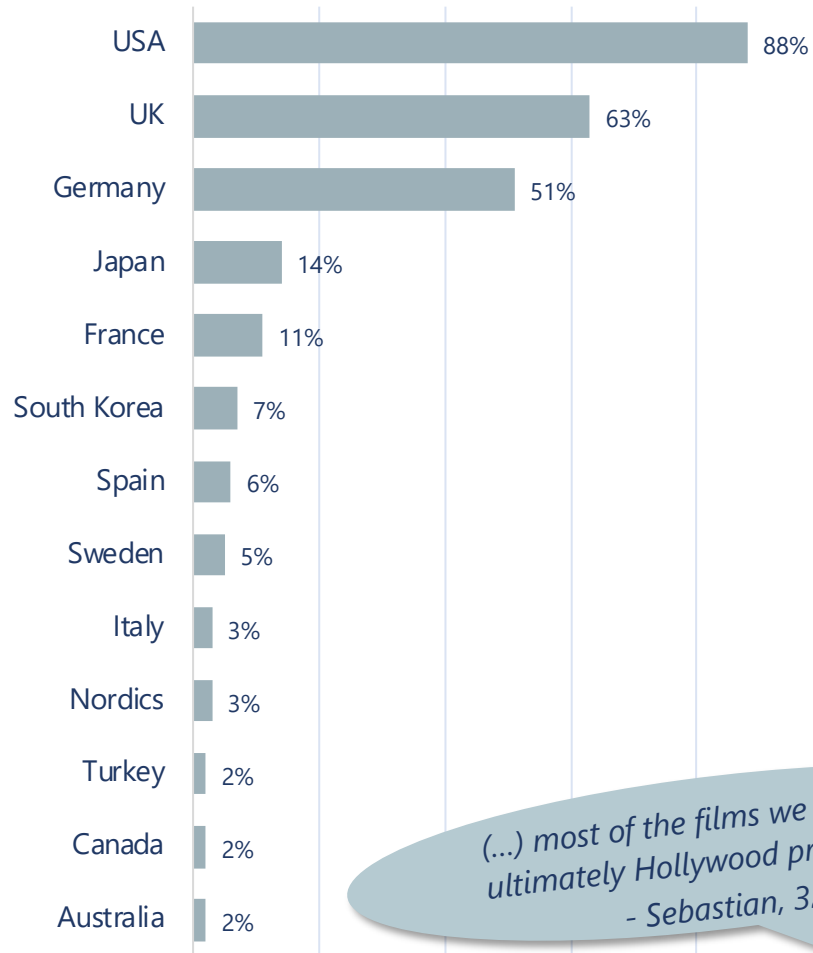


- Survey results suggest that British screen content has a high status amongst young people in Germany. Asked to write down their top 3 country of origin choices for longform screen content, 63% of respondents listed the UK (top graph).
- Recognition is notably higher in the older cohorts: 72% of 25-29 year-olds and 68% of 30-34 year-olds list the UK among their Top 3, and women name the UK more often (69%) than men (57%).
- Unsurprisingly, the UK is rarely the first choice (bottom graph). Still, 20% of all respondents named it as their No.1; 24% of women did so. A certain degree of self-selection amongst survey respondents, though, will have somewhat inflated these figures.
- Also, interviews revealed that many, and particularly 16-19 year-olds, have difficulties telling whether a show is British or not. Most of the youngest have limited experience with British shows, and many have difficulties distinguishing between English-language accents.
- Irrespective of age, audiences who watch everything dubbed into German tend to be unaware of origin and/or location. Dubbing enhances screen content's fictionality, eclipsing 'real world' cues. As a consequence, audiences in Germany are not 'trained' to pay attention to a story's location or characters' nationalities (also see slide 33). This is in contrast to our first case study market, Denmark.

Country of origin preferences

English-language content reigns supreme

% of respondents 16-34



(...) most of the films we watch are ultimately Hollywood productions.
- Sebastian, 32

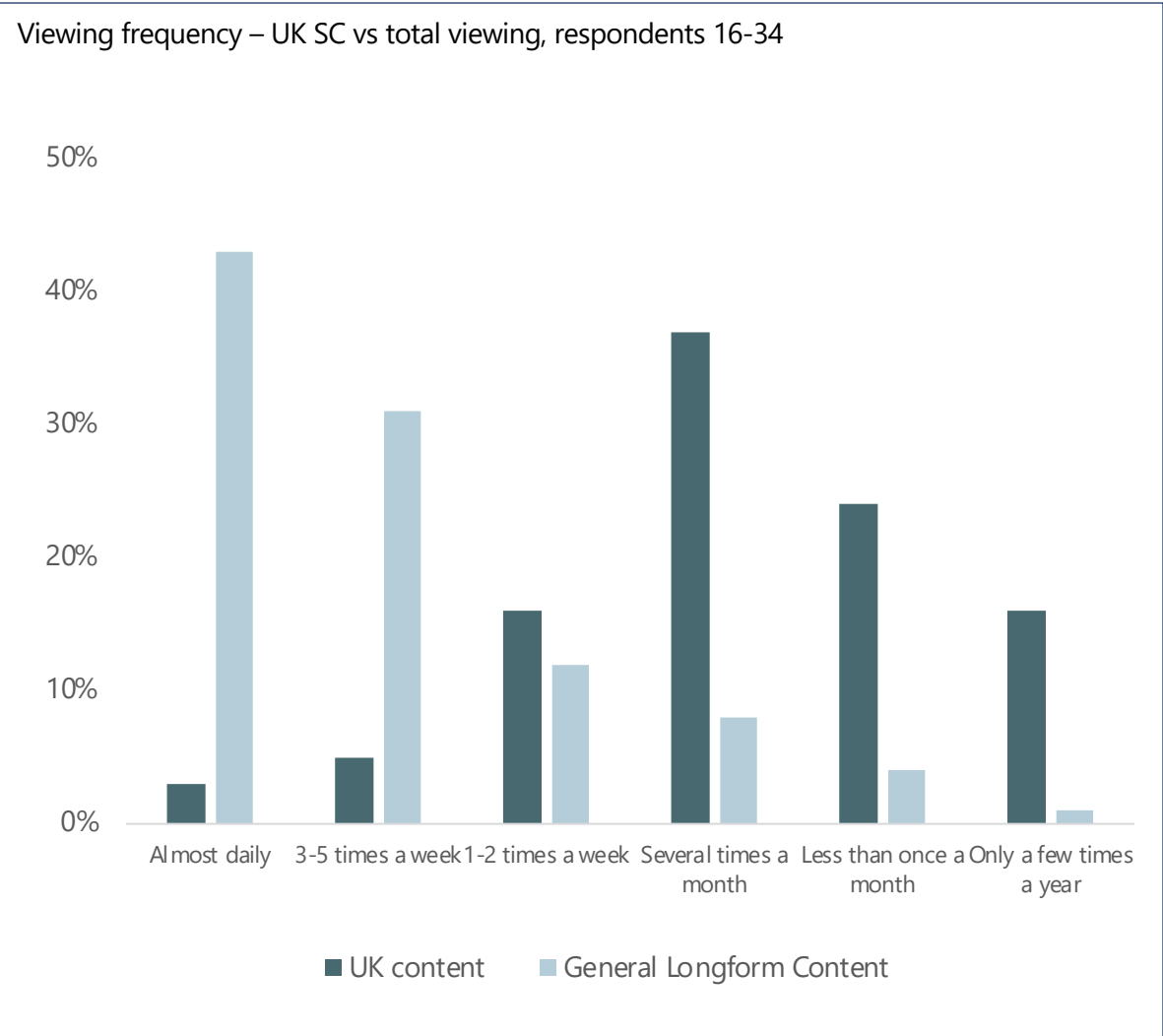
(My favourite country of origin is) the US (...) and then I'd say it almost doesn't matter to me where a film comes from. If I think it's exciting or interesting like *Elite* (...) But I would almost say that these series, that are maybe produced in Spain or South Africa, that they are somehow copies of US things.

- Livia, 32

- Among the top 3 choices, the US was named most often, by 88% of survey participants. Interviews confirmed the unique position of US content.
- The UK was named markedly more often (63%) than Germany (51%). All other countries had a much lower share of below 15%. Countries listed with a share of 1% or less were omitted.
- The survey and interviews both revealed strong appreciation of animated content, explaining Japan's high ranking. France and Spain rank comparatively highly because French and Spanish are the two foreign languages most commonly learned after English. Spanish production *Elite* is popular with young females.
- Canada and Australia rank comparatively strongly because of the English language and because many students in Germany, both in secondary and higher education, go there to study, for a year or a few months (see appendix A3).
- The quote by Livia (32) reveals that choosing non-German and non-US content is not always about language learning, interest in a particular country, or seeking something different. Very often it's simply because they have the look and feel of US productions.

Screen consumption frequency

UK screen content no match for US content

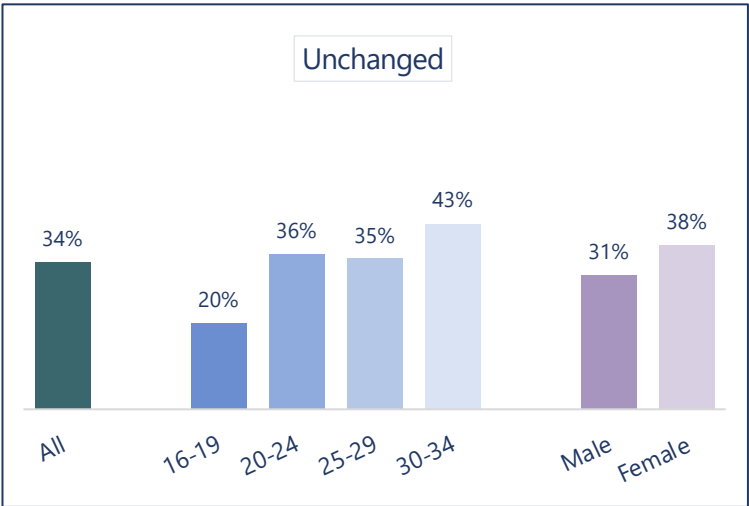
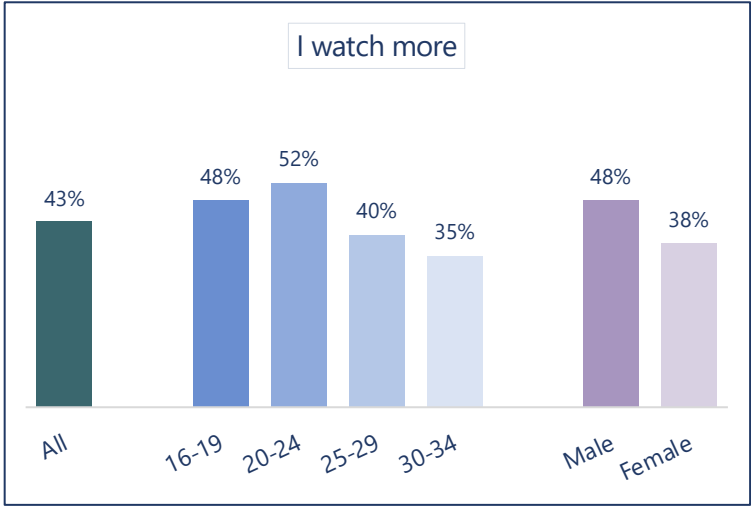


- Survey responses (left) show that UK screen content plays a sound but still moderate role in the consumption of 'longform content overall'. Most survey respondents claim to watch UK content several times a month (37%); a result similar to the BFI's finding for people aged 18-65 (slide 14). 24% of our young survey respondents watch it less than once a month, 16% only a few times a year.
- 26 Digital Diaries and 20 interviews confirmed the unique position of US content, with many interviewees highlighting its unrivalled quantity and production budgets.
- Out of 82 unique show titles entered into 26 Digital Diaries over 5 days, 39 were from the US, 17 from the UK, 16 from Germany, and 10 from other territories. Viewing of UK titles is likely to have been boosted a little by the research.

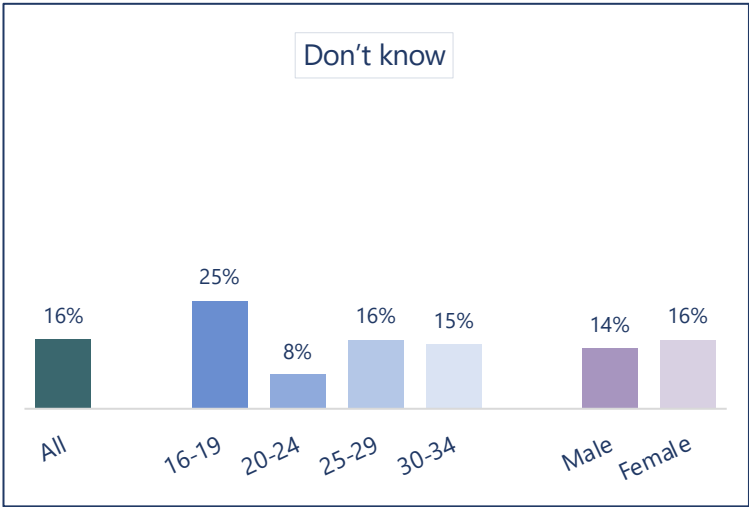
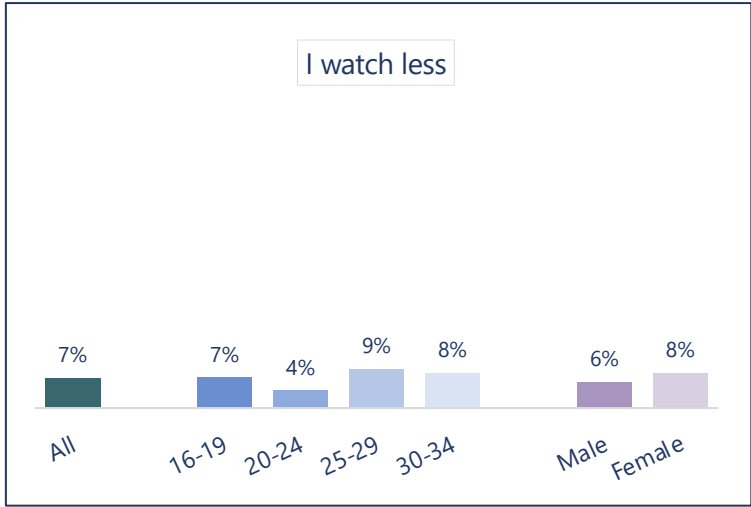
UK titles/co-pros watched by 26 digital diary participants over 5 days

Platform	No. of titles	Programme title (No. of episodes watched)
Netflix	11	<i>Derry Girls</i> (16), <i>Heartstopper</i> (10), <i>Cunk on Earth</i> (8), <i>Formula 1: Drive to Survive</i> (7), <i>The IT Crowd</i> (5), <i>Dirk Gently's Holistic Detective Agency</i> (3), <i>The Crown</i> (2), <i>MH370: The Plane That Disappeared</i> (2), <i>Red Rose</i> (1), <i>The Wonder</i> (1), <i>Luther: The Fallen Sun</i> (1)
Prime Video	3	<i>Dr Who</i> (2), <i>Lady Macbeth</i> (1), <i>Harry Potter Film</i> (1)
YouTube	2	<i>Would I lie to you?</i> (1), <i>8 Out of 10 Cats does Countdown</i> (1)
Britbox	1	<i>Unforgotten</i> (5)

Changes in the consumption frequency of UK content



- Asked about changes in their consumption of UK content in the last 5 years, 43% of 16-34 year olds believed they watch more than they used to, and 34% thought it has remained unchanged.
- In the two youngest cohorts, around half (48% and 52%) believed they watch more. Also of note is that 48% of men claimed to watch more.
- Very few, 7% overall, claim to watch less.

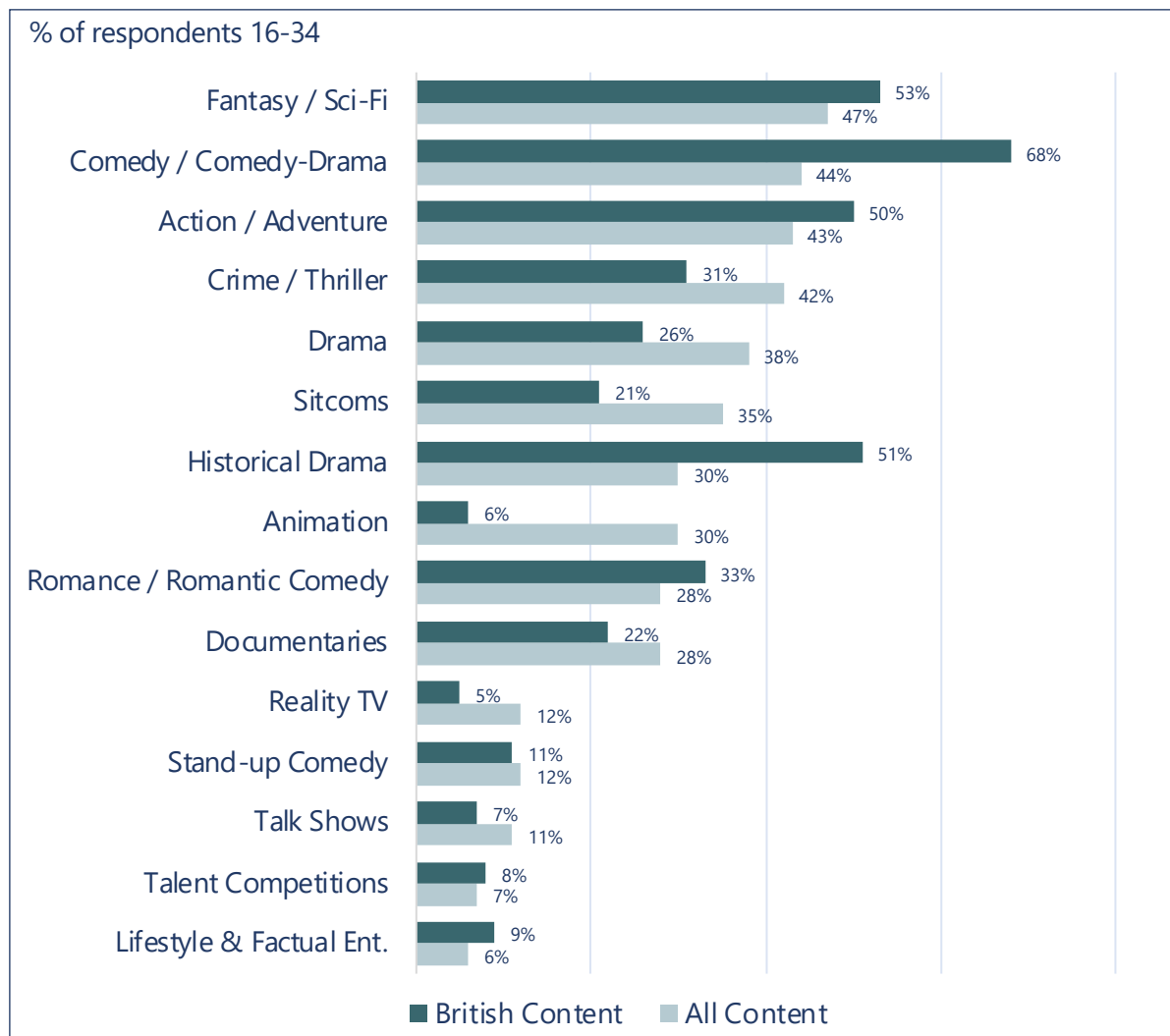


5 most popular explanations for watching more UK content

1	As I've gotten older, I have become more used to watching British content (58%)
2	There is more UK content to choose from (45%)
3	My streaming services recommend UK content to me (44%)
4	I watch more screen content in general (40%)
5	UK content has become better and more interesting (38%)

Genre preferences – UK content vs general genres preferences

UK screen content clearly excels in some genres



- Genres where the UK seems to perform particularly well include, comedy/comedy drama, historical drama, action/adventure, fantasy/Sci-Fi and romance/romantic comedy. In these categories British productions rate 5 or more percentage points better than respondents' overall genre preferences.
- The UK also slightly excels in lifestyle & factual entertainment and in talent competitions, which was confirmed in interviews. It should be noted that interviewees were carefully selected to cover people with high, medium and low interest in the UK and its content, and to cover the full range of UK content consumption frequency.
- UK screen content performs less well for drama, sitcoms and animation.
- British crime/thrillers also fare comparatively less well against general crime/thriller preferences. This is in contrast to other studies, which show that British crime fiction is recognised and appreciated more by older European audiences (Bengesser et al, 2022).
- UK documentaries, reality TV and talk shows appear less popular than productions from other countries. Interviews suggest that these are genres dominated by more popular domestic productions.

