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Tourism development in the Lake Constance region

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9.10.2012, Radolfzell

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Agenda

- Defining the spatial dimension of the tourism destination Lake Constance
- Key facts and figures: The international tourism destination Lake Constance
- Destination management in the Lake Constance region
- Examples of international cooperation in tourism offers

Spatial definition of the tourism destination Lake Constance

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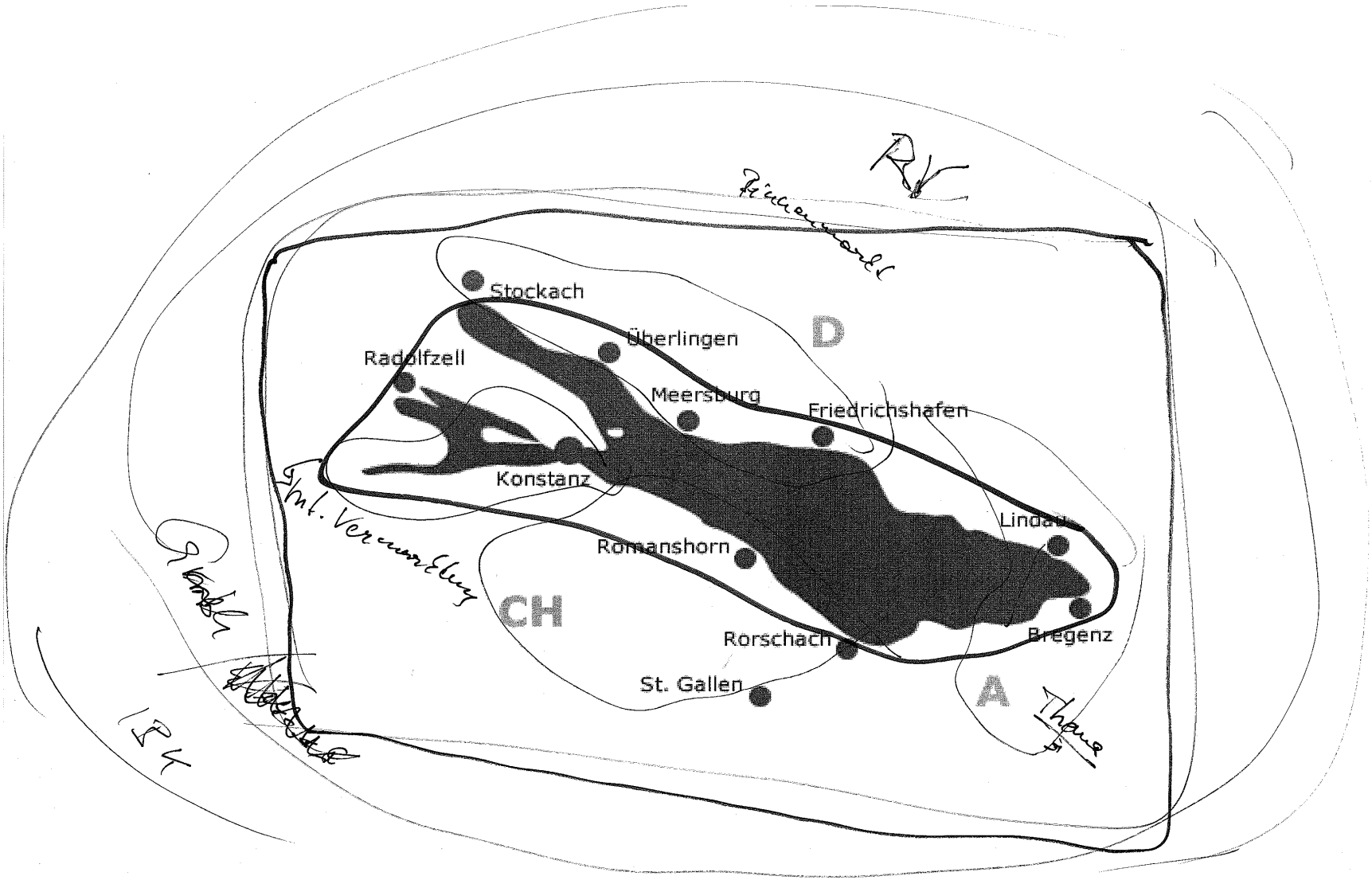
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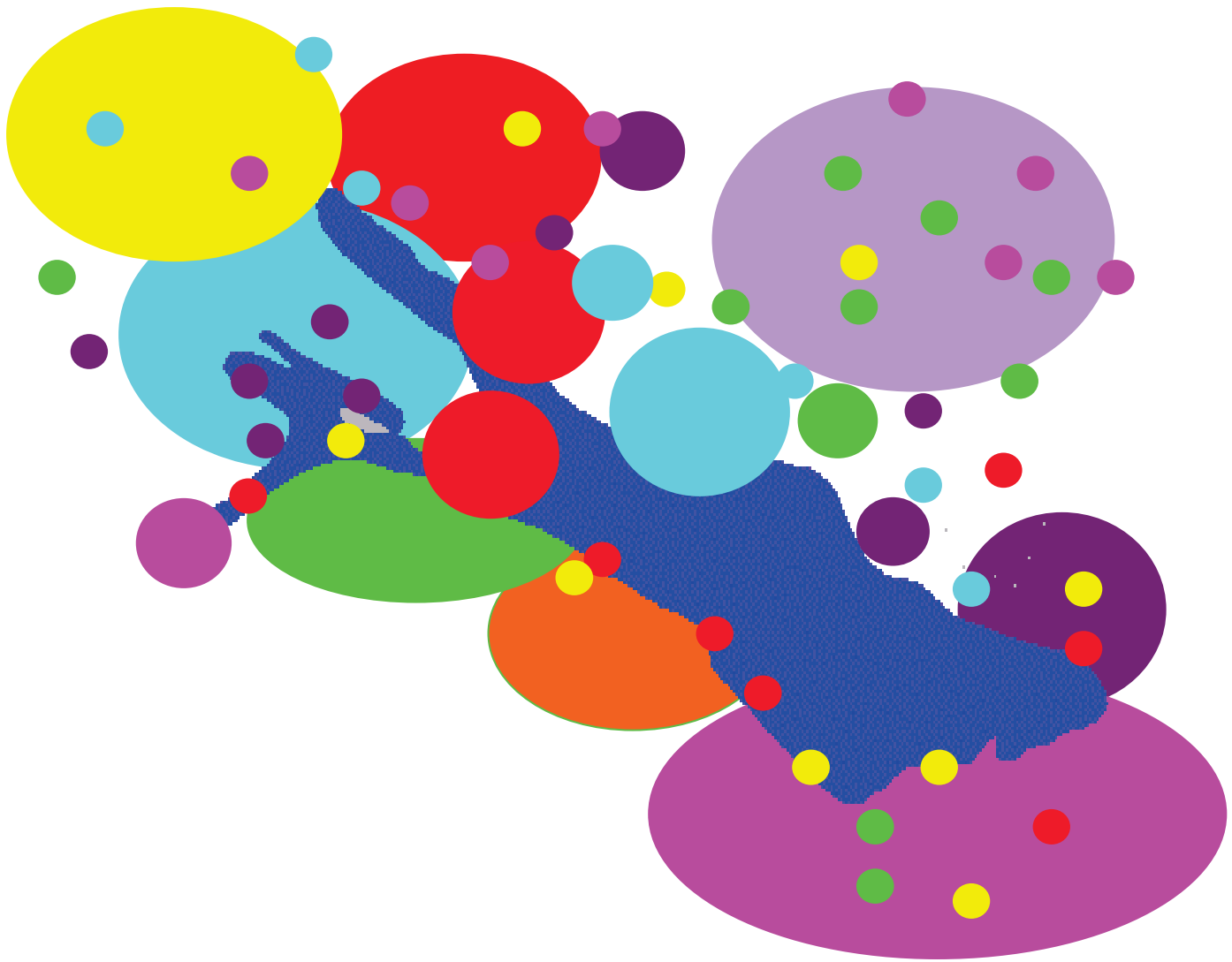

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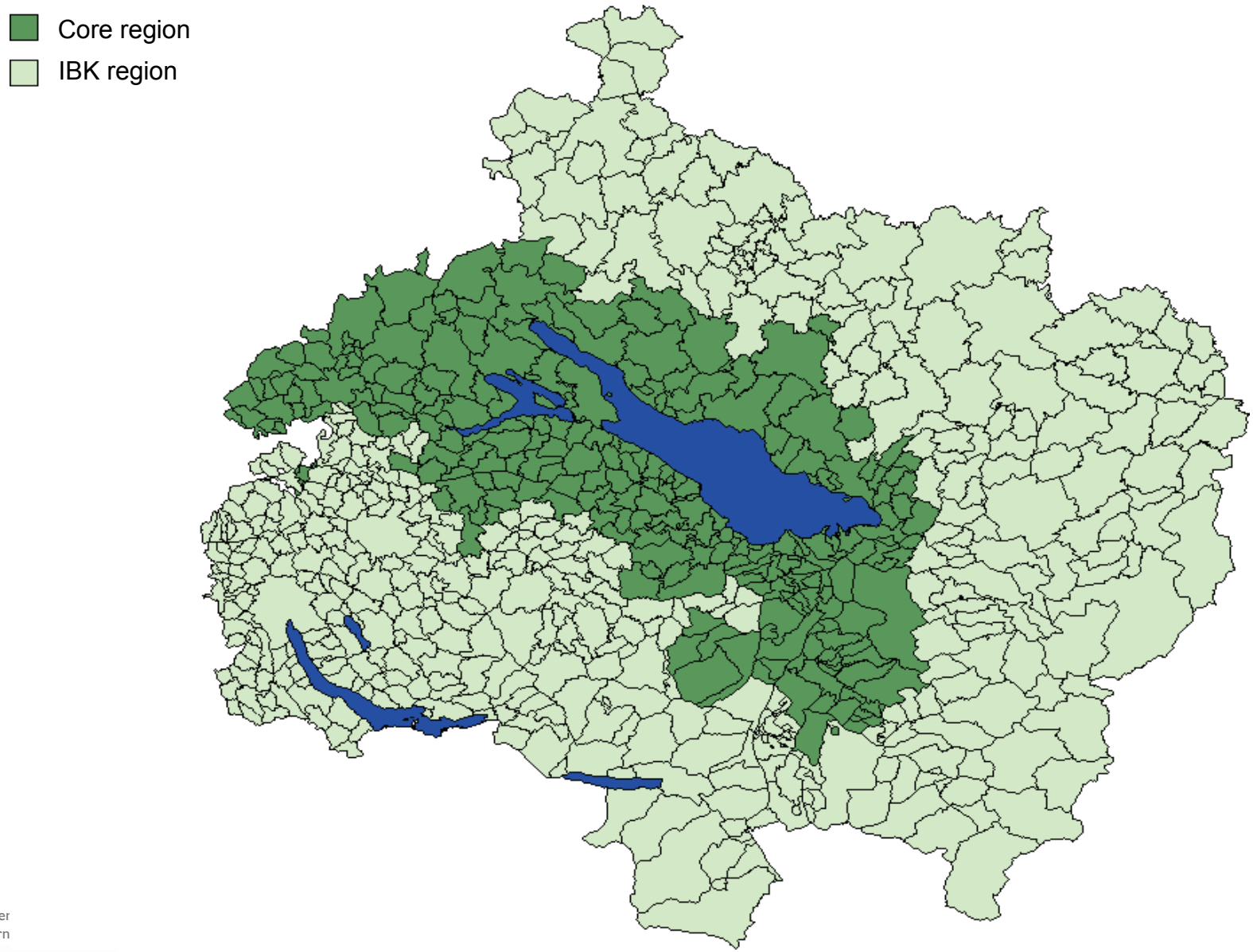
The core of the destination Lake Constance?



