



Living in the Future
Facts, Changes and Forecast for Germany

Dinner Speech for the ULI,
05th of June 2007 in Hamburg





Facts

Hours of work time p.a. (incl. home-to-office time) = 2.067 h

Hours of leisure time (excl. time to sleep, eat etc.) = 2.100 h

Disposable income = 54% (1962 = 45%)

Average income (pre-tax) 2006 = 2.630€ (men)
1.952€ (women)

Average working hours per week = 38.4 h

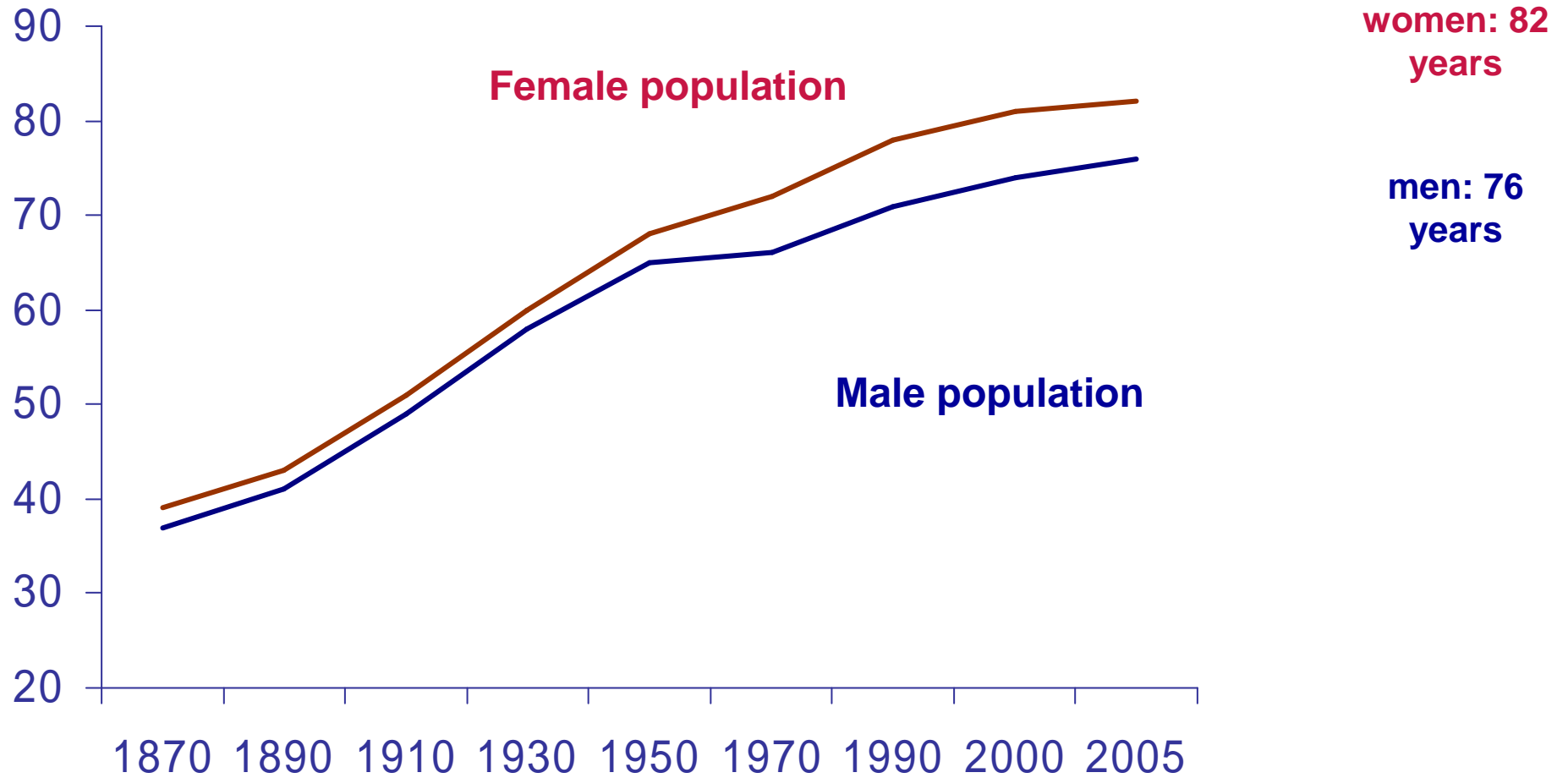
Average leisure time per day = 5 h

Holidays = 30 p.a. (1962 = 17)

Sick leave = 13,5 p.a.



