

Dear Partners and Trade Contacts:

We hope that you had a great start into the still young year – may it be a good one with much success and personal happiness! The noble team is off to a busy start, a.o. gearing up for the ITB trade show. Hopefully we can catch up with you personally in Berlin!

Below we share the latest edition of our noble insight Germany. May it be of value to you!

Kind regards,  
Marina Noble & noble team

#### **Wish to travel on record high**

Following a positive 2014 for the German tourism industry, experts believe that tourism will do even better in 2015. The key indicator "wish to travel" went up from 53 to 57%. Additionally, more people (64%, last year: 59%) have the financial means and time (57%, 53% in 2014) to go on holidays. The majority of Germans rate their own economical position as improved over last year. Only 19% (in the past year: 21%) fear their personal situation will worsen. Therefore researchers forecast a stable or even increasing demand. The number of trips and expenditure is expected to grow as well.

A new trend: 42% plan to visit a destination where they have never been before. However, trips within Germany will remain in first place (30%). Spain, Italy, Turkey and Austria are supposed to follow. Almost two thirds of all holiday trips will go to one of these five countries. The travel experts of the research institute FUR – which presented these figures - predict a growth potential for long-haul destinations, Scandinavia, as well as niche segments such as wellness, bike trips and cruises. Caravanning has also become of greater interest during recent years for the over 50 year old travelers. (Source: fvw.de)

#### **German tourists are looking for authentic experiences**

Germans are experienced travelers. Some of the older ones have seen half of the world, while many of the younger ones do not want to be part of organized trips visiting the typical highlights.

Therefore, the authenticity of a destination is ever more important. Unique experiences abroad are thus currently becoming part of the programmes of big tour operators – not just with the specialized study-trip tour operators as in the past. For example, Thomas Cook offers a sustainable visit of a "real" Maya village in Mexico. Whether it is harvesting coffee beans in Puerto Rico, drinking tea with Berbers in the desert or staying overnight with Cuban grandmothers, the contact with locals count. The German traveler wishes to have the feeling of being part of the life of local people in the destinations they visit.

The number of trips with "one of a kind" experiences has grown over the past year – not only with tour operators specialized in sustainable travels. According to experts on new tourism trends, people are tourists, but do not want to seem like one. Therefore they want to experience something which cannot be repeated. Obviously, travelers prefer to talk about the Cuban family where they sat in the kitchen rather than talking about their hotel. Another success story for the German travel company "Marco Polo" is their offer to eat with locals. Of course, these tours are just the "staging" of authenticity. However, Marco Polo believes in a strong potential for trips with adventure character while getting to know the country first-hand. (Source: Spiegel.de)

#### **Destination Germany shifts its focus to accessible travels**

In Europe, there are around 140 million disabled people needing special services when traveling. Now Germany wants to place a new focus on this target group. In order to welcome more disabled persons, the German National Tourist Board (DZT) plans to point out the possibilities for barrier-free travels.

One third of the handicapped people are in the age group 15 to 64 years. This age group makes some 340 million day and overnight trips per year – and is a growing market segment. People 64 years and older take another 450 million trips. Looking at demographics, it is obvious that this segment will continue to grow in the years to come – to some 520 million trips in 2020. Therefore, if there were more offers for accessible travels, additional demand of around 280,000 trips in Europe could be created.

In order to promote this segment, DZT together with partners will organize the "Day of Barrier-Free Tourism" at ITB March 6, 2015. (Source: travelbusiness.at)

#### **Going on holiday generates happiness**

Going on holiday makes people happy. A total of 85% of the Germans connect holidays "strongly" or "very strongly" with their personal happiness. Compared to the European average of 79%, Germans are leading with this strong holiday related feelings. Vacations are therefore the biggest source of personal well-being for many people. Following far behind are: receiving a tax refund (13%), finding money which one thought to be lost (12%) and one's birthday (6%). Some eight percent have the strongest feelings of happiness related to their work. (Source: fvw.de)

#### **Germans are internet geeks**

According to the European Bureau for Statistics (Eurostat), only eleven percent of the Germans have not yet been online. According to these figures, Germans obviously are internet geeks – compared to the rest of Europe (European average: 18%). More than two thirds of Germans are on the internet daily or almost daily (72%) (compared to the European average of 65%). These figures prove the rapid development of online life, as just 40% of the Germans and 31% of the Europeans used the web daily in 2006. (Source: welt.de)

#### **Strongest purchasing power in Hamburg and Bavaria**

According to research findings, people in Germany will avail of an additional 572 Euros to spend in 2015 (+2.7%). In absolute figures this is a total of 21,449 Euros for each of the almost 81 million Germans. As the inflation rate is expected to be 1.4%, the real increase in purchasing power is 1.3%. However, it all depends on where you live. People living south of Munich in the city of Starnberg have the most money, followed by the people residing just north of Frankfurt and the inhabitants of Munich. People in the district of Görlitz in the region Oberlausitz (German Federal State Saxonia) have the least money to spend.

On a state level, all of the Eastern federal states unfortunately still have less purchasing power than the western states – even 25 years after reunification. People living in the City State of Hamburg have the most money, followed by people in Bavaria, Baden-Wuerttemberg and Hesse. Purchasing power includes the disposable net income and payments from the state such as pensions, unemployment and child benefit. Purchasing power is a significant factor for the spending of private households and therefore for the general economic development in Germany. (Source: Spiegel-online.de)

#### **Germans prefer to relax rather than to work hard**

The top ten career targets in 2015 show it: Germans plan to shift down a gear in their work life. According to the "Manpower Top 10 Career List" the two first places with 36% each are "to take work less seriously" (+4% compared to last year) and "to be able to relax better after work". Out of the 1,000 people questioned, 19% say they want to "work more efficiently". Exactly 17% "want to work with more commitment". When it comes to superiors, 17% - in fifth place – intend to "show more self-confidence towards their boss". Following next are "to reduce work time" (16%), "work better with colleagues" (16%), "apply with other employers" (15%), "invest more time in their job" (11%) and "to improve networking" (11%). (Source: t3n.de)

#### **... Saving the best for last:**

Forget all you thought you knew about Germans! They are full of surprises. Or have you ever seen a singing receptionist and dancing chamber maids? If not, you should have been at Germany's largest hotel, Estrel Berlin, when suddenly out of nowhere more than 85 employees filled the lobby. This flash mob was a surprise event for the 500 guests celebrating in the lobby. The almost 100 singers and dancers normally work in guest services, the kitchen, in maintenance, housekeeping and at the reception. The reason for this unusual event was the 20th birthday party of the Estrel Hotel Berlin. By the way, the hotel even ordered a new song with a German composer - „My Estrel" - reminding the guests of famous Broadway hits. The hotel is currently in contact with the Guinness publishing house to check whether this dance event was the largest flash mob in a hotel so far. If you need proof of entertaining Germans: <https://www.youtube.com/watch?v=1isJhQbBLOE>

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