

A man and a woman are in a film set. The man is sitting at a desk, looking at a tablet. The woman is standing next to him, looking at him. They are both wearing professional attire. The background is a dimly lit room with warm lighting and a desk with a green lamp.

# Impact of Filming on Cultural Affinity & Tourism

Made in Germany Content Viewers

INTELLIGENT INSIGHTS. BOLD DECISIONS.

LONDON | LOS ANGELES | SAN FRANCISCO | SINGAPORE



REPORT BY 2CV  
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## The impact of 'Made in Germany' content on affinity with Germany

This research explored whether the filming of movies and TV series in Germany increases affinity for the country, among viewers of the content.

**We surveyed UK and US viewers who were either:**

- Viewers of 'Made in Germany' content
- Non-viewers of 'Made in Germany' content

We asked them about their attitudes towards German culture, language, food, history, arts, products and tourism.

By comparing the attitudes of viewer and non-viewer groups, we can demonstrate the impact 'Made in Germany' content has on viewers' affinity with German culture across these dimensions.

# We compared 'Made in Germany' viewer groups to non-viewers

## VIEWER GROUPS



### Content Viewers:

Watch 'Made in Germany' content



### Streaming Content Viewers:

Watch 'Made in Germany' content on global streaming services



### Title Viewers:

Watch specific 'Made in Germany' titles

## NON-VIEWER GROUP



### Content Non-Viewers:

Do not watch 'Made in Germany' content

## DEFINITIONS

**Content Viewers:** indicated they watch TV or movies from the country, and/or indicated they had watched one of the 15 popular TV/movie titles from the country presented in the survey

**Streaming Content Viewers:** content viewers who indicated they mostly watch the country's content through global streaming services

**Title Viewers:** respondents who indicated they had watched one of the 15 popular TV/movie titles from the country presented in the survey

**Content Non-Viewers:** indicated they do not watch TV or movies from the country, nor had watched one of the 15 popular TV/movie titles from the country presented in the survey

# 'Made in Germany' content boosts viewers' affinity for Germany, its culture, and tourism, with the strongest impact seen on global streaming audiences

'Made in Germany' content has a powerful effect in strengthening positivity towards Germany, its culture, and its tourism appeal.

Viewers consistently show greater affinity with Germany than non-viewers, and this effect is amplified among those engaging with the content on global streaming

services, who demonstrate the strongest connection of all.

These findings highlight the value of filming content in Germany as a means to enhance the country's reputation and drive broader cultural and commercial outcomes.



## HIGHLIGHTS

'Made in Germany' content viewers who watch on global streaming services are (compared to non-viewers):

**2.2x**  
more likely to intend to buy German products

**2.1x**  
more likely to want to visit Germany

**1.5x**  
more likely to find German culture appealing

# 'Made in Germany' content sparks stronger desire to visit Germany

## Interest in travelling to Germany in the future:

'Made in Germany' content viewers – watch on global streamers

2.1x more interest

73%

All 'Made in Germany' content viewers

1.5x more interest

53%

'Made in Germany' Non-Viewers

35%

## Viewing 'Made in Germany' content strongly boosts the desire to visit Germany.

“ Seeing shows on TV about Germany and the different towns I never got to visit. Makes me want to go back even more.

– MALE, 41 YEARS OLD, US  
'MADE IN GERMANY' CONTENT VIEWER

## This highlights the ability for strong local content to drive tourist numbers and spend.

“ The Netflix series enjoyed international success and made the Unicorn Cave even more famous. 'Dark' also brought us many guests from abroad; even Americans were here.

– RALF NIELBOCK, GEOLOGIST (BRAUNSCHWEIGER-ZEITUNG)

## Viewers were much more likely to say they wanted to travel to Germany compared to non-viewers.

“ People reacted extremely strongly to 'Dark,'" says Olaf Ihlefeldt. Fans of the series traveled from all over the world to see the [Südwestkirchhof] church for themselves, says Ihlefeldt. The majority are foreign series fans, coming from Latin America, Turkey and the Arab world. The visit is usually immortalized with a selfie.