Comfort viewing

Young people prefer relaxing, humorous content

I don't really have that much free time – I have to do homework, for example. And then I might just put on a lighter show to just have in the background and not be that bored. And usually that's something I have already watched, so that's a re-watch.

- Max, 17

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

- Regardless of genre and origin, it appears that young people prefer comforting content. More than anything they want something to help them relax and to make them laugh.
- Several interviews revealed that it is not uncommon for students to re-watch their favourite shows upon returning from school or university 'to eat and calm down' or to provide a background for 'studying' and 'doing homework'.

I usually watch blockbuster films (...) And if I searched for a specific category, it would probably be Romcoms, because I used to watch them a lot with my sister. It's just something fun to watch, and you can laugh about it.

- Jay, 17

[I haven't watched Peaky Blinders] not because it's historical... but I just like happy movies and series... a little bit of drama.

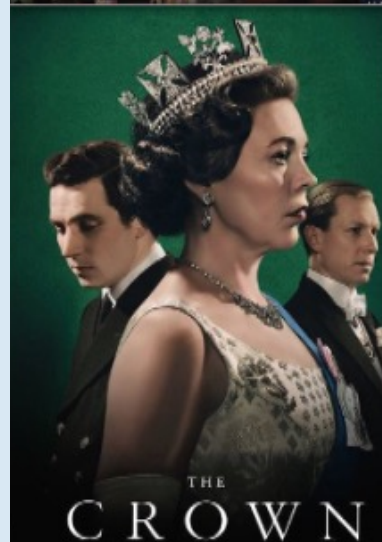
- Lina, 18

UK shows remembered – top 20 by number of mentions

MENTIONS TV SERIES/SHOWS



141	Sherlock
92	Sex Education
67	The Crown
63	Doctor Who
62	Fleabag
52	Peaky Blinders
49	Downton Abbey
49	Skins
47	Mr. Bean
36	Black Mirror
35	The End of the ****ing World
33	Broadchurch
32	Derry Girls
31	Heartstopper
30	Monty Python[’s Flying Circus]
26	Misfits
24	The Office (UK)
23	Bridgerton
22	After Life
21	Bodyguard



- Asked what UK titles they could remember, 377 survey respondents wrote down 1,747 TV titles and 1,151 film titles.
- Of the 1,747 series titles respondents identified as British, 309 were unique TV series titles, but less than half (151) were mentioned at least twice.
- The top 20 most named titles (left) were mentioned between 141 (*Sherlock*) and 21 times. 14 are available on Netflix; 4 on (Amazon) Prime Video, one on Disney+ and one on the BBC iPlayer via Prime Video.
- Only 7 titles could be attributed to ARD (1) or ZDF (6), although older titles may have aired on ARD or ZDF before.
- 38 titles were mentioned more than 10x – including *Bridgerton* (23), a US show with many British actors and a British setting.
- There were 21 possible misidentifications, including *Outlander*; again featuring British actors and settings. 17 of these were misidentified by one individual only, including *Friends*, *Jersey Shore*, and *Emily in Paris*.
- Overall the list suggests that shows that have been big on Netflix (*Sex Education*, *The Crown*, *Peaky Blinders*) or Prime Video (*Fleabag*) are the titles most seen and most easily remembered. Unlike in Denmark (5 titles), public service or commercial broadcasters, who used to form the mainstay of UK sales, did not feature in the top 20.

UK films remembered – top 20 by number of mentions

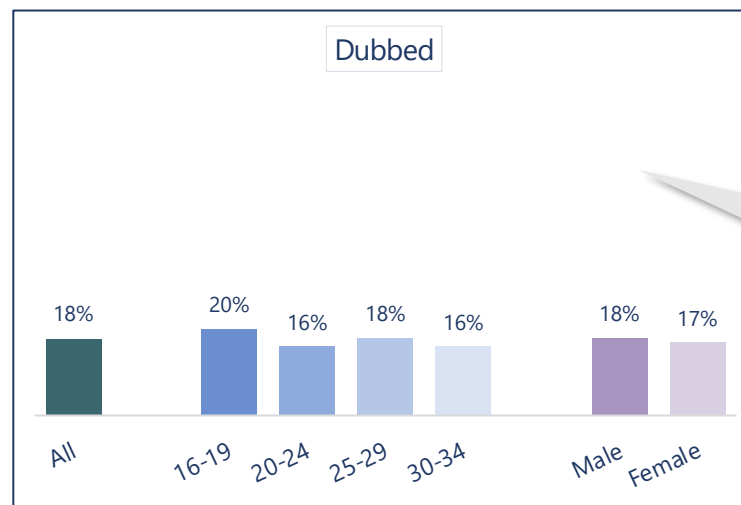
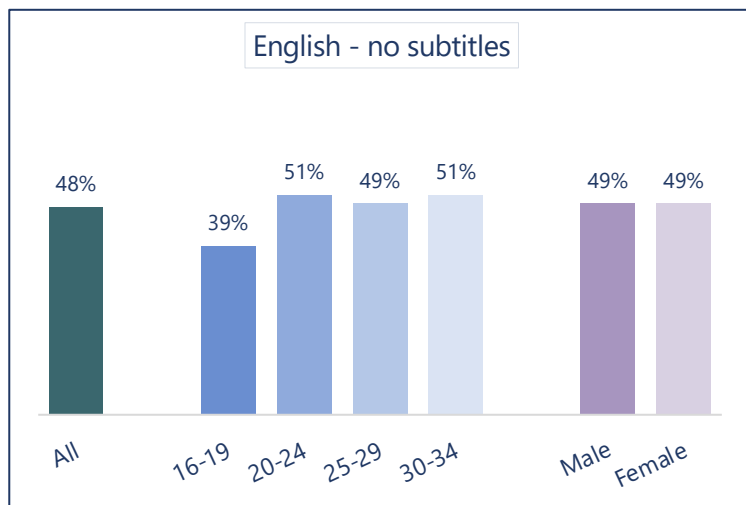
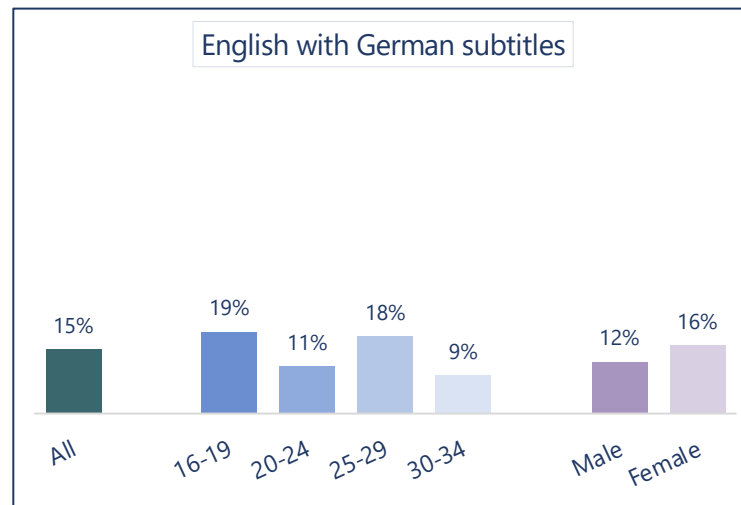
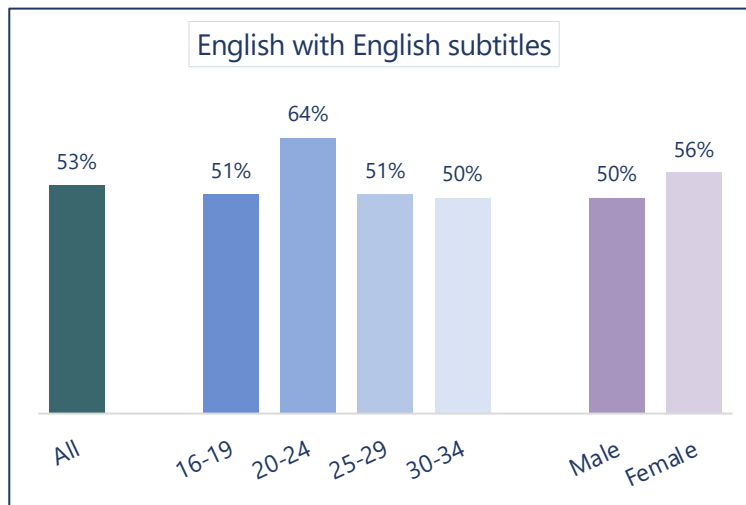
MENTIONS FILMS

112	Harry Potter
61	James Bond
39	Pride & Prejudice
36	Love Actually
30	Notting Hill
22	Kingsman [saga]
21	The Imitation Game
18	Enola Holmes
18	Fantastic Beasts
18	Paddington
18	The King
17	Sherlock Holmes
16	Life of Brian
14	Bridget Jones's Diary
14	Monty Python and the Holy Grail
14	The King's Speech
12	Dunkirk
12	Four Weddings and a Funeral
12	The Gentlemen
11	Atonement



- Of the 1,151 film titles listed by 377 survey respondents as British, 333 were unique show titles; only 135 were mentioned at least twice.
- The top 20 titles (left) were dominated by older franchises like *Harry Potter* (112) or *James Bond* (61) or older 'classics' like *Love Actually* (36) or *Notting Hill* (30). *Pride & Prejudice* is sometimes used as a school 'text', which might explain the high number of listings.
- It was not always clear whether mentions of *Sherlock Holmes* or *Monty Python* refer to the films or TV series (see also Slide 24)..
- Amazon dominates the film list: 12 of the top 20 were available, either in the basic Prime Video account (10) or as pay-per view/transactional VoD (TVoD) (2); only 5 films were available at the time on Netflix, one on Disney +, and one on Rakuten TV.
- Only 2 out of 333 titles, *Hamlet* and *Matangi Maya M.I.A.*, were attributable to public service outlets – in both cases to French-German PSB Arte, although older titles may have aired on ARD and ZDF before.
- Only 25 out of 333 franchises/titles were mentioned 10 or more times.
- Overall, the list suggests that, like in Denmark, it is older titles and franchises which are most seen and most easily remembered. The key difference with TV shows is that Amazon, rather than Netflix, emerges as the dominant distributor in feature films, including films available on TVoD.

Preferred language setting



- Most survey respondents expressed a preference for watching British screen content in English with English subtitles (53%), closely followed by watching in English without subtitles (48%).
- Significantly fewer respondents prefer to watch in English with German subtitles (15%) or dubbed (18%); although dubbing figures are likely to be impaired by social desirability.

The dubbed version is still bigger, but especially they [the PSBs] had lots of complaints and especially [from] younger people.
– German-based Sales Executive

From dubbing to English language viewing

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

Of course, in the beginning it's kind of hard. But if you start, then at some point you can't go back, I feel, because I just... I honestly cannot enjoy a movie when it's dubbed. It's... I don't know. I can't really explain it. But then I would rather not watch it at all.

– Emilia, 24

(...) 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

I told him [friend], 'Don't you notice that the lips don't move at the same rate as they're speaking in German?' Then he started catching onto that and the better his English got, the more he also watched movies in English on Netflix.

– Jay, 17

- The 20 interviews suggest a trend for watching more English language productions in English, with and without subtitles. All eighteen 16-29 year olds claim to watch either always in English or at least sometimes.
- Of two interviewees over 30, Sebastian (32) still watches mostly linear TV; a lot of it is domestic entertainment. But when streaming, he and his girlfriend watch English-language productions in English. Livia (32), although streaming only, is the sole interviewee who watches everything dubbed into German. She is one of the interviewees who does not have Abitur (A-Level/IB).
- Many noted how today there is much more content available to watch in English. Other key drivers are young people's increasing daily usage of English (on the internet and social media) and high levels of English language proficiency. Teachers tell students to watch screen content in English (slide 16) and many survey and interview participants reported watching in English to improve their language skills (slide 49).
- Most respondents noted that once they had started watching in English, they continued on that path.

Shifting results in a highly complex picture

(...) 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

It just depends if I'm more in the German mood or more in an English mood.

- Anke, 28

(...) movies or series from my childhood – I also watch them in German. And also German movies and series – I watch them in German and not in English. But if they're from America, or Spain, I watch them in English.

- Lina, 18

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... But sometimes I remember.

- Nele, 16

- Choice of language, where provided, still varies, depending on who young people watch with. Many interviewees reported watching English-language content in English (with or without subtitles) when watching alone or with friends or siblings whose English is equally good. They still watch dubbed shows, though, when watching with parents or grandparents (usually on linear TV) and also with friends who are less proficient in English.
- Popular movies and series encountered in German in the past, during childhood, are often re-watched as German dubbed versions-
- Also, non-English-language shows, like the Spanish *Elite* or Argentinian telenovela *Soy Luna* are often still watched dubbed into German (Julia, 19), but not by all (see Lina, 18).
- Some respondents, like Anke (28) and Nele (16), change the language setting depending on their 'mood' or because they suddenly 'remember' that they can watch in English.

Overall language choices remain highly diverse

I think in our class (...) not that many people are watching in English. I think there's just 6 or 7 out of 30. But in our age group, I think there are many more people who start watching in English.

- Nele, 16

Most of my family doesn't [watch in English]. But my sister and I, we both watch in the original language with subtitles. And I have quite a lot of friends who also watch English content in English.

- Lotte, 19

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

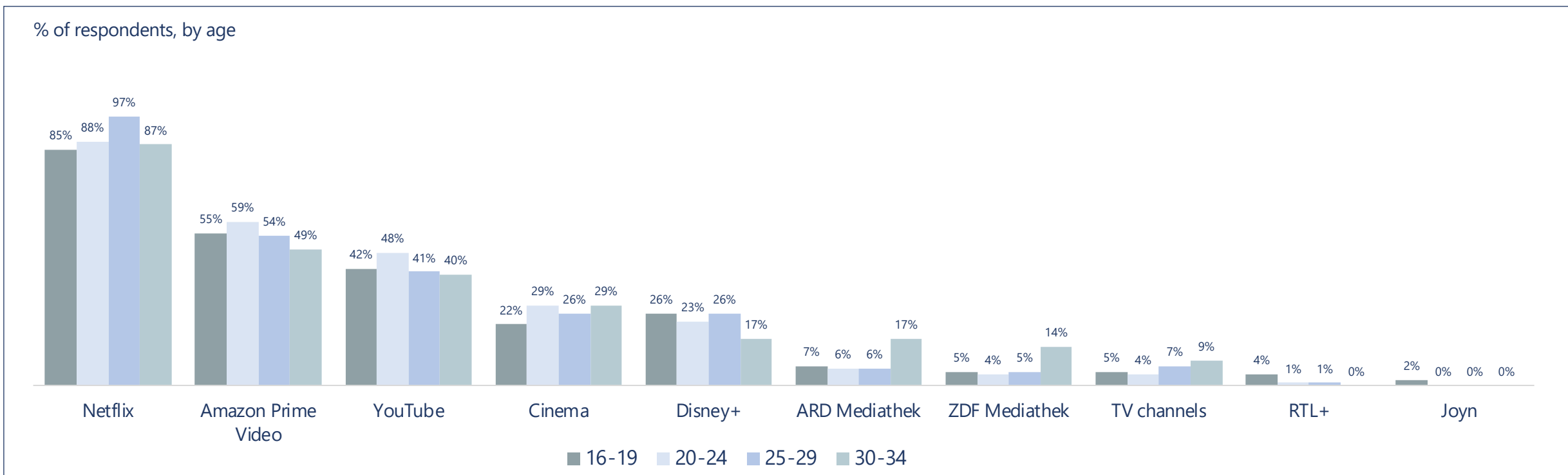
I don't speak English well enough to understand it. And rather than not understanding anything at all, I watch in German because I can.

- Livia, 32

- Everybody interviewed has friends or knows of people who still watch everything dubbed into German. The two key explanations given by our participants were: differences in English language proficiency, and interest in film & TV more generally.
- Also, most respondents reported that their parents don't watch in English: for their parents' generation it was 'completely utopian to watch in English' (Sebastian, 32).
- When asked to estimate how many of their friends, acquaintances and fellow students – aged 16-34 – watch English-language productions in English, answers ranged from 10% to 50%.

Most popular access points for British content

Netflix (still) dominates in all four age groups



- Asked to pick the 3 most relevant platforms for watching British content, Netflix proved the clear No.1 for all 4 age groups (85-97%).
- No.2 is Amazon Prime Video (49-59%), No.3 is YouTube (40-48%).
- Cinema keeps its 4th place for UK content.
- Neither TV channels nor their local streaming services play much of a role when it comes to UK content; something that is mirrored in general access preferences (slide 11) and in the Top 20 UK titles remembered by survey respondents (slides 24, 25).
- Only the oldest cohort (30-34s) looks for UK content on the public-service Mediatheken of ARD and ZDF.

4. Availability & discovery



Availability

- 1,183 unique UK show titles were available throughout 2022 on Netflix, Amazon Prime Video and ZDF – the two major SVoD services and the most important public service broadcaster for UK content.
- Netflix had the largest catalogue of UK productions with 751 season titles, followed by Amazon Prime (680 - more films than series) and ZDF (17).
- But young German audiences often do not recognise productions as British.

Sources of discovery

- Across age groups, recommendations from streaming services (73%) and friends & family (61%) are the most important sources of discovery. As in Denmark, recommendations from friends & family are notably more important for the two older cohorts (20-29s & 30-34s).
- Netflix is the VoD service where most UK content is found, watched and remembered. Survey respondents listed 117 UK titles that are currently on Netflix. 74 of those were TV shows - a quarter of all UK TV titles listed.
- But no labelling of UK content takes place on Netflix unless actively searched for. No research participant could see a category for 'British film & TV'.