Average life expectancy (in years)

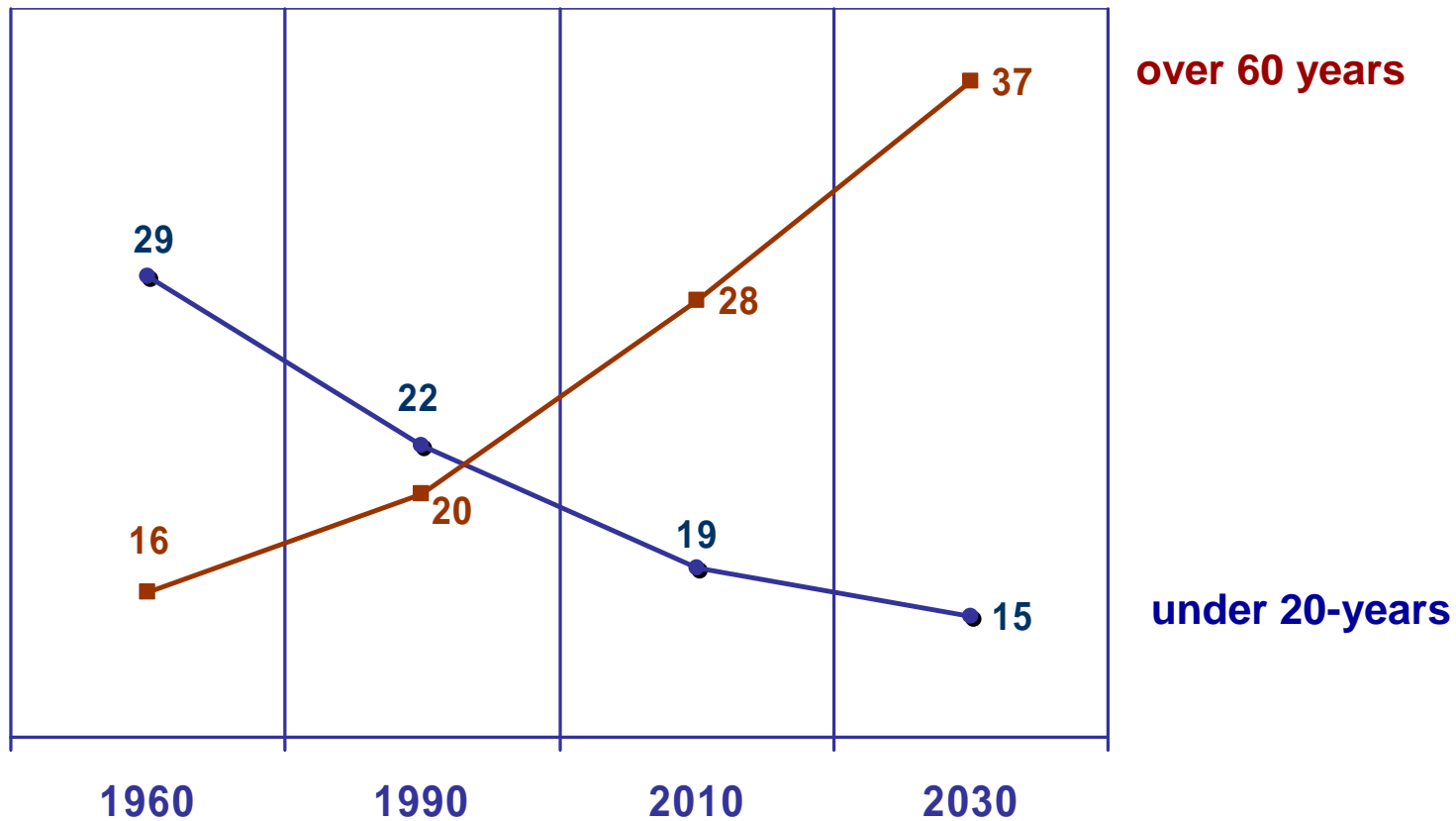




The scissors of age

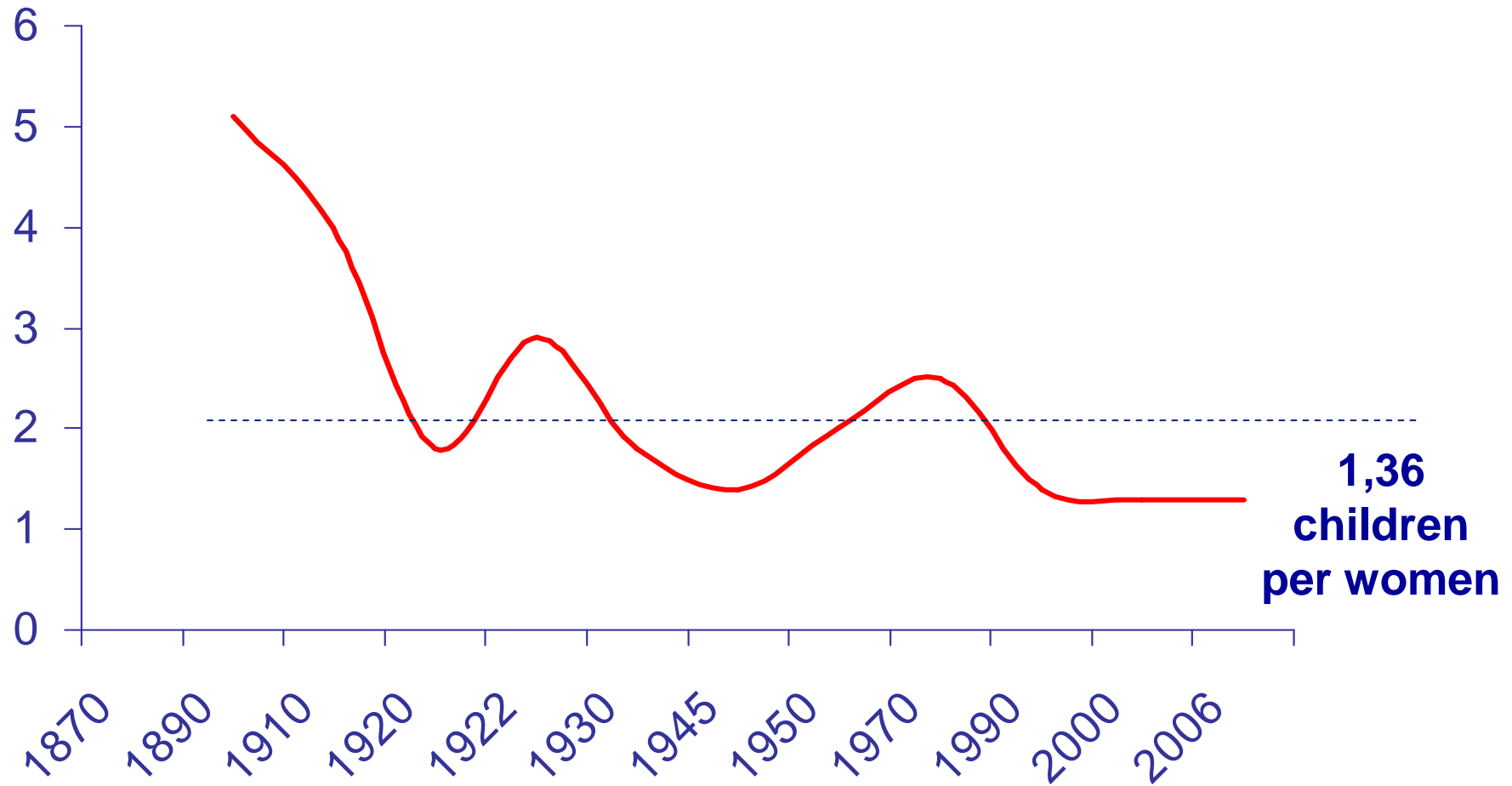
Conclusion of the demographical development

How the age pattern in Germany is changing (in percentage)