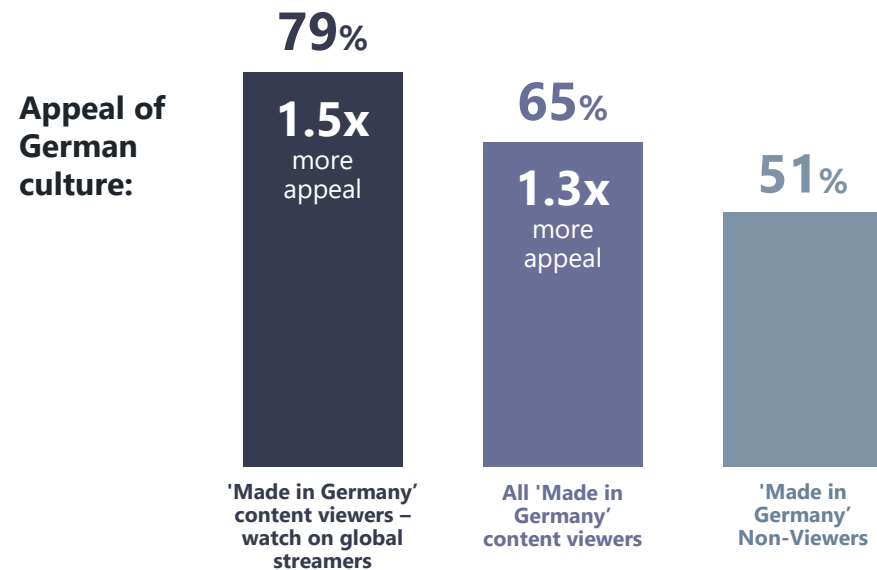
– TAGESSPIEGEL (GERMANY)



## German culture resonates more strongly with 'Made in Germany' content viewers

Viewing 'Made in Germany' content is a strong driver of German cultural appeal.

Viewers – especially those viewing on global streaming services – expressed greater positivity towards German culture than non-viewers.



## 'Made in Germany' viewers show greater intent to buy German products

The research showed that 'Made in Germany' content viewing is a strong driver of interest in German products.

Viewers are much more likely to be intending to buy German products in the future.

## 'Made in Germany' content viewing fuels curiosity about German history

Viewing 'Made in Germany' content is a strong driver of curiosity about German history.

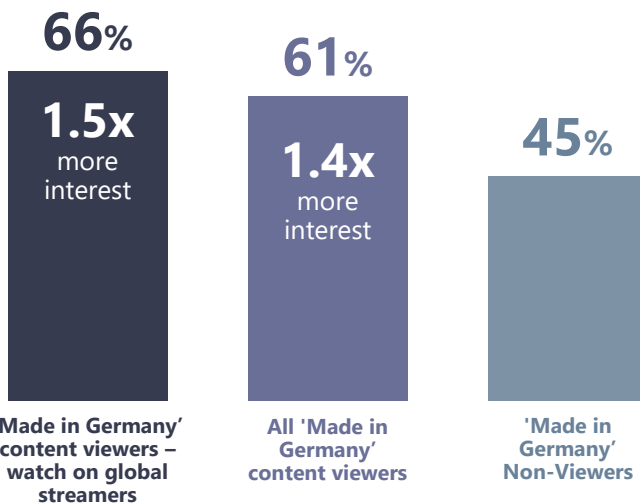
Viewers were more inclined to want to explore Germany's past and understand its historical context.

“ The Netflix series 'The Empress' brings Schloss Weißenstein into the spotlight as a prominent filming location. The castle responded with special guided tours for visitors.

– MARKTSPIEGEL NÜRNBERG, 2022



Interest in learning about German history:



## German food has greater appeal among 'Made in Germany' viewers

Viewing 'Made in Germany' content increases the appeal of German food.

Viewers showed a stronger enthusiasm for trying traditional German dishes compared to non-viewers.

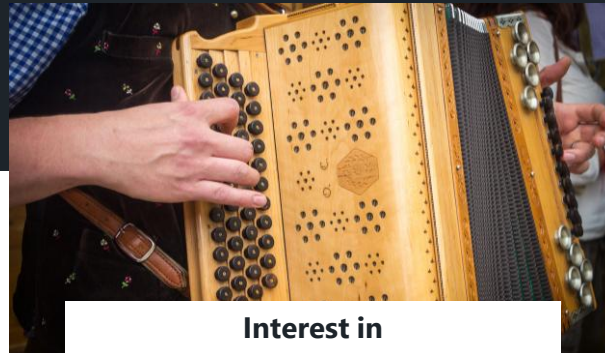
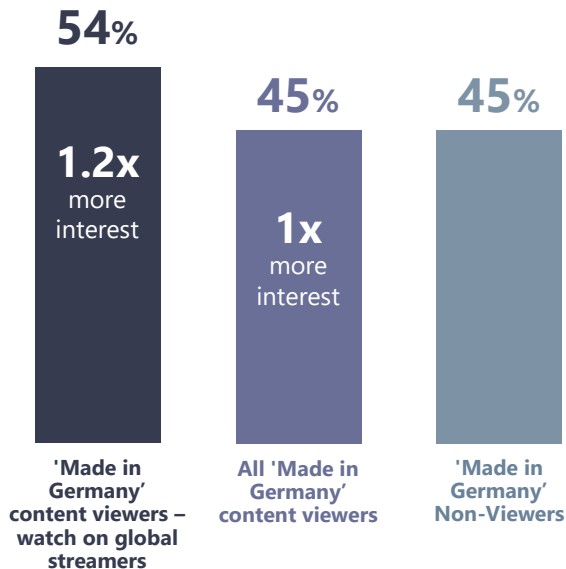
# Interest in German art and cultural expression rises with 'Made in Germany' content viewing

