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Measuring Sustainable Tourism (MST)

Pilot Study - Austria



Overview



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4. Tourism governance in Austria
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Objectives of MST Pilot Study - Austria



The **Austrian Pilot Study** is ...

- ... presenting a comprehensive and a **critical discussion** related to the usefulness of the measurement of **sustainability of tourism**;
- ... **discussing several aspects** of economic, social and environmental sustainability to be covered and propose some examples that would reflect these aspects;
- ... presenting an **overall summary of several indicators** measuring sustainability, taking into account relevance and implementation aspects;
- ... pointing out the **challenges of integrating** these into a tourism statistical system;
- ... **identifying data sources necessary** for the measurement of sustainability as well as the challenges related to these sources including the **interpretation** of the preliminary results;

Austrian Pilot Study - remarks



- At present, there is **not any official request** to do a Pilot Study on MST due to financial and staff constraints; nevertheless, a **provisional prototype** could be produced seen as a discussion basis and initiating further considerations on the tourism policy level as well.
- Apart from the respective Ministry responsible for tourism¹⁾ there were **not any further contacts** with other relevant organisations and stakeholders in this respect, so far.
- The study is mainly based on **already existing data and updated information** (e.g. UNECE document²⁾), no further investigations on other relevant indicators have been done, so far. - Nevertheless, additional issues were considered, based on discussions in the previous UNWTO MST Working Group, discussions with the “Federal Ministry of Science, Research and Economy” (BMWF) and UNWTO.
- However, the present “Pilot Study” and its conclusions will serve as a **basis for further investigations** in this respect.

1) Federal Ministry of Science, Research and Economy (<http://www.en.bmfwf.gv.at/Tourism/Seiten/default.aspx>).

2) See http://www.unece.org/fileadmin/DAM/stats/documents/ces/2005/30_e.pdf.

Challenges “Measuring Sustainable Tourism” (1)



Due to statistical and tourism policy requirements related to the measurement of sustainability of tourism the **following considerations** have to be taken into account:

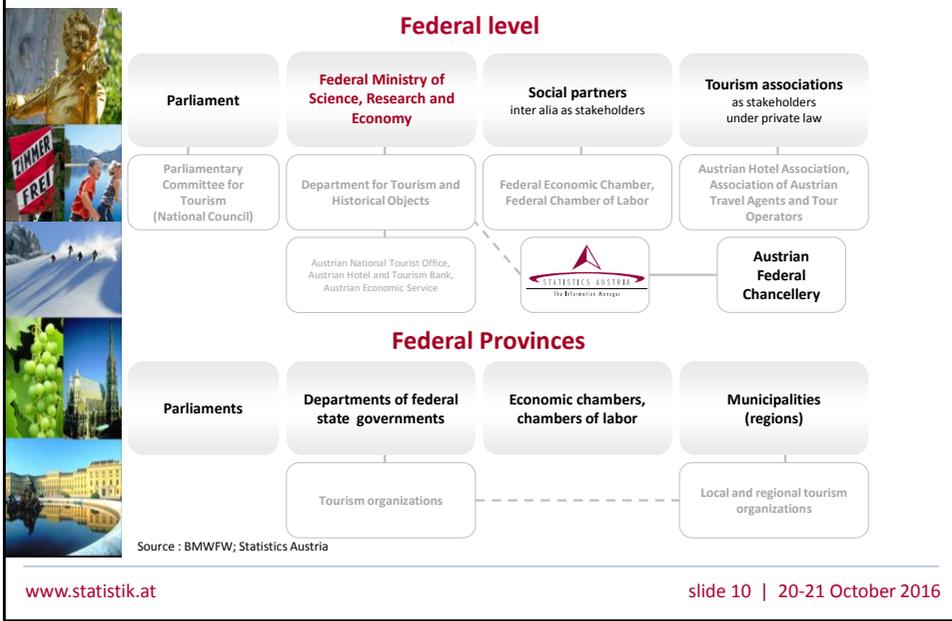
- A general **comprehensibility and feasibility** (i.e. related to comparability and data availability) of figures and data measuring sustainability of tourism should be maintained and guaranteed as far as possible.
- Many countries are in the majority of **environmental areas well developed**, i.e. related to waste separation, water use, renewable energy, etc. which also concern the tourism industry but which might be difficult to **quantify and measure or present separately** for the **tourism industry** due to non-available data in this respect.
- **Tourism policy goals of the countries are different, regional and local conditions** must be taken into account; therefore, general statements related to tourism sustainability - being valid for all regions and destinations - are not possible (i.e. comparability of indicators have to be considered); comprehensive analysis is mainly possible on destination level, only.