Facts and figures:
The international tourism destination Lake Constance

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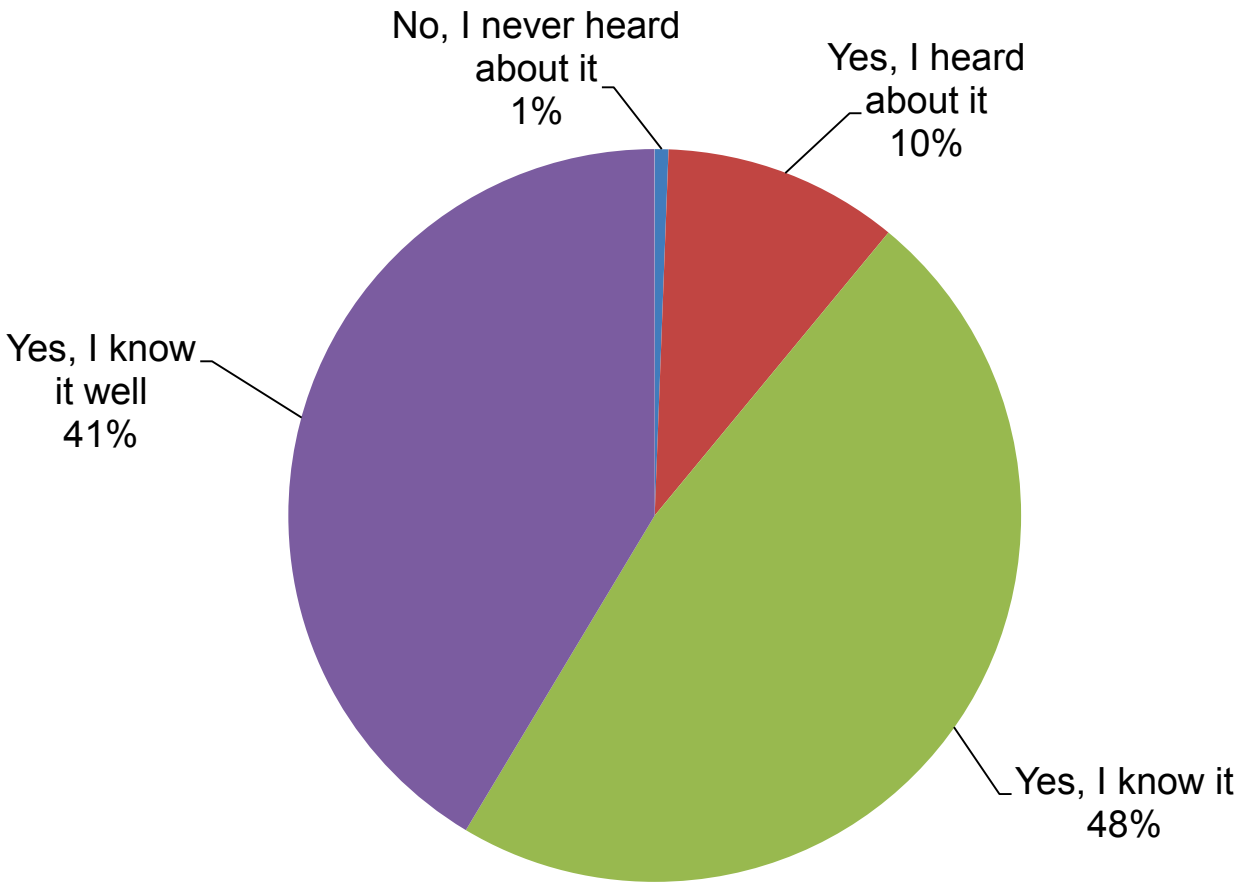
- ➔ 4 countries
- ➔ 10 federal states / cantons
- ➔ 41 counties and districts
- ➔ 528 municipalities
- ➔ 12 tourism organisations
- ➔ About 5,000 tourism experts (perceived even more…)

- ➔ … have to be coordinated…

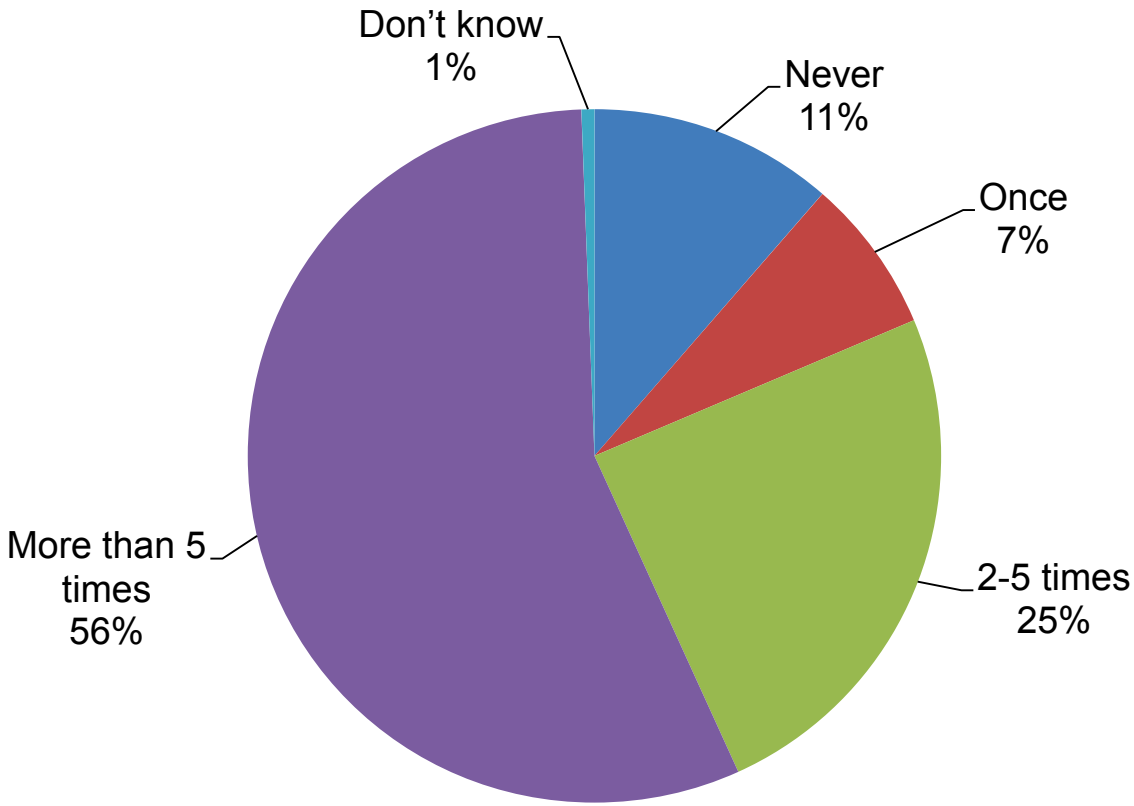
- ➔ About 3-5 million inhabitants
- ➔ More than 25 million overnight stays
- ➔ More than 30 million single-day guests
- ➔ Recreation area for more than 6 million people, who live in the whole catchment area
- ➔ Many regional and supraregional tourist attractions
- ➔ … and an outstanding popularity in the German-speaking countries

An outstanding popularity...



