

Form, Platform and the Formation of Transnational Audiences: A case study of how Danish TV drama series captured television viewers in the UK

Andrea Esser, University of Roehampton, UK

Abstract

This article combines analysis of form, platform and audiences for a holistic understanding of how Danish series entered the global trade in TV fiction. Building on existing research on form and production values it adds a wide-ranging empirical case study, exploring the specific local conditions that led to the introduction of Danish series in the UK in 2011 and subsequent growth in UK audiences for Danish and other subtitled TV series. It reveals the multiplicity of factors contributing to the success of the early Danish serial imports, the interdependence of form, platform and audiences, and the imperative to rethink dominant theories of international programme flows.

Key words

Nordic noir; Danish TV drama series; UK television market; subtitled drama; transnational TV audiences; TV programme flows

Introduction

For the past five years, television scholars have been intrigued by the seemingly sudden and unexpected success of Danish TV drama series selling around the world, most notably to 159 countries in the case of *Forbydelsen/The Killing* (2007-12) or 67 in the case of political drama *Borgen* (2010-13) (Bondebjerg and Redvall, 2015). Unexpected because, as Pia Majbritt Jensen rightly notes, until the 2010s Denmark was seen as ‘at the periphery of the global TV market’ (2016), its exports limited to the Nordic region and, in the case of crime fiction also Germany. Denmark was disadvantaged as a TV export country because of the small home market and the few people speaking Danish globally. This severely limits production budgets. Moreover, Danish TV drama—most of which historically has been produced by public service broadcaster, Denmark Radio (DR)—has been considered too culturally specific to lend itself to international distribution (Jensen, 2016). Consequently, the explosive rise in sales of Danish TV drama series during the 2010s seems to challenge dominant thinking about international TV programme flows. According to this paradigm,

foreign programming is believed to suffer from a ‘cultural discount’ (Hoskins and Mirus, 1988) and as a result therefore remains mostly restricted to ‘geo-linguistic’ or ‘geo-cultural’ markets (Sinclair, Jacka and Cunningham, 1996; Straubhaar, 2007).

This article combines research on form, platform and audiences to gain a holistic understanding of the unexpected programme flow from Denmark. Following this introduction, the first section offers a summary of the existing research, which—in its attempt to explain the recent and seemingly sudden international success of Danish TV drama series—thus far has centred above all on TV text and production. Subsequently I will add an in-depth exploration of transnational audiences and ‘platform’ through a historical case study of the UK market, today a key import market of Danish TV series. Platform in this article refers to BBC Four, the public service niche channel responsible for bringing Danish TV drama series into the United Kingdom, plus its wider UK market context. ‘Success’ is understood as the sale of *Forbrydelsen*, *Borgen* and *Bron/Broen* (*The Bridge*, 2011-present) to BBC Four and the three series’ critical and popular acclaim in the United Kingdom, which in turn led to more Danish TV drama series being sold to BBC Four and eventually other UK channels.

The success of Danish TV drama series in the United Kingdom was particularly surprising: at the time the country’s inhabitants were not generally knowledgeable about or interested in Denmark, nor would they have considered themselves to be particularly culturally proximate. Especially since the end of the Second World War the United Kingdom has looked towards the United States for inspiration and emulation not Europe (Robertson, 2014). Moreover, the UK TV market is the fifth largest in the world and much TV fiction is produced domestically. With its 26 million TV households and 58 million viewers (4+) the country has the third highest TV programming expenditure in the world (Ofcom, 2015). Historically UK audiences therefore have much domestic programming to choose from, and where TV fiction is imported it overwhelmingly comes from America. In the mid-2000s, for instance, around three-quarter of imports on the United Kingdom’s eight most important TV channels were from the US, followed by TV fiction from Australia and Canada (varying between 2 per cent and 8 per cent). In contrast, the average share of European imports was less than 1 per cent. Even European co-productions, which had higher production budgets but were ill-reputed as ‘Eurotrash’ and ‘Europudding’, accounted for no more than half a percent. For BBC Two, which imported the most from the Continent at the time, the share was 2 per cent (EAO, 2005, 2006); a figure similar to that of UK cinema audiences for European films

(Jones, 2014). In short, until the present decade UK viewers were strangers to TV fiction from Europe, let alone Denmark.

This history of low imports from the Continent and the perceived cultural distance make the United Kingdom a particularly interesting case study. First, the geo-linguistic market paradigm cannot explain the recent influx and success of Danish TV drama. Second, this novel direction of flow suggests that the particular market context into which TV programmes are imported might be one explanatory factor for shifts in international trade flows. Already Annette Hill has rightly called for a greater consideration of audiences in reference to what she calls the ‘push-pull dynamics’ (2016) of transnational drama production and consumption. In the following, I want to argue and show that a three-pronged approach should be taken. Combining research on platform, form and audiences allows us to see the multiplicity of factors that have contributed to the introduction and astounding success of Danish TV drama series in the United Kingdom and subsequently subtitled drama from other countries. As this article will demonstrate these factors include,

- a) transnational production values and practices;
- b) multiple textual aspects of innovation and quality, leading to
- c) viewers’ perception of *Forbrydelsen*, *Borgen* and *Broen/Bron* as ‘fresh’ and of ‘high quality’;
- d) the proliferation of TV channels and with this an increase in the demand and competition for content as well as the formation of niche audiences;
- e) BBC Four’s established educated niche audience;
- f) an adjuvant precursor in the form of Swedish detective novel and TV series *Wallander* (TV4, 2005-2013) and its BBC adaptation with Kenneth Branagh (BBC One, 2008-2016);
- g) the emerging trend for binge-watching quality drama and arising from this a degree of lucky timing;
- h) significant cuts to the BBC’s budget coupled with Government and commercial competitors insisting that the Corporation scale back on US drama. This caused an increase in imports overall and in (low-cost) non-US drama specifically.

In addition to this multiplicity of explanatory factors, the three-pronged approach reveals the interdependency of form, platform and audiences: form transnationalises because more and more content depends on international markets and audiences. Platforms (enabled by

technology) transnationalise their content because channel proliferation causes an increase in demand, which cannot be met domestically. Moreover, they transnationalise because they have discovered niche audiences' interest in non-domestic and non-US drama. Finally, audiences transnationalise because of form's quality and transnational look-and-feel; and because they can now easily find non-domestic, non-US content on established, familiar platforms.

