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## **STRUCTURAL CHANGES OF INCOMING TOURISM THE CASE OF MECKLENBURG-VORPOMMERN**

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The analysis of the structural changes of incoming tourism gives relevant information, also about possible problems. There are more than one solution in respect to these problems, as the case of Mecklenburg-Vorpommern shows.

Key words: incoming tourism, tourism marketing.

### **1. MECKLENBURG-VORPOMMERN AND INCOMING TOURISM**

Mecklenburg- Vorpommern is one of the sixteen federal countries of Germany. It is situated in the northeast of Germany and borders on the Baltic Sea.

The territory of Mecklenburg- Vorpommern comprises 23.170 square kilometres and the population amounts 1.7 Million people.

The coastline covers 1712 kilometres, including 354 of the outer coastline and 1358 of the bay coastlines (Bodden und Haff).

The landscape is marked by large forests (21 % of the country's territory) and wide lake areas (lakes and rivers cover 5,5 % of the territory).

Altogether Mecklenburg-Vorpommern offers good natural and cultural conditions for tourism. Examples for the last ones are the hanseatic towns and the meetings of old sailing ships in Rostock.

Tourism is one of the most important economic branches. More than 10 % of the gross domestic product is produced by Tourism and about 100.000 people are employed in that branch.

## 2. TOURIST ARRIVALS AND NIGHTS SINCE 1992 – A STORY OF SUCCESS

The tourist arrivals and nights continuously grow in Mecklenburg-Vorpommern since 1992.

Table 1: **Tourist arrivals and nights/ Mecklenburg-Vorpommern/ 1992, 1995, 2002, 2003** <sup>1)</sup>

<i>Characteristic</i>	<b>Unit</b>	<b>1992</b>	<b>1996</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>
Accommodation facilities total	Number	1069	1895	2638	2687	2656
Beds total	1000	66,3	106,6	164,1	169,5	170,7
Arrivals total	1000	1976	2850	4535	4751	5130
Nights total	1000	6659	10.809	19.760	21.006	22100
Average duration of stay	Days	3,4	3,8	4,4	4,4	4,4

<sup>1)</sup> Accommodation facilities, 9 beds and mor

From 1992 to 2003 the number of nights spent could get tripled. The tourism destination Mecklenburg-Vorpommern claimed their position upon the tourists from the new federal countries and extended their position upon the tourists from the old federal countries.

The base for this establishment is the rearrangement of the tourism economy since the reunion. Three phases are visible:<sup>1</sup>

a) **1991- 1995 Reorganization and preparation of investments**

Over 300 holiday homes of the trade unions were transferred into private ownership. Mecklenburg-Vorpommern and his tourism destinations prepare for investments in the infrastructure and begin to realise them.

b) **1996- 2001 High investment phase**

Around 62.000 new beds were brought on the market in this period, this is more than two thirds of the total supply.

Result: In the first years of this phase the occupation rate of the beds sank to 33,2 %. Because of that the federal government of Mecklenburg-Vorpommern reduced their subsidizing of building new accommodation facilities.

As a result the occupation rate rose up to 37,2 % at the end of this phase.

<sup>1</sup> Fischer, B./ Pescht, C. : The development of the tourism in Mecklenburg- Vorpommern, shown at some selected reference numbers 1992- 2003, Information and Contributions from the Baltic Institute for Marketing, Transport and Tourism, number 13, Rostock 2004.

c) **From 2002 Consolidation phase**

Between 2002 and 2005 there is "only" an expectation of an 10.000 bed increase.

In 2003 the load factor of beds rose up to 40 %. That is a record for so called German federal area countries (in contrast to city countries): E.g. Bavaria reached 31 %.

The tourism companies and institutions concentrate with their marketing on quality strategies.

The economic situation of the accommodation companies improved.

### 3. STRUCTURE OF INCOMING TOURISTS – DEVELOPMENT AND PROBLEMS

To get information about the structure of incoming tourists, tourist polls are very useful. Tourist polls have been conducted by the tourism association of Mecklenburg-Vorpommern every two to four years.

In 1997, 1999 and in 2003 the tourist polls were carried out by our Baltic Institute of Marketing, Transport and Tourism at Rostock University.

The tourist polls are conducted twice in the relevant year. In 2003 the tourist polls consisted of 4500 interviews in the summer (July/August) and 1500 in fall (October/November).

The following will show some important results from the summer-polls.

Due to our climate conditions two thirds of arrivals and overnight stays take place in the months from May to September.