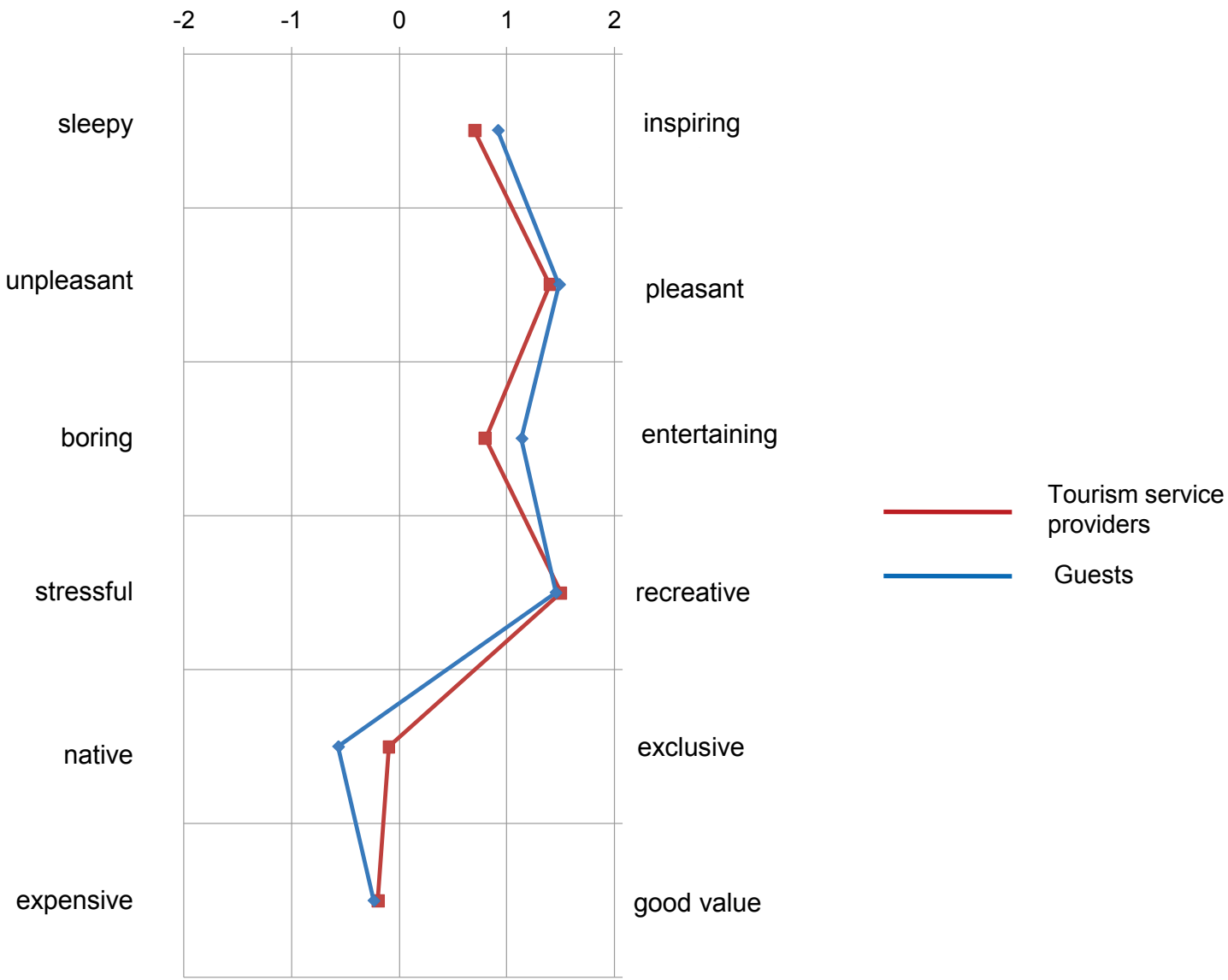
Source: Scherer/Johnsen/Strauf 2005

… and many regular guests



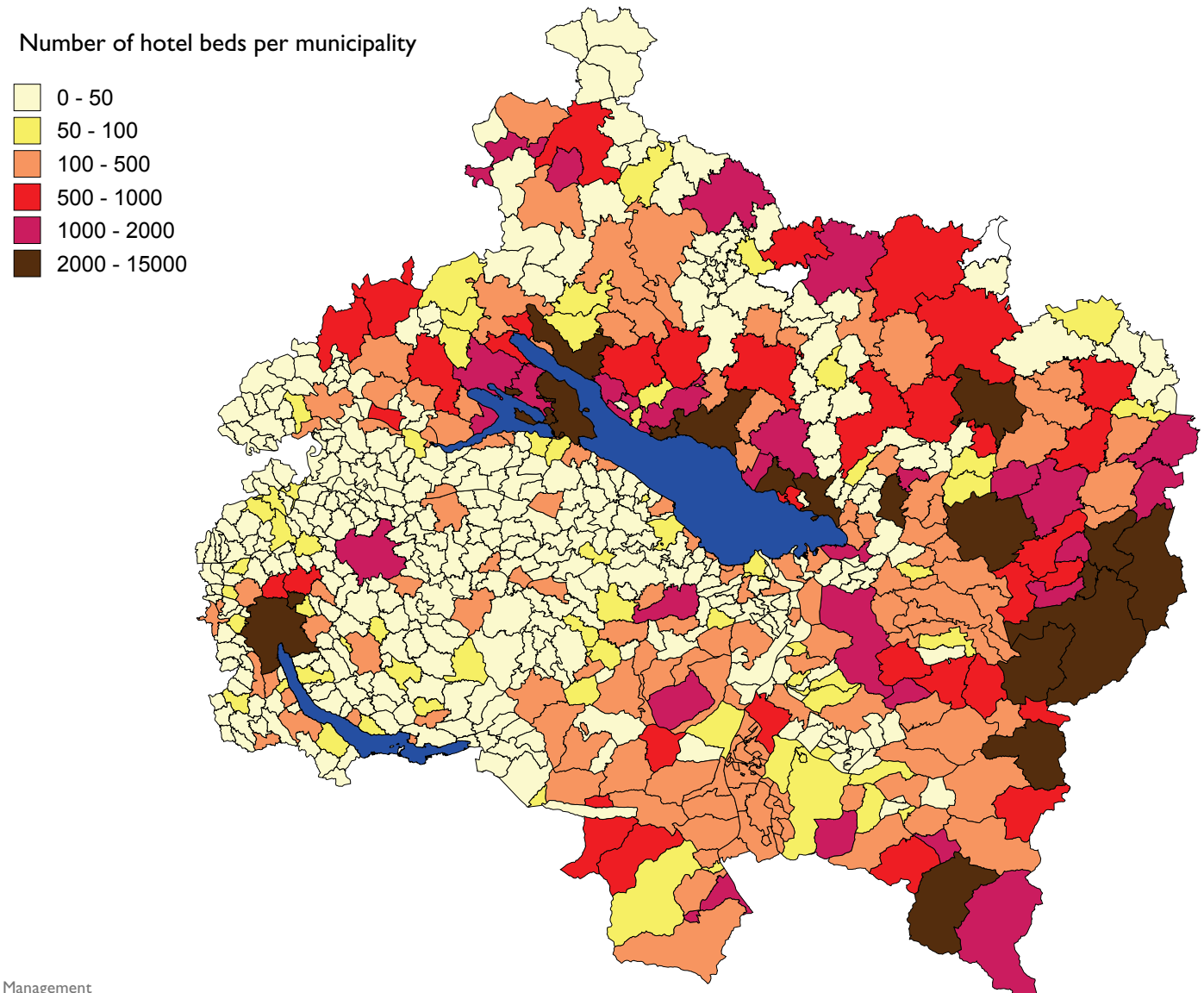
Quelle: Scherer/Johnsen/Strauf 2005

Image perceived by guests and tourism service providers



Source: Scherer/Johnsen/Strauf 2005, Survey IDT-HSG 2009

Supply of hotel beds (2009)



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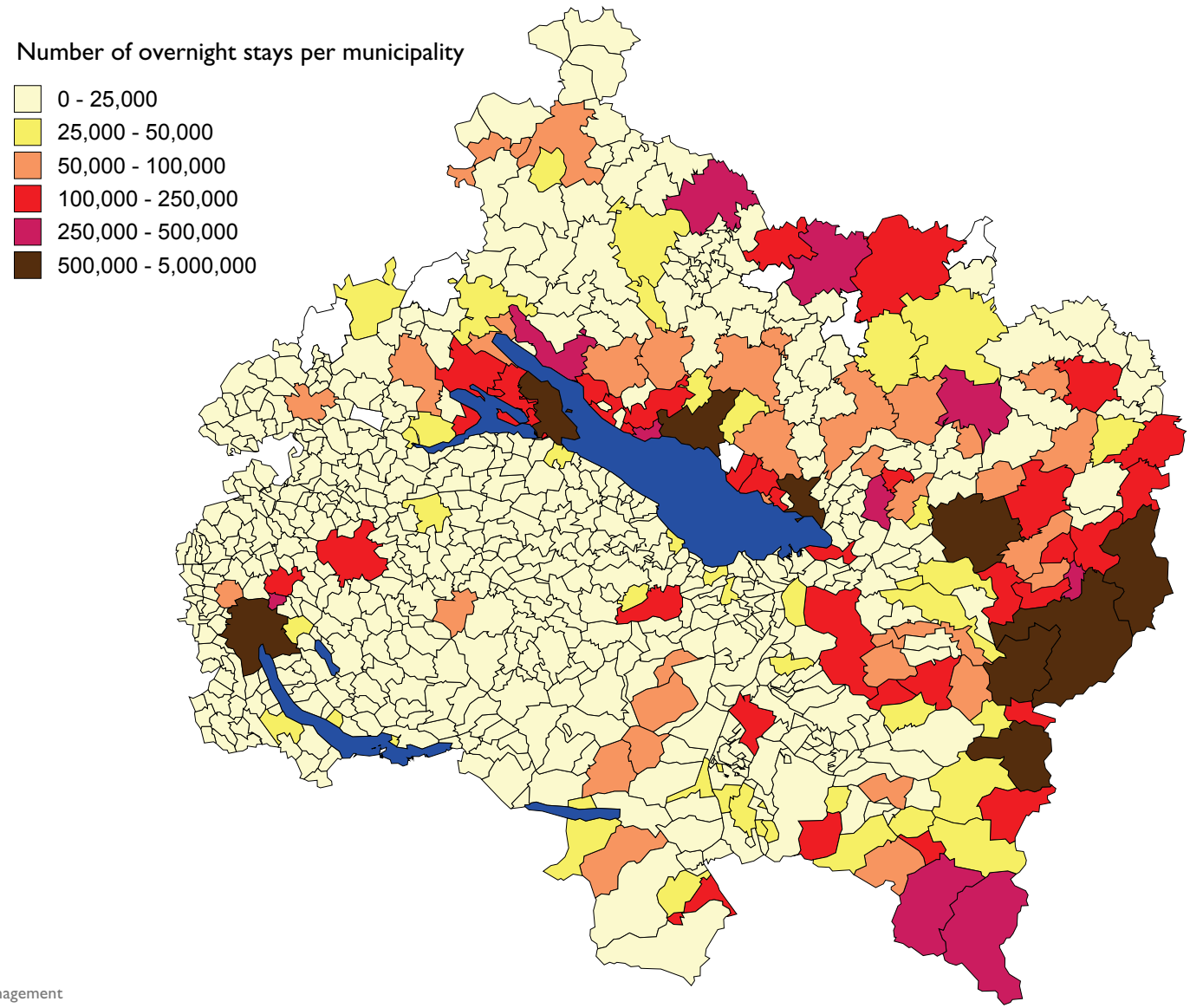
Source: Eigene Darstellung nach Daten der jeweiligen statistischen Landes- und Bundesämter

Overnight stays (2009)