The empirical evidence for this article stems from multiple sites and methods. For the exploration of platform, trade literature and policy document analysis was used as well as interviews with three key gatekeepers: Richard Klein, Controller of BBC Four (2008- 2013); Sue Deeks, BBC Head of Programme Acquisitions, Films & Series; and Jon Sadler, Head of Product Marketing, Arrow Films. The latter, a UK distributor of world cinema and cult films, were an early investor in the UK DVD distribution rights for Scandinavian TV drama series and instrumental in marketing and cementing the *Scandi-Noir* label through their website, newsletter, social media and *Nordicana* events (2013-2015). Audience research was carried out in the form of explorative group and individual interviews with 28 'ordinary' (i.e. non-professional) viewers, plus observation of Scandi-Noir inspired events and Facebook communications: *Scandi-Noir with Saga Norén* (11 September 2014), an evening featuring Sofia Helin interviewed by Mariella Frostrup, organised by the London-based *How to: Academy* in co-operation with the Swedish tourism board; *Nordicana* (6-7 June 2015), a two-day screening and 'meet the actors and writers' festival, organised by Arrow Films; the latter's 'NordicNoir TV' Facebook page; and the 'Fans of Scandinavian/Nordic Crime/Fiction and Drama Genre' Facebook group (*FoSCFG*). The closed, non-commercial group was launched in October 2013 by Richard East and by the end of 2016 had 8,000 members and daily postings by the dozen. In August 2015 it spawned a second group, 'Fans of European and World TV Dramas', launched by David Beattie, one of the *FoSCFG* administrators.

For the quantitative research, which illuminates the position and trajectory of Danish TV drama series on UK television and confirms the ground-breaking role of *The Killing*, a comprehensive ratings' analysis was carried out for the primetime schedules of seven relevant TV channels between January 2006 and July 2016. The ratings analysis and interviews were triangulated with two polls on age and access, posted on the *FoSCFG* page (8 November 2016). Both polls received over 400 responses and corroborated findings from interviews and ratings analysis, that the majority of UK viewers of Danish TV drama series watch them on television and tend to be 45+.

Form and the transnational appeal of Danish TV drama series

Up to this point, researchers have approached the quest to understand the recent international appeal of Danish TV drama series with textual research and production studies (Waade, 2011; Redvall, 2013; Waade and Jensen, 2013; Agger, 2015, 2016; Creeber, 2015; Redvall and Bondebjerg, 2015; Nielsen, 2016; Jensen, Nielsen and Waade, 2016). The two approaches have produced a number of plausible explanations. Although intertwined, for ease of use I have grouped them into three broad categories: ‘innovative textual qualities,’ ‘transnational production approach’ and ‘genre’.

Several scholars argue that contemporary Danish TV drama series possess aesthetic and narrative qualities, which were innovative and unique around 2010 when *The Killing* won international acclaim. Anne Marit Waade (2011), Pia Majbritt Jensen (with Waade, 2013) and Glen Creeber (2015) highlight the distinctive use of landscape (including the aural) to underline characters’ emotional and mental conditions and the ‘radical televisual style’, which mimics cinematic aesthetics through the ‘abiding use of dark colours and dim lighting’, ‘lurking camera placements’ and ‘rainy autumn scenes’. Narrative characteristics ascribed as particular to Danish TV drama series include strong female characters (Agger, 2011) and double- or triple- storytelling (Redvall, 2013), aimed at adding social critique and psychological complexity, and skilfully interweaving public, social and cultural issues with private themes. However, Eva Redvall and Ib Bondebjerg (2015) warn that the uniqueness of aesthetic and narrative qualities should not be overstated.

Primarily, Redvall and Bondebjerg ascribe the success of Danish TV drama series to their co-production nature and particular combination of local story formats and high professionalism. Public service broadcaster DR worked towards this for years, they say,

deliberately changing the in-house mode of production to facilitate the emergence of more ‘cinematic’ flagship series, which could compete with the dominant US shows in the domestic market while being marked by a ‘one vision’ idea of the importance of authorial designation and perceptions of a certain kind of public-service ‘double storytelling’. (2015: 235).

Intrinsically tied to these changes in production, several Danish scholars highlight the growing trend for ‘producing with an eye to the international market’ (Redvall, 2013; Jensen, Nielsen and Waade, 2016) and the notable ‘transnationalisation of production’ (Agger, 2015,

2016; Nielsen, 2016). On the one hand, financial necessity leads Danish producers to co-produce, which implicates an international outlook. On the other, production dogmas have—in the attempt to raise the professionalism of Danish drama production—been strongly influenced by US and UK production values and practices. This makes Danish TV drama more appealing internationally. It also means that Danish TV drama, despite appearances—despite the Danish locations, actors and production personnel—should be seen as transnational rather than national (Agger, 2015, 2016; Nielsen, 2016; cf Esser, 2015; Hilmes, 2014; Weissmann, 2012).

Finally, genre has been suggested by Waade (2011), Bondebjerg and Redvall (2015) as a likely contributory factor to the international interest in Danish TV drama series. International sales figures of crime novels from Scandinavian and other countries back the long-standing belief that crime has a strong universal appeal. In the UK readers began to discover Scandinavian crime novels in the new millennium (Forshaw, 2012). But again Bondebjerg and Redvall (2015) warn against overstating genre as an explanatory factor, noting that UK historical drama too is internationally popular. Importantly they add though: ‘[t]he use of certain established formats such as the crime genre can help foreign audiences approach foreign fare; viewers then know the over-all formula and contract and expect a certain standard of storytelling and style’ (2015: 224). As we will see later on, this point was also made by BBC Four controller Richard Klein (2016); and focus group participants noted that *The Killing* (in turn) opened them up to political drama *Borgen*.

Platform: The UK market, BBC Four and its established audience

If we want to understand trade flows, I have argued in the introduction, it is not enough to study form and its production. We, too, need to look at the importing institution(s) and their market environment. Today, as the distribution of audiovisual content is radically changing, a close look at the importing side seems particularly indispensable. At the global level it is important to recognise that the proliferation of TV channels and online distribution platforms fundamentally changes the TV content trade (Stemmers, 2016) and multiplies the demand for content (Doyle, 2013). Simultaneously, television is undergoing ongoing processes of audience ‘demassification’, which is accompanied by the formation of dedicated niche audiences (Küng, 2017).

As far as the United Kingdom is concerned, Jeanette Stemmers argues that in today’s consolidated, transnational programme sales market, UK content is becoming ‘increasingly less central to the success of UK distributors’ (2016). UK broadcasters can no longer bear the

costs of drama production on their own and their investment in original UK drama production has declined by a whopping 44 per cent between 2008 and 2014. The resulting ‘drought’, Steemers says, has been countered with ‘overseas content, including subtitled drama from Denmark, Sweden and other non-English speaking territories’ (2016: 742). Sam Ward (2013) has explored how BBC Four has used subtitled drama for branding that befits a public service broadcaster. The following historical exploration of the UK TV market, BBC Four and the formation of audiences for subtitled drama follows these leads.