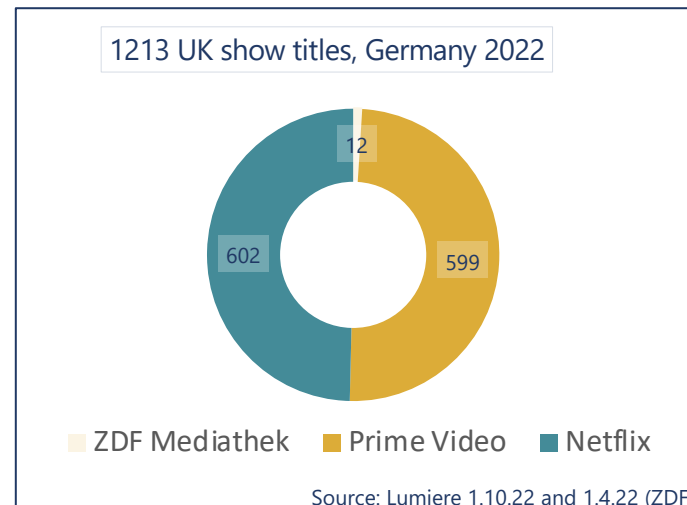
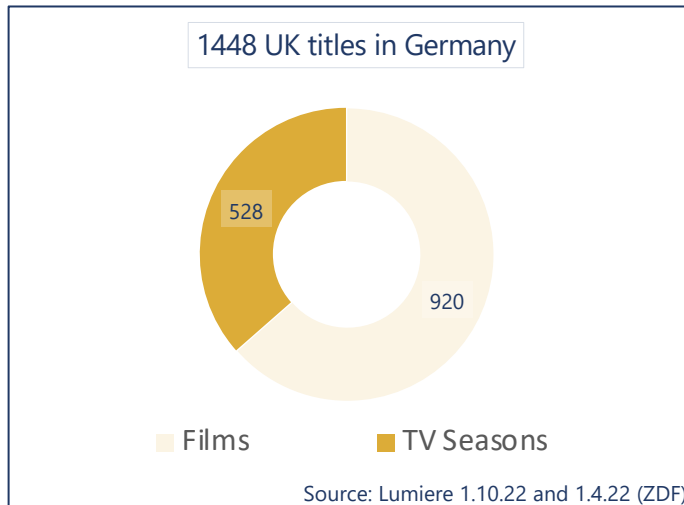
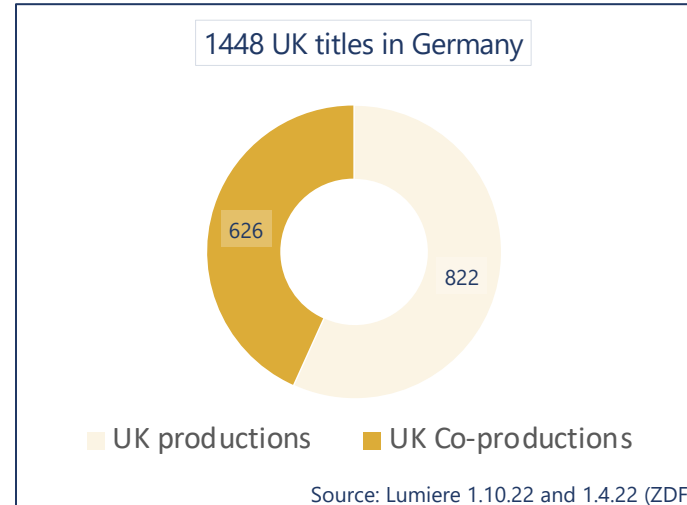
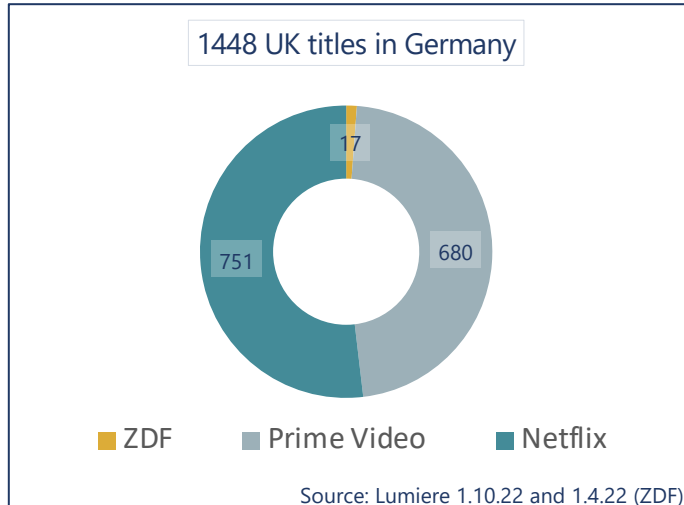
The role of social media

- Social media are an important source of discovery, especially for the under 30s, with TikTok and Instagram being the most influential.
- Promotions work best when humorous and user-generated or talent-led.

Active searches

- 21% actively search for British content. Searches positively correlate with age and education and are usually for a specific actor or show.

Availability of UK screen content on VoD Services



- Catalogue research based on the Lumiere database (European Audiovisual Observatory) revealed 1,448 titles on 3 VoD services. The number includes multiple seasons of TV series plus titles found on multiple services.
- Among SVoDs, Netflix had the largest catalogue of UK productions/co-pros (751), followed by Amazon Prime Video (680). Other key SVoD players include Disney+ (273), Joyn (140) and RTL+ (230) (Lumiere 01.10.22). We focused on Netflix and Amazon Prime as the most popular SVoDs in Germany, and the ZDF Mediathek, as a key public service offering that includes programming from ZDF Neo, a channel targeting 25-49 year olds.
- 822 titles were UK-only productions and 626 were co-productions with UK involvement, both as majority and minority partner.
- The graph on the bottom right shows the number (1,213) of **unique** UK show titles (excluding multiple seasons, but including presence on more than one platform), that research participants could have encountered throughout 2022 on Netflix, Amazon Prime DE and the ZDF Mediathek.
- Data in the final graph were used to approximate and compare title availability against titles promoted on the three services' landing pages, and against titles mentioned by participants (see slides 36, 37, 38).

Problem with 'origin unawareness'

He [Ricky Gervais] has a really dark humour, I guess, and he's very sarcastic. Is that the typical British humour I heard about? Because if you didn't tell me that he was British, I wouldn't know.

I wouldn't say that I can differentiate between 'This is an American production' and 'This is a British production' very well. (...) I thought the only movies or shows I know are Harry Potter or Mr. Bean and that's it. But during the survey I realised I've seen much more films and TV series without like noticing or thinking about [the fact that] it's British.

- Anke, 28

I knew that it [Luther] was British, yes, but if I hadn't known I don't know if I would recognise it as British. I don't know if I would have.

- Jamal, 22

I'm not aware of whether something is a British or German or a US production.

- Livia, 32

- Due to the many co-productions with the US and the generally high production value of British content, many UK productions are not recognised as such.
- Whilst 309 unique UK series titles and 333 film titles were remembered by the 377 survey respondents who provided titles - almost all correctly identified - the quotes reveal that for many young German audiences it is still difficult to identify what has been produced in Britain, has British actors or British locations.
- Statements like that by Jamal (22) showed that it is not only co-productions and 'transnational productions' that are hard to pinpoint. As previously argued, the dubbing tradition means that German audiences are not used to paying attention to origin, or even location. Everything becomes fiction.
- 'Origin unawareness' hence is nothing unique to English-language productions.

Some series I watch on Netflix are from Spain. Yesterday I searched where one of the series I'm watching is from, and it's from Spain. And I saw that very many other series or films are from Spain. And I didn't know this.

- Sofia, 16

No 'British labelling'

'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

I was surprised myself that I didn't see, like, a lot of British productions in the beginning of the rows, because I do watch a lot of British TV. But I also thought because some of the content is on Amazon Prime and not on Netflix, for example.

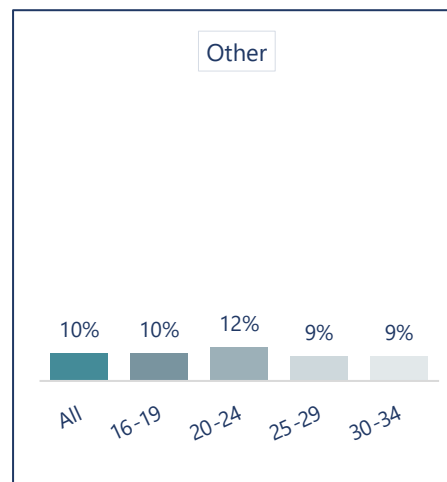
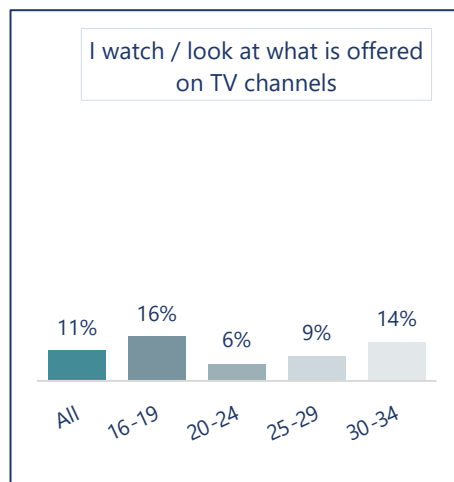
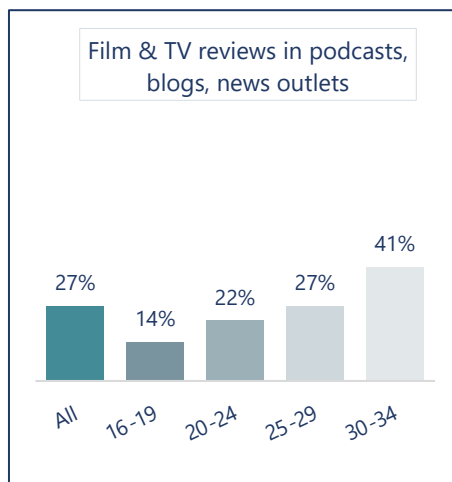
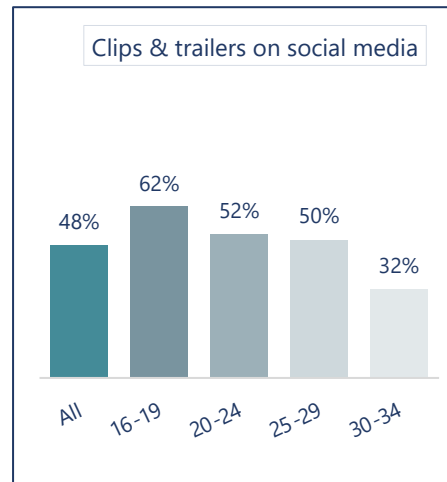
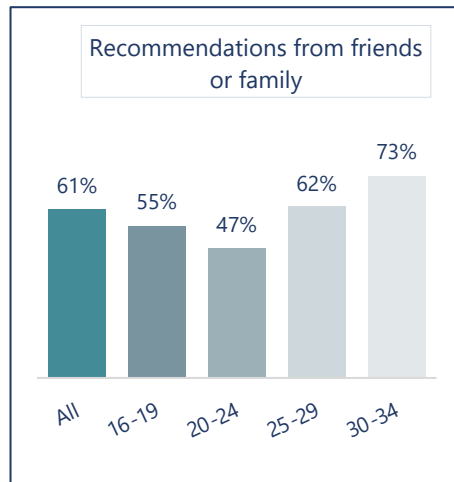
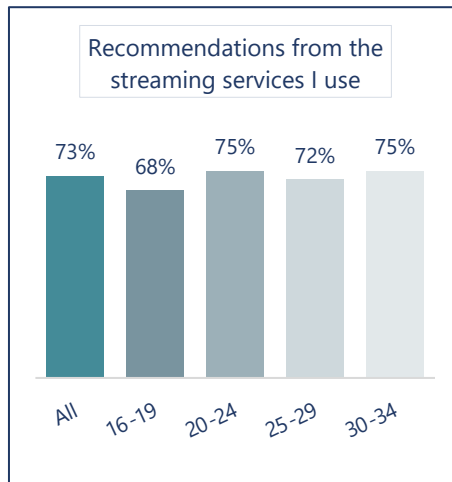
- Derja, 25

I see a row that says 'Spanish TV Series', 'Spanish TV Programmes', or 'German Comedy' or 'French Romantic Films'. But there's no specific row for 'British Films' or 'American Films' or series. It's only 'English'.

- Sofia, 16

- In addition to the generally origin-untrained eye many, particularly the youngest (16-19s), find it difficult to distinguish between different English-language accents.
- They have grown up with English as the lingua franca of the Internet and social media, where countless accents blur.
- But streamers tend not to differentiate between US and UK productions. This is not because many productions are co-productions between the two, but because English language productions are one category - the main category. Everything else is measured against this.
- A dedicated digital diary task and interviews revealed that none of the 26 respondents could see a Netflix category for 'British film & TV series', unlike for 'German' or 'European' productions, which is standard in Germany; or, for instance, for 'Italian films', a category that was offered to one of the researchers after having watched only 2 Italian language productions. In order for 'British film & TV series' to emerge as a category it had to be searched repeatedly and many more UK productions had to be watched consecutively.
- British productions thus are not promoted as such but are subsumed under all other English-language productions, where most of them disappear amongst and blur with the far greater number of US productions.

Sources of discovery



- Respondents were asked to pick a max. of 3 from 8 randomised options on how they discover British content, including fan websites and influencers (subsumed under 'other').
- Recommendations from streaming platforms (73%), followed by friends & family (61%), are the most important sources of discovery.
- But there are interesting age differences: Friends & family and Film & TV reviews are notably more important for the older cohorts. Clips & trailers (62%) on social media are markedly more important for the youngest audiences aged 16-19.
- Actors and other celebrities they know and love were also named by several respondents under 'other'.
- The following slides look at some of these influences in detail.

Recommendations from Netflix

17 UK titles/co-pros found in 'Popular on Netflix'			
1	Downton Abbey	10	The Crown
2	Fate: The Winx Saga	11	The Last Kingdom
3	Fireman Sam	12	Top Boy
4	Formula 1: Drive to Survive	13	Free Rein
5	Luther (series)	14	Lockwood & Co.
6	Peaky Blinders	15	Luther: The Fallen Sun (film)
7	Peppa Pig	16	MH370: The Plane that Disappeared
8	Sex Education	17	Red Rose
9	Skins		

10 UK titles/co-pros found on Netflix and mentioned by at least two interviewees		
UK title mentioned	No. people	Found in
Cunk on Earth	4	'British programmes' & 'Popular in British programmes'
Sex Education	4	'LP', 'Popular on Netflix', 'British programmes'
The Crown	3	'LP', 'Popular on Netflix', 'British programmes'
After Life	3	'LP' & 'British programmes'
Luther (film and TV series)	3	'LP', 'Top 10 Films today' (film), 'Top 10 TV today' (TV), 'Top 10 Films week' (film), 'Popular on Netflix', 'British Programmes' (TV)
Peaky Blinders	2	'LP', 'Popular on Netflix', 'British programmes'
Heartstopper	2	'LP' & 'British programmes'
Downton Abbey	2	'LP', 'Popular on Netflix', 'British programmes'
Dunkirk [2017]	2	'British Films' & 'Popular in British Films'
All Quiet on the Western Front	2	'LP', 'Top 10 Films in Germany Today', 'Netflix top 10 films in Germany (all week)'

- For one week (11-17.03.23), before the interviews, the interfaces of Netflix, Amazon Prime and the ZDF Mediathek were searched for UK screen content using 'pure', newly set up accounts. A vertical Landing Page (LP) screenshot was taken daily, plus horizontal screen shots of selected categories (below).
- 42 UK titles/co-pros were found on Netflix's landing page (LP); 17 were found in 'Popular on Netflix'. In total 209 UK titles were found in the key categories 'Top 10 TV programmes today', 'Top 10 films today' and 'Popular on Netflix'; and in the search categories 'British film', 'Popular in British film', 'British Programmes' and 'Popular in British programmes'. In addition, the 'Top 10 Films' and 'Top 10 TV' (all week) for Germany were checked on Netflix.com to ensure no UK titles promoted and popular at the time were missed.
- Survey respondents listed 117 UK titles that are currently on Netflix; 74 of those were TV shows (out of a total of 309 UK TV titles listed; see slide 24). 67 were found on the Netflix landing page and/or in the search categories mentioned above. 22 titles listed by survey respondents were promoted by Netflix, on its vertical landing page.
- 20 interviewees mentioned 25 UK titles available on Netflix, out of 79 title mentions. 18 appeared on Netflix landing pages and search categories above.
- 15 of these 25 titles were mentioned by 2 or more people. *Sex Education* and *Cunk on Earth* were the most mentioned (4 people each). 10 of these 15 were found during the interface research (bottom table).
- Luther* (film) and *All Quiet on the Western Front* were heavily promoted on Netflix SoMe accounts (FB, Instagram, TikTok, Twitter) in the period 18.2.-20.3.23.

Recommendations from the ZDF Mediathek

12 UK Titles/co-pros found on ZDF Mediathek Landing Pages

UK titles	Found in
Ófærð / Trapped	'LP', 'Top series for streaming', 'Thriller series'
The Mallorca Files	'Comedy series'
Inspector Barnaby / Midsomer Murders	'Further series'
Death in Paradise	'Comedy series', 'Further series'
Father Brown	'Further series'
Tell Me Everything	'LP', 'Top series for streaming', 'Drama series'
McDonald & Dodds	'LP', 'Top series for streaming', 'Comedy series'
The Chelsea Detective	'Further series'
The Iron Lady	'Our film highlights'
The Tourist	'LP', 'Top series for streaming', 'Thriller series'
The Windermere Children	'Our film highlights'
Vienna Blood	'LP', 'Thriller series'

- Overall, there are limited numbers of domestic and UK shows on public service broadcaster ZDF's on demand service, ZDF Mediathek, but UK shows are displayed prominently. 12 UK titles, including co-productions, featured between 11-17.03.23, including Anglo-German co-produced police drama, *The Mallorca Files*.
- 5 UK titles were found on the landing page (LP vertical shots) and a further 7 were found in the categories 'Top Series for Streaming', 'Film Highlights', 'Drama Series', 'Thriller series', 'Comedy series' and 'Further series'.
- *Ófærð (Trapped)* a co-pro of public service broadcasters from Denmark (DR), Iceland (RVK Studios) and the BBC, was promoted prominently that week on the LP and on social media (Instagram, Twitter, FB), as was the *The Iron Lady* (FB, Instagram).
- Other dramas on the LP that week included comedy series *McDonald and Dodds*, Australian-set thriller *The Tourist*, British-Austrian psychological thriller *Vienna Blood*, and ITV teen drama *Tell me Everything*.
- Of 642 UK TV shows and films mentioned in the survey, only 6 were airing on ZDF (*Death in Paradise*, *Endeavour*, *Line of Duty*, *Around the World in 80 Days*, *Silent Witness*, *The Chelsea Detective*). Only 2, *Death in Paradise* (mentioned by 8) and *The Chelsea Detective* (1 mention) featured on the ZDF Mediathek that week (see table). Older series may have been shown by ZDF in the past.
- Only 1 UK show on ZDF, *Midsomer Murders* (also on Amazon Prime), was mentioned during interviews. Only 2 out of 82 titles recorded during the 5 days of Digital Diaries were attributable to ZDF, and both were German productions.

Recommendations from Amazon Prime Video DE

Most heavily promoted UK titles/co-pros on Prime Video LP (at least 4x that week)			
1	Catastrophe	11	Sherlock
2	Cinderella (2021)	12	Spencer
3	Clarkson's Farm	13	The Grand Tour
4	Doc Martin	14	Great White
5	Everybody's Talking About Jamie	15	Penny Dreadful
6	Fireman Sam	16	Pink Panther
7	Fleabag	17	Ronaldo vs. Messi
8	Last Man Down	18	The Collection
9	My Policeman	19	The Hitman's Bodyguard
10	Peppa Pig	20	The Night Manager

7 UK titles found on Prime Video and mentioned by at least two interviewees		
UK title mentioned	No./people	Found in
Harry Potter	11	'LP Free for Me'
Mr. Bean	8	'British series'
Sherlock	6	'LP Free for Me'
Barnaby (Midsomer Murders)	4	'British series'
Downton Abbey (films)	2	'LP Free for Me' & 'British film'
Top Gear	2	'LP Free for Me'
Pride & Prejudice	2	'British film'

- For Amazon Prime Video, an estimated 108 UK titles/co-pros were found on the vertical 'free for me' landing page (LP). An estimated 168 UK titles/co-pros were found on the LP, in the categories 'Amazon Originals & Exclusives' (20), 'Film Recommendations' (11), 'Series Recommendations' (3), 'Top 10 in Germany' (1), plus in searches for 'British Series' (36) and 'British Films' (42).
- Survey respondents listed 99 UK titles, estimated to be currently available on Prime Video. This includes 37 TV shows (out of a total 309 UK TV shows listed by survey respondents; see slide 24). 55 of the 99 film & TV titles appeared on the Prime Video LP and in the above categories and searches. 33 were displayed on the Landing Page, and visible in the vertical screenshots.
- 20 interviewees mentioned 24 UK titles currently available on Prime Video (out of a total of 79 UK titles mentioned). 17 of these titles appeared on the Prime Video LP, and in the above categories and searches. 10 were visible in the vertical LP 'free for me' screenshots.
- 10 of these 24 titles were mentioned by 2 or more interviewees. *Harry Potter* (11), *Mr Bean* (8) and *Sherlock* (6) were the most mentioned. 7 of these 10 titles were found during the interface research (bottom table).
- Interface monitoring provides a snapshot of what is being promoted at a particular point in time. It was used to check against the UK titles mentioned by respondents in the survey and in interviews.
- Digital diaries and interviews reveal that respondents pursue their own personal tastes. Very few participants were watching or talking about the same shows.