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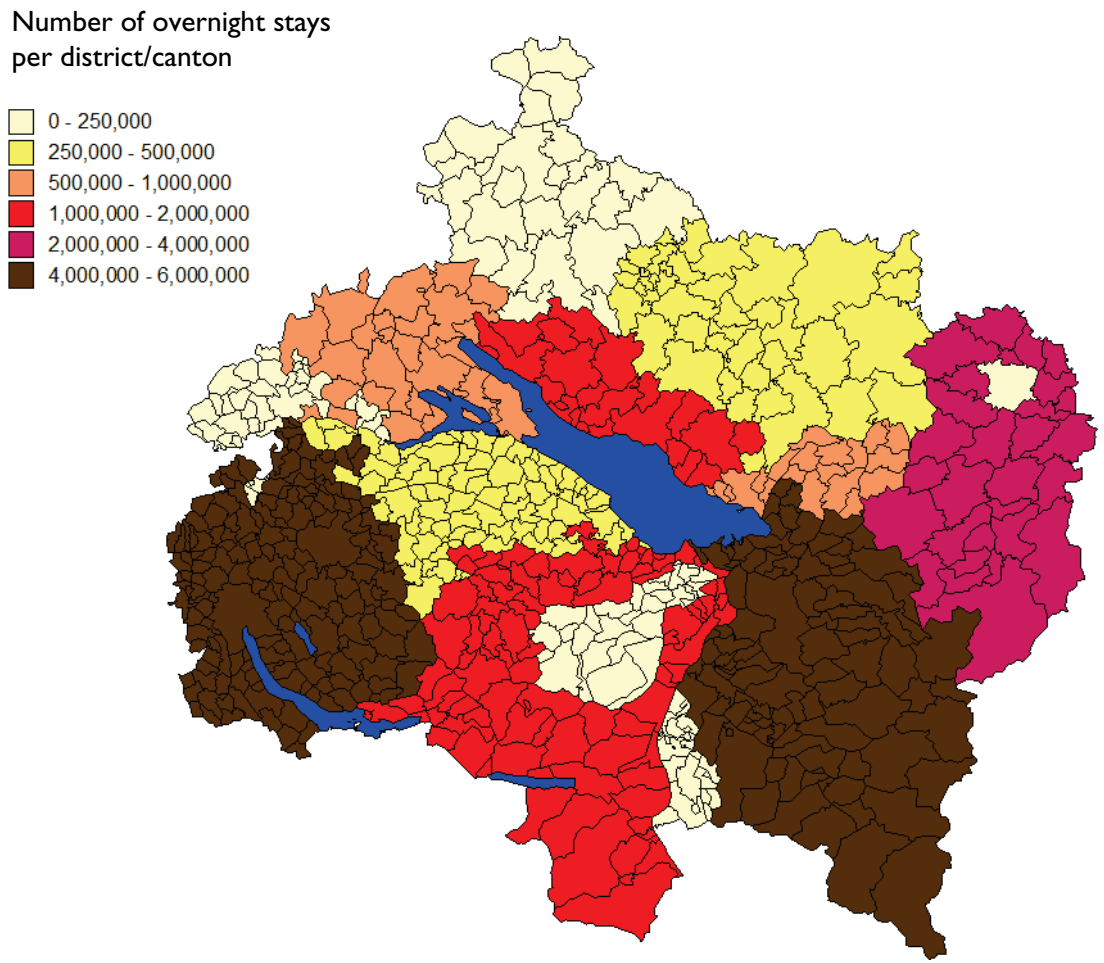
Source: Eigene Darstellung nach Daten der jeweiligen statistischen Landes- und Bundesämter

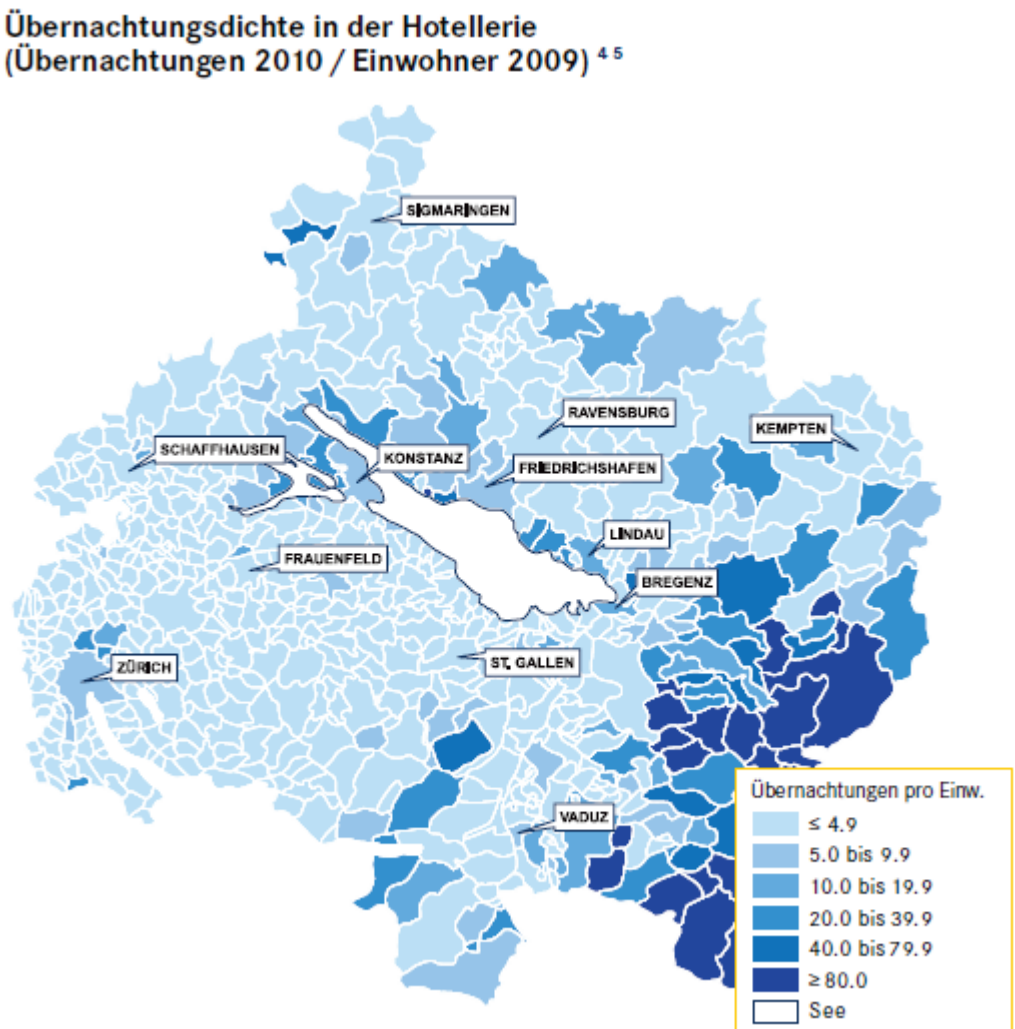
Overnight stays (2011)



German regions: 39% **Swiss regions: 34%**
Austrian regions: 26% **Liechtenstein: 1%**

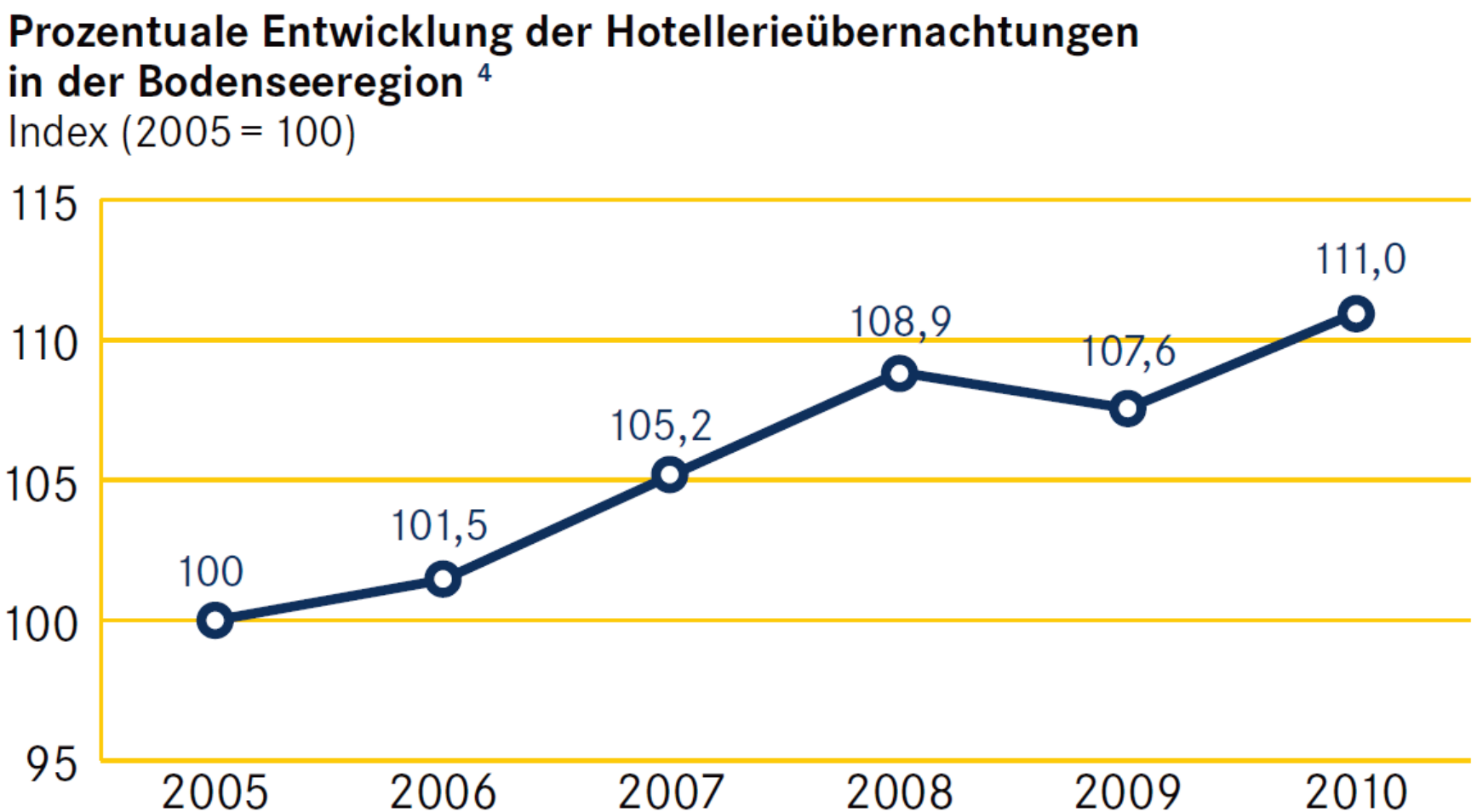
Source: Eigene Darstellung nach Daten der jeweiligen statistischen Landes- und Bundesämter