Competition for content and audiences in the United Kingdom is fierce. In 2015, the number of TV channels available to viewers stood at 316; most viewers were able to receive 50+ channels. Sixty-four percent of households subscribed to a pay-TV package, 59 per cent of adults (15+) had used on-demand catch-up services (BBC iPlayer, All4, My5, Sky on Demand), 25 per cent stand-alone video subscription services like Netflix and Amazon Prime Instant (Ofcom, 2016). Figure 1 gives an indication of the market’s high audience fragmentation:

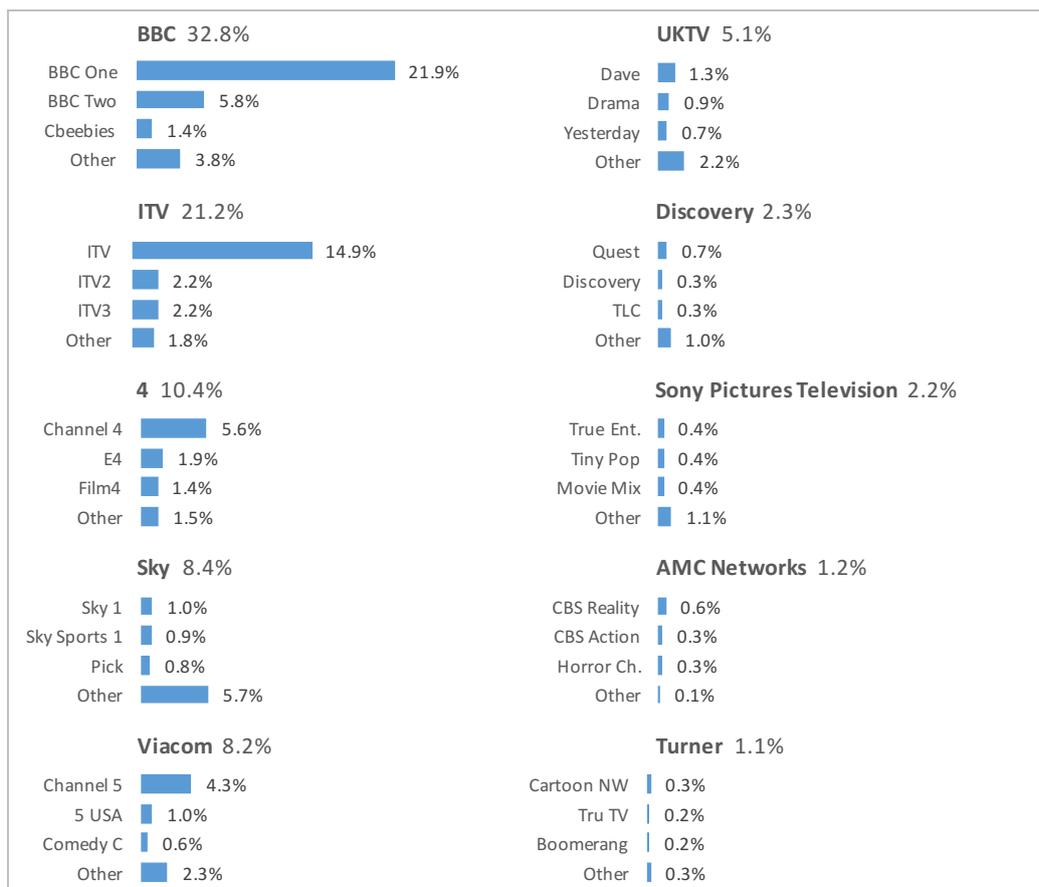
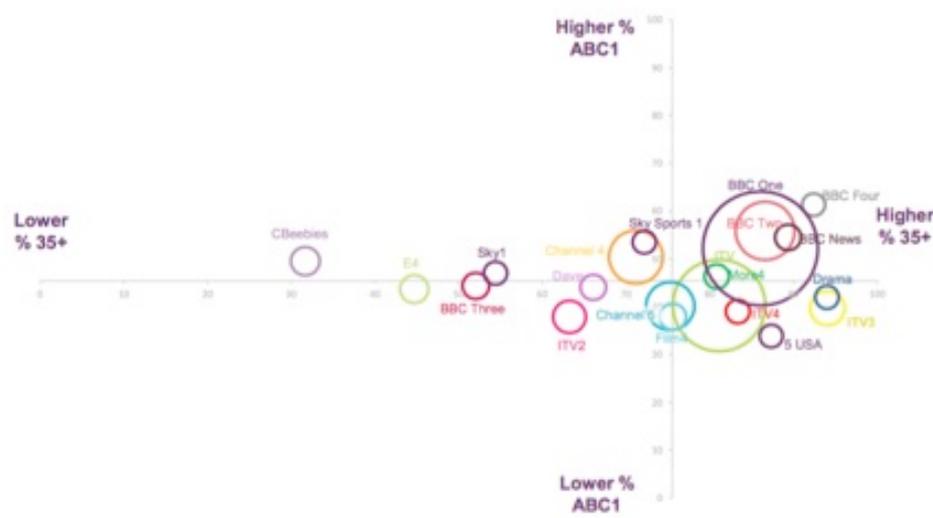


Figure 1: Average audience shares UK channels by Top 10 Broadcaster Groups, 2015

Source: <http://www.barb.co.uk/trendspotting/analysis/share-by-channel-2/>

BBC1 and ITV1, the two largest free-to-air channels, still have a combined share of 37 per cent, but the remaining 63 per cent are heavily fragmented. Four channels have a share of between 2-6 per cent, the other 300+ digital channels have shares of below 1 per cent. For clarification, BBC Four is included in BBC's 'other' category, together with six other channels. Sky's 'other' group includes over 28 channels.

BBC Four, a freely available digital channel, was launched in 2002 under the core concept of 'Everybody Needs a Place to Think'. This situated it as up-market and in direct competition with BBC Two, the former home of the miniscule share of subtitled drama historically broadcast in the United Kingdom. Graph 2 demonstrates that today BBC Four attracts the oldest and wealthiest viewers amongst the 20 most watched channels. The graph, created by the UK's audience measurement company, BARB, charts the age and socio-economic profile relative to the 35+ age and ABC1 SEG profile of viewers to total TV. The latter refers to the occupation of the chief income earner and is the basis for the classification of household social status commonly used in the United Kingdom. The social grades are: AB – higher (A) or intermediate (B) managerial, administrative or professional; C1 – supervisory or clerical and junior managerial, administrative or professional; C2 – skilled manual workers; D – semi-skilled and unskilled workers; E – state pensioners, casual or lowest grade workers. Only ABC1 have been considered in the below graph. The bubble size depicts each channel's market share.



Graph 2: Age and socio-economic audience profile of the 20 most viewed channels, 2015

Source: BARB in Ofcom (2016: 1)

Reflecting BBC Four's growing availability on different distribution platforms as well as changes in programming and scheduling, this channel's audience share (16+) in 2016 stood at 1.1 per cent. It had grown to this from an annual average of 0.1 per cent during its launch year in 2002, to 0.4 per cent in 2006 and 0.6 per cent in 2010 (i.e. the year before it launched *The Killing*).