Challenges “Measuring Sustainable Tourism” (2)



- From the **statistical and tourism policy point** of view there is the coincident opinion that figures related to sustainability should be well chosen, taking into account the **applicability and usability of the data** for tourism policy decisions; producing too much or unusable figures is a waste of time and money, from the producers' and users' point of view.
- However, a **well coordinated collaboration** between **tourism policy and (tourism/environment/social) statistics** is a prerequisite for achieving a **common understanding** related to sustainability measurement, therefore, taking into account all relevant governmental and non-governmental organisations.

Governance of tourism (statistics) in Austria



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Tourism policy goals - Austria



The **main focus** of the Austrian tourism policy concerns the **following topics**:(*)

- Austrian tourism has pursued the concept of **quality tourism**. Instead of capacity building measures, the emphasis lies on quality improvement in every field - aiming at a high-quality tourist offer including ecological and social aspects. In this respect "quality" also means preserving a **healthy environment** as well as cultural and regional identity.
- The objective is to **improve the economic and social living conditions** by simultaneously safeguarding the ecological basis of life. Thus "quality in tourism" and "sustainable development" are not conceived as opposites but rather as the **basis of a sound future tourism development**.
- According to a 2010 presented "**Tourism strategy**" ("New Ways in Tourism"), the **focus of tourism policy is lying on five areas**: enhanced coordination of marketing, more innovation, targeted financial support, better infrastructure and improved business conditions for enterprises.
- The strategy of this programme is intended to secure **Austrian tourism industry's competitiveness** not only over the short-term but also over the medium and long term.

*) Source: <http://www.en.bmwf.gov.at/Tourism/CurrentTourismPolicies/Seiten/default.aspx>.

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Challenges for the Austrian tourism



- Tourism is still **concentrated in space and time**. The western and southern part of Austria remains the tourism intensive one. More than half of “overnights spent” occur in February, March, July and August.
- There is still a **high dependence on a small number of core markets** (about three quarter of all nights spent in Austria are effected by three markets – Germany, Austria and the Netherlands).
- Encouraging investment and innovation as well as improving the **size and quality of tourism enterprises** (i.e. tendency to 5-/4-star hotels) are the main objectives for the coming years.
- The high relevance of **improving accessibility**, connectivity and sustainable transport (high dependence on car traffic, Alpine topography, etc.) has to be focused on.
- **Employment and labour market issues** are required (e.g. increasing the attractiveness of jobs in tourism and satisfying the high demand for skilled employees).
- The **improvement of the administrative and regulatory environment** (new legislation at European and national level e.g. the package travel directive, national tax reform, etc.) has to be supported.

Measures improving tourism sustainability in Austria



- environmental **impact assessment procedures** for tourism related projects, e.g. “Climate Alliance”;
- strategies for developing **environmentally friendly building** and construction practices for tourism facilities (e.g. rules for construction);
- implementation and enforcements of **environmental quality standards** (“Ecolabels”);
- regional **management plans for mountain areas**;
- regional **traffic management plans** (including tourism related transport);
- reviewing **capital investment programs** (for tourism development and tourism related transport);
- **price incentives** can be used to diversify tourism regionally and temporally;
- **finances for illegal activities** in protected zones (e.g. illegal camping or picking flowers);
- expenditure or **subsidies for environmental infrastructure** (i.e. sewage treatment facilities or waste disposal facilities);
- tourism **subsidies** can be **interlinked** to the fulfilment of environmental standards.