Overnight stays per inhabitant



Source: Statistik Plattform Bodensee 2012

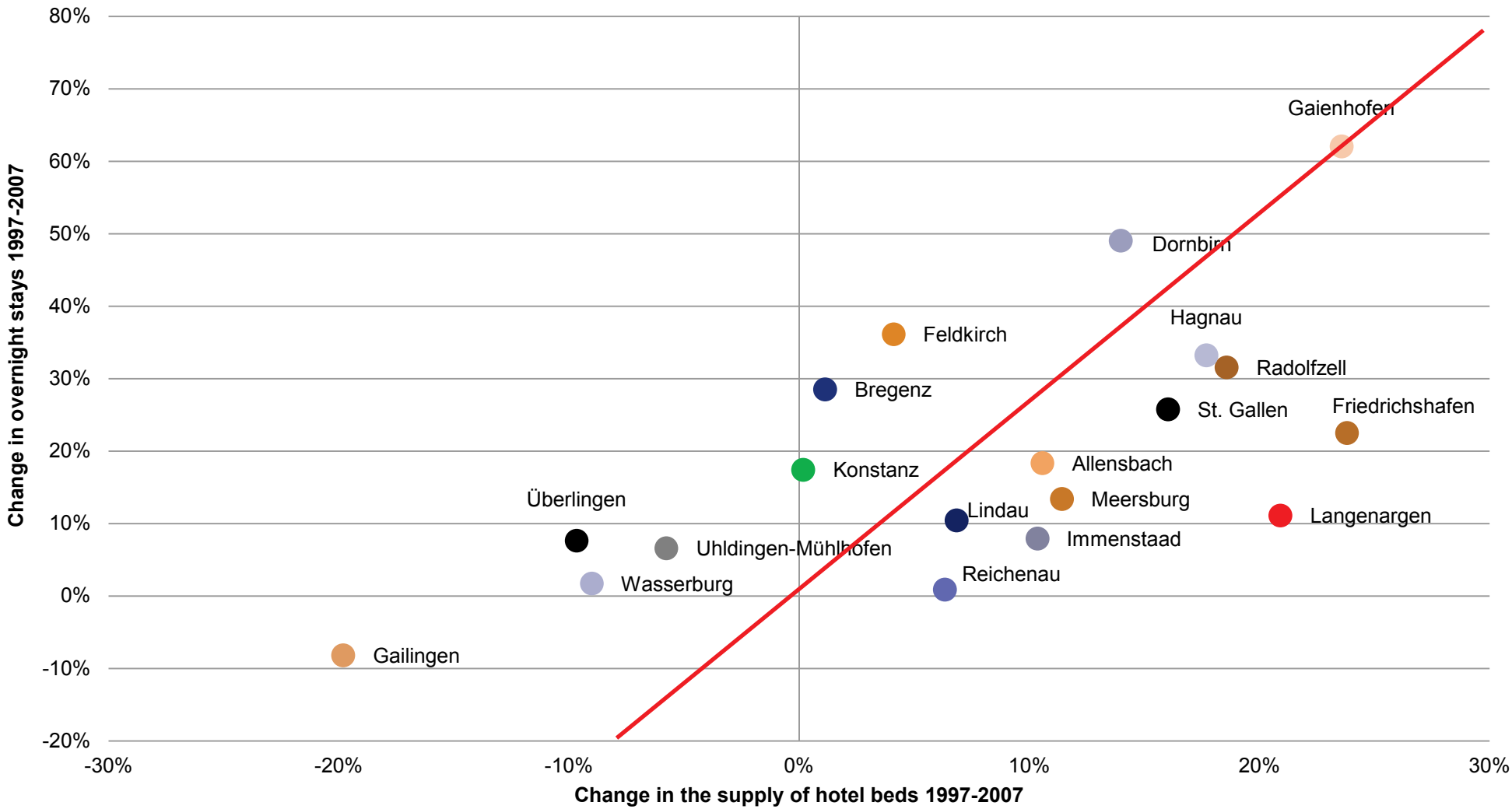
Development of overnight stays in the Lake Constance region



4 *Verwendete Daten für das Fürstentum Liechtenstein stammen aus dem Jahr 2009.*

Source: Statistik Plattform Bodensee 2012

Development driven by supply



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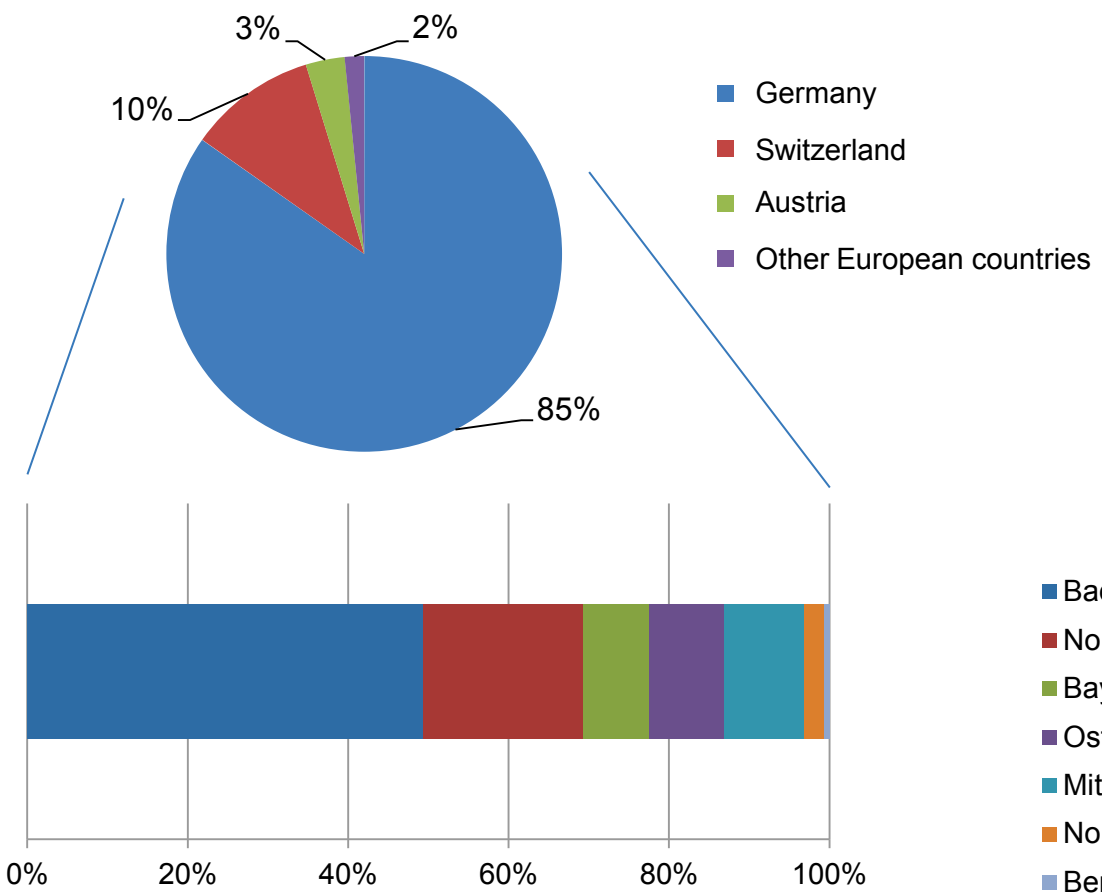
Quelle: Eigene Darstellung nach Daten der jeweiligen statistischen Landes- und Bundesämter