A strategic review of the BBC in 2010, which also included BBC Four, resulted in major consequences for programme output and is very likely to have played a part in the latter's growing interest in Danish and other subtitled drama—although neither Klein (2016, personal communication) nor Deeks (2016, personal communication) were willing to attest this. During the 2010 review the Government demanded that the BBC reduce its budget by 25 per cent. In addition, the Corporation faced pressure from politicians and commercial rivals to reduce spending on foreign acquisitions (meaning US imports).

Responding to these pressures and the planned licence fee freeze, the Corporation announced plans to make major cuts, including to its foreign acquisitions budget (Conlan, 2010; Sweney and Brown, 2010). The BBC, it should be noted, is the UK's most important source of original production (about 40 per cent of non-news commissions) (Oliver and Ohlbaum, 2015) and so the country's overall budget for drama production continued to fall, intensifying the 'dearth' trajectory of domestic drama noted by Steemers (2016). BBC Four's already very small annual budget of £50m was cut by 10 per cent. Moreover, in the attempt to fend off calls for the channel to be scrapped altogether for being too similar to BBC Two (Sweney and Brown, 2010; Herman, 2013), the Corporation changed the remit of BBC Four's service licence.

Until 2010 BBC Four's remit had been 'to be a mixed-genre television channel for all adults offering an ambitious range of innovative, high quality output that is intellectually and culturally enriching' (BBC Trust, 2006: 1). One of its many objectives was to provide 'the best international and foreign language feature films, programming and documentaries'. The revised service licence published in February 2011 maintained all objectives (BBC Trust, 2011: 1) but narrowed the remit, pushing international programming to the fore: 'BBC Four's primary role is to reflect a range of UK and international arts, music and culture' (BBC Trust, 2011: 1). A 'vision paper' published by the BBC to explain how it would reduce costs whilst 'putting quality first' stated for BBC Four: 'There will be no UK origination in drama, and BBC Four will significantly reduce its drama offer but it will continue to show the best foreign language drama series and films from across the world' (BBC, 2010).

***The Killing* and its precursors: Form, platform and audience interaction**

Prior to January 2011, when *The Killing*, the commonly acknowledged ‘game changer’ for Danish TV drama (Jensen, Nielsen, Waade, 2016) was launched, there had been subtitled films on BBC Four on a regular basis. According to Klein (2016), 20-30 films a year were stipulated, but ‘no one ever watched them’. As far as subtitled TV series are concerned, the schedule analysis reveals that only one serial was premiered on BBC Four before 2011, *Engrenages/Spiral* (in 2006 and 2009). In addition to this eight-episode French crime drama, two episodes of Italian detective TV series *Inspector Montalbano* had been broadcast in 2008 (one repeated in 2010, both in 2011) and there had been multiple broadcasts in 2008, 2009 and 2010 of the Swedish film series *Wallander* (with Krister Henriksson). *Spiral*, according to Sue Deeks,

did well enough on BBC Four to make the channel realise that there was maybe something to this contemporary subtitled modern crime drama. The sort of audience it got was a fraction of what our highest performing series get now. But at the time it was a good audience, and it was written about (...) how it put its head above the parapet (...). And it was because it performed to a certain level that we then looked at other dramas, and then the next one we bought was *Wallander* [TV4, 2005-2013].

A first single episode of *Wallander* was broadcast in December 2008 to coincide with the British *Wallander* adaptation (with Kenneth Branagh) on BBC One (2008-16). Already *Wallander* thus had a presence in the United Kingdom when the Swedish version was introduced; and ‘so it did well’, Klein (2016) said.

Table 1 shows both the maximum and average viewer ratings for *Spiral*, *Montalbano* and *Wallander* between 2006 and 2010. Moreover, to allow for a proper assessment of these series’ audience appeal, it reveals how their average ratings compare to the respective average ratings of the weekday or weekend primetime time-band (9-11pm). It shows that until 2009 the average numbers of viewers for *Spiral* (as well as those for the two *Inspector Montalbano* episodes) were clearly below the respective weekday/weekend timeband average. In other words, *Spiral*’s ‘good audience’ (Deeks, 2016) must be seen in relation to BBC Four audiences for foreign films rather than the average audience size the channel attracted in these slots. The comparison with the timeband also suggests that *Spiral*’s critical acclaim at the time may have been more remarkable than the show’s ratings. A truly notable change in the ratings’ picture for subtitled drama occurred with *Wallander* in 2009, when

most of Season 1 was broadcast (trialled on different days of the week). Thanks to the BBC adaptation, by now *Wallander* was a well-known brand and for the first time, a subtitled TV series achieved ratings higher than the timeband's average (+31 per cent). In 2010, when both Season 1 and 2 (26 episodes in all) were broadcast on Saturday nights, *Wallander* achieved an average rating 66 per cent higher than the weekend timeband average.

Title	Year	Schedule slot	Max. ratings '000	Average ratings '000	Performance vs timeband
Spiral	2006	Sun 9pm	138	62	-43%
Spiral	2009	Sun 10pm	146	118	-36%
Montalbano	2008	Mon 10pm	88	88	-58%
Montalbano	2008	Sat 10pm	53	53	-65%
Wallander	2008	Sat 10pm	147	147	-3%
Wallander	2009	Mon 9pm	412	295	+31%
Wallander	2010	Sat 9pm	538	418	+66%

Table 1: Maximum and average number of viewers (in thousands) of early subtitled TV drama series on BBC Four, 2006-2010, and performance as compared to average ratings in the respective timebands (i.e. 9-11pm on either weekdays or weekends)

Source: Author based on BARB data.

Note: The above figures represent consolidated viewing, i.e. including all viewing that took place on TV screens via BBC iPlayer and PVR/DVR recordings up to seven days after the first broadcast. In the attempt to reduce complexity, four additional 10pm slots for *Spiral* and *Wallander* on Mondays and Thursdays were omitted.

Following the success of *Wallander*, Klein said he instructed his acquisitions team to bring him a choice of 'six or eight shows from around the world' that they 'could buy cheaply'. He and Deeks both highlighted the financial as well as audience binding benefits:

I have got no money, but I know drama is a very good way of giving a channel character. Giving it a voice. Making it feel like this is our channel. (...) And it was very clear to me with *Wallander* that you could buy this foreign stuff cheaply. (Klein, 2016).

Klein's intention was to turn the Saturday night slot into one for 'posh soap for people who want to drink wine'. Saturday night television in the United Kingdom, the reader must know, is dominated by the big entertainment formats on BBC and ITV, *The X Factor* (ITV1, 2004-present), *Strictly Come Dancing* (BBC1, 2004-present) and *The Voice* (BBC1, 2012-16;

ITV1 2017-present), which consistently outperform ratings for TV fiction (Mediametrie, 2016). Other channels thus avoid scheduling expensive programming against these shiny floor shows and this means that viewers with no interest for the latter have little choice in TV fiction of a high production value.

