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BECOMING

Being in Continuous Innovation and Growing

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Trend analysis of the tourism economy using the example
of Mecklenburg-Western Pomerania (Germany)



Englisch/ English

Workshop with representatives of the tourism economy from Mecklenburg-Western Pomerania

Trend analysis tourism economy: Where is the journey going?

The tourism economy is facing many challenges. Especially in Mecklenburg-Western Pomerania, as the No. 1 tourism state in Germany, many hoteliers, restaurateurs, club owners, event organisers and their employees went through difficult times in the past months. While one overnight stay record broke the next in recent years, the past few months have been marked by unprecedented losses in turnover, due to the almost 300 imposed closing days. Of course, this has also had an impact on the already tense skilled labour situation before Corona. According to economy information, about one in ten skilled workers has left the tourism economy permanently. Around 30 percent of the businesses were unable to cover their staffing needs during the peak season, reported Tourism President Wolfgang Waldmüller at the presentation of the seasonal balance sheet on 25 August 2021.

These experiences were also confirmed by the participants in our workshop "Trend Analysis Tourism Economy". On 31 August 2021, a small group of economy experts discussed not only the current challenges, but also the many opportunities in the field of digitalisation and sustainability. It is clear that further support is needed. Especially for the tourism economy, which is characterised by small and medium-sized enterprises, it is difficult to set the right course for the future in terms of personnel and finances. The next step is to develop concrete solutions and initial training offers for trainees and employees. This also includes intensifying the exchange with associations, educational institutions, science and other cooperation partners in the tourism economy and building additional network structures.

We would like to thank all participants for their stimulating impulses and constructive ideas - especially Birte Nagel from DEHOGA MV and Johannes Volkmar from the MV Tourism Association for their support in holding the event in the House of International Tourism in Rostock.

// Anja Kirchner



Trend Analysis Tourism Economy

The PESTEL analysis is suitable for identifying challenges for an sector and a company. The method allows influencing factors to be systematised as follows:

- Political
- Economic
- Social
- Technological
- Environmental
- Legal

The results of our workshop and discussions with experts from the tourism economy can be found below:

Political factors:

- Important economic factor for MV - tourism state no. 1 - tourism strategy for the future: focus on sustainability and soft tourism
- Corona: sufficient state support vs. corona conditions | economic operation was completely restricted for over 7 months
- Need for unbureaucratic, federal and state-wide funding and advisory services for digitisation & sustainability

Economic factors:

- short season - holiday corridor & public holidays - target groups: family, partners - length of stay: short trip vs. summer holiday
- dependent on tourism offers and suitable infrastructure (transport, public transport, internet, etc.)
- Shortage of skilled workers in all areas: Kitchen, service, administration, cleaning etc.
- Investment backlog? Family business vs. big business - digitalisation & sustainability are complex issues, small and medium-sized enterprises need support here
- Efficient and customer-oriented process flows help to meet the challenges; Tourism 4.0 is no longer a trend
- Hotel classification and other quality seals



Social factors:

- Holidays in nature (family, health tourism, slow travel) vs. cruise vs. business travel vs. FeWo & Airbnb
- Food trends: organic, regional, vegetarian, vegan, allergy-friendly
- Health trends: mindfulness, relaxation, sports
- General trend: experience more instead of consuming more
- Tourism acceptance by locals:
"Traffic jams, crowded beaches and the best the best plots of land are gone" vs. we have great recreational and cultural locally. And there is life in the city again."

Environmental factors:

- Sustainable tourism and green travel (intelligent mobility concepts bus-train and "last mile", "Touri-Ticket for ÖPNV in MV", cycling and hiking trails, alternative disposable packaging, ReCup systems, etc.).
- CO2-free activities (hiking, cycling, etc.)
- regional and local economic cycles (food supply from the region, laundry, craftsmen for repair and maintenance)
- Hotels and facilities according to energy efficiency standards + sustainable construction methods

Legal factors:

- Temporary reduction in VAT on beverages and food
- Bed tax, visitor's tax etc.
- Amendment to the law on the misappropriation of property
- Review of economic aid claimed (bridging aid and short-time working allowance)



Where is the journey going?

Trend resonance tourism as a model for more sustainability?

In its trend study "The New Resonance Tourism", the Zukunftsinstitut has compiled some important impulses for the development of tourism. One of the most important findings: The demands and expectations of guests are changing. Instead of just consuming, the focus is on true experience. Due to the corona time, in which encounters and experiences were limited to a minimum, the desire for "real and true" experiences is very high. In this context, science also speaks of "going into resonance - with oneself and the environment". Because what remains in the memory and leaves a lasting impression are not things, but experiences - like the sound of the sea, the smell of the rapeseed field, the accordion playing and singing of the shanty choir, great conversations over good food.

At the same time, the study by the Zukunftsinstitut provides information on the direction in which companies need to develop further. Digitalisation is only a means to an end in order to offer better and more individualised services. Warmth, hospitality, friendliness and sincere interest will trump even the smartest application and technology gimmick.

But what is the path to more real and true experience?

1. Rethink offer

People experience travel as a transformative experience - as social beings we love and live community. Corona has shown on various levels what many were missing: exchange and shared experiences. If the tourism offer is rethought from this understanding, many new possibilities open up for companies and destinations.

2. Re-thinking destinations

No matter how well-equipped the hotel rooms and facilities may be, no matter how friendly and obliging the staff may be, if poor connections or traffic jams on arrival and long waiting times at check-in strain the nerves, the first hurdles to a relaxing holiday have been set. The same applies to local tourist attractions. Art and culture do not appeal to everyone, nor do crowded beaches and zoos. Finding a balance so that locals also feel comfortable is the big challenge. Politics and businesses must enter into a close exchange with all actors of the "tourism ecosystem". Open, honest and transparent exchange and cooperation are the key.

3. Re-thinking skilled labour

The shortage of skilled workers in the tourism sector has been a major problem for years, and corona has exacerbated the situation. New ideas and strategies will be needed to find and retain trainees and skilled workers. Those who see leadership as a service and their employees as partners make the resonance difference. Family-friendly working models, support for personal and professional development show that the focus is not only on the paying guest, but that the most important success factor of a company is satisfied and committed employees.

4. Re-thinking the logistics of travel

The holiday experience already starts with the booking and arrival. If you leave a positive impression here, you lay the foundation for a great time. Technology used sensibly can simplify and individualise time-consuming processes. This has added value for guests and employees alike.

Project partner

Germany

- RegioVision GmbH, Schwerin
- Unternehmerverband Norddeutschland Mecklenburg-Schwerin e.V., Schwerin
- WFS Bildungs gUG, Berlin

Czech Republic

- Association of Small and Medium-Sized Enterprises and Crafts of the Czech Republic, Prag
- INSTITUT INPRO, a.s., Prag

Italy

- CNA Abruzzo, Pescara
- Ilmiofuturo, Campli (Teramo)
- Roscioli Development , Campli (Teramo)

Are you interested in working with us?

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