**First:** The results of the tourist polls show an **increase of tourists with a higher income.**

Table 2: **Household net income of the tourists in Mecklenburg-Vorpommern /Summer 1994, 1997, 1999, 2003**

Net income in €	guests overall				old federal countries			new federal countries		
	1994	1997	1999	2003	1997	1999	2003	1997	1999	2003
below 1.000 €	24,4	21,1	13,9	7,6	12,6	7,6	3,5	27,3	19,1	11,2
1.000 – 1.499 €	30,0	22,9	23,2	12,5	15,6	18,6	8,3	28,3	27,0	16,8
1.500 – 1.999 €	23,4	21,0	26,8	17,5	21,1	23,8	13,9	21,0	29,1	21,3
2.000 – 2.499 €	14,7	16,8	18,1	21,9	22,6	22,3	19,7	12,6	15,0	24,4
2.500 – 2.999 € <sup>1</sup>	7,5	8,4	18,1	17,5	12,8	27,7	21,4	5,2	9,8	13,9
3.000 – 3.999 € <sup>2</sup>		9,7		12,7	15,3		17,6	5,5		7,9
4.000 and more				10,3			15,6			4,5

<sup>1</sup> 1994, 1999: 2500 € and more

<sup>2</sup> 1997: 3000 € and more

The share of tourists with a household net income from 2000 € up rose from 36,1 % in 1999 up to 62,4 % in 2003.

Those results seem to be relatively positive but by analysing the expense behaviour of the tourists problems become visible:

a) **The expenses for accommodation rose slightly.**

Table 3: **Expenses for accommodation in Mecklenburg-Vorpommern/ Summer 1994, 1997, 1999, 2003**

Accommodation type	Average expenses per night in €			
	1994	1997	1999	2003
1. Hotels	41	45	45	57
2. Hotels garnis			41	43
3. Pension	19	28	28	29
4. Guesthouse		27	25	38
5. Holiday houses and flats in a centre			23	27
6. Holiday houses and flats to rent	17	21	22	23
7. Private rooms		18	18	18
8. Own holiday house or flat		21	18	18
9. Private free of official charge	14	18		19
10. Sanatoriums, Spa clinics		44	33	32
11. Youth hostels		12	15	16
12. Camping sites	8	9	10	9
13. Mobile home		10		
14. Farm		19		22
15. Other type	16		16	19
16. Average		27	28	31

Between 1997 and 1999 the accommodation expenses stagnated. Compared to 1999 the accommodation expenses went up 11% in 2003 but for a period of time of 4 years this increase is just moderate.

Some of the accommodation types could only record minor increase in room sales. (holiday home, holiday flat, youth hostels, sanatoriums, spa hotels)

The hotel industry lies over the average. The increase from 1999 to 2003 is 27%.

This means an average increasing rate (per annum) of 6 %.

**b) The expenses per day of the tourists stagnate.**

In 1999 the tourists spent 20,5 € per day, in 2003 each tourist spent 20,3 € on average (without expenses for accomodation).

This problem doesn't only appear in the tourism destination Mecklenburg-Vorpommern. A stagnation even a decrease of the daily expenses of the tourists exist in all regions of germany.

**Second:** By taking the present behaviour of expenses of the tourists and their share of the german population as a standard the current situation should be changed.

The analysis of the areas of origin show that 47,1 % of the tourists come from the old federal countries, 50,9 % from the eastern part of Germany and 2,0 % are foreigners (2003):

Table 4: **Tourists areas of origin/ Summer 1994, 1997, 1999, 2003**

Area	Tourists Summer 1994 (shares in %)	Tourists Summer 1997 (shares in %)	Tourists Summer 1999 (shares in %)	Tourists Summer 2003 (shares in %)	2003 compared to 1999 (% - points)	Population 31.1.2000 (shares in %)
Old federal countries	54,1	43,4	43,7	47,1	+ 3,4	79,0
New federal countries (including Berlin)	44,1	56,1	54,2	50,9	- 3,3	21,0
Foreign countries	1,8	0,5	2,1	2,0	- 0,1	

The share of the tourists from the old federal countries stays with 47,1 % clearly below their population share (79 %).

The tourists from the western federal countries have higher expenses than the tourists from eastern countries (2003):

	old federal countries	new federal countries
Accommodation expenses	34 €	27 €
Daily expenses	22 €	19 €

#### 4. POSSIBLE SOLUTIONS

In Mecklenburg-Vorpommern the tourism companies and institutions go - starting from the research results - a lot of different ways to solve the above mentioned problem.

Two of the the most important ones are:

- a) The way of closer networking between the offers of tourism and the offers of other companies.
- b) The way of increasing the share of tourists from the old federal countries using their information behaviour.

a) With reference to the network of the tourism and other companies exist a lot of examples. Well known is the network between the tourism and the health industry (health tourism, wellness tourism).

A new way in our federal country is the network between tourism and retail companies

A first step was to include questions about the shopping behaviour of the tourists in the tourist polls 2003.

The tourists were asked whether they bought retail products during their stay in Mecklenburg-Vorpommern (without food).