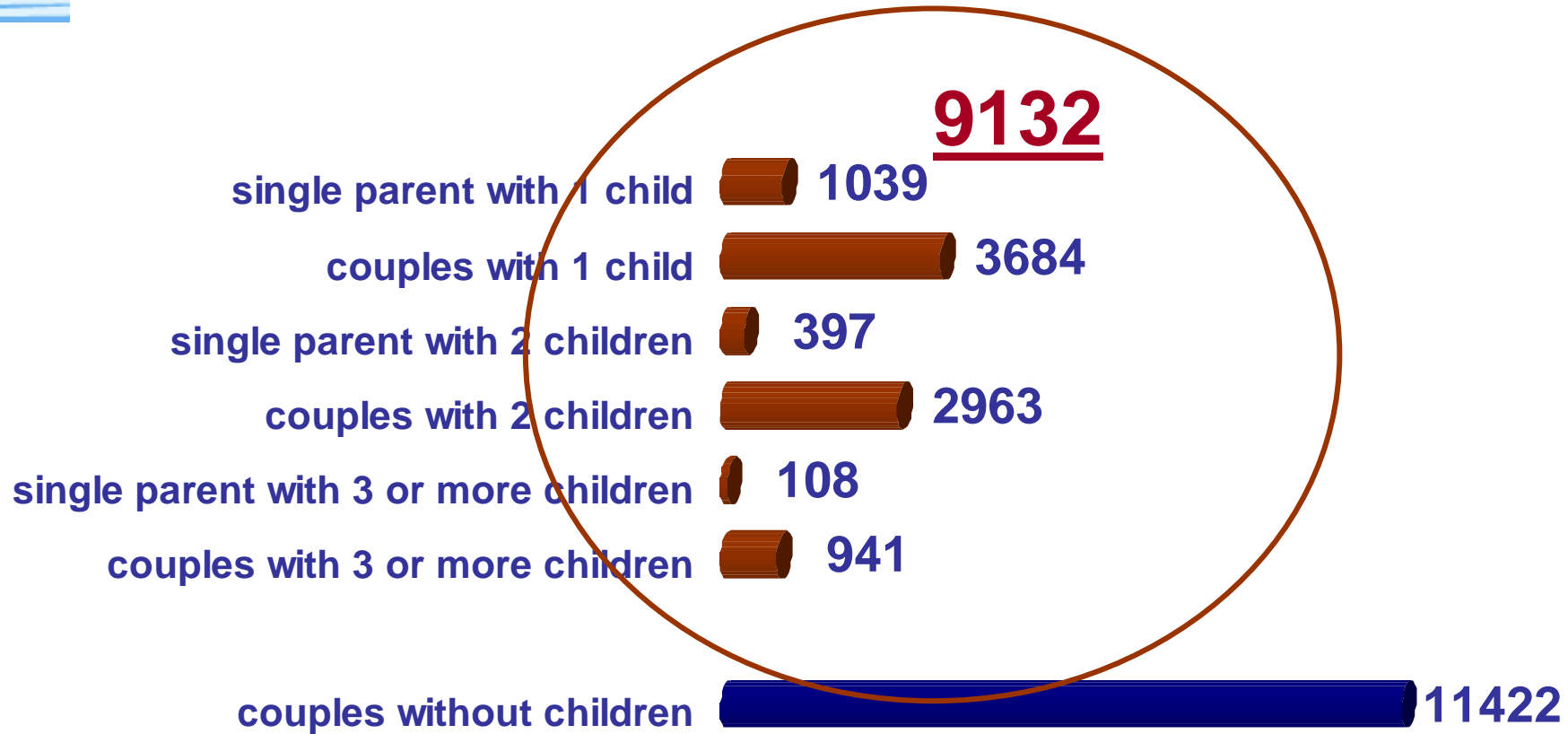


Germany's birthrate





Families in Germany*



*in 1000 under 18 years



Conclusion of the demographical development

- smaller families
- less economic growth
- less consumers
- less qualified employees
- less life quality
- less prosperity
- less innovation
- Germany's fallback system will loose its function (pension-, health- or care system)