Watching with parents

Inspector Barnaby, my parents watched it one evening when I was younger – I think 12 or 10 or something. And I was just sitting next to them and asking them what this is, because I thought it would be interesting. And then I started to watch it, and then I continued, and we all really liked the series. And then we started to watch this every month.

- Sofia, 16



(...) sometimes, when I'm with my grandparents, we watch Barnaby.

- Evelina, 17

Paddington, my father gave me the movie as a DVD as a present, when I was younger. So I know these from my parents - the British series and movies.

- Mila, 16



- Whilst those aged 25+ are more likely to state that recommendations from friends & family are what influences them the most, after recommendations from their streaming services, parents are still very influential for the youngest (16-18) when it comes to encounters with British productions.
- Many of our interviewees revealed that their first encounters with UK content happened on linear channels, as children watching with parents and grandparents. Titles mentioned include *Midsomer Murders*, *Miss Marple*, *Endeavour*, *Lewis*, *Love Actually*, as well as *Jamie Oliver's cooking shows*. Watching these is connected with family-viewing and feelings of nostalgia.

[Love Actually] probably once a year. Around Christmas, of course. And I remember that this is also some movie I know from my childhood because I think it was one of the favourite movies of my mother. And so, when I still lived at my parents' place, we watched it a lot on Christmas. So it's, I would say, one of my favourite British movies, but basically because I connect this with, again, family and being together, and then Christmas.

- Anke 28



Discovery driver social media

(...) 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. (...) If there's a potential for a series to be made a meme of, then it's a good series, kind of, because people are watching this series, people are loving this series and people are relating to the series in a way that they want to express themselves through memes. I think it's a very, very important point for me personally because I think at least 60% of series I've only watched because I saw a meme of it.

- Didier, 29

I watched some YouTubers at home. I guess he was called Kostas Kind, something like that. It's a German YouTuber as well. And he lived in the UK with his boyfriend for quite some time, so they all talked a lot about the UK. And they were also doing YouTube when they were over there, so they presented their everyday life of living in the UK.

- Fernand, 17

- Social media are clearly an important driver of discovery for 16-29 year-olds, and particularly those aged 16-19 (62%). Only the 30-34 year-olds seem less engaged with social media (32%).
- The 'clout' of other SoMe users are what sells screen content to people aged 16-29.
- TikTok is the most influential promotion tool for screen content. As Derja (25) and other participants noted, its algorithms are particularly advanced and its recommendations therefore are more trusted (see next slide).

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'. And (...) I loved it! Derry Girls as well! I haven't watched it, but I will watch it because I keep seeing clips on TikTok of the nun. There's a particular nun in the TV show. And she's so funny.

- Derja, 25

TikTok

The power of other users

I hadn't heard of Derry Girls before I was in an Irish pub - there was a quiz night and they asked about this particular TV show. And I hadn't heard of it yet. And that was just, like, a couple of months ago. And then I started looking it up and I wasn't interested. But then when I saw the clips on TikTok, just a couple of weeks ago, I was really interested (...) it's mostly fan-made stuff I see and not the trailer. And because the trailer is usually, I think, 2 minutes, right? And the fan-made stuff is like 15 seconds or something. But I see the fan-made stuff and if it interests me, then I will watch the trailer.

- Derja, 25



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

- Lina, 18



[W]hen I'm on TikTok and there's a clip of a movie, I look on Netflix to see if I can watch it.

- Evelina, 17

- TikTok was mentioned consistently by participants aged 16-29 (also see Appendix B1), and there was strong agreement that it heavily influences what they watch.
- It's the hype on TikTok, and the many short clips produced by other users, that convinces them that they should watch a show. As Derja (25) notes, hearing about *Derry Girls* and looking it up didn't get her interested, but after seeing clips on TikTok she got 'really interested'.

I get a lot of videos and movies and edits [on TikTok] from someone who tells you what movie you should watch. (...) In English. I would say it's all in English. (...) They're popping up on your 'For You' page, and you're just watching them. (...) They're made by other people who maybe liked the series or the movie and create a video about it, or who post their favourite scene of the movie.

- Julia, 17

The significance of humour

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

- Lotte, 19

[W]hen I see like a clip, for instance on TikTok or Instagram, of a movie — like, some funny scene out of it — I usually want to go back and watch the movie and understand the whole movie, because I think, 'That's a really cool clip. What's this whole thing about?' And then it usually makes it a lot more special for me because I've been basically, like, teased on one level, and then I want to watch it again. Or what also happens in the same context of rewatching movies — like, I'll see an old clip of a movie I've already watched. And yeah, I'm just enticed to watch it again because it was just a really fun experience.

- Jay, 17

(...) if it's funny, I may click on it later again.

- Lenny 16

- Promotion clearly works best when it's humorous, though. Numerous explicit and implicit comments made by eighteen 16-29 year olds during interviews revealed the importance of humour in getting young people interested in a show.

If I see an interesting clip on TikTok about a new TV show or maybe an old TV show... because they also show a lot of old TV shows where I'm like, 'I didn't even notice that this existed or it was this funny!' And so a certain clip or a certain scene will be on TikTok. And then I will be interested in that and watch it, or look where I can find it.



(...) with I May Destroy You, I saw a clip on TikTok and from the clip I watched, I was interested in the TV show! So just because of that clip! And the trailer, I don't know... it didn't capture what it was about! So nowadays, the people making the trailers don't know any more what actually captures young people's attention. Or I don't know — maybe they really thought that was like a good way to make a trailer. So it's not about the TV show because, as I said, I saw a clip on Twitter and I was like, 'I gotta watch that. That was hilarious'. And it was I May Destroy You.

- Derja, 25

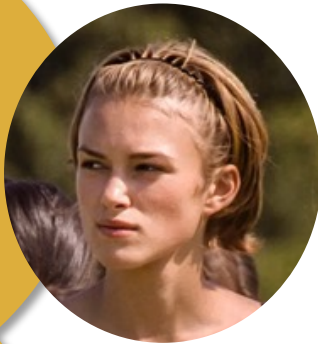
Actors as drivers

(...) when I start a new film and I like the actors, I look for them on Instagram and follow them.

- Nele, 16

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



- Interviews also revealed the importance of actors and celebrities as key discovery and promotion drivers.
- This finding is also supported by the BFI/Yonder study (2021a: 58), which concluded that, in addition to renowned UK films and television programmes, the 'actors most widely known are also most likely to drive positivity towards British produced film/TV'.

(...) before it [Heartstopper] came out I think I already followed 2 of the actors in it [on Instagram], and I already liked those actors. And yeah, I think they did a good job. The other actors also did a good job, which I also can see because they convinced me so much that I am now also following the other actors too.

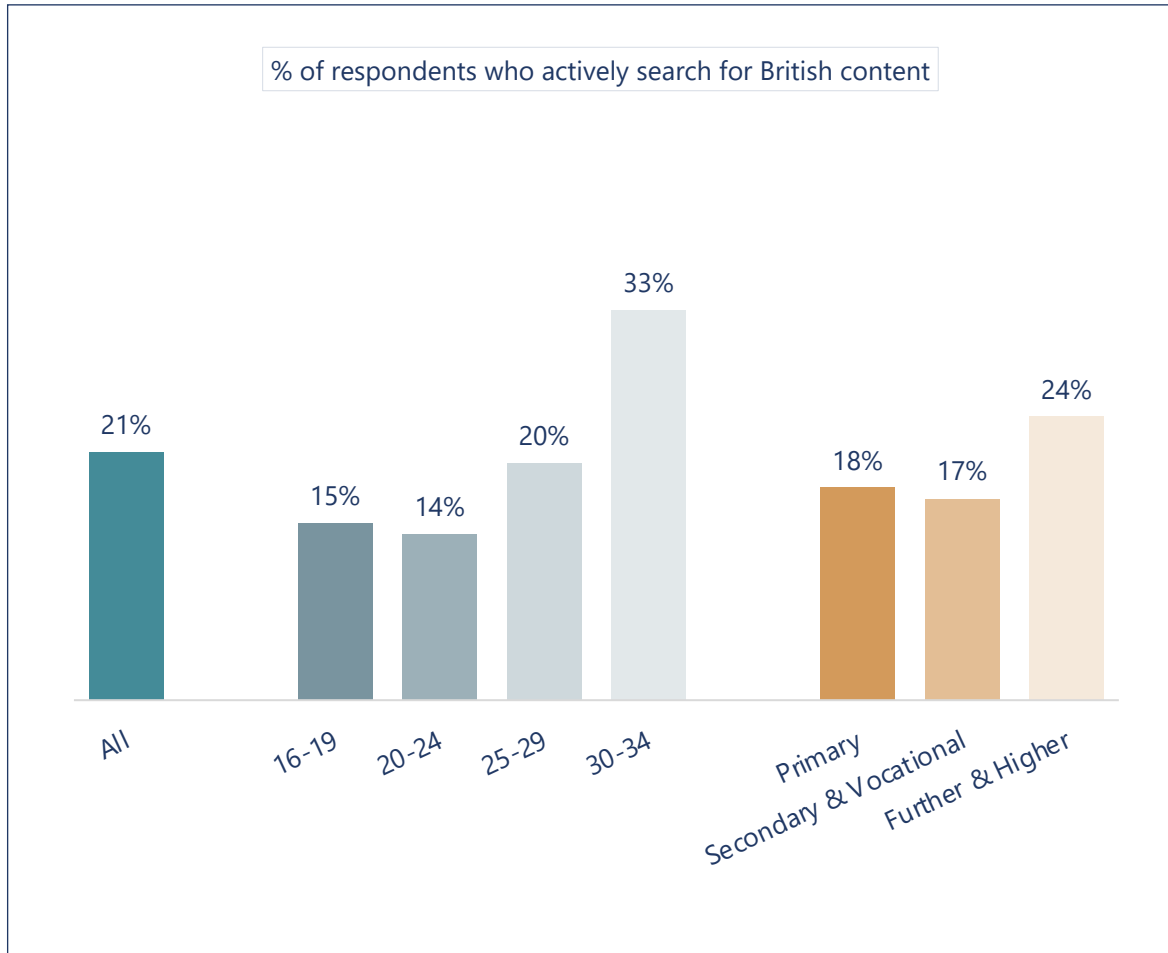
- Max, 17

I saw a clip from the show and one of the actors from Abbott Elementary used to be an actor in a show I watched back-to-back in the day, which was called Everybody Hates Chris. And I saw him and then I was interested.

Jamal, 22



Active searches for UK screen content



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

- 21% of survey respondents recorded that they 'actively search' for British content.
- As the graph shows, active searches positively correlate with age and education. Only 14-15% of 16-24s search for British content but 33% of 30-34s do. 24% of those with a university qualification actively search for UK content, compared to 17-18% of those with a primary and secondary school qualification.
- Active searches are usually for specific shows they have heard of or have seen clips of, or for actors they like and admire.

(This is) probably for me the most usual way to find movies I want to watch (...). I like an actor and an actress in a movie and then I find out who it was and then I Google their name and I just skim through what movies they got awards for or what their first movie was.

- Emilia, 24

5. Motivations



Reasons for choosing British content

- The most important reasons for choosing British content are dislike of German content, the ease of watching in English, learning English and British humour.

Dislike of German content

- Interviewees felt that German content lacked quality and relevance, describing German film and television as 'quite bad', 'boring' and 'cringy'.

English – the language of advantage

- Coupled with the wealth of English-language screen content available on global streaming services and perceptions of UK content as high quality (slide 57), the ease of watching screen content in English is the most popular reason for choosing UK content. Also, many young Germans watch UK (and US) content in English to improve their language skills.

British Humour

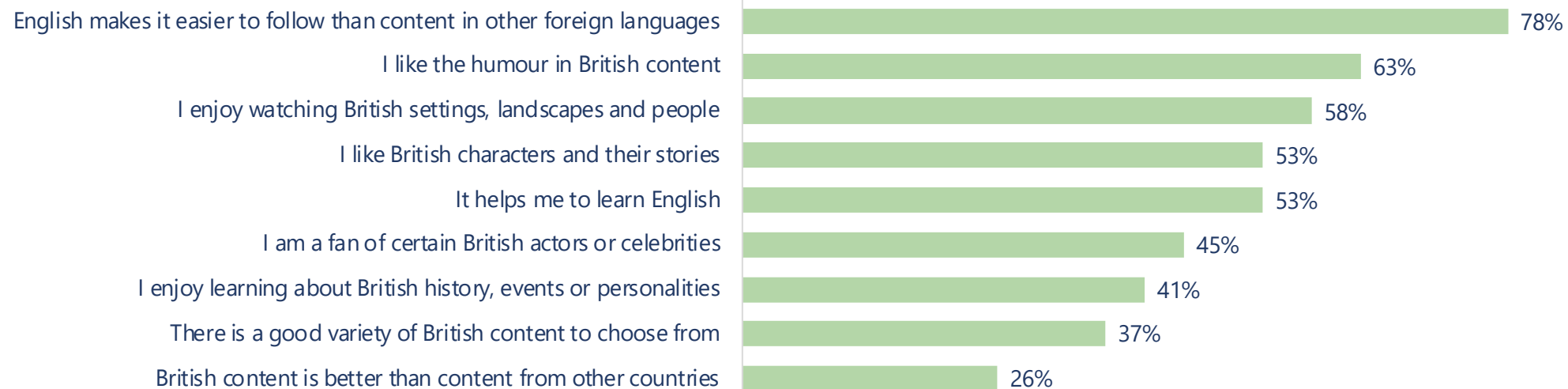
- As in Denmark, British humour is perceived as special - sarcastic, dark and intelligent - and is compared favourably to that of other countries. Interviewees appreciated how a lot of British content often has a humorous touch, no matter how dark or sad the story.

British settings & people

- Between 45% and 58% of survey respondents watch UK content because they 'like the setting, landscapes and people' (58%), 'British characters and their stories' (53%) or because they are 'fans of British actors or celebrities' (45%).

Reasons for choosing British content

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



- Asked to indicate their agreement with possible reasons for choosing UK content on a slider scale, the statement that received the most support was accessibility because of language - 78% of respondents strongly agreed (80-100%) or agreed (60-80%) with this statement.
- Humour, the top reason in Denmark, was the second top reason (63%) in Germany.

- Enjoyment of British settings, landscapes and people came third (58%), ranking higher than Denmark where it ranked second from bottom.
- 'I like British characters and their stories' and 'It helps me to learn English' (53%) came joint fourth. In Denmark, only 26% agreed that learning English was a factor in choosing British productions.

Dislike of German screen content

The overlooked reason

[T]he German ones seem a little bit... I don't want to say redundant, but it's just not as interesting, I guess.
- Derja, 25

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

I watch a lot of productions from the USA or Great Britain, so things that are in English. In fact, 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

- An important factor, which was not covered in the survey and only emerged during interviews, was that many interviewees felt that German content lacks quality and relevance.
- The 20 interviewees almost unanimously agreed that German film and television are 'quite bad', 'boring', 'cringy' - a word also used by the youngest Danish interviewees for Danish productions. 16-29 year olds confidently claimed that no one in their age group watches German shows.
- Two interviewees in their 30s were less damning, but Livia (32), who mostly watches fiction on Netflix, said she watches 'rather less German content'. Sebastian (32) still watches many German entertainment shows on linear TV to switch off. When he has more time and energy he streams content, usually 'Hollywood' fiction.
- The few German exceptions mentioned are all either popular long-running shows, like *Germany's Next Top Model* and the detective series *Tatort*, or German comedy on Netflix, including *Türkisch für Anfänger*, *Isi and Ossi*, and *Fuck You Göthe*.

We [my family] don't watch any German movies or series at all, because my parents and I, we just don't like the stories.

- Mila, 16

English – the language of advantage

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

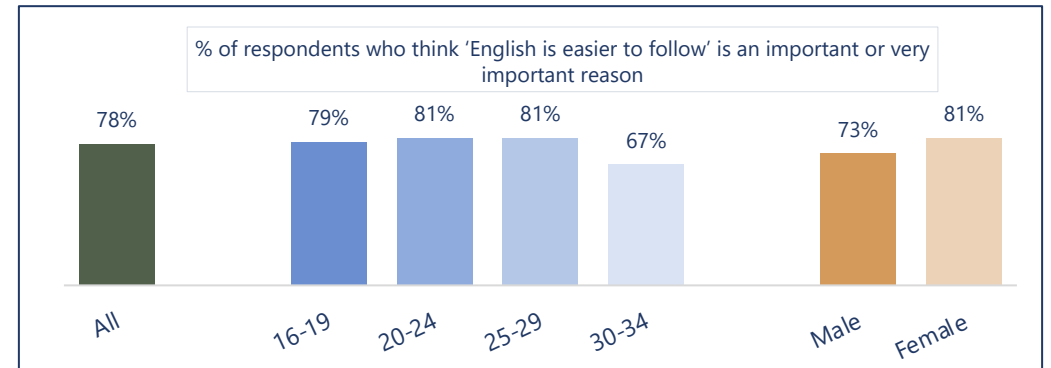
(...) in Denmark or even Benelux, the titles go out so much quicker. In Germany, ...because it's dubbing and being dubbed, there's always quite a lot of delay. And I think, especially in view of this age group, this is a tricky situation. Especially if titles really pick up and become famous... And then of course, with the streamers coming in, the streamers are always a bit quicker.

- Germany-based Sales Executive

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

- The ease of watching screen content in English was by far the most popular motivation for choosing British content. 66% of survey respondents strongly agreed with this statement (putting the slider scale at 80-100%), and 12% agreed (putting it between 60-80%). 78% thus agreed overall.
- The ability to understand the spoken language is particularly important for those who watch or re-watch screen content while doing something else. Interviews revealed that while subtitles may be used to support understanding, they are not particularly popular with younger audiences.



- The significance of English as the 'language of advantage' (Collins, 1998) was emphasised by both Derja (25) and one of our industry interviewees, who noted that dubbing always delays the release date. For those who follow the buzz on social media, watching in English is therefore almost a must.

Learning English

Well, it started through the Internet because when I was younger, I wanted to better my English skills, so I started watching some English Youtubers. And just watching that kind of made me interested in watching more and more and more, and so it got to the point where I just started only consuming English content and basically kind of abandoning the German content.

– Lotte, 19

Watching something in English is an easy way for me to practise my English.

– Luisa, 23

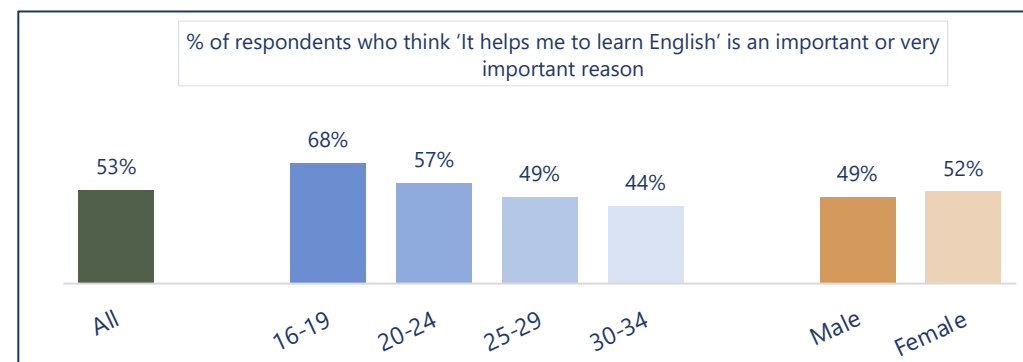
(...) listening to language, and also reading what they are actually saying, I think that's simply how it's helping me to develop my English.

– Fernand, 17

(...) it's a conscious decision I made when I was in school still, to improve my English.

– Jamal, 22

- Learning English is a key motivation for watching in English: 53% of respondents agreed with this, including 36% who agreed strongly.
- It ranked more highly than in Denmark where it came bottom (26%). However, young people in Denmark are more used to English-language content, and they rank higher in the EF English Language Proficiency Index (slide 6).
- This reason is significantly more important for the youngest. 68% of all 16-19 year-olds agreed with this statement, 49% of them strongly.