The Killing attracted Deek's attention when cable channel AMC bought the adaptation rights for the United States. Deek's (2016) could not remember hearing the show mentioned before then but mused that she would probably have rejected it on the grounds that it had 20 episodes: 'too much of a risk', when there was 'so little experience with subtitled drama', she said. Considering the low viewership for foreign films, we should maybe better say, positive experience. Klein (2016) said he liked the series 'at first sight (...) it is obviously very, very well made' and he believed that 'for our audience this was perfect. This was absolutely what they were going to watch. (...) It was posh soap. It was subtle'. Like Deeks he conceded, though, that he 'had no idea *The Killing* would become iconic'.

Already showing in 10 European countries, *The Killing* began broadcasting on *Wallander's* Saturday night slot on 22 February 2011 with a double bill; a scheduling practice that would persist. Soon there was much favourable press coverage—much 'noise' as Gerard Gilbert (2011), a critic of *The Independent* called it—and thanks to the growing fame of Sarah Lund's somewhat unusual TV character and jumper, the serial quickly came to be referred to as a 'cult hit' in the British press (see, for example, Hogan, 2011). Knowledge about 'Danish drama' became widespread amongst the better educated, but even tabloids like *The Sun* reported on *The Killing*. Asked whether there had been a particularly strong marketing push, both Deeks and Klein contended that BBC Four's budget was too small for much marketing. Deeks (2016) remembered that the press just 'latched on to it, and started writing about it'. However, she also remembered 'really pushing to get an on air trailer for *The Killing*' because 'it was ten weeks and twenty episodes, and it was really crucial that it worked'.

Once it was clear that *The Killing* attracted viewers, Klein said, he and his team resolved to buy more Scandinavian series. Season 2 of *The Killing* commenced yet in the same year (in November). *Borgen* and *The Bridge* were acquired and launched in January and April 2012 respectively. Together the three programmes became BBC Four's top rating programmes, each regularly occupying one of the first three places in the channel's weekly Top10 programme lists throughout 2011 and 2012 (BARB, 2017). *The Killing II* doubled the ratings achieved with Season 1, attracting over 1.2 million viewers; slightly older, educated and well-off ABC1 viewers as is typical for BBC Four audiences (see Tables 2 and 3).

Title	Female profile	Under 55 profile	ABC1 profile	HE profile
The Killing	56	29	70	52
Borgen	52	28	79	55
The Bridge	54	31	71	51
Montalbano	54	21	70	45
Spiral	44	24	58	38

Table 2: Socio-demographic profile of BBC Four viewers of subtitled drama broadcast in 2012, in %

Source: Author based on BARB data; HE refers to Higher Education profile, whereby it has to be noted that people aged 55+ in general left education earlier than later generations.

Taking into account that most elderly people do not use social media, we could say that the Facebook age poll conducted amongst *FoSCFG* members in 2016 roughly corroborates the age profile gained from this socio-demographic analysis in 2012. Of the 418 people participating in the poll, 169 were 55+ (101 were 55-64, 68 were 64+) and 144 were in the 45-54 age group. By a wide margin this was followed by people aged 35-44 (69), 25-34 (28) and 16-24 (8).

Interestingly, the extensive press coverage for *The Killing*, plus the appeal *Wallander* had for the BBC Four audience, seemed to positively impact on the ratings for *Spiral*, which was brought back in April 2011. All subtitled TV drama series on BBC4 now achieved ratings that, often by far, surpassed the average ratings of the channel's weekend primetime timeband (see Table 3).

Title	Year	Slot 1	Max. ratings '000	Average ratings '000	Performance vs Timeband
The Killing I	2011	Sat 9pm	611	534	+65%
The Killing II	2011	Sat 9pm	1,237	1,102	+240%
The Killing III	2012	Sat 9pm	1,262	1,095	+136%
Borgen I	2012	Sat 9pm	775	744	+60%
The Bridge I	2012	Sat 9pm	1,254	1,112	+139%
Wallander (H)	2011	Sat 9pm	644	465	+44%
Wallander (L)	2012	Sat 9pm	649	516	+11%
Spiral III	2011	Sat 9pm	691	407	+26%
Montalbano	2011	Sat 9pm	579	469	+45%
Montalbano	2012	Sat 9pm	931	756	+63%

Table 3: Maximum and average number of viewers (in thousands) of subtitled TV drama series on BBC Four, 2011-2012, and performance as compared to the average ratings in the weekend primetime timeband (9-11pm)

Source: Author based on BARB data; *Wallander* (H) refers to the film and later TV production with Krister Henriksson (TV4, 2005-2013), *Wallander* (L) to the earlier miniseries of TV films with Rolf Lassgård (SVT, 1994-2007).

As the doubling of viewers for Season 2 of *The Killing* suggests, this Danish crime serial undoubtedly was a game changer. However, the development of a fixed Saturday slot for foreign drama series, Deeks contended, was gradual and organic; caused by '[t]he success of these series and the appetite from BBC Four viewers for these series'. The scheduling and ratings for *Wallander* in 2010 support her claim.

Interestingly both Klein and Arrow's Jon Sadler remarked that audiences' taste for subtitled drama coincided with their discovery of the pleasures of high-quality serial television narratives. Nowadays, Klein said, '[q]uite a lot of the audiences consume their drama like they read books (...) And this audience reads books' (cf Hill, 2016). Sadler (2016), whose DVD sales, too, benefitted from this combination of 'lucky timing' and being 'first mover', remarked:

The Killing came around the time when binge-watching really became a phenomenon. So it hit a good market, when the DVD market was still really strong. The digital streaming market hadn't really come along a lot then. Netflix wasn't in the UK. I think at that time *The Killing* sold around 300,000 box sets [in the UK]. And that's big in television. There will be a lot of English dramas that haven't sold that many.

Thus, what seems to have pushed Danish TV drama series into the limelight is the combination and interaction between the new multi-episode serial form of televisual storytelling, the series' quality and first-mover advantage, the existing BBC Four niche audience and the emerging trend for binge-watching. Lucky timing also meant that BBC Four and Arrow Films were the first platforms to offer such content in the UK market.

Audience discourse on platform and form

Whilst DVD sales were remarkable, it is clearly television which, in the United Kingdom, plays the most important role in both the discovery of Danish TV drama series as well as their ongoing consumption today. The vast majority of both the 28 people interviewed and the 400+ participating in the Facebook access poll watch it on television, either when

broadcast or recorded with a time-lag. With the poll allowing for as many options as applicable, ‘TV channels’ was ticked 331 times, ‘Catch-Up’ 225 times, ‘DVD’ 172 times and ‘Stand-Alone Subscription Services’ 147 times. Fewer than 50 people declared using online streaming or peer-to-peer sharing, whereby it needs to be noted that despite the request that only UK-based fans should participate in the poll, this was not always observed and explains some of the ticks for the latter three options. (The vast majority of *FoSCFG* members at the time were UK-based.)