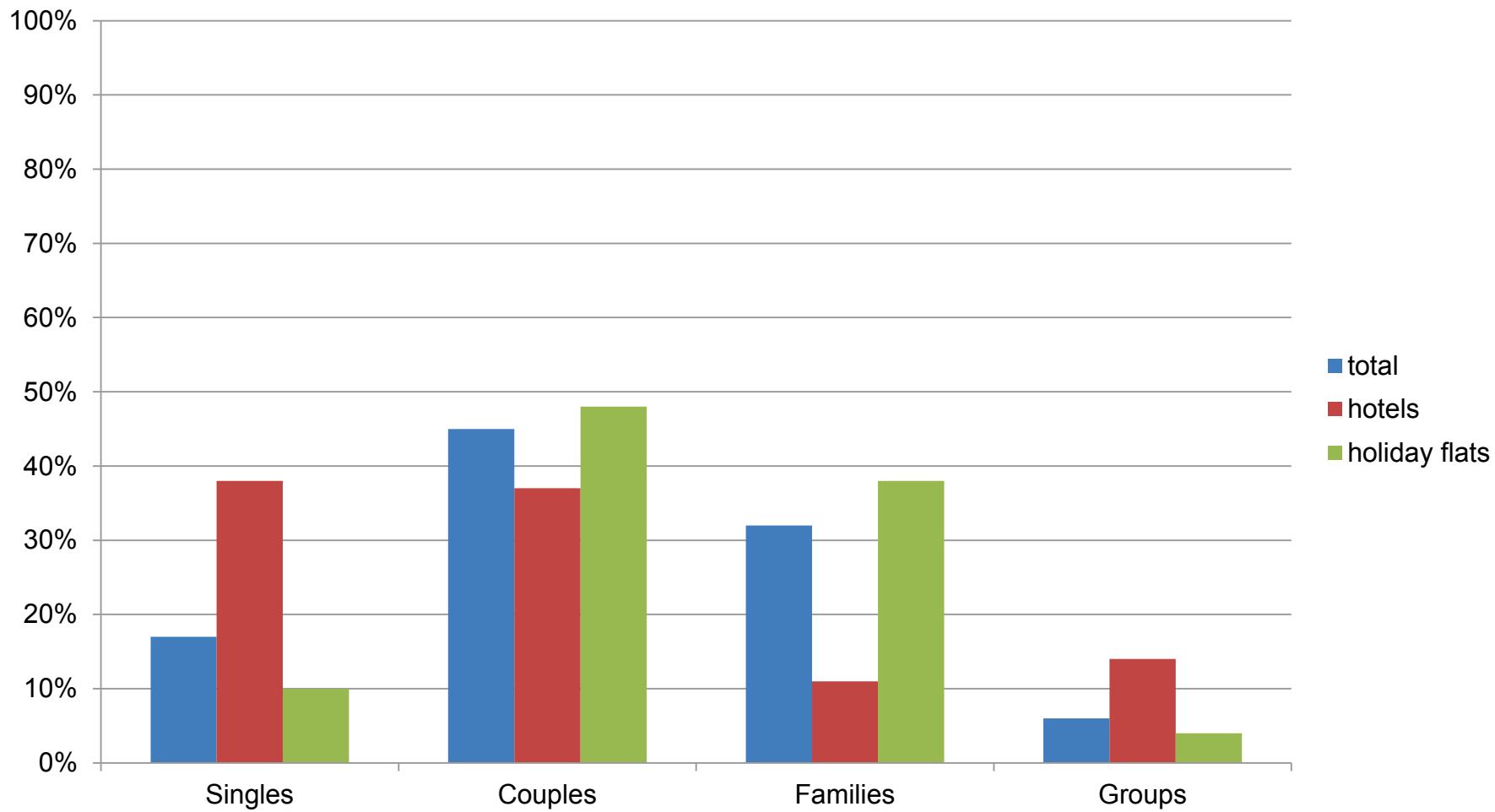
Origin of the overnight guests



In total, guests from Baden-Württemberg made up 48% of all guests.

Source: IDT-HSG Online-Survey 2010.

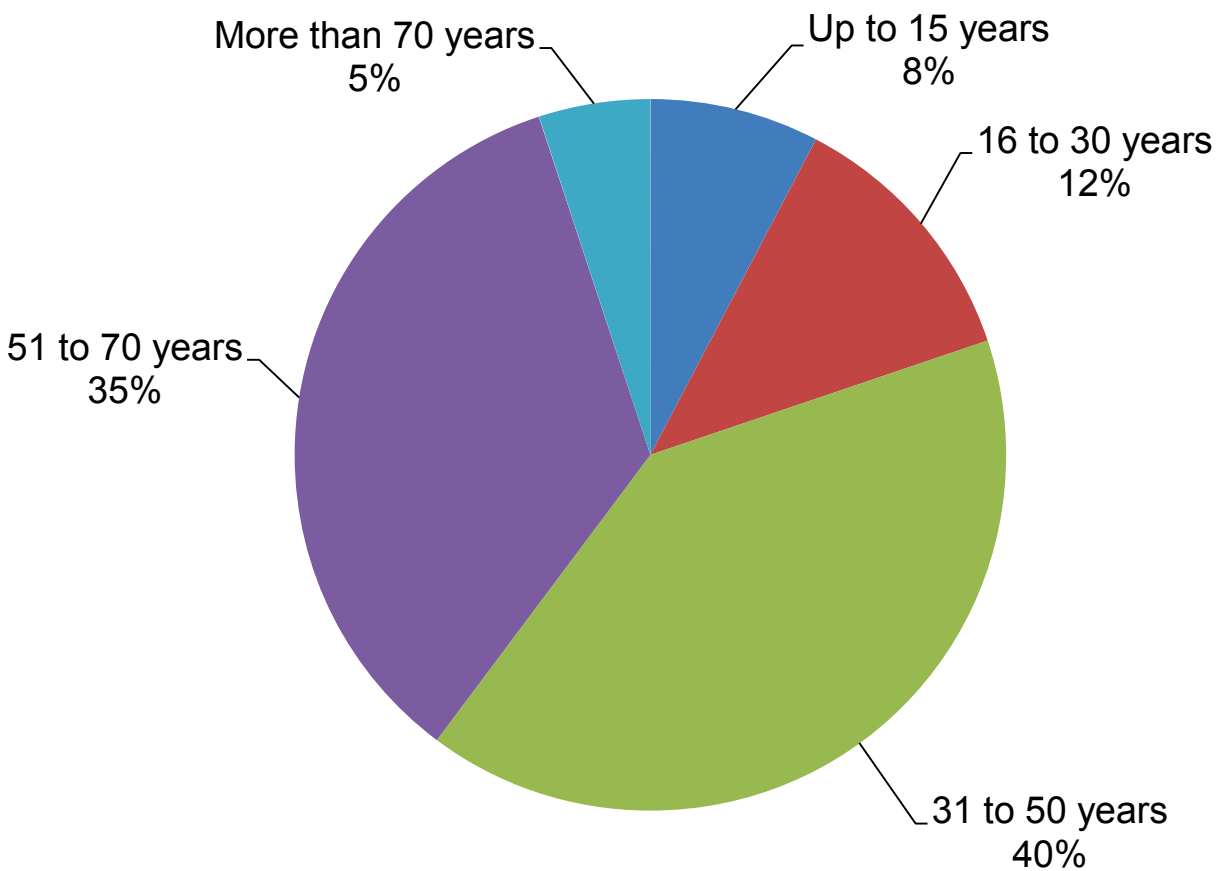
Guest structure



Couples are the most prevalent guests.

Source: IDT-HSG Online-Survey 2010.

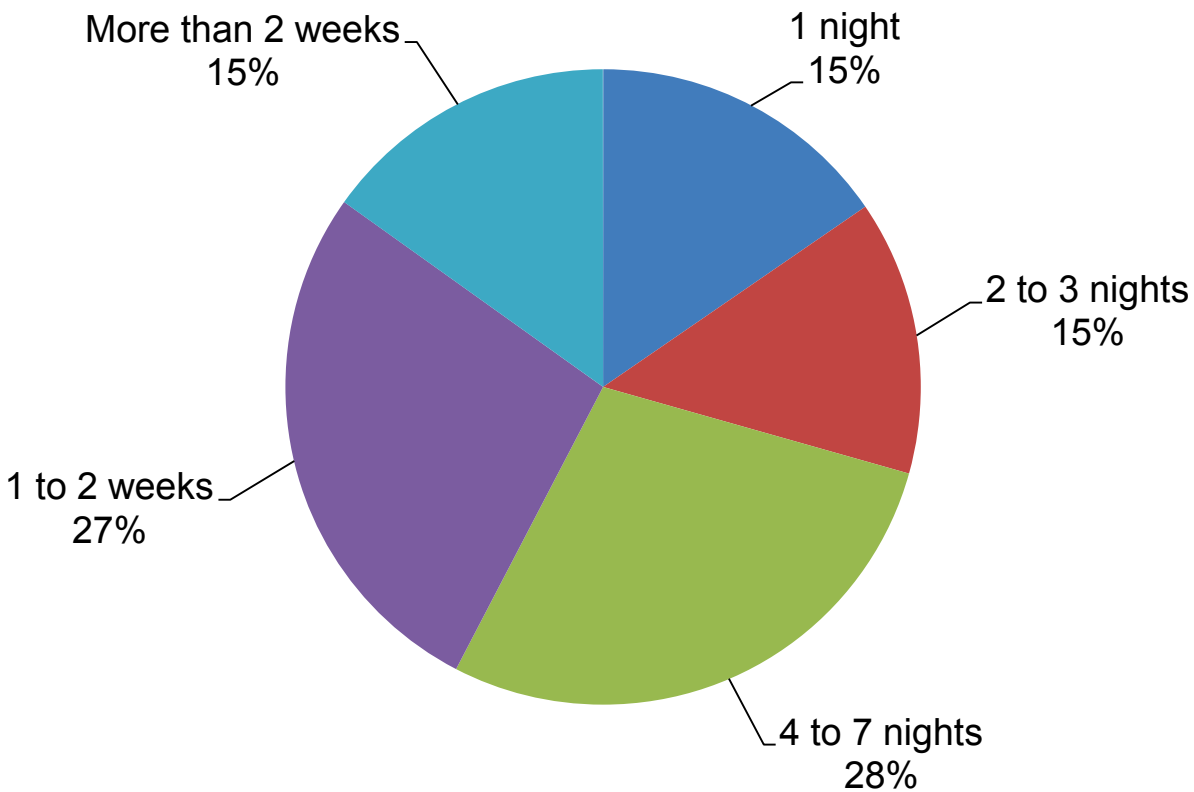
Age structure



40% are older than 50 years.

Source: IDT-HSG Online-Survey 2010.