The role of British accents

Cockney accents are probably quite hard to understand. And also, for American English, the deepest Texan accent (...) So those types of accents, they would probably kind of 'scare me off', I guess. [laughs] So I would definitely enable subtitles when I hear those accents. But in general, I guess I kind of enjoy to get to know quite different, varied accents, and that's something I've always liked, especially when I started to get interested in English.

– Fernand, 17

(...) 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

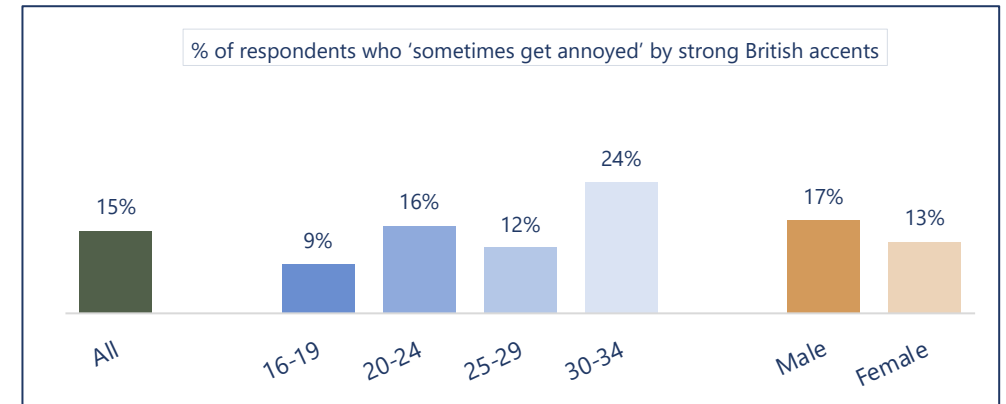
(...) accents draw me in more... but I think maybe Irish is very difficult. So if the accent or the dialect is way too strong, then I will still watch it in that language, but I will put on the subtitles.

– Derja, 25

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

- According to the survey, British accents are not a problem. Only 15% of respondents agreed with this statement (compared to 7% in Denmark). Interestingly, the responses by age group are in reverse order. In Denmark it was the youngest who were most annoyed (16%). In Germany they mind the least (9%), which begs the question whether it is their lack of experience with UK content that leaves the youngest in Germany feeling that accents are no problem.
- Interviews revealed more mixed responses. Markus' comments suggest that there can be a difference between what one believes or wants, and what happens in reality.



Humour

Very strongly associated with British screen content

(...) obviously Britain is not the only country with humour, so it's really that special type of humour. (...) Yeah, it's, as I already said, sometimes a bit darker than other types of humour (...) it can be a bit mean or something like that. Sometimes it tries to insult other people in a very light way, and it can be quite funny. Obviously there's a line you really shouldn't cross, but it can be really good.

- Max, 17

(...) there's Ricky Gervais's sense of humour [in After Life], it just fitted incredibly well. Totally dry, this very classic British humour just fitted perfectly and that's why I really liked the series.

- Markus, 26

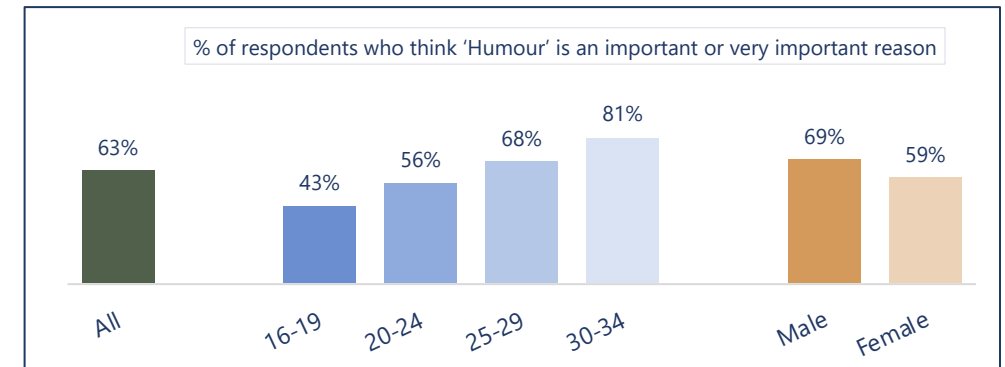
I really, really love the English humour. It's like one of the best in the world, and you can describe it by saying 'it's English humour'. Everybody knows what English humour is. It's a very dry humour; there's no other country that has their own humour, if you want. Like, there's no German humour, there's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

- Didier, 29

Taskmaster (...) there's lots of episodes with James Acaster and other British comedians in there that are just really entertaining (...) – well, especially James Acaster just had this kind of flat, but also like really hilarious kind of humour that I just really enjoy because it's just so straightforward.

- Lotte, 19

- As in Denmark, humour resonated strongly with survey respondents. In both countries, the marked difference between the youngest (43% agreement) and the oldest (81%) is nearly identical, as is the gender difference.



- Like Denmark, word associations with British programme titles listed in the survey's free text boxes were most numerous for humour-related words. Like Denmark the humour is described as 'special', 'dry', 'dark', 'intelligent' and 'daring' – and present even in dark and sad narratives.
- Many interviewees confirmed their appreciation of this uniquely British humour.

Humour

Compares positively

*I would say the humour is more subtle. I would say in comparison to American comedy films in particular, which are just more 'hammer it home' (...) Or there are situations that are absurd and therefore funny. I also saw *Four Lions* in the cinema back then...that's such a gloomy, brutally black sense of humour. I don't know if a film like that could have been shot in Germany.*

- Sebastian, 32

I think British comedy is way more sarcastic and it's also more in-depth [than German comedy]. You have to have a certain intellectual level to get what the other one is saying. Otherwise you'll be offended. (...) So you have to think a little bit and then you get it, and then it's hilarious.

- Derja, 25

*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. So, I think the British humour is closer to the German humour than the American humour. So, I enjoy this strong sarcastic tone that you find, for example, in *The Lobster* or *In Bruges*.*

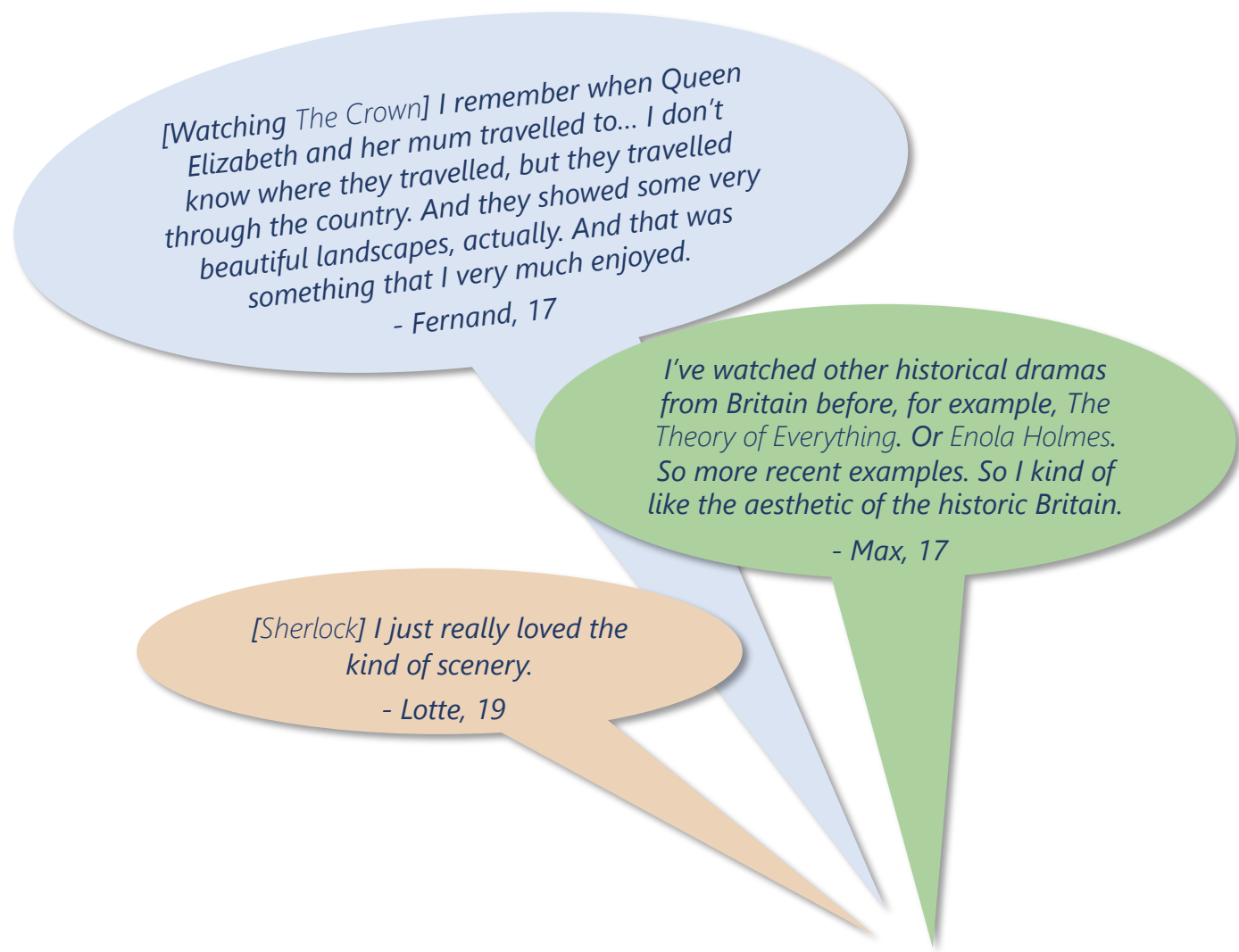
- Emilia, 24

[UK content has] usually quite a lot of humour in it – obviously not every show, but many shows are quite focused on the humour and it really also is 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.

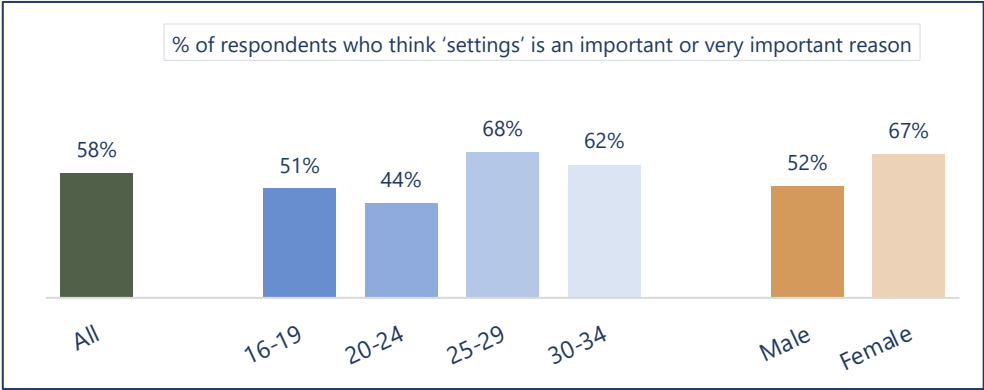
- Max, 17

- As in Denmark, most interviewees also compared British humour favourably to US humour, and to the humour in their own country.
- Numerous interviewees in both countries noted that they missed humour elements in domestic content that is not explicitly comedy.

Settings, landscapes and people



- Whilst the survey suggests that young German audiences enjoy British settings, landscapes and people (see below), respective mentions in interviews were less numerous.
- What did transpire was a fascination with London and Scotland. Some interviewees mentioned *Outlander*, which many respondents believe to be British. 295 out of 426 survey respondents had visited the UK; 73 had even lived there, 15 of them in Scotland.
- According to the DAAD (German Academic Exchange Service), the German Erasmus+ budget for the HE sector doubled between 2014 and 2020 to 150m EUR, sending over 47,000 HE students in 2020 abroad to study or for work experience (DAAD, 2023).
- Teachers attested that many students in secondary school, also go on exchanges, funded by the Erasmus+ project. Most go to the US, Australia, Canada or the UK.



British on-screen talent: Actors

'[A]uthor-led' or 'talent-led'. So yes, this is what we see much more, especially in terms of the younger-skewing shows.

- Germany-based Sales Executive



(...) 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



- As one of our Sales Executive interviewees notes, creative talent is an important motivation for young people to engage with British content.
- Interview comments on slide 43 (actors as discovery drivers) already confirm this. The quotes by Lotte and Jamal also emphasise how individual British actors motivate them to watch UK content.
- 45% agreed with the statement 'I am a fan of certain British actors or celebrities', compared to 46% in Denmark.

I saw a few episodes of Top Boy. It's more a gangster show I guess. So I like it. There's also a UK rapper who's part of the show. Dave, his name is Dave [English rapper David Orobosa Omoregie]. Yeah. He's the reason I started watching this.

- Jamal, 22



British on-screen talent: comedians & presenters

I really, really love the way Graham Norton... I really think he's a great show master or moderator and he did well, did a good job to be, like, very nice, polite, humorous but also like 'frech' [cheeky] - like, again, that's this risk-taking. You know in German TV shows you have Thomas Gottschalk asking one dumb question after another, and you have a Graham Norton teasing and already almost, yeah, mobbing his counterparts, and I really love that humour - that is something I really like.

- Didier, 29

I watch clips on YouTube [of Ricky Gervais]. I think he's coming to Germany, to Berlin this year and I'm trying to get tickets for him.

- Jamal, 22

Gordon Ramsay... I think he's really funny. Yeah, so I do look [stars and celebrities] up or follow them on social media, on Instagram and TikTok, if they also post anything. (...) I did watch his TV show as well, but I think that was an American production, though. He also had a show in the UK, but I watched the one where he was in the US and rating all the American restaurants.

- Derja, 25

Obviously I know Jeremy Clarkson because of Top Gear. I've watched that, so I know him. I've also watched other shows that he's been in - for example, his farming show recently, and also The Grand Tour. It's quite entertaining, but I don't really like him himself that much. He does a good job, maybe at entertaining, but I didn't really want to sit with him together.

- Max, 17

- The same is true for British comedians and presenters. Although not quite as well known in Germany as in Denmark, interviews revealed that the humour of British comedians like Ricky Gervais and James Acaster (slide 51), and of presenters Graham Norton and Gordon Ramsay is appreciated amongst those who know them.
- Fewer people than in Denmark, where *Top Gear* is bigger than in Germany, mentioned Jeremy Clarkson. Max, who did, finds him a talented entertainer, but not likable.

6. Values & Attributions



Values & attributions that appeal in UK content

- Values that are recognised in UK content overlap with motivations for choosing to watch it. This chapter adds to the previous by drawing on interviewees' descriptions of UK content, and on opinions and feelings that might be less conscious motivational drivers.

Overall good quality

- Asked to describe British content, many interviewees found it difficult to do so. Those who did noted its overall high quality – production value, innovation, on- and off-screen talent, and humour.

Acting talent, realism & authenticity

- 71% of respondents believe that 'British acting is of high quality'.
- 44% think that 'UK content feels realistic or authentic' - the statement with the second highest agreement.

Relevance

- 41% can relate to the characters and themes in UK screen content and 38% think that UK content deals with topics relevant to young people. *Sex Education* and *Heartstopper* were the two titles most mentioned in this respect. Other well-known UK titles like *Downton Abbey*, *The Crown* and *Inspector Barnaby* work against this image.

Diversity

- Diversity in UK content is recognised and appreciated by more people in Germany than in Denmark, both amongst audience participants and in industry circles. The UK is seen as being ahead of other countries.

Describing British screen content

High quality all round

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

UK content has always been really important as our main driver is excellency. (...) We always look across the UK content – I mean, especially in the last 2 years. Definitely, definitely.

- Senior Editor, Film festival

(...) pretty famous actors and a long tradition of making movies and films (...) I think it usually has quite high quality, probably because Britain is quite a rich country and also has the money for that kind of entertainment.

- Max, 17

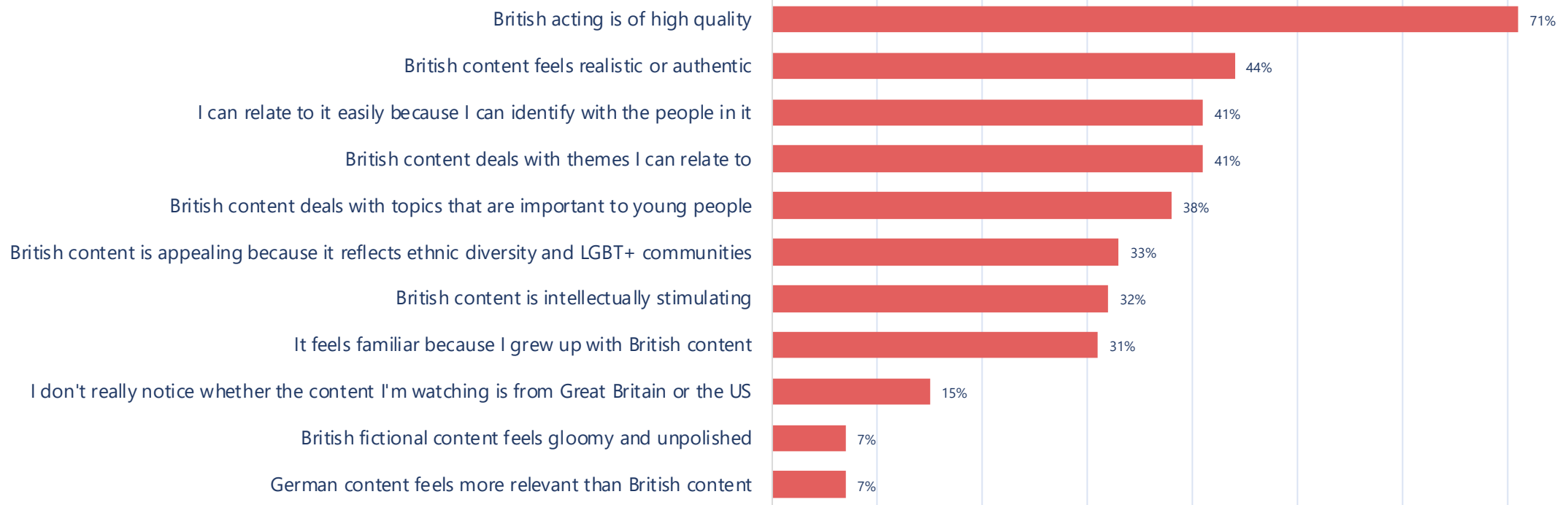
Funny, diverse, attention-grabbing as well. Because they just really jump at you when you see them.

- Lotte, 19

- Asked to describe British content, not all interviewees felt able to do so, in contrast to Denmark where recognition of British content and familiarity with it are higher overall.
- Those who did noted its overall high quality - production value, innovation, on- and off-screen talent, and humour.
- Asked about their motivation for watching British content, only 26% of survey respondents agreed with the statement 'British content is better than content from other countries' (slide 46).
- Given the sweeping nature of the above statement and the unrivalled status of US content (plus content from other countries), the low agreement figure is no surprise. Even so, in Denmark 31% agreed with this statement, reflecting the higher status of UK content in Denmark.

What appeals about UK content? - values & attributions

% of respondents who agree or strongly agree with these statements



- The statement 'British acting is of high quality' received the highest agreement by far (71% vs 69% in Denmark). The statement 'UK content feels realistic or authentic' came second (44%), but agreement was much lower than in Denmark (57%).
- Similar shares to Denmark felt that they can easily relate to the people (41% vs 38% in Denmark) and themes (both 41%).
- More Germans think that UK content deals with topics important to the young (38% vs 32%) and appeals because it reflects diversity (33% vs 25%).
- Markedly fewer than in Denmark find UK content 'familiar because they grew up with it' (31% vs 42%), intellectually stimulating (32% vs 49%), or gloomy and unpolished (7% vs 30%) – variations which very likely result from differences in exposure (quantity and range of shows watched).