Asked how they discovered subtitled drama on BBC Four almost all of the interviewees said through recommendations from family, friends and colleagues. Grace, who admitted she was very reluctant at first, said: ‘if somebody you really respect tells you, “you really ought to watch this”, you kind of think, “maybe I’ll give it a go”’ (2014). Only three people actively remembered seeing the trailer before *The Killing* started. No one mentioned having watched foreign films on BBC Four. Foreign films are different from today’s series, TV veteran Klein (2016) mused: They are art-house and hence too unfamiliar to make for comfortable, easy viewing. Concurring with both the transnationalisation of production argument and Bondebjerg’s and Redvall’s (2015) hypothesis that knowing the over-all formula and contract of a genre helps audiences approach foreign fare, Klein (2016) believes that the success of the Danish serials lies in their familiarity. They all, he said,

had echoes to shows, people here already know: *West Wing*, *24 Hours*, *[Inspector] Morse*, *Midsomer Murders*. These are all things that we know and are very familiar with. And so we kind of know. We know the language, we know the geography of these shows and the mechanics of them.

The Killing thus may not have been as unfamiliar as it first appeared. At the same time, it made a seminal contribution to familiarising UK audiences with the aesthetics and narratology of transnational ‘Danish’ TV drama serials. As focus groups and interviews revealed, for the vast majority *The Killing* was the door-opener for all subsequent Danish and other foreign language drama.

The qualitative audience research also corroborated the other arguments that have emerged from textual and production research. It should be noted that testing these theories was not the objective of the interviews and focus groups. The latter were explorative and carried out before most of the literature summarised above had been published; Agger (2011) and Redvall (2013) were only read after the audience research had been completed.

Unprompted, interviewees vocalised that for them the appeal of *The Killing*, *Borgen* and *The Bridge* lay in ‘the use of colours and landscape’ and the ‘subtlety’ of the music and the way actors look and dress.

Sophie: Because it’s sort of the ‘low key-ness’ of it, in a way that the whole Scandinavian – you know, *Wallander* and (...) It’s more the atmosphere, you feel the atmosphere. (Focus group 3, 30 April 2015)

Related to this were the perceived authenticity and realism of the characters and story worlds, as well as the natural, relatable but also admirable characters:

Alison: ‘Cause if that were America, [Saga] would be glammed up to the nines; she would be plastered in makeup, she would wear the perfect outfit on the perfect body, and everything would be perfect. I mean, she’s a very attractive woman, but she’s not plastered in makeup. And that’s really refreshing. (Focus group 3, 30 April 2015)

Isobel: [*The Killing*] had a female lead, who was working against all the odds. And her relationship with her partner who was from another part of Scandinavia, so you had that element. And her relationship with her mother. And I felt that you could really identify with her. (Focus Group 1, 15 October 2014)

Both female and male interviewees liked the strong, if somewhat unconventional, female leads. Unprompted, they praised the avoidance of stereotypes and clichés and the quality of the acting. Further supporting the findings of textual and production analysis, respondents commented (again unprompted) on the complexity and depth of the storytelling and the exploration of psychological issues. Interestingly, they also described the series as ‘ground-breaking’. Words such as ‘new and fresh’, ‘refreshing’ and ‘stylish’ were used by numerous respondents. Several noted how TV series from other countries appear to have adopted a ‘similar look’ since. Nobody remembered much about engaging with reviews in the media. In fact, when asked whether they remembered media coverage and/or had started watching because of favourable media coverage (after no unprompted references had been forthcoming), most could not remember. Some even repudiated having been influenced by media coverage. But people’s recollection can be hazy. Also, we all internalise media

discourse indirectly, via friends and family. Unfortunately thus it is impossible to establish what and how much of the above has its origin in media coverage and discourse.

One final point of interest that shall be mentioned here, relating back to Steemer's (2016) revelation about the current 'dearth' of UK drama, is that members from one focus group, when asked why they mentioned so little UK drama in their discussion of 'quality', bemoaned the focus of UK production on period drama and the general lack of domestic drama that matches the quality of older hit shows, like *Prime Suspect* (ITV1 1991-2006)—another show with a strong female lead—or more recently, *The Fall* (BBC2 2013-2016).

Min: There isn't plenty, though. There's not that much good British drama.

Sophie: Not that much quality.

Alison: Not that much quality stuff, no. (Focus Group 3, 30 April 2015)

Whilst people in this group of librarians (Focus Group 3, 30 April 2015) still watch and enjoy a range of UK drama series, they clearly saw the Danish serials discussed as superior in terms of scriptwriting, aesthetics and innovation. However, a participant in another focus group reckoned that since *The Killing* 'British drama has kind of stepped up' (Isobel, Focus Group 1, 15 October 2014).

Outlook and conclusions

Today there are many subtitled TV drama series on offer and BBC Four is no longer their exclusive home. High-quality subtitled TV drama series are now shown on several UK channels and acquired in a competitive market. Danish-Swedish co-production *The Bridge* remains the highest rating series. Season 3 in 2015 regularly attracted around 1.5 million viewers. The first episode, which achieved the highest rating, attracted a maximum of 1.78 million viewers. To put this into perspective: With its launch episode on 21 November, *The Bridge III* occupied third place in that day's primetime ranking, behind hit reality TV show *I'm a Celebrity – Get Me Out of Here!* (ITV1, 2002-present) with 8.65 million viewers and long-running UK medical drama serial *Casualty* (BBC1, 1986-present) with 4.65 million viewers (all 16+). In market share terms this translates into 7.6 per cent, 38 per cent and 19.6 per cent respectively—an astounding success for both subtitled drama and drama shown on BBC Four, a channel with an annual (all-day) average market share of 1.1 per cent.

Whilst *The Bridge* still reigns supreme on BBC Four, high ratings for subtitled drama are no longer unusual. By July 2016, *Spiral* (BBC4, 2006-present), *The Young Montalbano*

(BBC4, 2008-present), *Salamander* (BBC4, 2014), *Inspector de Luca* (BBC4, 2014) and *Trapped* (BBC4, 2016-present), had all surpassed the one million mark. In addition to ratings, both interviews conducted for this research and the remarkable growth of the *FoSCFG* Facebook group and its offshoot *Fans of European and World TV Dramas* demonstrate that people in the United Kingdom now enjoy TV series from a variety of non-English-speaking countries. Many focus group members stressed they ‘love all good drama’ from wherever it originates and that Danish drama, whilst presently a promise of quality, is not (or no longer) unique.

What I have argued and shown in this case study is that form, platform and audiences for fictional TV series are tightly intertwined. Responding to technological, economic and cultural forces each advances the transnationalisation of the other: audience and platform demands cause or ‘pull’ (Hill, 2016) TV drama series of a high production value which, due to their high expenditure, have to be financed transnationally. The offer, or ‘push’ of these series in turn grows transnational audiences and with this platforms’ demand for such content. The proliferation of distribution platforms, on the other hand, heightens competition for especially audience-binding serial content and drives an increasing number of platforms to take a niche-target approach. Audiences for subtitled drama, as the above has shown, were already pre-established on BBC Four and then grew significantly thanks to the quality and innovative nature of the Danish serials here discussed.