Viewing 'Made in Germany' content strengthens interest in German art and cultural expression.

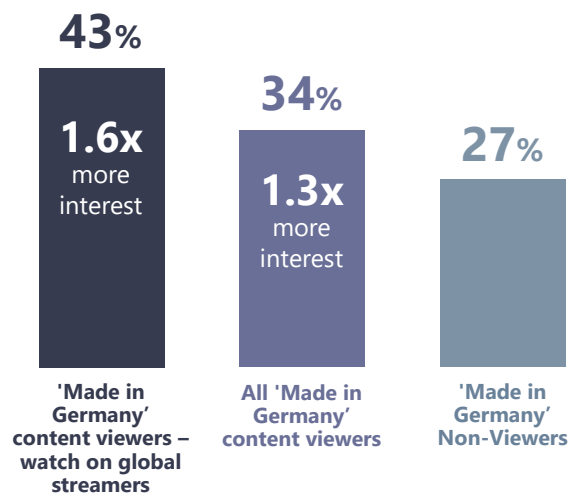
Viewers on global streamers were noticeable more engaged with Germany's festivals, music, and literature than others.



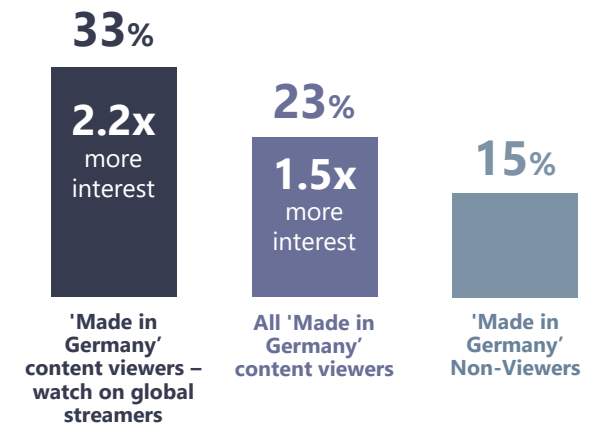
Interest in German cultural festivals:



Interest in German music:



Interest in German literature:



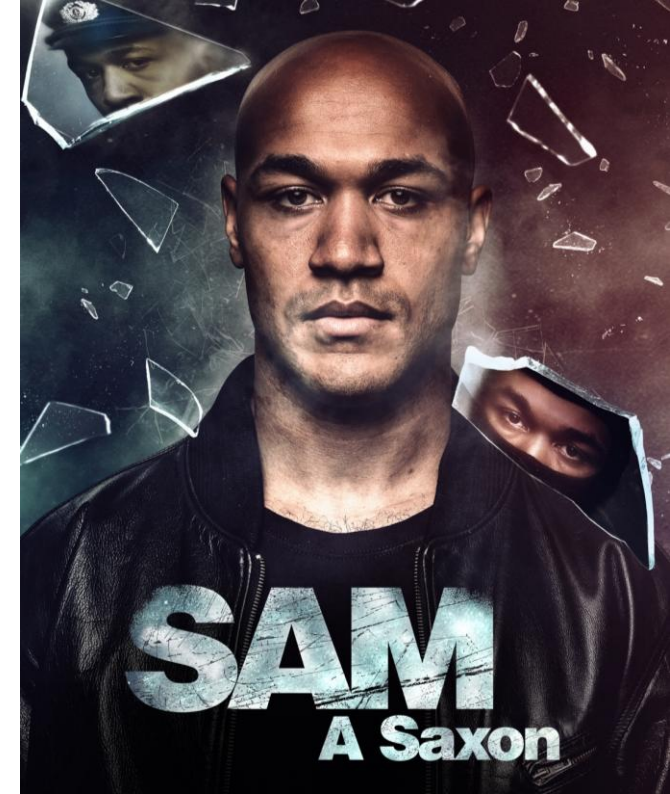


**These 4 titles stand out for generating the strongest & most consistent viewer impact across key themes**



Across the 15 titles evaluated, these four most effectively fostered cultural affinity across multiple categories.