Preliminary results (2)



Economic sustainability

Development of nights by the most important markets 1974, 2000, 2007 and 2015

Country of origin	in 1000				Share in %				Change in %			
	1974	2000	2007	2015	1974	2000	2007	2015	1974-2000	2000-2007	2007-2015	1974-2015
Germany	59.430	52.334	48.167	50.199	56,7	48,0	39,7	37,1	-11,9	-8,0	-4,2	-13,9
Austria	24.779	21.123	19.008	16.425	24,5	22,4	22,2	26,9	-2,7	-4,0	-10,4	-47,0
Netherlands	4.882	7.378	9.089	9.178	4,6	6,5	7,5	6,8	57,5	23,2	1,0	96,0
Switzerland	1.666	2.892	3.703	4.912	1,3	2,5	3,0	3,6	173,9	28,1	32,6	380,7
United Kingdom	1.776	3.066	3.922	3.550	1,8	2,7	3,2	2,6	72,6	28,2	-9,7	95,0
Italy	525	2.534	3.058	2.927	0,5	2,2	2,5	2,2	382,6	20,6	-4,2	457,5
Belgium (incl. Luxembourg) ⁽¹⁾	1.533	2.216	2.755	2.928	1,5	1,9	2,3	2,2	44,6	24,3	6,3	93,0
Czech Republic	64	685	1.392	2.179	0,1	0,6	1,1	1,8	572,5	103,0	71,1	3,024,1
France	1.010	1.461	1.702	1.753	1,0	1,3	1,4	1,3	44,6	16,5	1,0	73,5
Poland	105	755	1.037	1.708	0,1	0,7	0,9	1,3	619,8	37,4	64,8	1,529,6
USA	1.340	1.878	1.858	1.875	1,1	1,7	1,2	1,2	40,0	-22,3	16,8	75,0
Hungary	169	729	1.311	1.645	0,2	0,6	1,2	1,2	331,7	107,1	10,2	885,4
Denmark	696	879	1.445	1.479	0,7	0,8	1,2	1,1	26,3	64,3	2,3	112,3
Russia ⁽²⁾	-	-	797	1.189	-	-	-	-	0,6	0,8	-	-
China ⁽³⁾	-	-	245	964	-	-	-	-	0,2	0,7	-	-
Other countries abroad	4.563	5.731	8.345	12.122	4,0	5,0	6,7	9,1	43,0	42,5	30,9	205,3
Total	103.239	111.686	121.461	135.246	100,0	100,0	100,0	100,0	12,8	6,8	11,4	31,4
of which												
Central European Countries ⁽⁴⁾	836	2.599	5.972	8.721	0,6	2,3	4,9	6,4	308,8	129,7	46,0	1,271,5
Asia ⁽⁵⁾	101	1.069	1.489	1.970	0,1	0,9	1,2	1,5	956,6	39,3	188,6	1.836,7

Source: Statistics Austria, accommodation statistics. (1) Belgium and Luxembourg (where applicable) observed since 1997. (2) 1974 and 2000 Russia under 15 countries. (3) 1974 and 2000 China under 10th-east Asia. (4) Bulgaria, Romania, other CE countries, former Yugoslavia, Croatia, Latvia, Lithuania, Slovakia, Slovenia, Estonia, Czech Republic, Germany, Hungary. (5) India, Indonesia, Korea, South Korea, Malaysia, Philippines, Singapore, Thailand, Viet Nam, Taiwan, HK, Other Asian countries. Last updated: 6/2016.

Tourism Policy Goal: Diversification of tourism markets

- Data show, that the share of German nights in regard to total nights decreased, while other tourism generating countries such as the Netherlands, Switzerland, the CEE-countries or Asian countries could increase their market shares.
- **But:** A diversified mixture of countries of origin is **fostering economic sustainability**, as a tourism destination does not only depend on one market. At the same time it is not obvious whether the market diversification meets the requirements of social sustainability, as **cultural and social peculiarities** might be forfeited for the sake of achieving economic advantages.