Working world of tomorrow

Formula 0,5 x 2 x 3



Renaissance of the personality

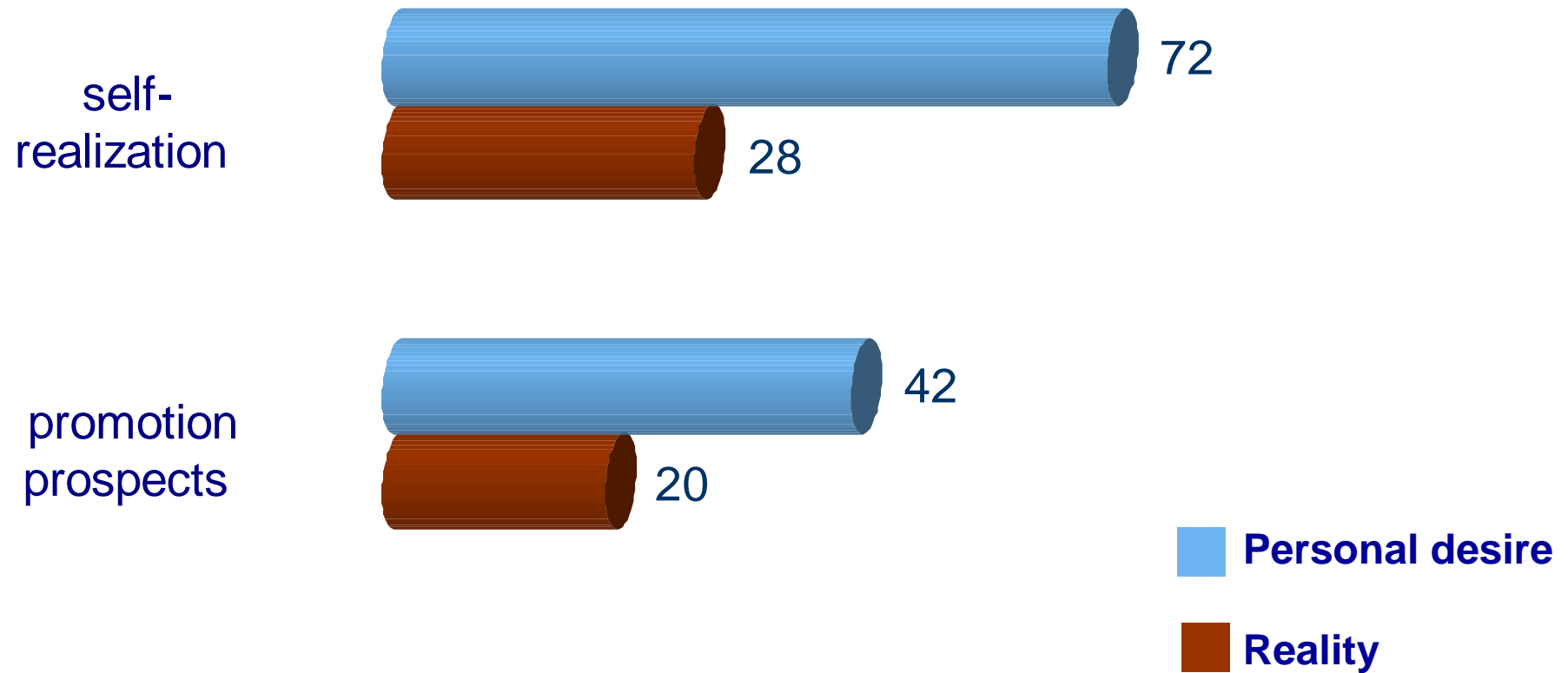
Top 10 of the most important needs in career life

1981	1999	2005
1. effort	1. effort	1. effort
2. responsibility	2. self-confidence	2. self-confidence
3. self-confidence	3. independency	3. interpersonal skills
4. dynamic performance	4. responsibility	4. responsibility
5. independency	5. ambition	5. independency
6. self control	6. interpersonal skills	6. honesty
7. interpersonal skills	7. dynamic performance	7. courtesy
8. open mindedness	8. courtesy	8. dynamic performance
9. ambition	9. self control	9. ambition
10. courtesy	10. open mindedness	10. open mindedness



Personal desire and reality within career life

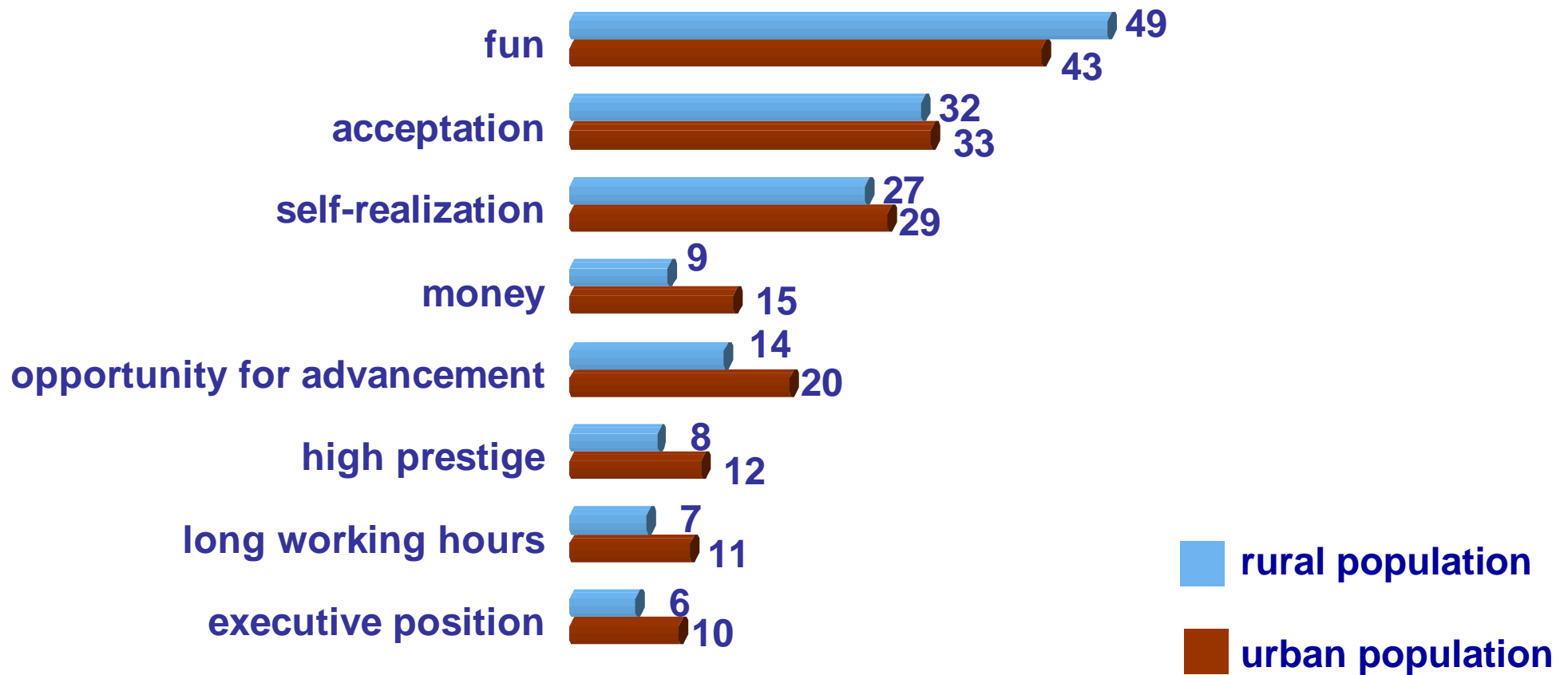
Out of 100 employees wish respectively can full fill within their jobs:





Career Reality – comparison of rural and urban population

Out of 100 employees can full fill during their job:



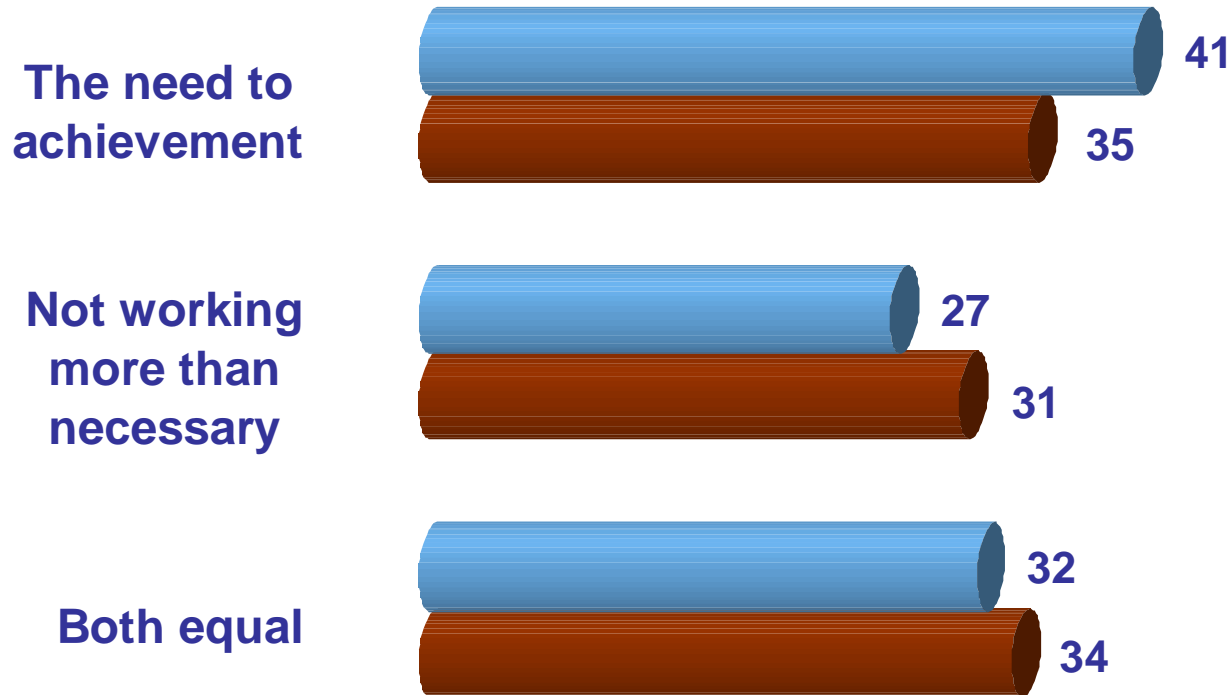


Hard work is a goal - again

the young generation is changing their views

Out of 100 - age 18-29 - years answered:

■ 1992 ■ 2005





Consumerism in the 21. Century

Saving age

Reasons:

1. Euro-Introduction

2. uncertainty

3. "Zeitgeist"



Young generation:

***„Style is not to have money,
but to spent it”***



Total population:

“Luxatic”

= mix of Luxury and ascetic



Less interests in moving

The Germans prefer consistency

Out of 100 Germans would like to live in:

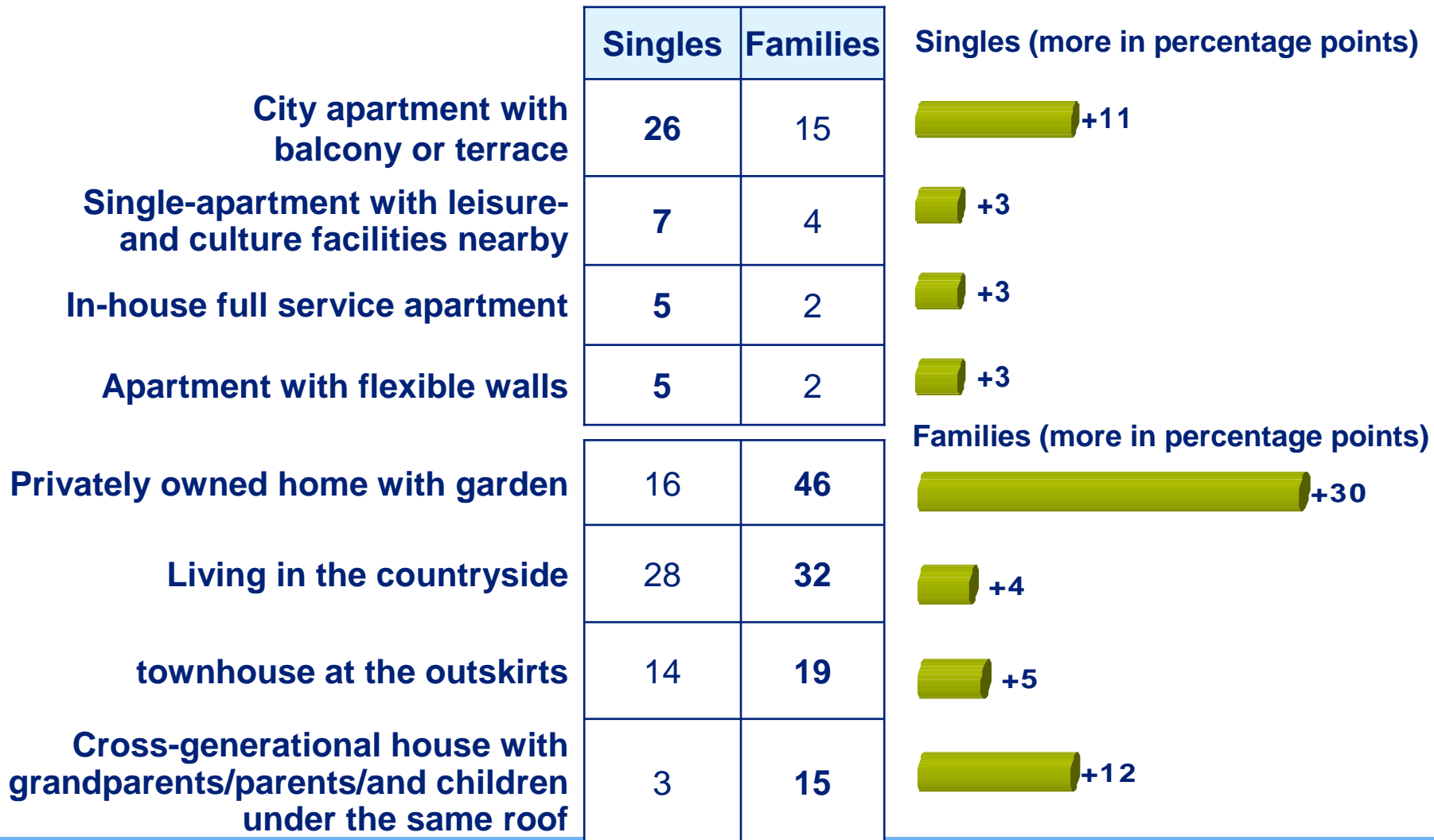
	At the countryside (up to 4.999 inhabitation)	In a small town (5.000 - 19.999 inhabitation)	In a middle sized town (20.000 - 99.999 inhabitation)	In a city (more than 100.000 inhabitation)	Suburb of a city
landsmen	59	19	17	3	2
small- towners	47	36	7	3	5
Middle sized towners	20	22	45	9	5
towners	8	12	11	40	28



