



noble insight into germany

Dear Partners and Trade Contacts:

Europe is getting ready for the continental soccer championship, which will bring us suspense during the next weeks. We even have a noble betting game going which national team will be the winner. Even more important: We hope that the games will take place without any incidents and be a symbol for a peaceful, fair and multi-cultural Europe.

Please read our noble insight into Germany for an update on the developments in our country.

Kind regards,

Marina Noble & noble team

April sales in German travel agencies breaking five-month slump

Holiday sales in German travel agencies grew by 6.6% last month, breaking a five-month downward trend, according to a monthly survey by market researchers GfK. The 6.6% growth figure for April means that cumulative sales for summer 2016 are now 'only' 6% behind last year's levels. In terms of individual departure months, July is the only month with higher sales than last year while August is 18%

behind 2015 levels.

The sales increase, which follows a similar 6.7% growth figure in the monthly survey by IT services firm TATS, could signal a long-awaited recovery in demand after five months of falling sales, experts believe.

However, these figures mean it will be difficult for summer 2016 sales to recover sufficiently to return to 2015 levels, according to GfK. About €480 million worth of revenues are still 'missing' and only 64% of summer 2015 revenues have so far been reached for this year. (Source: www.fvw.com)

German consumer climate on the rise again

German consumer optimism improved distinctly in April. Growth is being observed for both economic and income expectations as well as the propensity to buy. Consumers are clearly assuming that the German economy will regain some momentum in the coming months. As a consequence of the consistently high demand for labour, the round of wage negotiations which recently began will lead to a welcomed growth in income for a considerable number of workers. In addition, given the persistently low energy prices, inflation will remain very moderate this year. This implies that people will also have significantly more money in their pockets in real terms. Pensioners, too, can look forward to a significant increase in their income this year. In accordance with the recent measure adopted by the German government, the statutory pension will be raised by 4.25 percent in the West and by a staggering 5.95 percent in the East.

However, the upturn is expected to be moderate. Gross domestic product is anticipated to rise by 1.6 percent this year (1.7 percent rise in 2015). For 2017, the institutes are currently forecasting economic

growth of 1.5 percent. (Source: www.gfk.com)

Favourite holiday destinations in 2015

The German Research Institute (FUR) has analyzed the data for leisure trips taken by German tourists in 2015, revealing several changes in the list of the most popular destinations. The countries and regions Germans favour were much closer to home. There is also a clear desire for sun and sea over colder climates, as large numbers of holidaymakers headed for the beaches and the Mediterranean leaving the mountains behind. While 29% did not leave Germany, the data showed that 71% of tourists spent their vacation abroad.

The top 10 destinations visited by German tourists last year were: 1. Bavaria (Germany) because of its traditional culture, great landscape and landmarks (Neuschwanstein Castle, Oktoberfest); 2. Mecklenburg-Pomerania because of sun and beach at home; 3. The Spanish islands. It is expected that areas like the Balearics (Mallorca) and Canary Islands (Tenerife, Fuerteventura) will continue to see high numbers as tourists who turn away from Northern African options. 4. Italy. Rome, as always, saw its fair share of German tourists, but many travelled further into the heart of the country to enjoy the medieval cities of Tuscany, Umbria and Latium. 5. Turkey – because of its beaches. This year, experts wonder if security concerns may send Turkey out of the top 10 as travelers choose sunny destinations they consider safer. 6. Austria, mainly for skiing holidays. 7. Croatia 8. Greece 9. France 10. Poland (Source: www.tourism-review.com)

Munich once again German city with highest

quality of life

Munich made it again: According to the ranking of consulting company Mercer, it is the most popular city in Germany. Once a year, Mercer asks employees going on business trips to give their opinion regarding 39 criteria. Among these are political, social, economical and environmental matters as well as health, education, public transport and public services concerns. For the first time Mercer also asked participants on their opinion regarding personal safety.

Internationally Vienna comes in first place amongst the 230 mega cities, followed by Zurich, Auckland, Munich and Vancouver. Dusseldorf and Frankfurt are two more German cities within the top ten list, ahead of Berlin (13), Hamburg (18), Stuttgart (24) and Leipzig (60). (Source: www.fvw.de)

Publishing houses pin hope on sports and women

The already much diversified media landscape in Germany will expand further. The majority (60%) of publishing houses plans to launch new publications in 2017. Nine out of ten intend to release up to four new titles. Eleven percent even plan on at least five new magazines. 80% of the questioned publishing houses (all members of the association of German magazine publishers) work on special editions around major sports events (Olympic Games and European Soccer Championship) and 64% on new digital titles.

According to the association, almost 1,600 periodicals appear at least once a quarter. Readers spent 257 million Euros on magazines per year. In the past years, there have been more new magazines than disappearances.

Generally speaking there is a continued trend towards special interest magazines with small or mid-scale circulations at premium prices. A main trend is to

target women with several new publications entering the market in 2015 and 2016. While having a higher turnover with printed titles, publishing houses have a higher reach with digital media. The total reach of the 50 largest general interest publishing houses is divided in half: half on digital and half on printed products (in 2013: 70% printed and 30% digital). Experts explain these changes in reading behaviour with the increased use of smart phones and tablet computers. (Source: Frankfurter Allgemeine Zeitung)

More than ten million read newspapers online every day

Online newspapers currently reach more than half of the German-speaking population (53.5% of people 14 years and older). Some 10.1 million internet users read the online edition of a newspaper daily. The digital reach of newspapers is growing . However, printed newspapers still have 42 million readers per day and therefore remain the most used news medium – making Germany a very traditional media market

These figures are based on current research of the ZMG (Marketing Association of Newspapers) and AGOF digital facts 2016-1 (Association Online Research). (Source: www.zmg.de)

... Saving the best for last:

Birds attack Berlin central railway station! Employees and travellers alike feel just like in the famous Alfred Hitchcock movie “The Birds” (1963) where crows attack. These birds are very clever animals. They are known to be extremely curious and playful, e.g. they let nuts fall from great heights to open them. So obviously they know how things work. At the train

station, they destroy windowpanes on the roof. And results are annoying for everybody as rain falls on travellers. Some hundred windows had to be changed since the opening of the new station ten years ago. How do the crows destroy the glass? They let iron screws drop. By the way, nobody knows where they get these screws! Fact is: 100 windowpanes have been broken so far. Every pane is custom build as they have different sizes. It costs 10,000 Euro to manufacture them – per pane.

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