Preliminary results (3)



Economic sustainability

International travelling: Receipts and expenditure 2002-2015 (in million €)

Year	Travel receipts ¹⁾	Travel expenditure ²⁾	Net travel ³⁾	Receipts passenger-transport	Expenditure passenger-transport	Net passenger-transport	Travel receipts ⁴⁾	Travel expenditure ⁴⁾	Net travel ⁴⁾
2000	10.593	6.768	3.826	1.608	833	776	12.201	7.601	4.602
2001	11.046	7.365	3.681	1.745	929	816	12.791	8.294	4.497
2002	11.579	7.287	4.292	1.619	889	730	13.198	8.176	5.022
2003	11.917	7.635	4.282	1.611	1.003	608	13.528	8.638	4.890
2004	12.203	7.473	4.730	1.694	1.269	425	13.897	8.742	5.155
2005	12.904	7.505	5.399	1.796	1.416	380	14.700	8.921	5.779
2006	13.255	7.642	5.613	1.889	1.667	222	15.144	9.309	5.835
2007	13.641	7.698	5.943	1.844	1.652	192	15.485	9.350	6.135
2008	14.677	7.721	6.956	1.836	1.736	100	16.513	9.457	7.056
2009	13.896	7.744	6.152	1.479	1.399	80	15.375	9.143	6.232
2010	14.027	7.717	6.310	1.678	1.574	104	15.705	9.291	6.414
2011	14.267	7.531	6.736	1.920	1.701	219	16.187	9.232	6.955
2012	14.706	7.825	6.881	1.955	1.839	116	16.651	9.664	6.987
2013	15.237	7.738	7.499	1.889	1.883	6	17.126	9.621	7.505
2014 ⁴⁾	15.675	8.148	7.527	1.769	1.871	-102	17.444	10.019	7.425
2015 ⁴⁾	16.497	8.124	8.373	1.906	1.786	120	18.403	9.910	8.493

Q: STATISTICS AUSTRIA, Travel Balance of Payments, OeNB (Central Bank of the Republic of Austria). Compiled on 3 May 2016. – 1) Excl. international passenger transport. – 2) Incl. international passenger transport. – 3) Revised data. – 4) Preliminary data. – 2000 - 2013 final data.

Tourism Policy Goal: Increasing the receipts

- Data showing rising receipts related to inbound tourism, from 10.6 bn Euro in 2000 to 16.5 bn Euro in 2015; the net-travel receipts more than doubled during the same period of time.
- **But:** Nothing to be said about development in **various sub-areas**, such as the receipts by accommodation, by region, by local transport, by restaurants/food and beverage, etc. which might be different and requires different policy measures, therefore.

Preliminary results (4)



Social sustainability

Women in tourism industries 2013 (TSA)

Tourism characteristic industries	Full time equivalents			Shares in %		
	Male	Female	Total	Male	Female	Total
Hotels and similar	25.459	38.293	63.753	39,9	60,1	100,0
Second home ownership						
Restaurants and similar	45.011	54.132	99.142	45,4	54,6	100,0
Railways passenger transport	5.939	651	6.590	90,1	9,9	100,0
Road passenger transport	35.542	6.571	42.113	84,4	15,6	100,0
Water passenger transport	24	10	34	71,3	28,7	100,0
Air passenger transport	2.338	2.186	4.524	51,7	48,3	100,0
Passenger transport supporting services	648	104	752	86,2	13,8	100,0
Passenger transport equipment rental						
Travel agencies and similar	18.274	14.569	32.843	55,6	44,4	100,0
Cultural services	6.695	6.702	13.397	50,0	50,0	100,0
Sporting and other recreational services	4.315	3.024	7.338	58,8	41,2	100,0
Total tourism characteristic industries	144.245	126.241	270.486	53,3	46,7	100,0

Tourism Policy Goal: Increasing the share of women working in tourism

- Data showing a rather huge share of women working in particular in tourism characteristic industries, i.e. in the hotel and restaurant sector.
- **But:** Nothing to be said about the **quality of jobs**, differences between wages of males and females, and about the reasons related to the rather huge differences of shares of males and females in different industries etc.

