

Sustainable tourism development at Lake Constance

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Dr. Kerstin Fröhle, Lake Constance Foundation



„In future, our main concern will no longer be wheather we can travel to every place on earth. Our main interest will be wheather it is worthwhile arriving there!“

(Herman Löns, 1908)

TTP Sustainability Survey 2010

Sustainability Workshop

**Group Marketing TUI Travel
International Consumer Research**

What do holidaymakers associate with Sustainability the most?



Multi response in %
Familiar with sustainability,
values 3 to 5

TOTAL

N = 3,295



n = 441



n = 427



n = 443



n = 427



n = 443



n = 305



n = 391



n = 418

Top 3 associations

Low 3 associations

	TOTAL	UK	Germany	France	Belgium	Netherlands	Sweden	Poland	USA
Protection of natural resources	70	77	76	67	64	76	65	55	76
Environmental protection	67	78	71	63	65	70	66	49	71
Waste reduction	39	44	32	49	36	36	33	35	48
Fair trade	29	28	29	33	36	36	21	28	17
Protecting human rights, fighting poverty and child labour	25	15	27	20	29	22	33	42	18
Organic agriculture	19	18	22	18	14	23	31	12	20
Equal opportunities/fair pay in the workplace	18	13	15	13	21	14	18	35	16
Promoting education/cooperation in the community	18	16	15	11	13	13	20	35	21
Animal protection	15	11	13	27	21	11	13	8	13

Question: And what do you associate with sustainability?



10% or less below total



10% or more above total

Which are the most interesting Sustainability issues for holidaymakers?



Top-Two-Box in %
Base: Respondents interested in sustainability (values 3 to 5)

TOTAL N = 3,137

 n = 404
  n = 428
  n = 435
  n = 364
  n = 333
  n = 285
  n = 483
  n = 405

Top 3 interests (overall)

	TOTAL	UK	Germany	France	Belgium	Netherlands	Sweden	Poland	USA
Pollution issues	71	67	77	80	70	53	56	79	76
Biodiversity and animal protection	64	60	76	73	55	40	56	78	66
Climate change and carbon emissions	63	60	67	68	60	46	54	73	63
Fair trade and labour standards	62	62	62	59	52	43	57	87	61
Social and community issues	61	57	71	55	46	41	60	86	65
Other environmental issues	57	56	58	57	49	39	53	71	64
Organic food & agriculture	52	46	56	56	35	31	44	84	53

Question: You have indicated you have an interest in sustainability, which areas are you most interested in?

Which areas should we focus on? – Preserving habitats, resources and ensuring fair working conditions



Multi response in %

TOTAL



N = 3,887

n = 507

n = 502

n = 501

n = 503

n = 501

n = 369

n = 502

n = 502

Holiday companies should be committed to ...

	TOTAL	UK	Germany	France	Italy	Netherlands	Sweden	Russia	USA
... preserving nature and natural habitats at the holiday destinations.	70	64	65	69	70	69	62	85	72
... saving energy, water and other natural resources	55	54	58	64	57	53	48	40	66
... fair working conditions at the destination and the hotels it does business with.	55	59	56	52	58	61	63	40	53
... environmental friendly and socially responsible economic development in the holiday destinations.	55	55	52	50	51	49	59	71	51
... protecting endangered animal and plant species.	42	40	37	46	43	41	36	49	42
... tackling climate change.	23	29	32	19	20	26	32	15	16

Question: When you think of holiday travel in general, in which sustainability areas do you think companies offering holidays involving flights should focus on? Holiday companies should be committed to ...



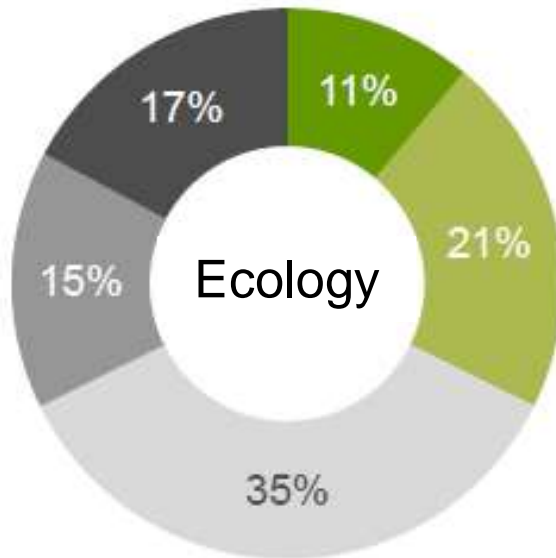
10% or less below total



10% or more above total

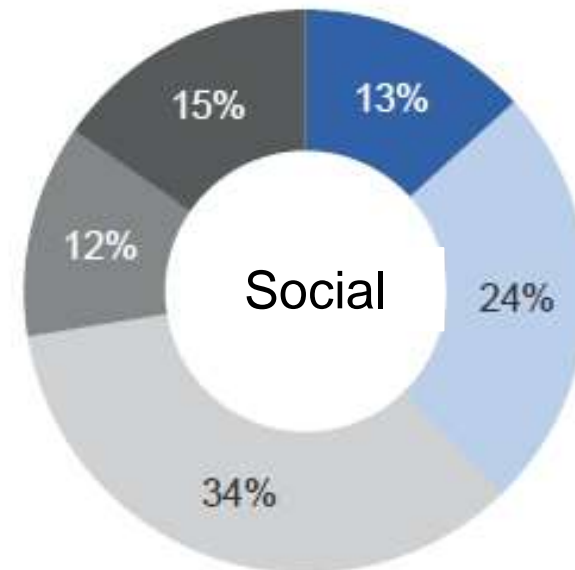
Importance of sustainability at vacation trips