Also uniquely, this research has revealed the significance of platform in introducing Danish TV drama to the United Kingdom. There can be no doubt that it was BBC Four, nudged by a combination of institutional, political and market forces, which enabled these series to be discovered by UK audiences. By adding an in-depth exploration of ‘platform’, the article has made an important contribution to the list of factors that are likely to have caused the introduction and astounding success of Danish and other subtitled TV drama series in Britain and potentially other markets. To avoid duplication, I would like to refer the reader back to the introduction for the full list of factors identified to date.

Finally, the research for this article suggests that the dominant theories of trade flows, based on notions of cultural discount and geo-linguistic, or geo-cultural markets only hold to a certain degree. This has always been the case, as I have argued elsewhere (Esser, 2016). However, with the increasing transnationalisation in the production, distribution and consumption of televisual entertainment, calls for revisions of the above concepts and theories are likely to grow. For a start we should support the assertion that today’s high production value TV drama should be seen as transnational rather than national (Agger,

2016; Esser, 2015; Hilmes, 2014; Nielsen, 2016; Weismann, 2012). Following on from this I would like to propose that trade of this type of TV fiction, too, should no longer be described as international (i.e. between individual countries) but transnational. The term transnational more adequately denotes the plurality of TV programme producers, commissioners, distributors and buyers working across borders on a daily basis in complex, fluid webs of collaboration and interdependency.

Acknowledgements

This research has been conducted with the support of a guest researcher grant from Aarhus University, Denmark, and is connected to the FKK-funded project ‘What Makes Danish TV Drama Series Travel?’ (2014-2018).

References

- 24 Hours* (2001-2010) Fox, Imagine Entertainment/20th Century Fox Television/Real Time Productions/Teakwood Lane Productions.
- Agger G (2011) Emotion, gender and genre: Investigating *The Killing*, *Northern Lights: Film and Media Studies Yearbook* 9: 11-125.
- Agger G (2015) Strategies in Danish film culture – and the case of Susanne Bier, *Kosmorama*, 259. Available at : <http://www.kosmorama.org/ServiceMenu/05-English/Articles/Susanne-Bier.aspx> (accessed 31 July 2017)
- Agger G (2016) The development of transnationality in Danish Noir – from *Unit One* to *The Team*, *Northern Lights: Film & Media Studies Yearbook* 14: 83-101.
- BARB (2017) Weekly top10 programmes. Available at : <http://www.barb.co.uk/viewing-data/weekly-top-10/> (accessed 31 July 2017)
- BARB (2016) Share by broadcaster 2015. Available at: <http://www.barb.co.uk/trendspotting/analysis/share-by-channel-2/> (accessed 23 October 2016).
- BBC Trust (2006) BBC Four Service Licence. Issue date: 18 December 2006. London: Author. Available at : http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/regulatory_framework/service_licences/tv/tv_servicelicences/bbcfour_servicelicence_18dec2006.pdf (accessed 31 July 2017)
- BBC Trust (2011) BBC Four Service Licence. Issued February 2011. London: Author. Available at :

- http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/regulatory_framework/service_licenses/tv/2011/bbc_four_feb11.pdf (accessed 31 July 2017)
- BBC (2010) Delivering quality first. Vision, 6 October, London: Author. Available at : http://downloads.bbc.co.uk/aboutthebbc/reports/pdf/dqf_vision.pdf (accessed 31 July 2017)
- Bondebjerg I (2016) *Transnational Europe: TV-drama, co-production networks and mediated cultural encounters*, Palgrave Communications. 2:15034 doi: 10.1057/palcomms.2016.34
- Bondebjerg I and Redvall E (2015) Breaking borders: The international success of Danish television drama. In: Bondebjerg I, Redvall E and Higson A (eds) *European Cinema and Television. Cultural Policy and Everyday Life*, Basingstoke: Palgrave Macmillan, pp. 214-238.
- Borgen* (2010-2013) DR 1. DR.
- Bron/Broen* [The Bridge] (2011-2018) DR1 and SVT 1, Filmlance/Nimbus Film for SVT/DR.
- Casualty* (1986-present) BBC1, BBC Bristol/BBC Cymru Wales.
- Conlan Tara (2010) BSkyB poised to snatch Mad Men from BBC, *The Guardian*, 30 September. Available at : <https://www.theguardian.com/media/2010/sep/30/bskyb-mad-men-bbc> (accessed 31 July 2017)
- Creeber G (2015) Killing us softly: Investigating the aesthetic, philosophy and influence of *Nordic Noir* television, *The Journal of Popular Television*, 3(1): 21-35.
- Deeks S (2016) BBC Head of Programme Acquisitions, Films & Series, Interview with the author and Anne Marit Waade, London, 18 July.
- Doyle G (2013) *Understanding Media Economics*. 2nd ed, London: Sage.
- Esser, A (2015) What defines a national production?, Paper presented at the *New Directions in Film and Television Production Studies* conference, UWE Bristol, 14-15 April. Available at: [https://pure.roehampton.ac.uk/portal/en/persons/andrea-esser\(b705c7aa-e8b6-4bdb-a2b2-c00763307a2c\)/publications.html?page=1](https://pure.roehampton.ac.uk/portal/en/persons/andrea-esser(b705c7aa-e8b6-4bdb-a2b2-c00763307a2c)/publications.html?page=1) (accessed 9 September 2017).
- Esser A (2016) Defining ‘the local’ in localization or ‘adapting for whom?’ In: Esser A, Bernal-Merino M and Smith IR (eds) *Media Across Borders: Localizing TV, Film and Video Games*. New York: Routledge, pp. 19-35.
- European Audiovisual Observatory (2005) Yearbook 2004. Volume 5. Strasbourg: Author.
- European Audiovisual Observatory (2006) Yearbook 2005. Volume 5. Strasbourg: Author.