Appeal of acting talent

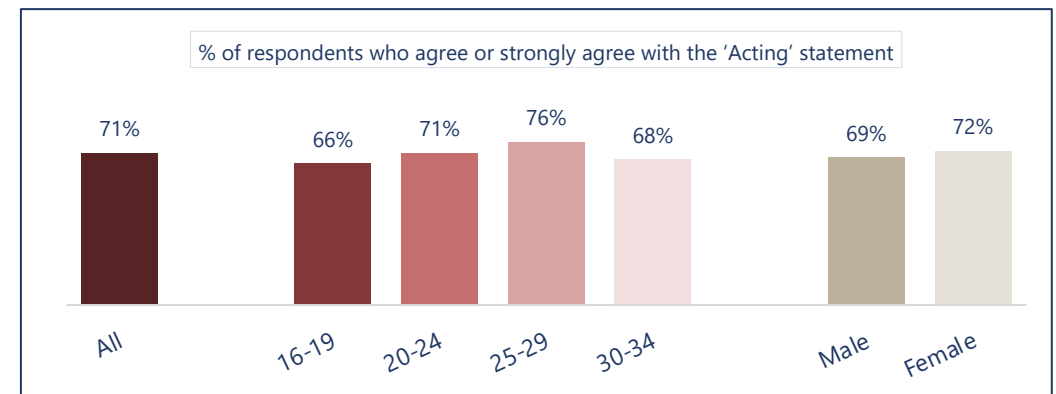
Well, I'd also add Benedict Cumberbatch. So yeah, one thing I realise, I just noticed, is that I think British acting is superior to American acting because there is a lot of shows where the main actor is British, but the show's American for example, like in *Snowfall* [stars Damson Idris]. And I don't know if you know the show, but there's a show called *The Wire*, and Idris [Elba] is part of that. And I don't know why they picked British actors. I think they are just better than American actors to play.

- Jamal, 22

I think the most important thing is authenticity (...) a lot of German shows are so staged that they're not believable. So, I mean, I watch them, and they sound like, I don't know, a one hour long commercial or something, because the voices - how they speak - are so weird that I always think no one in real life would ever talk like that. (...) for me, at least, it's not the case in British series or movies, but maybe also because I'm not, like, an English native speaker. Maybe if I were, I would think that too.

-Emilia, 24

- Asked to indicate their agreement with 'statements other people have made about British screen content', 71% agreed or strongly agreed with the statement that British 'acting is of high quality'.
- Actors mentioned included Benedict Cumberbatch, Ricky Gervais, Idris Elba, Damson Idris, Cillian Murphy, Phoebe Waller-Bridge, Diane Morgan, Florence Pugh and Keira Knightley, all of whom have been prominent on Netflix and/or Amazon, and of course 'anyone who was in Harry Potter'.
- Emilia's quote reveals that British actors appeal because they seem more authentic than German actors, but she also muses that this might be a misconception because she is not a native speaker.



Appeal of authenticity & realism

(...) 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, or if you watch the German dubbed version of the film, everyone speaks German, everyone speaks the same language, and you have the feeling that everyone comes from the same country or place. Which is something I don't experience with British television, in contrast to US television where there are fewer accents. But on British television there is just this diversity. You can tell which part of England the person is from. 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

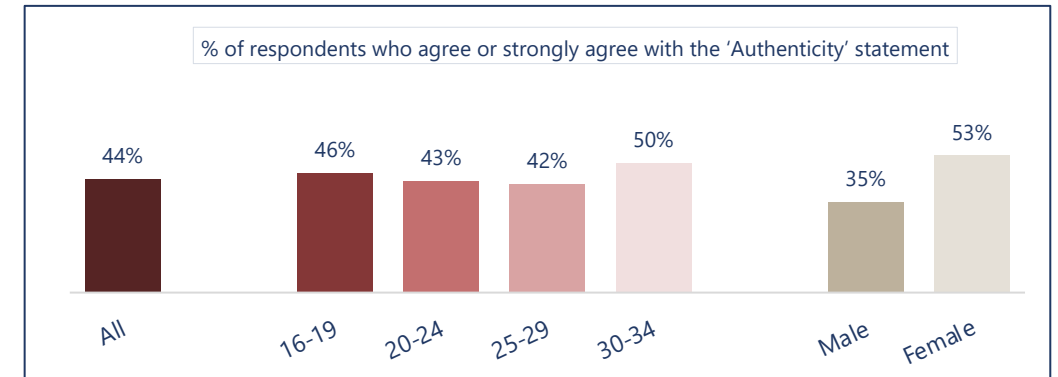


(...) movies like Pride & Prejudice and Jane Eyre and all of those movies. And I love those movies. When I think about older British times, those are the movies that are in my head. It just feels authentic: the way people dress, the way people talk (...)

– Derja, 25



- The statement 'UK content feels realistic or authentic' ranked second for appeal (44%) but was much lower than in Denmark (57%). This might be explained by lower 'familiarity with UK content' (31%), compared to 42% in Denmark. In other words, exposure to less UK content as you grow up – quantitatively, historically and on diverse platforms – leads to different perceptions in Germany than in Denmark, at least amongst the older cohorts.
- Notably more female respondents (53%) agreed with the above statement than males (35%). In Denmark there was no marked gender difference - 56% of males and 58% of females agreed. Again, this is possibly due to greater exposure to and greater familiarity with UK shows in Denmark than in Germany.



Relatability

*The characters [in *Sex Education*], they were kind of quirky. Everyone was kind of special. There was basically no typical movie or series character. I guess 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

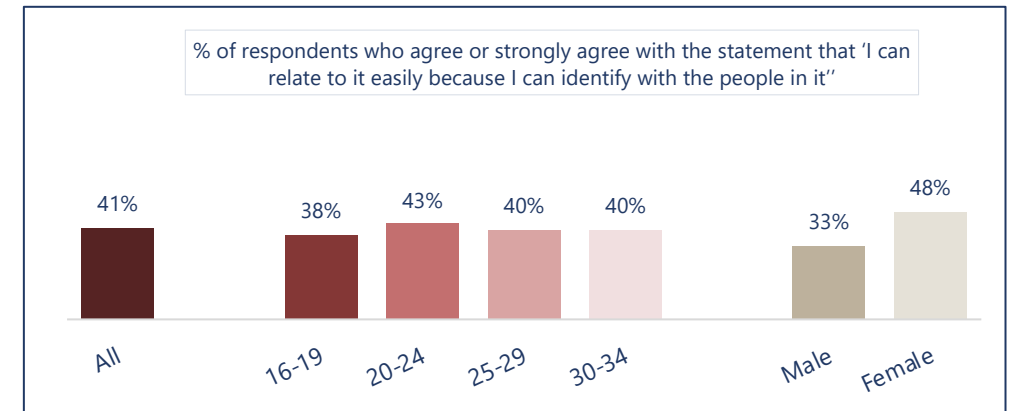
I feel like there's always a character in this show [Heartstopper] which people could identify with. They are very rich in the facades that they have.

– Max, 17

Documentaries are really something that are quite strong – also because they come with a sense of authenticity, and I think also show a lot of struggle that young people here can identify with a bit more. When you're growing up young, everything is a struggle. Everything. And I think that somehow that's a bit more reflected in some of British films.

– Founder and (former) director of LGBT Film Festival

- Respondents in both Germany and Denmark felt that they can relate to the people portrayed in UK screen content and to the themes addressed.
- Relatability with people achieved an overall agreement rate of 41%, similar to Denmark (38%).
- In Germany there are no notable age differences, but a notable gender difference. Again there was no gender difference in Denmark.



Relatable themes

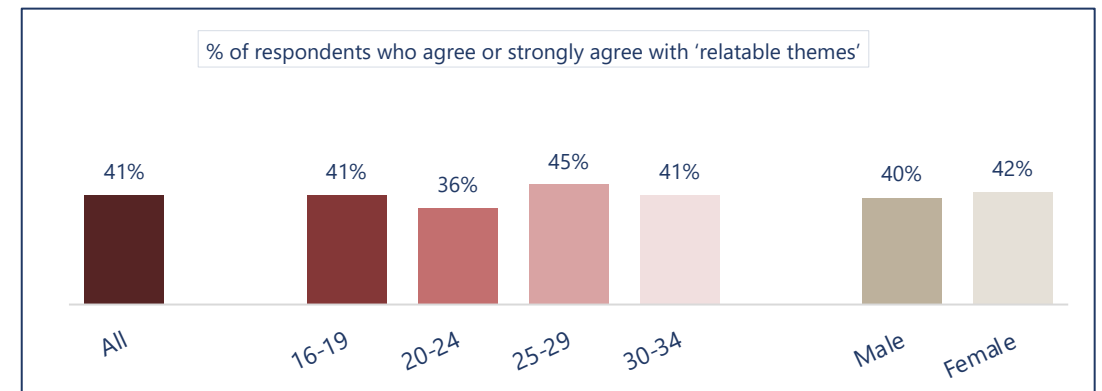
[The UK] are doing topics where in Germany sometimes it's very sensitive, and I think they [the buyers] have the feeling that with an international hit, it's much more easy to address these very heavy topics, like sexual abuse, and these are topics, of course, the younger audience are interested in.

- German-based Sales Executive

British things are closer than things from the USA, especially in school or university settings... the US ones are structurally too far away and too oversaturated.

- Anonymous survey respondent

- Relatable characters are often connected to relatable themes; and the overall responses for the latter was exactly the same as for people (41% agreement), with no notable age or gender differences.
- Important to highlight is the apparent link between 'relatable themes' and 'topics important to young people', which was less evident in Denmark than in Germany (next slide).
- One of our industry interviewees, a German-based Programme Sales Executive, noted that UK content covers sensitive topics that younger German audiences are 'of course' interested in.



Youth topics

(...) 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

[Sex Education] was, like, a really, really relevant show, and I thought it was so important that a show like that exists (...) it really talks openly about topics that interest young people.

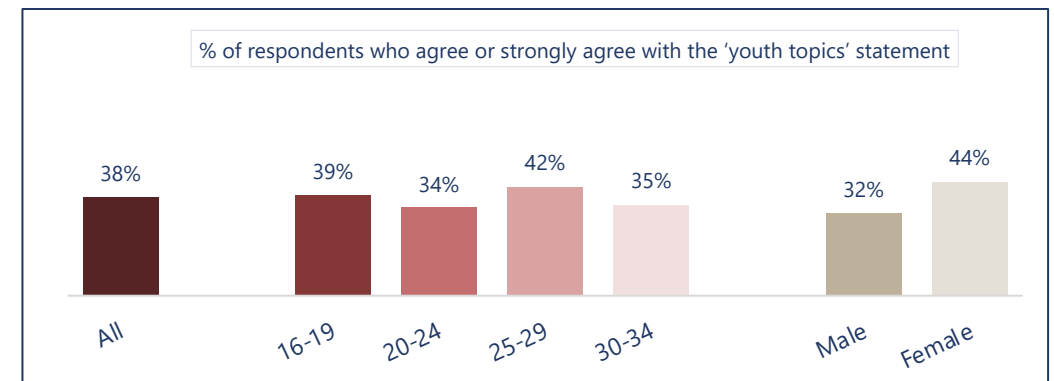
- Emilia, 24



Sex Education deals a lot with just the exploration of becoming an adult and just trying to figure yourself out, which is just really important. And I love watching shows that deal with that, especially since I myself am a teenager and it kind of helps you understand yourself better and especially the characters. Like, Otis, he's just really interesting, and I was able to relate to him a lot in some of the scenes, which just made the show a lot more appealing for me. And also it's just that kind of humour, especially with the sex jokes, which is really funny.

- Lotte, 19

- The link between relatable characters and topics, and especially those important to young people, is particularly evident in Lotte's comments (below).
- The agreement rate for relevant 'youth topics' (38%) is slightly lower than for relatable themes and people (41%). In Denmark it was lower still (32%), again possibly because of greater exposure to a wider range of UK content.
- Looking at the UK shows mentioned during interviews by at least 2 participants (slides 36 and 38) also reveals why the perception of UK content dealing with 'youth topics' remains below 40%. Shows like *Downton Abbey*, *The Crown* and *Inspector Barnaby*, which everyone knows or at least knows of, work against the image of youth-oriented programming.



Appeal of diversity

There's a kind of diversity (...) A lot of American productions, from what I've seen, just have a lot of basic character casting. Like, that's this white woman. Then there's the white man. They fall in love. They have a story, and so on and so on. And in British shows there's also a lot of shows with older main characters that you can watch. And there's young teenagers. There's people of colour. There's characters with different weights and stuff like that. There's just a lot more variety.

- Lotte, 19

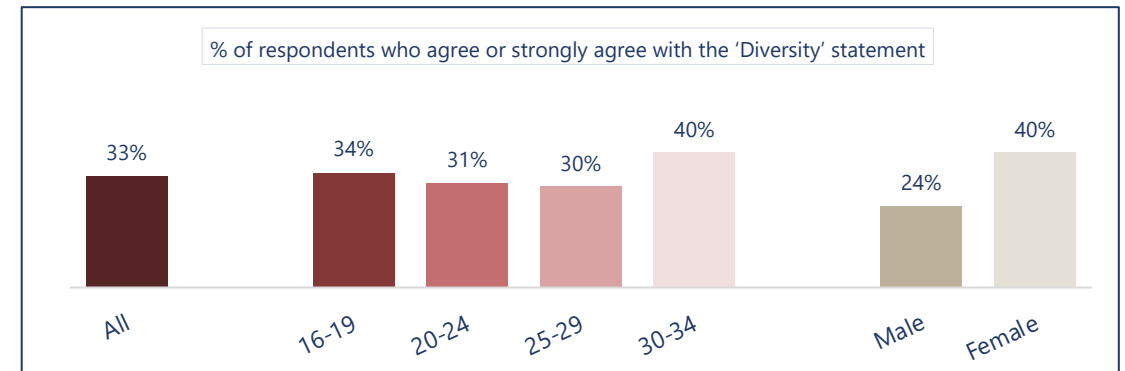
I think it was just nice to have like a totally very diverse cast [in *Sex Education*]. (...) it's all part of the whole appeal of the show I think. They don't try to maybe show a typical British school. But they show all the different characters who might be in a British school - who are usually, maybe, if you really attend a school, hidden by the mainstream - and just puts the accent on just those persons. And I thought that was really, like, cool. (...) so there were people... yeah, I mean different sexual identities and orientations. So that was one. But also, like there were a lot of characters from different ethnic backgrounds. So that was cool too.

- Emilia, 24

[*Snowfall*, which stars Damson Idris] it's something I relate to, I guess, yeah. Most of the shows I watch have black leads, I guess. But I'm not only watching black shows (...)

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 in Germany. I barely watch German shows.

- Jamal, 22



- A third of survey respondents in Germany also recognise and appreciate diversity as a defining value of UK content (33%); this is higher than Denmark (25%).
- As in Denmark, appreciation of diversity was notably higher among women (40% vs 36% in Denmark) than men (24% vs 12%).

Recognition of diversity in industry circles

What I like about UK content is, it's always very colourful. The cast is always very wide and inclusive... I personally think it's nice, but for Germany I don't think it matters. We don't have this awareness yet that you need to be a bit more broad in your cast, sadly.

- Commercial buyer B3DE

You could count on it every year that there's gonna be something – either 1, 2, or 3 films in the programme from Britain or the UK on the shortlist.

- Founder and (former) director of LGBT Film Festival

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

- In industry circles, both amongst film festival executives and in broadcasting, diversity in UK content is recognised and praised.
- It is also recognised as something of importance to today's younger generations.
- One of the interviewees, Emilia, who is training to become a teacher, spoke of how she was researching contemporary screen productions to teach diversity in school and how a friend pointed her to *Heartstopper* as potential source material.

7. Cultural diplomacy & soft power



UK screen content's wider impact

- UK screen content contributes to German audiences' knowledge and perceptions of the UK. But this is less the case than in Denmark, where familiarity with British screen content is much higher.
- Many German respondents believe that what they have learned in school has been most influential in shaping their image of the UK and of British people. They also highlight the stereotypical nature of these images. Some also pointed to British stereotypes in US screen productions.
- London and Scotland have great appeal for Germans. Notably more German than Danish respondents reported having travelled to or lived in Scotland. As in Denmark, the political status of the four nation states and differences between England, GB and UK are not well known, though. England is commonly used as a synonym for the UK, or GB.

Cultural diplomacy & soft power

- Although more limited than in Denmark, due to the more limited exposure, UK screen content positively influences German attitudes towards the UK.
- Given that less than a quarter of people in Germany have a favourable view of the UK, increased consumption of UK content could play a vital role in improving opinions of the UK and attitudes towards it.
- Evidence also exists that UK content contributes to the construction of the nation brand. In Germany it has power in particular to encourage tourism.
- Screen content's power 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.

Stereotypical images of Britain

What I wrote about politeness and such, that came from my English lessons and the strong emphasis on how questions are formulated, how a text is formulated, that politeness plays a major role in this. That phrases are sometimes more complex. A lot was made of having 'British teatime' and 'British breakfast' and baked beans with bacon, especially in English lessons at primary school.

- Sebastian, 32

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

- Findings from Denmark suggested that UK screen content plays the most important role in shaping perceptions of the UK as a country, its culture, politics and social composition. Almost no respondent mentioned English lessons in school.
- In contrast, many German respondents mentioned the strong influence of English and history teachers or lessons. They also noted how this left them with very stereotypical images of the UK.
- Several interviewees, like Jamal, also noted the influence of American productions, which also propagate stereotypical images.
- The lesser influence of UK screen content in Germany reflects lower familiarity with it.

I think everything I know from British culture is from American culture. You know what I mean? I grew up with a lot of American TV shows and the way they portrayed the UK and British culture is how I learned about it. (...) there's always the exchange student, who's British, who's, like, very polite.

- Jamal 22

UK screen content's impact

[My impressions] come from, like, the movies growing up. So, because sometimes there are like American movies. where the protagonist is like, 'Oh, I need a change of scenery, I need to go away from my corporate job', and then they will go to Scotland or Ireland, for example. And then you see that, and the nature and how green everything is and the water, it's just really beautiful. And so that definitely had an impact on the way I see Britain. (...) also, like, older movies like Wuthering Heights – that also has an influence. (...) – and also there was a movie called Bend It Like Beckham. I watched it as a kid, so that also had an impact. So everything I know about the UK is formed by movies and music, and also just being there.

- Derja, 25

[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



I guess they [TV & Film] had some sort of influence as well, especially stuff like The Crown, where you get to see a lot of landscapes, where you get to know something about British history as well, and also hear a lot of language as I've already mentioned – those sort of elements influence your picture of the UK quite a lot, I guess. At least for me.

- Fernand, 17

- German interviewees with frequent exposure to UK content acknowledged the impact that screen content, both British and US, has on their perceptions of the country and its people. In the case of our interviewees, as the quotes show, it is all positive.
- The quotes also suggest that increased consumption amongst young German audiences could make a positive contribution to how the UK is perceived.
- Findings from the BFI/Yonder study (2021a: 22) revealed that people in Germany (18-65) feel much less favourable towards the UK than people from other countries. Only 21% of respondents in Germany felt favourable towards the UK compared to 32% in the Nordics, 28% in the Netherlands and 36% in Italy. The global average was 35%.

The potential for cultural diplomacy – countering stereotypes

I feel like 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. Especially if you watch the cooking shows – it's proven that British people can cook some good food.

- Lotte, 19

I really have a lot of touch points with British pop culture, so like the music or also television or streaming series. I consume them very often or regularly, and I think that me, for example, BBC series are often very pioneering series, which then get copied a lot, or which have the cultural impact, I would say, so England or Britain is a country which seems very sympathetic. I think so. I really like that country and I would love to go there again of course sometime. Yeah.

- Didier, 29

- Where British film and television programmes generate positive opinions about the UK and attitudes towards it, they make a positive contribution to cultural diplomacy and soft power.
- Of course, screen content does not aim to shape attitudes; whereas cultural diplomacy commonly refers to *deliberate attempts* to shape attitudes about people, places, institutions and goods, usually in an international context.
- Even so, as the research results for Denmark and the comments from Lotte and Didier suggest, screen content can be an effective, if unintentional, tool of cultural diplomacy, countering stereotypical images and creating or reinforcing positive feelings toward the UK.
- As far as Germany is concerned, UK screen content's impact might have been more limited to date. But with more and more people watching English-language productions in English, and rising interest in British content with age (slide 21), UK screen content has the potential to make a significant contribution to improving the UK's image in Germany.

