



noble insight into germany

Dear Partners and Trade Contacts:

We hope that 2016 – and now the lunar year of the monkey – has started well for you and will continue this way.

We at noble re-launched our website in a new design and we invite you to have a look at www.noblekom.de. Accordingly, we also present our newsletter in a more contemporary format making it hopefully easier to read and use. How do you like it? Any feedback is welcome!

We hope to also be in touch personally – maybe at ITB Berlin in March, which presently keeps us busy.

**Kind regards,
Marina Noble & noble team**

Nothing can stop Germans from travelling

The outlook for the German tourism market remains promising this year according to market researchers. Travel agents are slightly more optimistic about sales prospects despite slow bookings at the beginning of the year.

This prognosis for the tourism year was presented at CMT in Stuttgart, the first consumer tourism fair of the year, by "Forschungsgemeinschaft Urlaub und Reisen e.v. (FUR). The results - based on an online survey conducted in November 2015

- are part of the annual FUR "Reiseanalyse" ("Travel analysis").

The FUR experts expect that there will be more than 70 million holiday trips in 2016, driven by positive economic trends such as stable employment levels and rising wages. This would be a 2% increase on last year while spending could rise 4% to about €69 billion.

Favourite holiday types will remain beach, relaxing, nature and family vacation. Interest in wellness trips is, however, decreasing slightly. There will be more cruise and city trips as well as short holidays.

In terms of destinations, Germany will remain number one this year with about 30% of trips, followed by Spain, Italy, Turkey and Austria. These five most popular destinations traditionally account for about two thirds of all holidays each year. However, FUR, predicted that Germans could go on more long-haul holidays this year.

Please note: The attacks in Paris and Istanbul took place just as the survey was underway. FUR believes the results might be different when up-dated data will be presented at ITB next month. (Source: fvw.de; fvw.com)

Travel agencies with higher turnover in 2015

The total sales turnover of German travel agencies increased by four percent in 2015. Cruises play an important part in this development whereas air traffic ended with only a very slight plus.

The calendar year 2015 was an exciting one for the travel trade: booking figures went both up and down – influenced by plane crashes, terror attacks, wars and the refugee crisis.

Nevertheless, the industry can be satisfied. According to latest surveys, the total tourism turnover increased by 2.6%. Cruises continue to remain the strongest growth factor – increasing turnover by 16%. (Source: fvw.de)

Consumers remain in spending mood

Increased purchasing power and good signs in the labour market inspire most people with confidence: Despite the uncertain world economy, strong turbulences on the stock exchange and unsolved refugee crisis, the spending mood with Germans remains good. Private consumption has become the main pillar of the economy replacing exports.

People are prepared to buy expensive goods, such as furniture and cars. Reasons for the good mood in addition to the labour market are increases in incomes and decreasing costs for fuel and heating oil. With interest rates remaining low consumers are less interested in saving money. (Source: spiegel.de)

Online study of German state TV: use of internet increases with all age groups

The two main German public TV channels ARD and ZDF have published their "Onlinestudie" since 1997. The latest study reveals that in 2015 the increase of total internet users was very small: 79.5% of all German-speaking people older than 14 were online (increase of only 500,000 internet users over 2014).

Since the population 14 to 49 years are almost completely online, the increase is mainly within the older generation. The strongest increase of internet use was with people older than 70: an increase of 44% (0.8 million daily users)!

The intensity of use, however, clearly increased with all age groups. 63% of the population is online daily (+8.5% - amounting to 3.5 million more people – over 2014).

As in the year before, the growth of women being online daily was disproportionally higher (+2.1 million or +6.0%) than with men (+1.2 million or 3.4%).

Strongest internet use was with mobile users. The average 'onliner' spends some 108 minutes daily on the internet. 'Onliners' with mobile access spend 158 minutes.

Most online time is dedicated to communication (social networks, messaging services, E-Mail), followed by online information search as well as the use of media such as watching videos and the news, listening to the radio and music. (Source: ard-zdf-onlinestudie.de)

German National Tourist Board focuses on nature holidays

Each year, the German National Tourist Board (GNTB, German: DZT) features different themed campaigns to promote the travel destination Germany. Focus is placed on selected aspects of the core 'Travel Destination Germany' brand, including special occasions or anniversaries within the GNTB's 'Megatrends' of culture and nature. 'Holidays in the heart of nature in Germany' is the name of the 2016 global campaign being run by GNTB.

Accordingly the focus of the sales and marketing activities is placed on the 130 natural landscapes, among them 15 UNESCO biosphere reserves and 100 nature parks. Incredible pictures and unexpected facts about these protected landscapes show Destination Germany as you've never seen it before. Main markets for the campaign will be the Netherlands, Great Britain, Belgium, Switzerland, France, Italy, Spain, Austria, the Czech Republic, Poland, Denmark and Sweden.

In 2015, some 2.6 million Europeans visited Germany for a nature holiday. Alongside Austria and France, Germany is one of the most popular nature destinations worldwide with European travelers. (Source: fvw.de; www.germany.travel/en/international-press/themes)

German birth rate at its highest since 1990

Women in Germany are having more children. The Federal Office of Statistics announced that the average birth rate was 1.47 children per woman in 2014. For the third consecutive year, birth rate increased; In 2013 it just was an average 1.42.

At the same time, statistics show that first time mothers are becoming older. In 2014, the average mother had her first child

at the age of 29.5 years – in 2013 she was two months younger: 29.3 years. When having a second child, the average mother was some 32 years – being one month older than second child mothers in 2013. (Source: zeit.de)

... Saving the best for last:

Compared to other international travelers Germans go 'offline' more often than others. That's one of the main findings of the Expedia/Egencia Mobile Index Study 2015. The study solicited input from 9,642 travelers across 19 countries worldwide who own at least one mobile device.

One top finding is the perceived importance of the smart phone as a travel companion. Travelers – precisely 66% of them - now consider it to be the single most indispensable item they carry with them when they travel, ahead of even their toothbrush, deodorant and driver's licence.

However, Germans do not quite comply with this trend. For the majority (75%), the toothbrush still is the most important travel device followed by deodorant (37%), driver's licence (31%) – and only in fourth place the mobile phone with 29%.

The relevance of mobile devices is tied to how the device improves the quality of travel itself. Business travelers use mobile devices to remain tightly connected to their home office. Global travelers admit to being addicted to their mobile devices, even while on vacation. In fact, a full 60% of travelers say they agree they never truly "unplug" on leisure trips.

Once again, Germans behave contrary to the trend: only 20% stay connected to the office while on holiday. That's the lowest figure of all countries surveyed! And 32% of them admit to avoid staying in contact with the office at all – internationally this figure is 18%. (Source: viewfinder.expedia.com/news/expedia-egencia-mobile-index-study-of-global-travelers-reveals-that-they-now-consider-the-smartphone-to-be-their-most-indispensable-travel-companion)

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