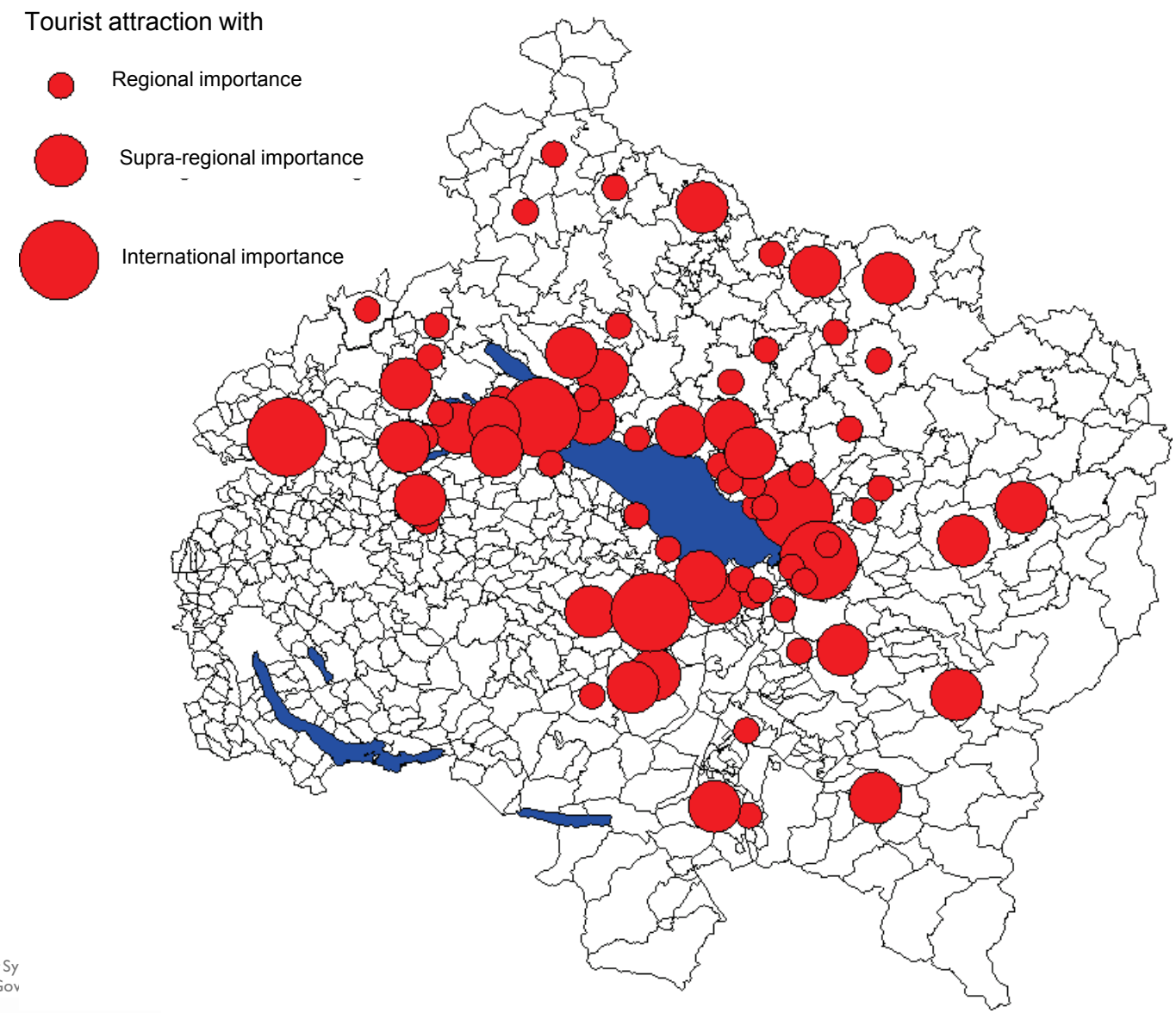
Length of stay



42% stay longer than one week.

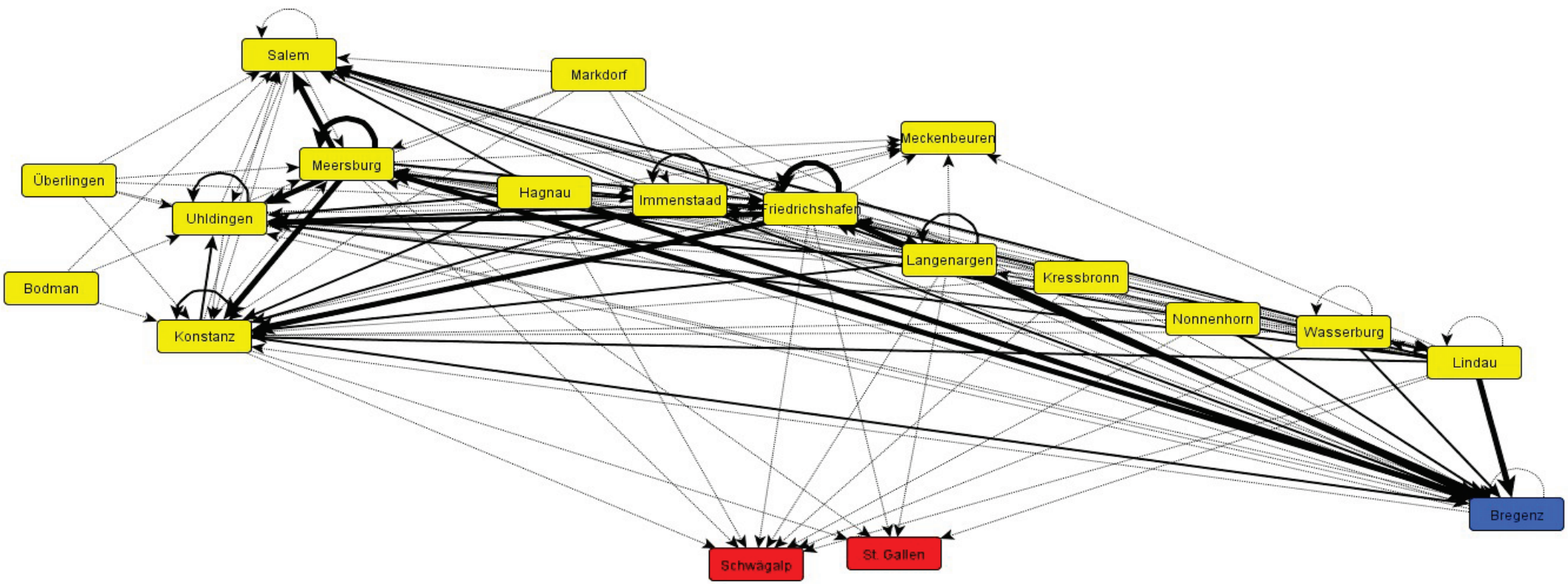
Source: IDT-HSG Online-survey 2010.

Most important tourist attractions



Source: Own inquiry 2009

Movement patterns (BEK)



Quelle: Auswertung der BodenseeErlebniskarte 2008 (ohne Schifffahrt)

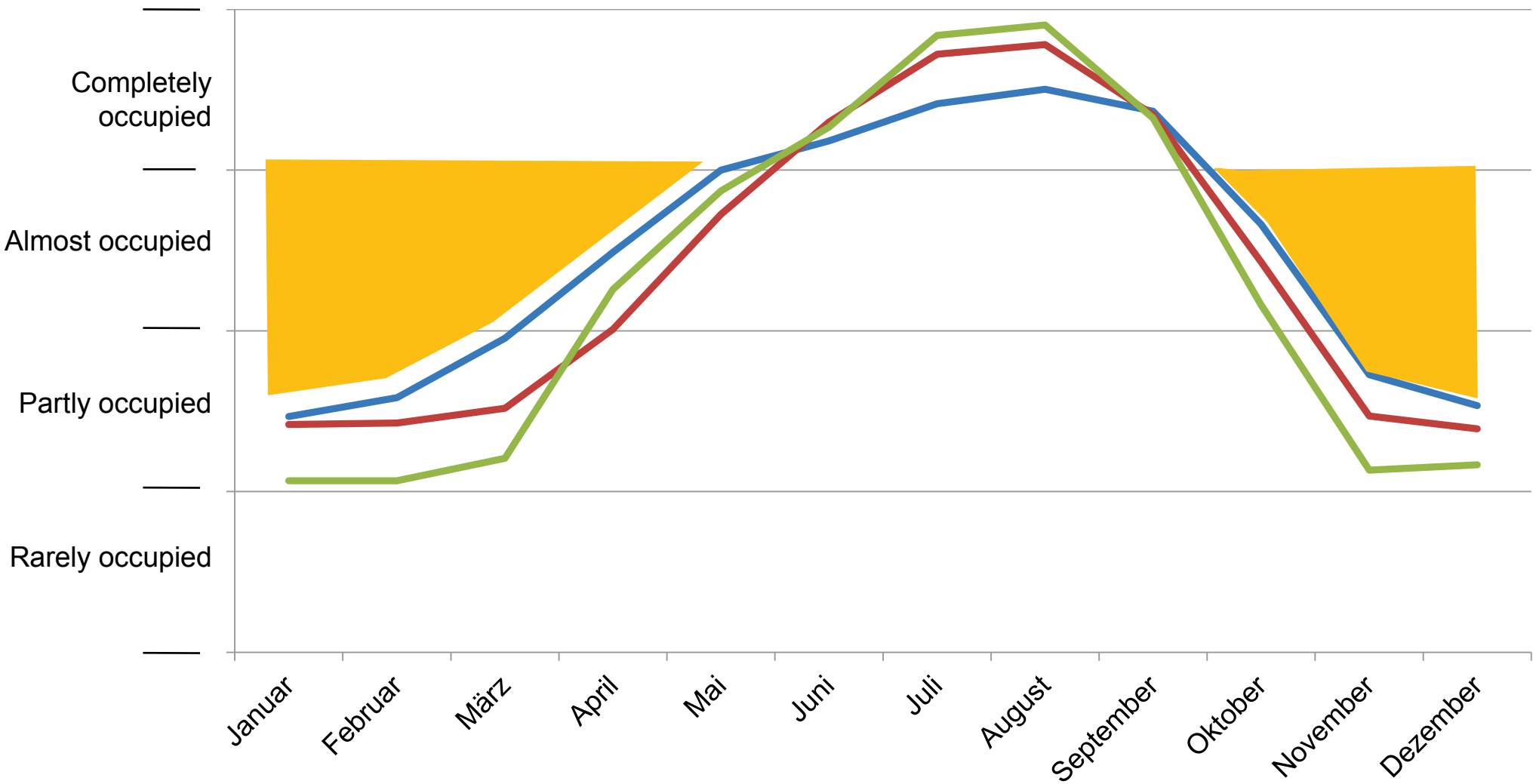
Economic importance

Lake Constance (core region)	Overnight stays		Single-day guests	
	absolute	turnover	absolute	turnover
D	5‘600'000	716'800'000 €	25'000'000	702'500'000 €
CH	800'000	102'400'000 €	5'000'000	140'500'000 €
A	900'000	111'800'000 €	2'000'000	56'200'000 €
Total	**7‘300'000**	**931'000'000 €**	**32'000'000**	**899'200'000 €**

Total turnover by tourists: about 1.8 billion €,
which is equivalent to about 35'000 employees (fulltime) in hotels and restaurants

Quelle: Übernachtungen: Daten der statistischen Landes- und Bundesämter, Ausgaben Übernachtungs- und Tagesgäste: DWIF (2010 und 2006)
Raumabgrenzung: Destination Bodensee (enger Raum), Daten für 2011

The Challenge



Quelle: IDT-HSG Online-Befragung 2010.