37 % of Germans want to make socially acceptable vacation trips, environmental friendly ist relevant for 32 %



■ voll und ganz ■ 2 ■ 3 ■ 4 ■ ganz und gar nicht

Mein Urlaub soll möglichst ökologisch
verträglich, ressourcenschonend und
umweltfreundlich sein.



■ voll und ganz ■ 2 ■ 3 ■ 4 ■ ganz und gar nicht

Mein Urlaub soll möglichst
sozialverträglich sein.

Basis: Deutschsprachige Wohnbevölkerung ab 14 Jahre
RA face-to-face 2014, n = 7.785

Why environmental friendly and socially responsible tourism?

- Tourists are increasingly demanding and interested in environmental quality
- Long term protection of intact nature and land scape = lakes!
Important capital for the tourism sector
- Added value for the region and the local population
- More and more touroperators request sustainability, e.g. TUI, Forum Anders Reisen with 48 small/medium size tour operators
- Certified environmental quality is increasingly requested by donors = requirement for financing
- Potential for the reduction of costs (e.g. Energy, water, waste)



Important Tourism Destination: Lake Constance Region



Area: 536 km²

Length: 63 km

Width: 14 km

Maximal depth: 254 m

Europe's largest natural drinking water reservoir – water supply for 3.7 Mio. people

Important rest and breeding ground for waterfowl and migratory birds.

Lake Constance Region

➤ Important Tourism Destination

- 90 % of Germans know the region
- 2012 about 18.8 Mio. overnight stays
- Average stay: 3.4 days
- 85 % of tourists arrive / move by car
- Up to 32 million day trippers per year
- Tourists spend ca. 1.8 billion Euro per year (only German lake region)
- 5.5 % of the population works in tourism
- 10 main attractions!
- The most important attraction is Lake Constance!



To handle the big amount of visitors and to implement a sustainable tourism in the region various measures are necessary

How to achieve sustainable tourism?

Standards and labels for the certification of a certain environmental quality /sustainability of products /services and destinations

- for Accomodations, Touroperator, Destinations

Environmental Management Systems (EU EMAS, ISO 14001) for continuous improvement of environmental performance

Guidelines on Social Responsibility = ISO 26000 (not certifiable)

In preparation = ISO 37101: Sustainable development and resilience of communities - Management system

Positive example: ECO-CAMPING

ECO-CAMPING is an association to promote the environmental protection & nature conservation, security and quality on campsites



Implementation of an integrated ECO-CAMPING Managementsystem in the campsite businesses; developed on the basis of the Europe-wide Eco-Management and Audit Scheme (EMAS).

Start at Lake Constance with 16 camping sites. Now there are more than 250 camping sites in europe.

Results of the implementation of ECOCAMPING Management 2008-2010 Jesolo International Club Camping (Italy)



Savings:
100,000 € p.a.

Water consumption
- 50 %

Gas consumption
- 72 %



Positive examples for sustainable tourism activities:

„Solar-powered boats“

- Promote „gentle“ tourism on the lake.
- Crossings or tours on regular ferry operations.
- Special events like concerts or special nature tours
- Possible to rent for crossings or tours for families, schools, associations, enterprises



Food: „Gutes vom See“ – regional brand for environment-friendly food from the Lake Constance Area

Association with over 45 members from the areas agriculture, food processing, whole sale and retailer, gastronomy and commercial citchen.

The brand garantees a regional and environment friendly production and processing.



Positive examples for sustainable tourism:

Flower Island of Mainau

Famous for their flower gardens with palms, mediterranean plants and subtropical and tropical vegetation

- 1.6 million visitors per year



Engangement in environment protection:

- Implementation of the Environmental Management System EMAS since 1997
- Separation of waste for the visitors in the park
- Organic Certification of vineyards and Orchards
- Implementation of the Energy Management System - ISO 5001
- Projects to promote sustainable mobility
- FSC-certification of the Mainau Forest (420 ha)
- Certification of the gastronomie with the European Organic Label.

Lake Constance – positive example for sustainable lake tourism?

NO !!!

What is missing:

- Plan for sustainable tourism development with concrete aims and time table for implementation
- Certified environmental friendly hotels and apartments
- More restrictions for boating; no water ski or other polluting water sports
- No more infrastructures for recreational activities at the lake
- Sound promotion of environmental friendly mobility (public transport)



Thank you for the attention!

**Dr. Kerstin Fröhle, Bodensee-Stiftung (Lake Constance
Foundation)**

Kerstin.froehle@bodensee-stiftung.org