



## noble insight into germany

may 2015

Dear Partners and Trade Contacts:

While we are getting ready for the long Pentecost holiday weekend, German train drivers went on a strike again this week – forcing hundreds of thousands to worry about having to change their Pentecost travel plans. In recent weeks they were joined by the staff of childcare, youth and remedial centers – while German Rail and the trade union quickly agreed to return to the negotiation table, it is already a record strike year.

We promise to keep working ☺ and have compiled our new edition of noble insight into Germany. Enjoy reading!

Kind regards,  
Marina Noble & noble team

### Germans love to travel – seniors growing age group and Spain favourite outbound country

The three main results of the recently published 31st "Travel Analysis" are: Germans remain fascinated with traveling; Germany still is their most favourite destination followed by Spain; and senior citizens are more interested in traveling than ever.

In 2014, exactly 57% of the Germans went on a holiday of at least five days lengths (unchanged from last year). More senior citizens are travelling. Last year this figure reached almost 50% - up from 44% ten years ago. This trend is likely to intensify in the coming years due to demographic factors. Older travelers are now on holidays almost as often as young adults and even more often than middle-aged singles.

In terms of destinations there were no significant changes according to the Travel Analysis. Germany remained the most popular destination with 37% of holidays taken domestically. Spain extended its lead position as the top foreign destination with a 1.2 percentage point rise to 14.4% of all holidays, followed by Italy, Turkey, Austria, Croatia and Greece. For the first time, the long-haul market lost slightly (-0.4%). Outlook for 2015: 44% of the Germans definitely want to go on holiday (-1%). Only every fifth interviewee will refrain from taking a holiday trip. The number of people without holiday plans remained on the same level (35%). However, experience shows that one third of the undecided will finally go on holiday within this year. The survey also found that 29% of the Germans "dreamt" of a cruise holiday, in particular the age group 50-64.

The "Travel Analysis" by the Hamburger Stiftung für Zukunftsfragen (Hamburg Institute for Future Issues) is based on interviews with more than 4,000 citizens in January 2015 regarding their travel behaviour in 2014 and their travel intentions this year. (Source: stiftungfuerzukunftsfragen.de / fwv.de)

### Germany tourism: five consecutive record years

Germany as a destination continues to boom. Statistics counted a total of 424 million overnight stays of tourists and business travelers in 2014 (+3%). The strongest increase of five percent to 75.5 million stays was by foreign guests. Therefore, the German tourist Board (DZT) forecasts 80 million overnight stays of foreign guests by 2020. The number of German guests amounted to 348.5 million stays (+3%). (Source: fwv.de)

### The future of tourism...

...lies in the internet. Experts on future trends expect that the planning and booking of travels will increasingly take place in the internet, especially on the mobile internet. The number of people booking online is expected to double from a current 27% to 54% of the population. Furthermore, "online travelers" are heavy users of mobile devices. It is expected that by 2020 more than 50% of all trips would be booked online.

These findings are part of the study "Holiday Trends 2025" by the Hamburg Institute for Future Issues (FUR). The study confirms the prognosis of the Association of Internet Travel Marketing (Verband Internet Reisevertrieb e.V., VIR) that online-tourism will continue to become more important as the internet is integrated even further into daily life during the next decade. FUR believes that in the future up to 90 percent of the people online who travel will use the web to obtain information on holidays – and this throughout all age groups. Manner and amount will differ heavily: Some will only look for the weather forecast prior to departure; others will book a holiday home or buy services while already being on travel. (Source: v-i r.de)

### More magazines than ever

The number of magazines in Germany has reached a new record. At the end of February, a total of 1,595 magazines were available "on the shelves". When circulation goes down, many print publishing houses react with higher prices and new trend titles, such as "Gala Men" (celebrity magazine for men) or "Vegan für mich" ("Vegan for me"). Last year the publishing houses launched 133 new journals. In the first two months of 2015, some further 16 periodicals appeared. It is expected that the number will rise once again as around one third of the printing houses currently plan to develop one to four magazines for this year. Every fifth house even intends to launch five or more.

Print products still are the main business of the publishing houses. The companies questioned believe that their core business will generate 64% of the turnover, digital business 16% and other business 20%. The enterprises expect a decrease in turnover for advertisement of 2.4% and for sales of 1.9%. In order to compensate these losses, the publishing houses plan to "attack" digitally and believe in a 9% growth in this area. (Results of survey by the "Verband Deutscher Zeitschriftenverleger" – "Organization of German publishers of magazines") (Source: Frankfurter Allgemeine Zeitung)

### Cash is king in Germany

The German Bundesbank (German Federal Bank) is our leading and most trusted money expert. For example, the bank not only knows that the majority of the population (53.2%) still prefers to pay cash, but also that the average amount of money carried in a purse is 103 Euros (with 5.73 Euros as coins). So far it remains true: Cash is king with Germans. At the same time, the share of payments by EC-Karte (bank debit card) increased from 25 to 29%. For purchases worth 50 to 500 Euros, the EC-Card is the most used means of payment (43%). When the bill is higher, Germans prefer to wire-transfer money. For small sums, some 79% of the population still pay cash (-3% since the last survey in 2011). However, experts believe that in the future even the Germans will pay more often with credit cards as these become increasingly popular and more people buy online. (Source: Frankfurter Allgemeine Zeitung)

### Germany: a nation of car lovers and almost one million kilometers of traffic jams

The German Automobile Club (ADAC) counted 475,000 traffic jams of a total length of 960,000 kilometers (approx. 600,000 miles) and 285,000 hours standstill. When you transfer these numbers into life time, German car drivers spent more than 32 years in traffic jams – just in 2014! The reasons for this mobility disaster are more cars every year as well as poor road conditions and damaged bridges. Generally speaking, traffic jams have a negative impact on the German national economy. (Source: heute.de)

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

A genuine product – and marketing – success story is the German brand 'Persil'. You can find the washing powder almost all over the world. Today it is sold in more than 50 countries and repeatedly voted as one of the most trusted brands in Germany by the magazine "Reader's Digest". Did you know that chemists discovered the cleaning abilities of two substances in 1907? This discovery resulted in the name of 'Persil' (derived from Perborat and Silikat). By combining both substances when cooking the laundry, sparkling oxygen was set free which then dissolved the dirt. This "washing revolution", started in the German city of Dusseldorf, meant that women did not have to scrub clothes and laundry anymore. Much less hard work was needed and the results were better. However, Germany's most widely sold washing powder is not only successful because of its chemical formula, but also because of the marketing genius of Mr. Fritz Henkel and the globalization of the business. As early as in 1907 he booked the first ad for his product in the local newspaper. And in 1922, the "White Lady" was created by a Berlin artist. The lady wearing a bright white dress carrying a Persil-package in her left hand was "the" brand icon for decades.

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