City apartment or privately owned home

Living desires of singles and families compared

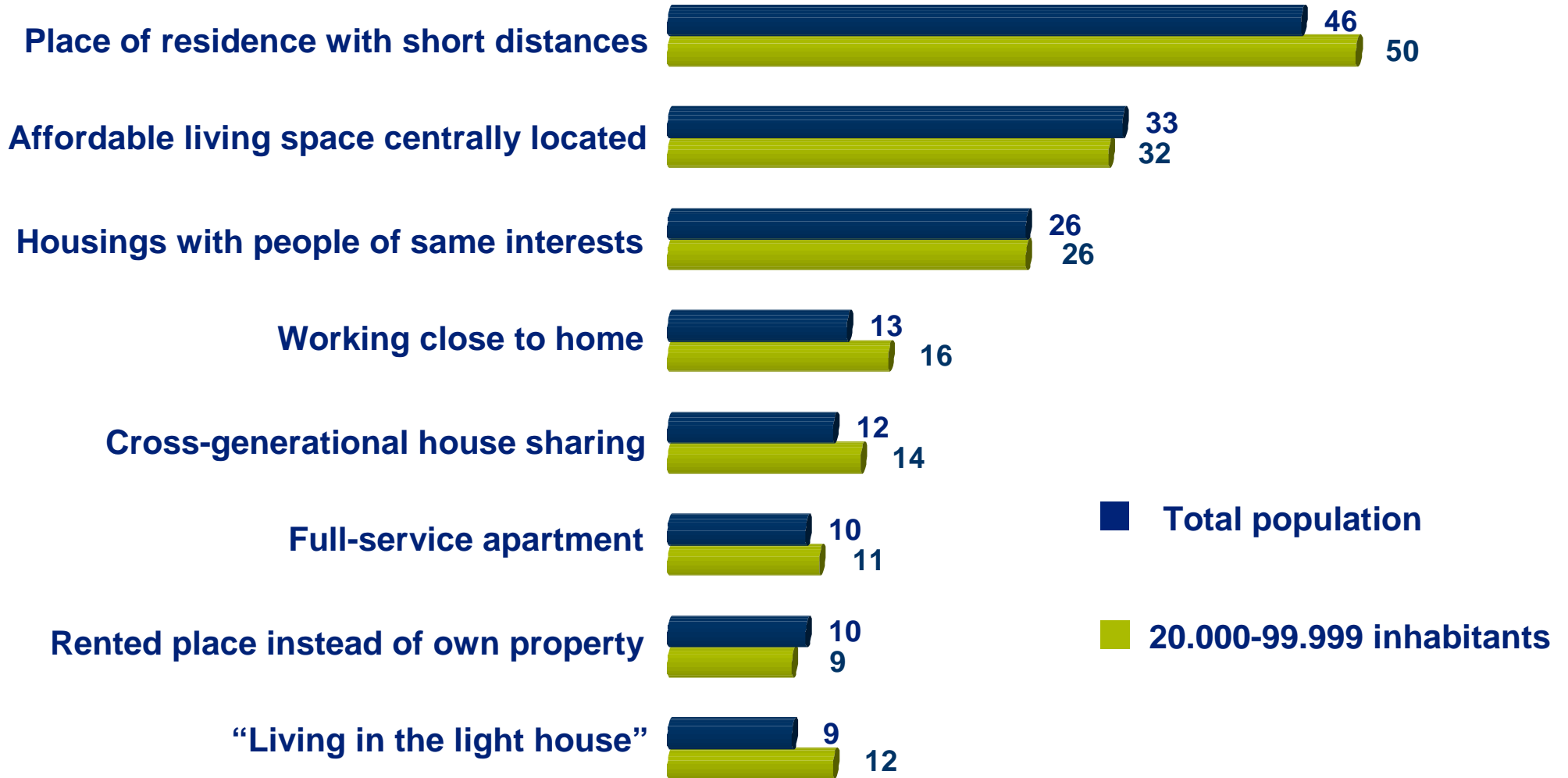
Out of 100 Germans answered the question: How do you want to live in 20 years?





How the population wants to live in the future

Out of 100 Germans want:





Forecast: The City of tomorrow

Less – Older – More colorful

Trends regarding central living

Short distances

variety of choices

High degree of life- and experience quality

Together instead of alone



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