- European Audiovisual Observatory (2008) Yearbook 2007. Volume 2. Strasbourg: Author.
- Forbrydelsen* [*The Killing*] (2007-2012) DR1, DR.
- Forshaw B (2012) *Death in a Cold Climate*. Basingstoke: Palgrave Macmillan.
- Gilbert G (2011) Wanted in Britain: Europe's must-see TV thrillers, *The Independent*, 5 March. Available at : <http://www.independent.co.uk/arts-entertainment/tv/features/wanted-in-britain-europes-must-see-tv-thrillers-2232956.html> (accessed 31 July 2017)
- Herman D (2013) What's the point of BBC4? *New Statesman*, 15 May. Available at : <http://www.newstatesman.com/culture/culture/2013/05/what's-point-bbc4> (accessed 31 July 2017)
- Hill A (2016) Push-pull dynamics: Producer and audience practices for television drama format *The Bridge*, *Television & New Media*, 17(8): 754-768.
- Hilmes M (2014) Transnational TV: What do we mean by 'coproduction' anymore?, *Media Industries*, 1(2), Available at: <https://quod.lib.umich.edu/m/mij/15031809.0001.203/--transnational-tv-what-do-we-mean?rgn=main;view=fulltext>
- Hogan M (2011) The Killing: BBC4's new Scandinavian import, *The Guardian*, 21 January. Available at : <https://www.theguardian.com/tv-and-radio/tvandradioblog/2011/jan/21/the-killing-bbc-police-drama-women> (accessed 31 July 2017)
- Hoskins C and Mirus R (1988) Reasons for the U.S. dominance of the international trade in television programmes, *Media, Culture & Society* 10: 499–515.
- I'm a Celebrity – Get Me Out of Here!* (2002-present) ITV1, Granada/ITV.
- Inspector de Luca* [*Il commissario De Luca*] (2008) Rai, Ager 3.
- Inspector Montalbano* [*Il commissario Montalbano*] (2009-present) Rai, Palomar/Rai Fiction.
- Inspector Morse* (1987-2000) ITV, Zenith Productions/Central Independent Television/Carlton Television.
- Jensen, PM (2016) Global impact of Danish drama series: A peripheral, non-commercial creative counter-flow, *Kosmorama*, 263. Available at : <http://www.kosmorama.org/Artikler/Global-Impact-of-Danish-Drama-Series.aspx> (accessed 31 July 2017)
- Jensen, PM, Nielsen JI and Waade AM (2016) When public service drama travels: The internationalization of Danish television drama and the associated production funding models, *The Journal of Popular Television*, 4(1): 91-108.
- Jensen, PM and Waade, AM (2013) Nordic Noir challenging the 'language of advantage':

setting, light and language as production values in Danish television series. *The Journal of Popular Television*, 1(2): 259-265.

- Jones, HD (2014) The market for foreign-language films in the UK, Paper presented at the Migrating Texts colloquium, University College London, 31 October. Available at : <http://mecetes.co.uk/outputs/conference-papers> (accessed 31 July 2017)
- Klein R (2016) Controller of BBC Four (2008- 2013), Interview with the author and Anne Marit Waade, London, 24 February.
- Küng L (2017) *Strategic Management in the Media. Theory to Practice*, 2nd ed, London: Sage.
- Mediametrie (2016) Eurodata TV Worldwide. One Television Year in the World 2016 Issue. Levallois Perret Cedex/Paris: Author.
- Midsomer Murders* (1997-present) ITV, Bentley Productions.
- Nielsen J (2016) The Danish way to do it the American way, *Kosmorama*, 263. Available at : <http://www.kosmorama.org/Artikler/The-Danish-Way.aspx> (accessed 31 July 2017)
- Ofcom (2015) *International Communications Market Report 2015*. London: Author. Available at : https://www.ofcom.org.uk/data/assets/pdf_file/0020/31268/icmr_2015.pdf (accessed 31 July 2017)
- Ofcom (2016) *The Communications Market 2016*, Part 2: Television and Audiovisual, pp. 51-107. London: Author. Available at : https://www.ofcom.org.uk/data/assets/pdf_file/0024/26826/cmr_uk_2016.pdf (accessed 31 July 2017)
- Oliver and Ohlbaum Associates (2015) Consolidation, Globalisation and Vertical Integration – Myths and Realities. Industry report commissioned by Pact. Available at : http://stakeholders.ofcom.org.uk/binaries/consultations/psb-review-3/responses/Pact_Annex.pdf (accessed 31 July 2017)
- Prime Suspect* (1991-2006) ITV, Granada Television/ITV Productions.
- Redvall EN (2013) *Writing and Producing Television Drama in Denmark. From The Kingdom to The Killing*. Basingstoke: Palgrave Macmillan.
- Robertson R (2014) Situating glocalization: A relatively autobiographical intervention. In: Drori G, Höllerer MA and Walgenbach P (eds) *Global Themes and Local Variations in Organization and Management*, London: Routledge, pp. 6–34.

- Sadler J (2016), Head of Product Marketing, Arrow Films, Interview with the author and Anne Marit Waade, London, 13 April.
- Salamander* (2012-2013) Eén, Skyline Entertainment.
- Sinclair J, Jacka E and Cunningham S (1996) Peripheral vision. In: Sinclair J, Jacka E and Cunningham S (eds) *New Patterns in Global Television*. Oxford: Oxford University Press, pp. 1–32.
- Spiral [Engrenages]* (2005-present) Canal+, Son et Lumière/Canal+/CinéCinéma.
- Stemmers J (2016) International sales of UK television content: Change and continuity in the ‘space in between’ production and consumption, *Television & New Media*, 17(8): 734-753.
- Straubhaar J (2007) *World Television. From Global to Local*. London: SAGE Publications.
- Strictly Come Dancing* (2004-present) BBC1, BBC Studios.
- Sweney M and Brown M (2010) BBC may lay off quarter of online staff and close 6 Music radio station, *The Guardian*, 26 February. Available at : <https://www.theguardian.com/media/2010/feb/26/bbc-strategic-review> (accessed 31 July 2017)
- The Fall* (2013-2016) BBC2/RTÉ1, Fables Limited/Artists Studio/BBC Northern Ireland.
- The Voice* (2012-2016) BBC1, Talpa/Wall to Wall, (2017-present) ITV1, ITV Studios Entertainment/Talpa.
- The West Wing* (1999-2006) NBC, John Wells Productions/Warner Bros. Television.
- The X Factor* (2004-present) ITV1, Syco Entertainment/Talkback Thames/Thames.
- The Young Montalbano [Il giovane Montalbano]* (2012-present) Rai, Palomar/Rai Fiction.
- Trapped [Ófærð]* (2015-present) RÚV. RVK Studios.
- Waade AM (2011) BBC’s *Wallander*: Sweden seen through British eyes, *Critical Studies in Television*, 6(2): 47-60.
- Wallander* (1994-2007) SVT, SVT.
- Wallander* (2005-2013) TV4, Svensk Filmindustri/Yellow Bird/ARD Degeto.
- Wallander* (2008-2016) BBC1, Left Bank Pictures/Yellow Bird.
- Ward S (2013) Finding ‘public purpose’ in ‘subtitled oddities’: Framing BBC Four’s Danish imports as public service broadcasting, *The Journal of Popular Television* 1: 251-257
- Weissmann E (2012) *Transnational Television Drama. Special Relations and Mutual Influence between the US and the UK*. Basingstoke: Palgrave Macmillan.

Authors Biography

Andrea Esser is Professor of Media and Globalization at the University of Roehampton, and Director of the AHRC-funded Media Across Borders network. Her research interests revolve around the transnationalisation of the media, the globalization of culture and media management. Recent work considers transnational television audiences, transnational TV production networks and the global phenomenon of the TV format. Before joining Roehampton University, she worked in media consulting and publishing, and lectured at Goldsmiths and other London universities. In 2014/15 she spent six months as a guest researcher at Aarhus University, Denmark. Contact: a.esser@roehampton.ac.uk