This highlights the impact of 'Made in Germany' content that authentically portrays German landscapes, culture and storytelling in strengthening Germany's image.





## 'Made in Germany' title viewers are more likely to purchase German products

Viewers of 'Made in Germany' titles are more likely (*extremely or somewhat likely*) to purchase German products as compared to non-viewers.



**75%**  
(2.9x)



**74%**  
(2.8x)



**74%**  
(2.8x)

'MADE IN GERMANY' NON-VIEWERS: **26%**

Munich



**67%**  
(1.9x)

Sam A Saxon



**66%**  
(1.9x)

Deutschland 89



**64%**  
(1.8x)

'MADE IN GERMANY' NON-VIEWERS: **35%**

## German travel & tourism are positively perceived by 'Made in Germany' title viewers

Viewing 'Made in Germany' titles increases interest (*extremely or very interested*) to visit Germany in the future as compared to non-viewership.



Deutschland 89



**73%**  
(1.6x)

Munich



**73%**  
(1.6x)

The Empress



**72%**  
(1.6x)

## 'Made in Germany' title viewers are more interested to learn about German history

Viewers of 'Made in Germany' titles are more interested (*extremely or very interested*) to learn about German history as compared to non-viewers.



'MADE IN GERMANY' NON-VIEWERS: **45%**

## German culture has higher appeal among 'Made in Germany' title viewers



Viewing 'Made in Germany' titles is more likely to increase appeal (*highly/somewhat appealing*) of German culture as compared to non-viewership.

Munich



**76%**  
(1.5x)

Sam A Saxon



**74%**  
(1.5x)

Paradise



**74%**  
(1.5x)

'MADE IN GERMANY' NON-VIEWERS: **51%**



## 'Made in Germany' title viewers are more likely to find German food appealing

Viewers of 'Made in Germany' titles are more likely to find German food appealing (*highly/somewhat*) as compared to non-viewers.

Sam A Saxon



**73%**  
(1.5x)

Where's Wanda



**71%**  
(1.4x)

Dark



**71%**  
(1.4x)

'MADE IN GERMANY' NON-VIEWERS: **49%**

Sam A Saxon



**38%**  
(1.5x)

The Empress



**38%**  
(1.5x)

Deutschland 89



**37%**  
(1.5x)

'MADE IN GERMANY' NON-VIEWERS: **25%**

## Viewing 'Made in Germany' titles sparks higher interest in German arts (cultural festivals, music & literature)

Viewing 'Made in Germany' titles increases interest in German arts as compared to non-viewership.



# Appendix: Methodology

## Method:

- Online surveys with TV/movie viewers across UK and US
- Number of surveys: 3,404
  - 'Made in Germany' content viewers: 1665
  - 'Made in Germany' non-viewers: 1739

## Qualification criteria:

- Ages 18-65
- Watch TV shows and/or movies regularly and watches a minimum 2 hours per week

## Questions asked:

- **Culture:** 'How appealing do you find the German culture?' (5-point scale – 'Highly appealing' to 'Highly unappealing')
- **Travel:** 'If taking time off work/finding the time was not a problem and money was no issue, how interested would you be in visiting Germany in the future?' (5-point scale – 'Extremely interested' to 'Not at all interested')
- **Products:** 'How likely are you to purchase German clothing brands and products (e.g., fashion, electronics, beauty etc.) in the next 12 months?' (5-point scale – 'Extremely likely' to 'Extremely unlikely')
- **History:** 'How interested are you in learning (more) about the history of Germany?' (5-point scale – 'Extremely interested' to 'Not at all interested')
- **Food:** 'How appealing do you find German food?' (5-point scale – 'Highly appealing' to 'Highly unappealing')
- **Arts:** 'Which of the following elements of each culture are you interested in?' (Cultural events, music, literature)

# Appendix: Methodology

## Full list of 'Made in Germany' titles analyzed:

- Dark
- Kleo
- Where's Wanda
- Deutschland 89
- The Empress (Die Kaiserin)
- Dear Child (Liebes Kind)
- Maxton Hall: The World Between Us
- Sam a Saxon
- Pitch Perfect: Bumper in Berlin
- All Quiet on the Western Front
- Munich – The Edge of War
- I'm Your Man (Ich bin dein Mensch)
- Atomic Blonde
- Exterritorial
- Paradise

*'Made in Germany' content includes local German productions and international productions filmed in Germany. Both highlight the impact of viewership on various categories (i.e., themes mentioned in previous slide) related to Germany.*