Table 5: **Retail shopping (without food)/ all tourists/ Summer 2003**

Article group	Number of mentioned product	Average price in €
1. Drugs, medical and cosmetic products	109	19,0
2. Textiles, clothes, shoes, leather	1017	57,0
3. Furniture, household, lightening home articles, carpet, non electric domestic appliance	76	26,8
4. Electric domestic appliance, broadcasting and television appliance, magnetic tapes and CDs	48	51,9
5. Metall, painting articles, glas, home improvement, sanitary, building material	14	32,8
6. Books, newspapers, writing articles, office furniture, computer, software	361	11,9
7. Others (activities, service, hobbies, art, jewellery, toys, souvenirs)	759	39,4
Total	2384	41,6

The tourists named 2400 different products, which were bought while their stay.

By systematizing the results there is a main emphasis put on the product group textiles/ clothes/ shoes/ leather and the group other products (souvenirs and service).

If the shown results are projected at the whole amount of tourists in Mecklenburg-Vorpommern the importance of the tourists for the retailing branch becomes clear.

We see, the closer cooperation between tourism and retail companies is absolutely necessary.

We need networking, we need packages, which include the offers of tourism companies as well as retail companies.

**b)** In the past a main tool - to achieve an increasing number of tourists from the old federal countries of Germany - was the consideration of their individual motives and interests. This goal should be followed in the future, too. But we have to add more measures.

An example for additional measures is the increasing consideration of the information behaviour of the tourists.

The tourists in Mecklenburg-Vorpommern were asked which travel stimulation was the reason for coming into our tourism destination

Table 6: **Stimulation for travelling to Mecklenburg-Vorpommern/ Summer 1997, 1999, 2003**

Travel stimulation	Tourists in all		
	1997	1999	2003
Travel fare	1,7	1,1	1,0
Newspaper advertisement	6,4	4,4	4,2
Internet		2,1	11,0
Reports on TV, radio <sup>1</sup>	7,1	8,6	13,6
Reports in newspaper, magazines	6,6	9,6	8,1
Cataloges from the touroperators	4,7	6,5	3,5
Resort brochures	7,0	8,8	8,6
Hotel brochures <sup>2</sup>			2,8
Travel literature; travel guide	13,6	10,6	8,7
Advice in travel agency	4,4	3,7	1,5
Recommendations by relatives and friends	41,4	42,8	35,8
Former stays	56,9	53,3	62,4

<sup>1</sup> 1997: Reports in electronic media

<sup>2</sup> 1997 und 1999 not asked

The development since 1997 shows:

Previous stays are a dominating fact as a stimulation for travelling to Mecklenburg-Vorpommern. Compared to 1999 it is more important in 2003. (share in 1999: 53,3 % share in 2003: 62,4 %).

The suggestions of friends and relatives are still in 2003 a fundamental fact but they lost weight compared to 1999 (-7,0 %- points).

In 1999 the Internet was relatively meaningless (share: 2,1 %), in 2003 the share rose up to 11 %.

The television and the radio continuously increase their importance. (share in 1997: 7,1 %, share in 2003: 13,6 %)

Travel literature and guides clearly lost importance (share in 1997: 13,6 %, share in 2003: 8,7 %)

The advising in travel agencies tends to loose all of its importance (share in 1997: 4,4 %, share in 2003: 1,5 %)

Analyzing the stimulation of the tourists from the old and the new federal countries of germany some fundamental differences will be visible:

The previous stays were more important for the tourists from the new federal countries (77,4 %) than for the tourists from the old countries (48 %).

The other way around with the suggestions of friends and relatives: 27,4 % of the tourists from the new federal countries and 44,3 % of the tourists from the old federal countries named this particular reason.

The World Wide Web played a more important role for the tourists from the old federal countries with a share of 13,7 % (new federal countries: 8,2 %).

The above mentioned results show also the high importance of the satisfaction of the tourists.

Satisfied tourists come back and recommend Mecklenburg-Vorpommern to their friends and family.

All statements show the necessity of tourism research and the developing of concepts for the future tourism.

Currently Mecklenburg-Vorpommern works out a new tourism concept on the base of the tourist polls and further research projects (e.g. safeguarding the supply of the tourism companies with high quality personnel staff). It is supposed to be done in May 2004 and it will show development opportunities for the next decade.

## REFERENCE

1. Fischer, B./ Pescht, C. : The development of the tourism in Mecklenburg- Vorpommern, shown at some selected reference numbers 1992- 2003, Information and Contributions from the Baltic Institute for Marketing, Transport and Tourism, number 13, Rostock 2004.

Sažetak

**STRUKTURALNE PROMJENE TURISTIČKIH DOLAZAKA  
NA PRIMJERU MECKLENBURG-VORPOMMERN**

*Analizom strukturalnih promjena turističkih dolazaka dolazi se do relevantnih informacija, između ostalog i u svezi mogućih problema. Kao što pokazuje slučaj Mecklenburg-Vorpommern, za pojedine se probleme može naći više od jednog rješenja.*

*Ključne riječi: turistički dolasci, turistički marketing.*