The potential for cultural diplomacy – furthering interest in the UK

(...) those beautiful landscapes...and London with its beautiful sightseeing thingies. I get interested in how people speak in the UK as well - like the British accent for example. Yeah, that's probably... and then combined with some series I watched, and I guess that made the whole interest.

- Fernand, 17

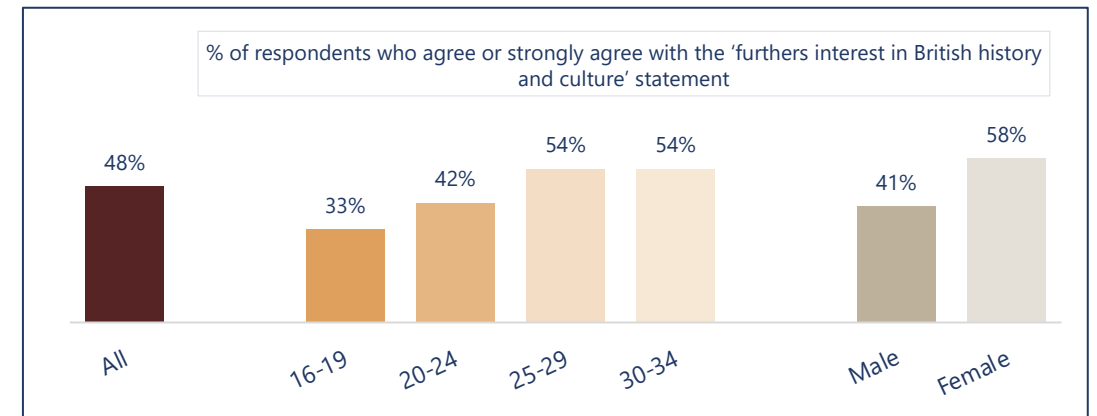
[*Outlander*] sometimes it encouraged me to, like, Google specific battles that took place and see, like, 'Oh, where exactly is that in Scotland?'

- Emilia, 24

(...) the city doesn't play a huge role in this show (...) *Luther* could also play in Frankfurt, for example. You know, it wouldn't make no difference.

- Jamal, 22

- In addition to improving the UK's image, screen content has the potential to raise interest in the country, as the comments by Fernand and Emilia and also the survey results show.
- 48% of all survey respondents agreed with the statement that UK screen content 'furthers my interest in British history and culture more generally'. The figure is particularly high for the two older cohorts; i.e. those who consume most British content.
- The comment by Jamal reveals that this potential is diminished, however, in shows that downplay cultural references and/or location. Also, Emilia's quote suggests that non-UK productions, like *Outlander*, have an equal amount of power if set in the UK. The same will be true for *Bridgerton*.



The soft power of UK screen content

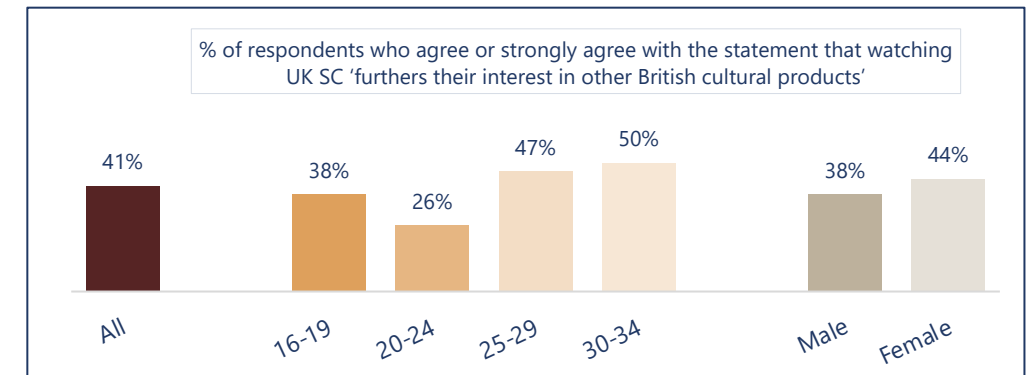
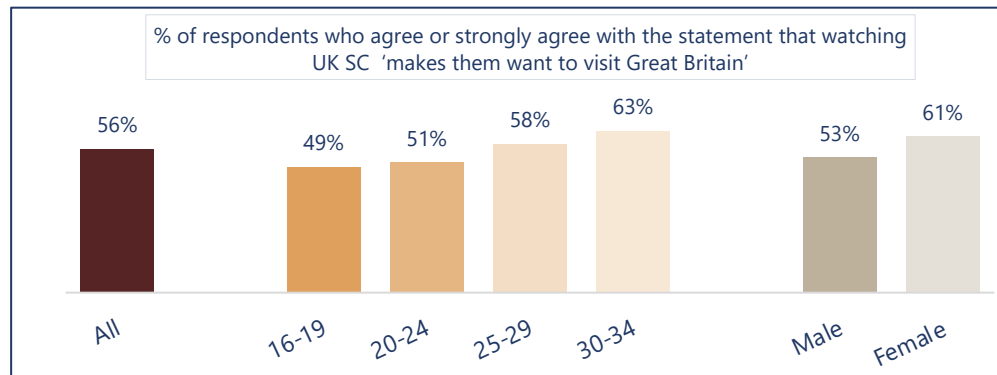
I've seen, of course, Sherlock, and I saw Baker Street, and I obviously also went there when we visited London because it was just on my bucket list of places I had to see! And I also want to one day visit the places where the Harry Potter movies were filmed, because that also seems very interesting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

- Lotte, 19

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 also some evidence that UK screen content contributes to UK 'soft power' - commonly referred to as the construction of the nation brand, which in turn has political and economic impact by asserting status, boosting exports, and attracting tourism and investment.
- 56% of survey respondents in Germany believe that watching British screen content makes them want to visit the country (compared to 47% in Denmark).
- 41% think it makes them more interested in other British cultural products (compared to 38% in Denmark).



Fictional screen content is seen as 'true to life'

Asterix and the Britons... because that was one of the first videocassettes I had. Of course, I already understood as a child that that wasn't authentic, but the idea of bad beer, bad food, and constant fog still stuck with me.

- Sebastian, 32

[Outlander] I know it's not a documentary, but to get like a slight insight into what was happening in the 18th century.

- Emilia, 24

Harry Potter, it's just the way the British houses are – when I see them, I think it's very British. It's also described like that in the book. And the way they behave or talk – it's just something that I associate with Britain. And also the uniforms (...) also with James Bond, for example, the way that, for example, a suit – like in The Kingsman, you also see Brits in suits – that's also something I associate with Britain. And I think it's solely because of James Bond. (...) looking like a gentleman and being dressed nice – I associate that with Great Britain.

– Derja, 25

- The power of 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', but subconsciously they process it as representations of reality.
- The three quotes are testament to that. Moreover, they show that the power of screen images even reaches those who clearly 'know better' (Sebastian and Emilia) and/or have significant first-hand experience of the UK (all 3).
- With the exception of Sebastian, none of the other 19 young people interviewed questioned the screen portrayals of Britain they had come across, or hinted at their fictional nature. 15 of them had been to the UK; some, like Emilia, have even lived there.



8. The Brexit factor



Brexit comments

- Neither the survey nor the interviews were positive about Brexit.
- Survey and interview responses mostly reveal a sense of increasing distance between the UK and the EU, coupled with disappointment and a lack of understanding of how the UK could vote for Brexit.
- That said, not all interviewees care much about Brexit and have something to say on the issue.

Impact on the consumption of UK products

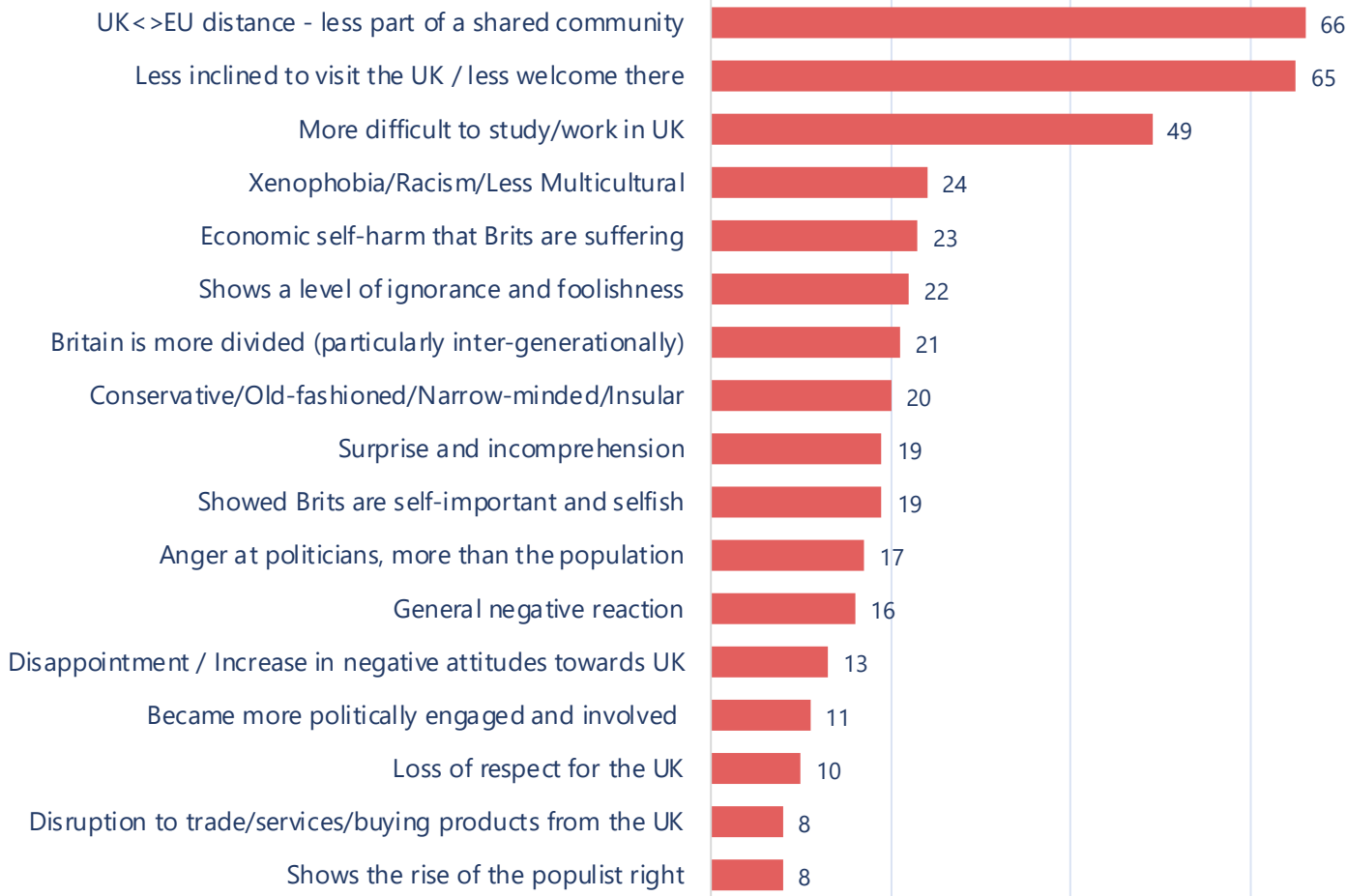
- No respondents voiced any potential adverse effects on their consumption of UK screen content.
- But some revealed that trade disruptions and increased taxes make online purchases of UK products (e.g. DVDs) less attractive.

Other consequences & potential implications

- The most consequential Brexit effects noted were not related to screen content but to new difficulties in going to the UK to study. Most importantly this is the result of the UK no longer participating in the Erasmus+ programme, leaving students without funding to go to the UK.
- Some teachers and secondary students report that school trips to the UK have become more difficult because of visa requirements for non-European passport holders. Other places (e.g. Ireland, Malta) have become alternative destinations for school trips.
- It remains to be seen whether interest in Britain and British culture will decrease as a result of declining first-hand experiences and the increase in screen content from other countries on VoDs.

Survey responses to Brexit

Number of times a topic was mentioned



- Like Denmark, the survey's open-text Brexit question was answered by almost half of respondents (186 out of 426 in Germany, compared to 197 out of 422 in Denmark).
- As in Denmark, the strongest feeling is one of a growing distance between the UK and the EU, expressed by 66 people; i.e. over a third of those who responded.
- Equally strong was the reaction to feel 'less inclined to visit the UK and/or feel less welcome there' (65). This was in marked contrast to findings in Denmark, where only 27 respondents had expressed this view.
- Many more noted hard negative consequences, particularly for studying or working in the UK (49 versus 24 in Denmark). The UK dropping out of Erasmus+ is felt strongly in Germany (slide 77).
- Disruption to trade or finding it harder to buy UK products was noted by fewer (8 versus 16).
- Similar numbers as in Denmark expressed regret or fear about an increase in xenophobia and racism (24/23), or linked Brexit to conservatism, insularity and narrow-mindedness (20/20).

Brexit comments

It hasn't changed my view. I still find it a bit difficult to understand why the majority of the population decided that at the time, but I think it's very, very difficult to judge from the outside (...) I would still like to go there just as much as before, enjoying the countryside or the cities, that hasn't changed at all.
– Markus, 26

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 organized. So I often thought 'British people. What the hell are you doing there?'
– Anke, 28

I think it's sad that they are not in the EU anymore because it was a nice community, and Great Britain is a nice country.
– Mila, 16

- Although some interviewees expressed regret (Mila), felt unaffected (Markus), or acknowledged differences in attitudes amongst the British population (Anke), most comments about Brexit were unfavourable.
- Nearly all comments in both the survey and the interviews, revealed a lack of understanding about why so many people had voted for Brexit.

Brexit & the consumption of UK products

Impact of Brexit unclear

[Brexit] didn't affect my view of Britain and the people at all. It only affected my view of online shopping! Because when I want to buy something from a British company, I have to pay the tax and all of that, so that's annoying. But otherwise it hasn't affected my view or perception of the people or the country or, I don't know, their TV shows or music or anything.

- Derja, 25

(...) the only thing that bothered me about Brexit is that if you order something in England, you sometimes pay customs on it, i.e., more customs than before or more shipping costs.

- Markus, 26

- There is no evidence that Brexit has had an adverse effect on the consumption of British screen content.
- Quite the reverse: 43% of survey respondents believe their consumption of British screen content has increased over the past 5 years, and 34% believe it has remained the same (slide 21). Only 7% believe they watch less, and of those 7% (n=35) only 4 respondents ticked Brexit as a possible explanation.
- Since the consumption of UK screen content in Germany is neither as widespread nor as frequent as it is in Denmark, none of the interviewees commented on the possibility of Brexit affecting their consumption of British films and series. Also, unlike Denmark, no one mentioned the adverse effect on buying British DVDs online.
- However, Derja and Markus, two avid consumers of UK screen content, noted trade barriers and taxes caused by Brexit and how this has an adverse effect on buying physical goods from the UK.

Other Brexit consequences

Educational trips have starkly declined

(...) speaking from a student's point of view, stuff like Erasmus, the student exchange programmes, we would now not be able to travel to the UK that easily. And those certain things... I guess that's something that I don't like about Brexit and find quite annoying.
- Fernand, 17

(...) in my 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

- The most consequential Brexit effects noted were not related to screen content but to new difficulties in going to the UK to study.
- Most importantly this is the result of the UK no longer participating in the Erasmus+ programme. For the future the effects might be felt even more strongly. The European Erasmus+ budget for 2021-2028 has been nearly doubled again, to EUR 26.2bn. Even more study trips will go elsewhere.
- The experience of teachers interviewed still varied. Two said school trips to Britain were still going ahead. One, like the Danish colleagues and Lina (below), noted that for classes which have many children without a European passport, school trips that used to go to Britain now head elsewhere.

I'm rather sad that I can't visit Britain as easily anymore. And because, before the start of Brexit, I always thought 'One day I want to study abroad in Britain, maybe, or just live there'. But now, thanks to Brexit, it's a bit harder for me to one day study there or live there. So it also made me lean a bit more towards Ireland (...) It's definitely still a dream of mine to one day study in Britain, but it's just...harder.

- Lotte, 19

We were the last class who got to go to London because of Brexit (...) Because there are a lot of immigrants and it's really hard for them to go to England.

- Lina, 18

Brexit consequences & possible long-term 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

- Interest in and positive attitudes towards a country are grounded in an intricately woven mix of first-hand experiences - through travelling and meeting people, English teachers, etc. - as well as mediated encounters in the form of news and cultural products, including film & television.
- It remains to be seen Whether interest in Britain and British culture will decrease as a result of possibly declining first-hand experiences and the increase in screen content from other countries on streaming services. For now, the findings from this research suggest that young people's growing interest in UK screen content may well be able to compensate for a possible decline in first-hand experiences.