Destination management organisation

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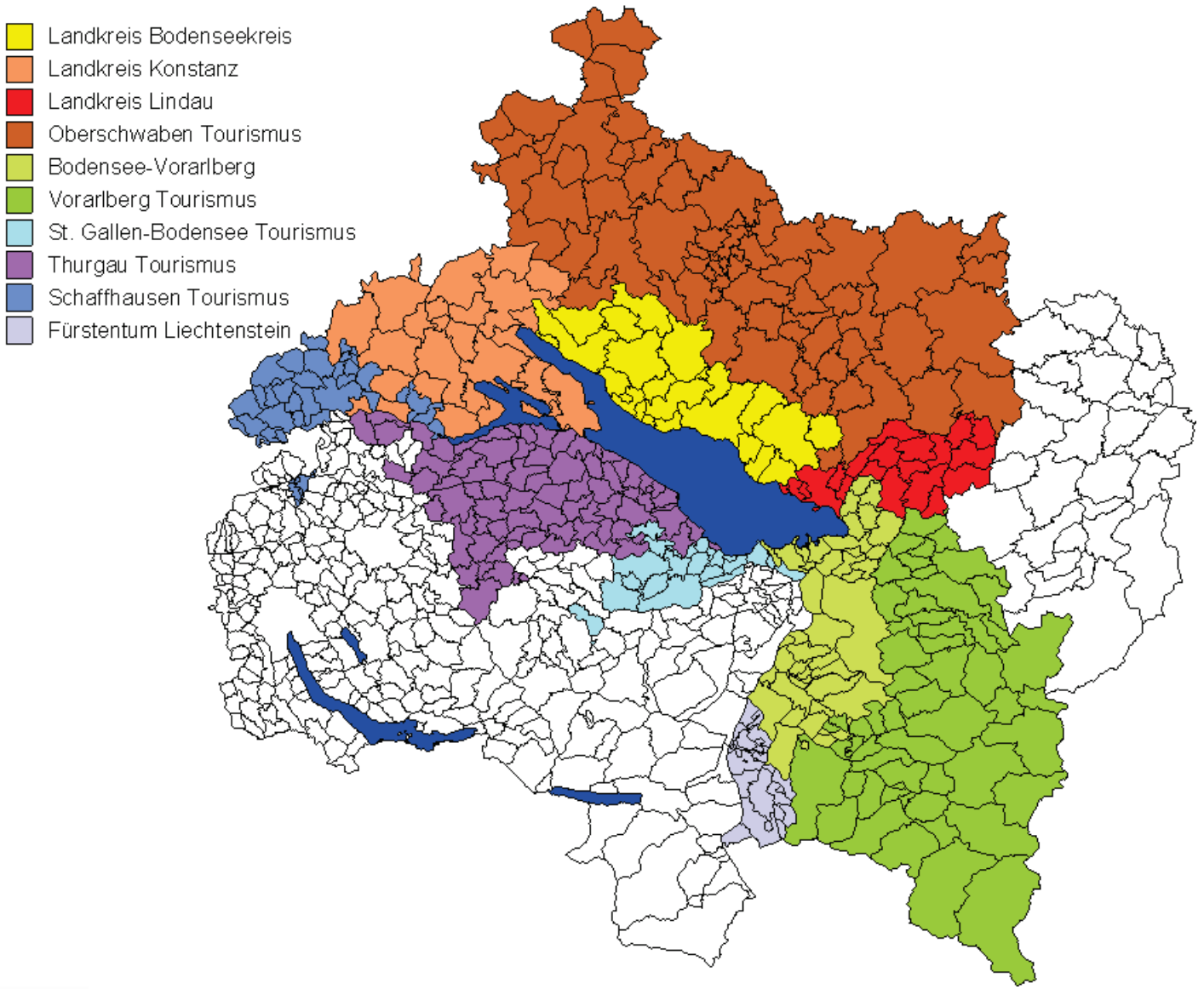
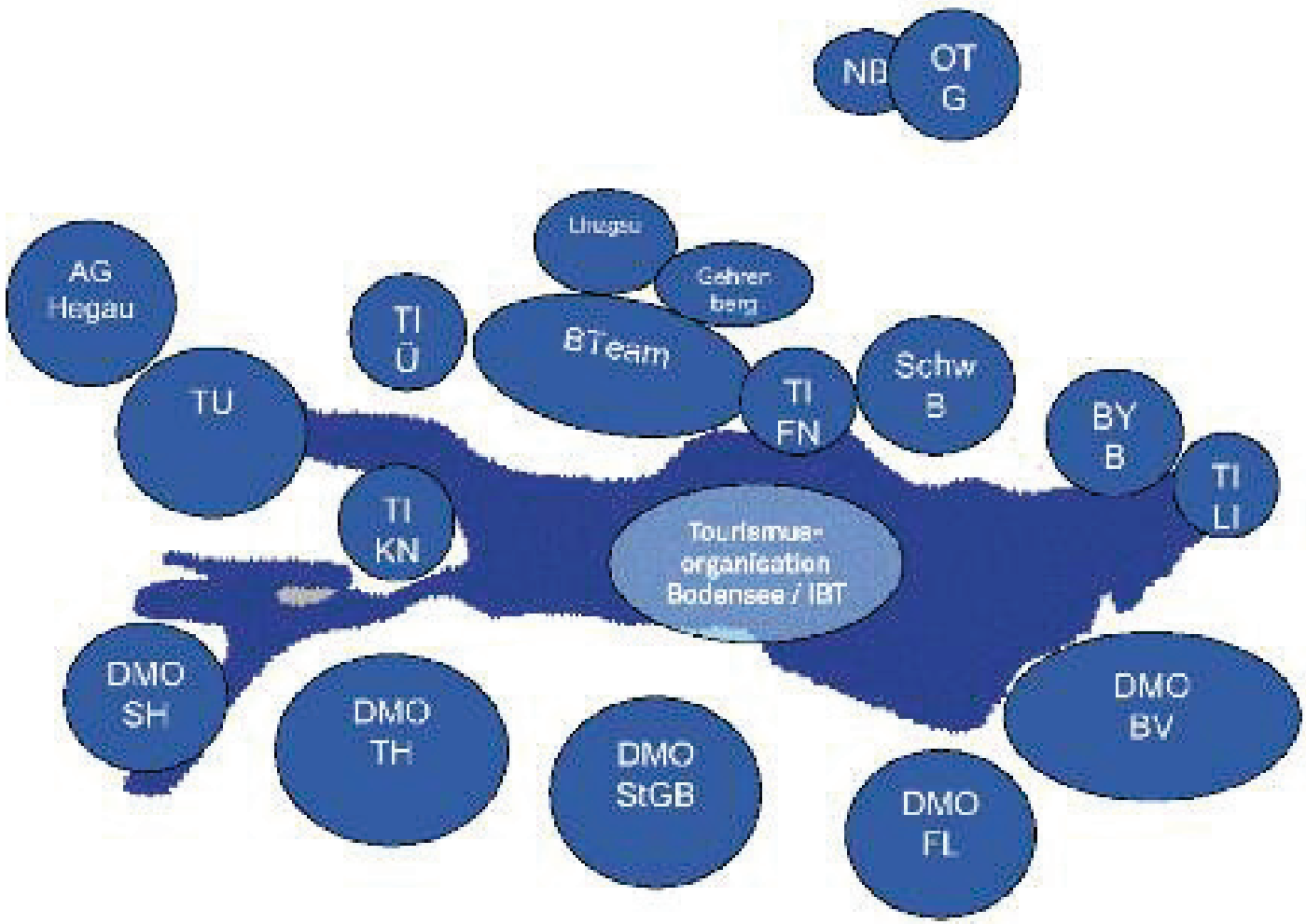
Shareholders of International Lake Constance Tourism Ltd.



Regional and interregional cooperation



Source: Internationale Bodensee Tourismus GmbH 2012

Interreg IV project: Competitive positioning of the Lake Constance region to improve destination management

- Project coordinator: IBT (destination management organisation)
- 19 regional partners: Universities, shareholders, tourism organisations, enterprises and other stakeholders
- Aim:
  - Optimise the destination management to improve the competitiveness of the destination
  - Share a vision to create a common identity within a multinational destination
  - Image profil and positioning on a national and international market
- Intensive work during 3 years (2009-2012)

Interreg IV project: Competitive positioning of the Lake Constance region to improve destination management

- Results:
  - SWOT-profil
  - Agreement on a strategic direction
  - Definition of the brand's content
  - Suggestions for the main brand topics
  - Development of products and offers corresponding to the brand
  - Discussion and proposal of organisational models
- Soft facts:
  - Many personal contacts, networking
  - Better interregional and intercultural understanding
  - Recognition and appreciation of the Lake Constance's potential as an international destination

Integrated location marketing

VIER LÄNDER REGION
BODENSEE

Source: Südkurier from 14.9.2011

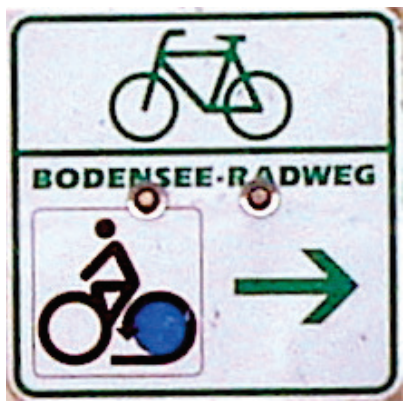
Tourist offers

Bodensee Erlebniskarte – Lake Constance guest card

- Includes reduced or free tickets for more than 180 attractions in the whole region
- Choose between 3 days or 2 weeks
- Price: 49€ - 130€
- Validity: 1.4. – 14.10.2012
- About 30’000 sold each year

- Tendency towards attraction-hopping
- Less time for each attraction
- Only few sold

Lake Constance bike tours



- Tourism package organised by private companies (baggage transport, bike rental, hotels, sightseeing, etc.)
- Cooperation with different service providers
- Professional marketing
- One of the most popular bike trails in Europe (length: 260km, about 300‘000 guests per year)
- Additional offers were created: Canoe tours, hiking, etc.

Summary

- Destination is attractive for overnight guests, single-day guests and inhabitants
- Positive tourist development with increasing number of guests
  - But: Challenge to extend the season and to attract international guests
- An innovative and flexible destination management is necessary to meet the international shareholders' expectations
- An integrated location management has to work inside (identity) and outside (image) the destination.
- Personal contacts and networking between touristic service providers are needed to create packages and touristic offers – the Interreg IV project initiated much.
- The Lake Constance is the highest value of the destination – it should unite not separate.