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

9. Appendix



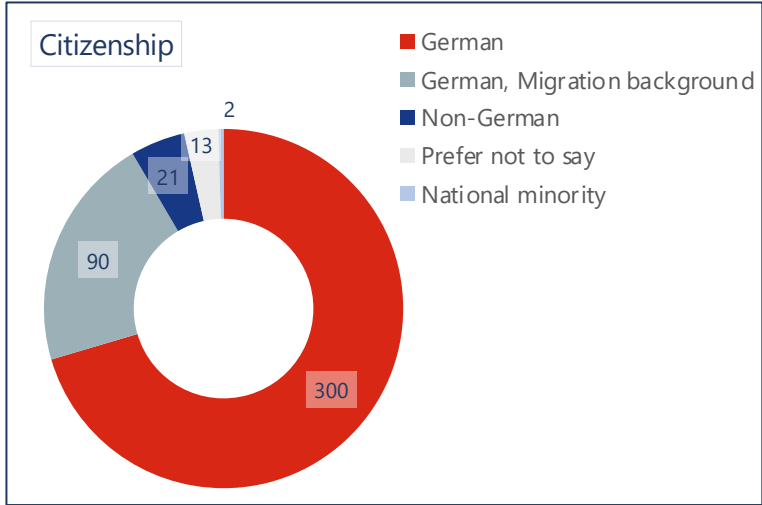
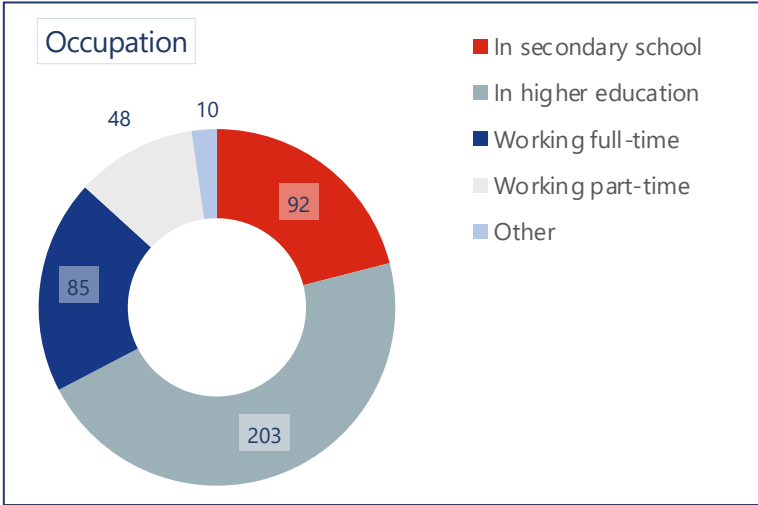
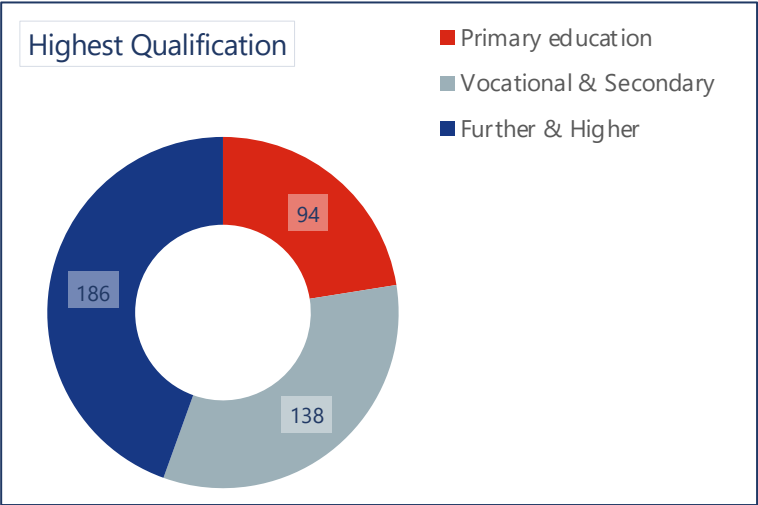
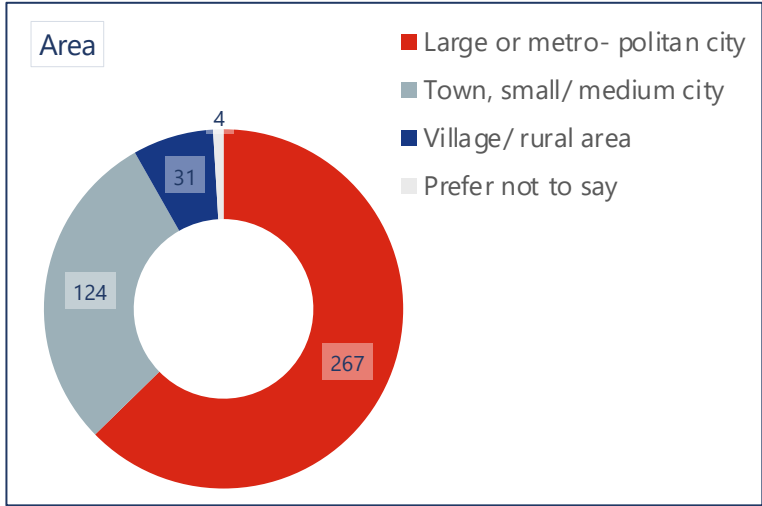
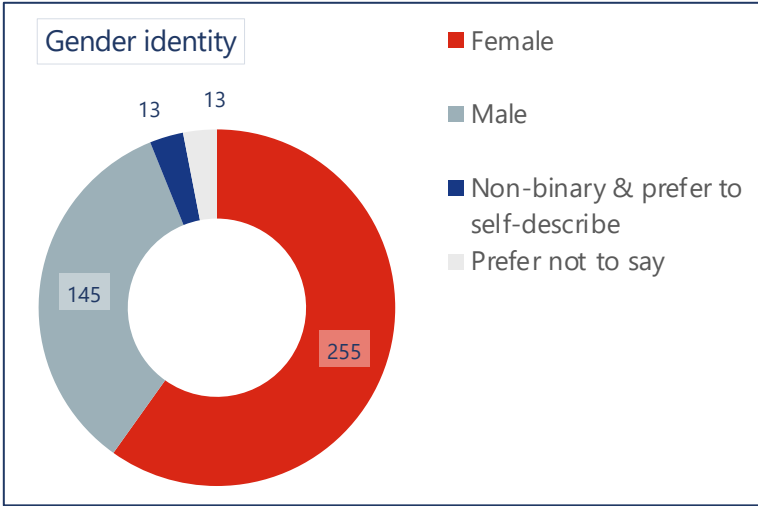
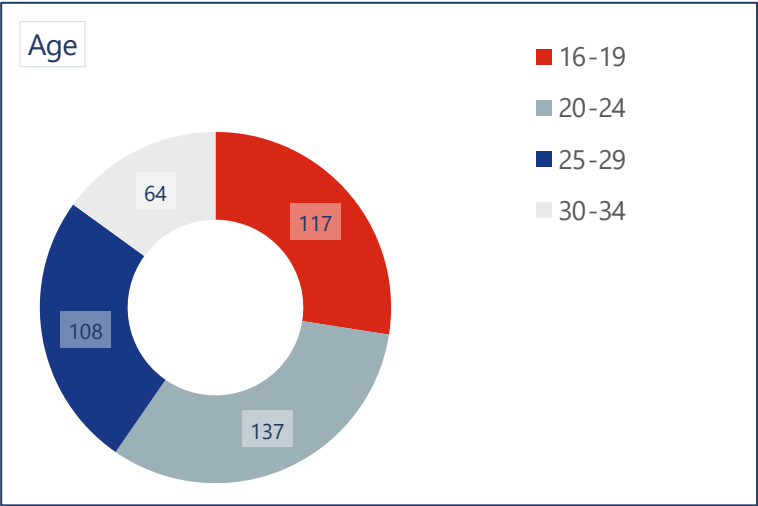
A – Methodology / Research participants

B – Market data Germany

C – Bibliography

D – List of illustrations

A1 - Key demographics



A2 - Survey weighting table

Gender and Age Distribution Survey Germany

Count			
	Female	Male	Total
16 - 19	60	44	104
20 - 24	98	33	131
25 - 29	65	38	103
30 - 34	32	30	62
25 - 34	97	68	165
Total	255	145	400

% of grand total			
	Female	Male	Total
16 - 19	15%	11%	26%
20 - 24	25%	8%	33%
25 - 29	16%	10%	26%
30 - 34	8%	8%	16%
25 - 34	24%	17%	41%
Total	64%	36%	100%

Ratio Sample vs Population			
	Female	Male	Total
16 - 19	1.8056	1.2142	1.4971
20 - 24	2.819	0.7597	1.6752
25 - 29	1.055	0.6075	0.8295
30 - 34	0.5048	0.4631	0.4838
25 - 34	0.776	0.534	0.6539
Total	1.3213	0.7005	1

Sex and Age Distribution German Population

(Q1 2023, numbers taken from national TAM system, run by GfK)

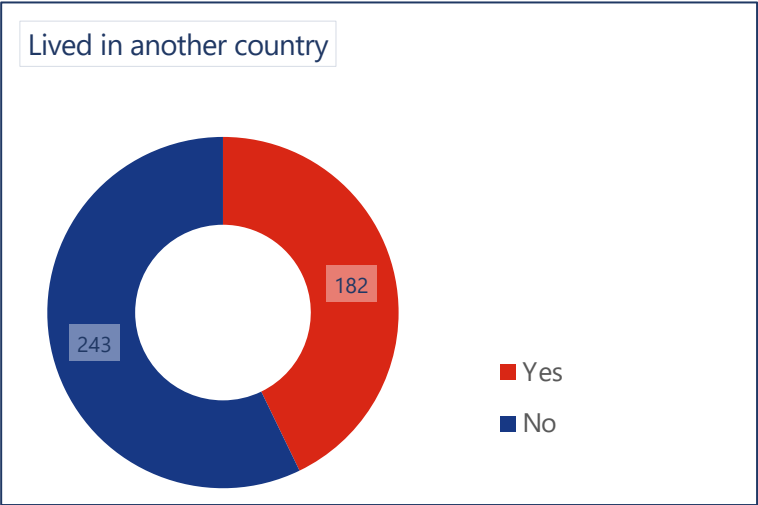
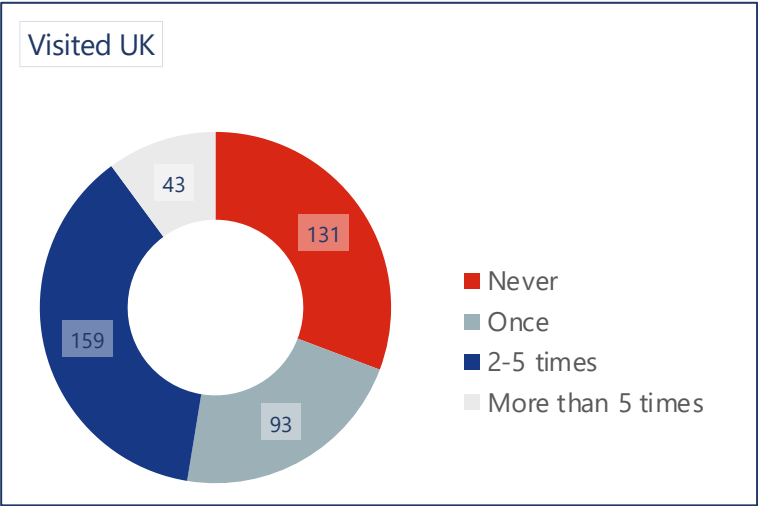
Count			
Count	Female	Male	Total
16 - 19	1,407,245	1,534,625	2,941,870
20 - 24	1,472,204	1,839,471	3,311,675
25 - 29	2,609,247	2,649,157	5,258,404
30 - 34	2,684,409	2,743,181	5,427,590
25 - 34	5,293,656	5,392,338	10,685,994
Total	8,173,105	8,766,434	16,939,539

% of grand total			
	Female	Male	Total
16 - 19	8%	9%	17%
20 - 24	9%	11%	20%
25 - 29	15%	16%	31%
30 - 34	16%	16%	32%
25 - 34	31%	32%	63%
Total	48%	52%	100%

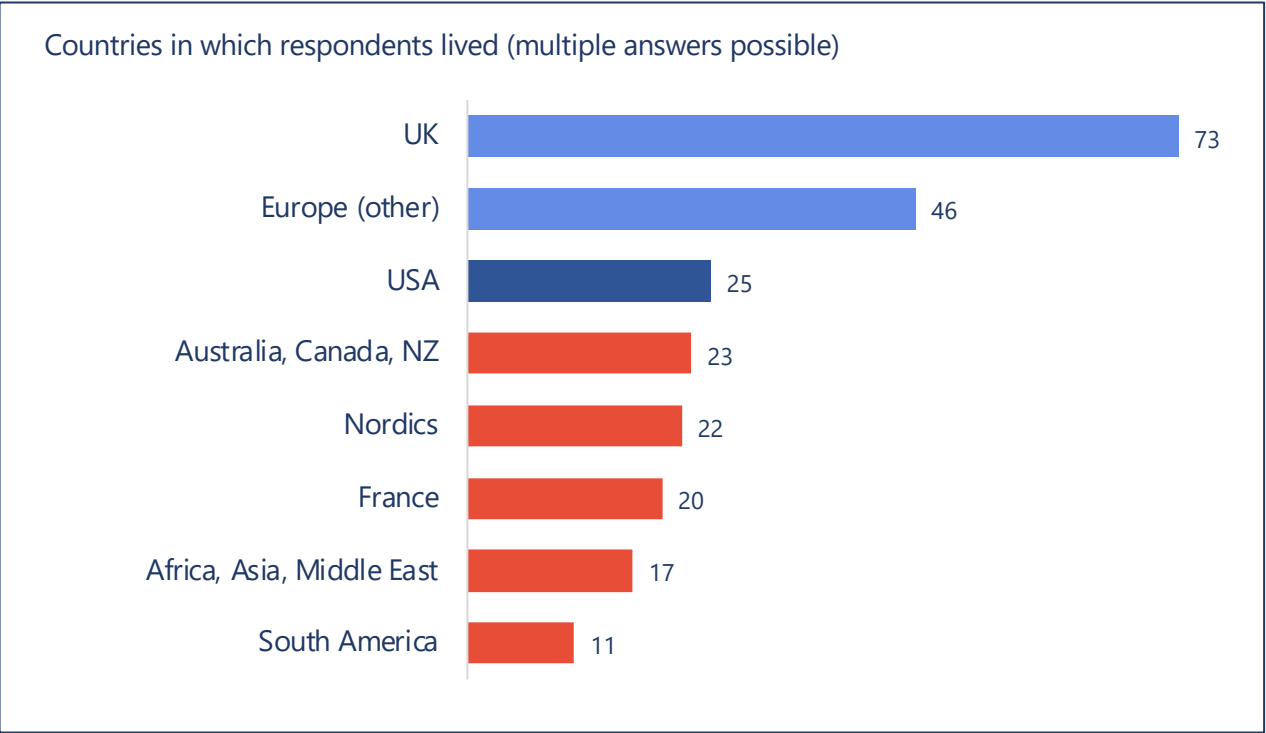
Weight (= 1/ratio)	
	Weight
Female 16-19	0.5538
Female 20-24	0.3547
Female 25-34	1.2887
Male 16-19	0.8236
Male 20-24	1.3162
Male 25-34	1.8725

- As a result of our survey methodology, the sample is skewed towards certain demographic groups.
- Females are overrepresented because they proved more willing than males to participate. The number of 30-34 year olds, too, was lower, as in Denmark.
- In order to mitigate the imbalances, we applied a weight to each respondent, either up- or down-weighting their survey responses. This approach achieves a truer representation of the different age and sex groups within the German population.
- We only applied weights for age and (self-identified) gender, our main demographic variables.
- We arrived at the weights by comparing age and gender distributions in our sample to those of official age and sex statistics in the German population. The comparison resulted in a ratio expressing the degree by which the sample distribution differs from the population.
- The weight is a factor which adjusts the skewed proportions of the sample, and brings them in line with the population. Example: 25% (F20-24 Sample) x 0.3457 (weight) = 9% (F20-24 Population)
- As this approach would have resulted in an extreme weight for the group 30-34, giving a small group of respondents too much influence in the aggregated results, we decided to use only three age groups for weighting: 16-19, 20-24, 25-34.

A3 - Survey respondents – relation to UK



73 survey respondents had experience of living in the UK, 123 of living in an English-speaking country:



Note: Of the 73 respondents who have lived in the UK, 15 noted that this was in Scotland. The nation features prominently in one year’s collective school textbook, where it is the focus of English lessons.

A4 - Digital diary & activities

Screen Encounters with Britain

Digital Diary - Tag 4

Bitte gegen Ende des Tages ausfüllen



Es gibt 3 Aufgaben

1. Bitte gib **alle Titel von Filmen & Fernsehshows** an, die du heute geschaut hast (> 20 Min.) und beantworte einige Fragen darüber, wie du geschaut hast.
2. **Denke darüber nach**, welche Dinge, Filme und Serien **deine Vorstellung von Großbritannien**, Briten und britischer Kultur **geprägt** haben. Halte dies in einigen Stichpunkten fest.
3. Schaue & bewerte einen **Trailer** für eine neue britische Mini-Serie.

Mein Streaming- / Fernseh-Tag

Bitte nenne alle Filme & Fernsehshows (20+ Min.), die du heute geschaut hast.

Um einen Film oder eine Show einzutragen, musst du einfach nur unseren Fragen folgen. Wenn du mit einem Titel fertig bist, wirst du gefragt, ob du noch einen weiteren Titel eingeben möchtest - so lange, bis du nichts mehr einzutragen hast.

OK, los geht's

Ich habe heute nichts geschaut

Wie hast du diese(n) Titel geschaut?

Bitte klicke alle relevanten Optionen an.

Englisch + deutsche Untertitel

Englisch - ohne Untertitel

Englisch + englische Untertitel

Deutsche Synchronisation

Anders, und zwar:

Trailer - Tag 4

Zum Abschluss möchten wir dir einen Trailer für eine neue Mini-Serie zeigen.

Bitte schau dir den Trailer an und klicke auf die **Sterne unter dem Video** um anzuzeigen, wie groß dein Interesse ist, die Serie zu sehen.

★☆☆	= Wenig Interesse
★★★	= Interessiert mich
★★★★	= Werde ich definitiv gucken



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

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

26 respondents completed the DD. They were selected for variety of demographics (age, gender, occupation) and personal factors relating to the UK (international experience, frequency of UK screen consumption, self-proclaimed interest in UK on a slider scale from 0-100).

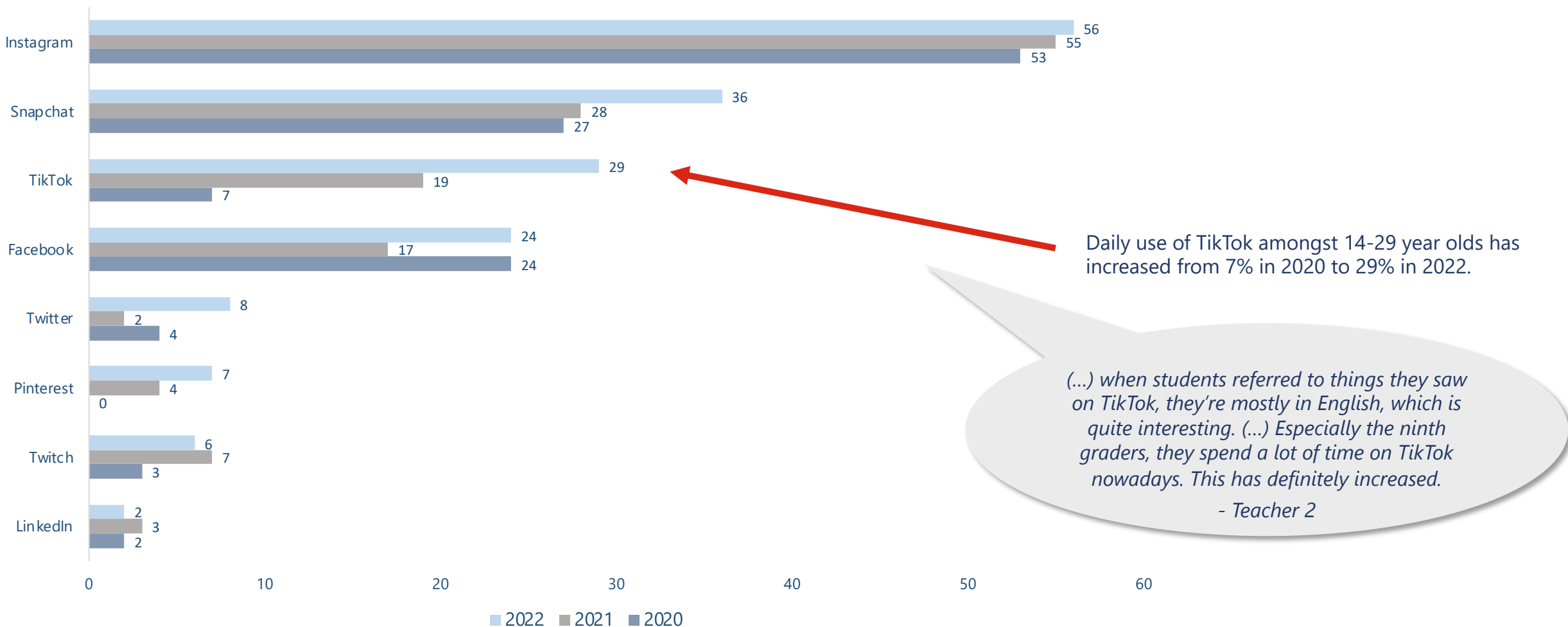
12 were selected after completing the DD to participate in a 60 min online interview. Following the same guiding questions, each interview was personalised, using the information provided in the DD.

A5 - List of 20 interviewees

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	12 x 60 min interviews 6 female 6 male aged 17-32
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	3 x 50-90 min focus groups 6 female 2 male aged 16-18
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	

B1 - Social media consumption in Germany

Daily Use of Social Media 2020-2022 by 14-29 year olds (%)



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Brexit: The Uncivil War, Baffin Media/Channel 4/House Productions
Bridgerton, Shondaland/CVD Productions/Netflix
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James Bond, Eon Productions/MGM
Kingsman: The Secret Service, Twentieth Century Fox/Marv Films/Cloudy Productions
Love Actually, Universal Pictures/StudioCanal/Working Title Films
Midsomer Murders, Bentley Productions/All3Media
Paddington, StudioCanal/Anton/TF1 Films Production
Peaky Blinders, Caryn Mandabach Productions/Tiger Aspect Productions
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Top Boy, Cowboy Films/Dreamcrew/SpringHill Entertainment

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Suggested Citation

Esser, A., Hilborn, M., Steemers, J. (2023). Screen encounters with Britain. What do young Europeans make of Britain and its digital screen culture? Interim Report Germany. King's College London. <https://doi.org/10.18742/pub01-139>

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The data supporting this article 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.

Acknowledgement

This work was supported by the Arts and Humanities Research Council [grant number AH/W000113/1], part of UK Research and Innovation (UKRI) .