Preliminary results (5)



Environmental sustainability

Domestic trips for personal purpose, 2015, by main means of transport and destination

Destination	total trips	Car	%	train	%	coach	%	others	%
		2015							
Burgenland	622,7	567,0	91,1	20,0	3,2	32,1	5,2	3,6	0,6
Carinthia	1.160,5	961,7	82,9	101,8	8,8	61,9	5,3	35,1	3,0
Lower Austria	1.050,1	941,7	89,7	58,1	5,5	37,5	3,6	12,8	1,2
Upper Austria	1.063,5	869,1	81,7	149,3	14,0	27,9	2,6	17,3	1,6
Salzburg	1.293,9	1.043,8	80,7	178,2	13,8	61,4	4,7	10,6	0,8
Styria	2.052,5	1.836,6	89,5	134,8	6,6	59,6	2,9	21,5	1,0
Tyrol	977,4	744,2	76,1	147,2	15,1	68,5	7,0	17,4	1,8
Vorarlberg	211,1	126,1	59,7	75,8	35,9	9,2	4,4	-	-
Vienna	765,9	327,9	42,8	396,6	51,8	32,8	4,3	8,6	1,1
Austria	9.197,6	7.418,1	80,7	1.261,8	13,7	390,9	4,2	126,9	1,4

numbers cannot be statistically interpreted due to a too low number (<160000) of trips

Tourism Policy Goal: Using of alternative means of transport

- Domestic tourism data showing still a rather low share of alternative means of transport for reaching several Austrian provinces (train: 13.7%) and a high share of cars (80.7%).
- **But:** Due to lack of data, information related to **inbound tourism** is not available; still the most non-resident visitors are arriving in Austria by car (from neighboring markets such as Germany). Furthermore, the data are referring to high aggregated regions (=Federal Provinces).

Preliminary results (4)



Environmental sustainability

Energy sources used for "hotels and similar establishments" and "buildings for culture, leisure, education and health" 2001

Austrian Provinces	Total number	Fuel oil		timber		wood chips, pellets, sawdust, straw		coal, coke, briquets		electric power		gas		alternative heat sources		other fuel		Long-distance heating		not centrally heated	
		total	in %	total	in %	total	in %	total	in %	total	in %	total	in %	total	in %	total	in %	total	in %	total	in %
Energy source and number of hotels																					
Burgenland	1.369	485	35.4	85	6.2	24	1.8	8	0.6	64	4.7	379	27.7	7	0.5	-	-	19	1.4	298	21.8
Carinthia	9.271	2.455	26.5	382	4.1	130	1.4	29	0.3	326	3.5	228	2.5	35	0.4	2	0.0	100	1.1	1.586	17.1
Lower Austria	4.790	1.661	34.7	497	10.4	149	3.1	97	2.0	189	3.9	1.992	41.6	24	0.5	7	0.1	93	1.9	761	15.9
Upper Austria	3.878	2.698	69.6	249	6.4	272	7.0	40	1.0	84	2.2	728	18.8	39	1.0	4	0.1	189	4.9	482	12.4
Salzburg	4.478	2.754	61.5	164	3.7	135	3.0	18	0.4	299	6.7	846	18.9	26	0.6	5	0.1	289	6.0	462	10.3
Styria	9.081	2.999	33.0	134	1.5	168	1.8	80	0.9	105	1.2	985	10.8	30	0.3	5	0.1	264	2.9	701	7.7
Tyrol	8.077	4.195	51.9	287	3.6	46	0.6	6	0.1	235	2.9	452	5.6	46	0.6	4	0.0	62	0.8	775	9.6
Vorarlberg	1.995	1.191	59.7	79	4.0	97	4.9	3	0.2	73	3.7	185	9.3	16	0.8	3	0.2	66	3.3	282	14.1
Vienna	1.103	129	11.7	24	2.2	1	0.1	1	0.1	7	0.6	27	2.4	524	47.5	6	0.5	1	0.1	83	7.5
Austria	59.817	19.667	32.9	2.264	3.8	947	1.6	248	0.4	1.402	2.3	4.774	7.9	229	0.4	18	0.1	1.334	2.2	5.649	9.4
Energy source and number of buildings for culture, leisure, education and health																					
Burgenland	708	129	18.2	3	0.4	25	3.5	-	-	95	13.4	232	32.8	7	1.0	1	0.1	27	3.8	189	26.7
Carinthia	1.101	309	28.0	6	0.6	64	5.8	1	0.1	102	9.3	100	9.1	13	1.2	-	-	201	18.3	218	19.8
Lower Austria	3.951	1.714	43.4	48	1.2	99	2.5	4	0.1	209	5.3	1.451	36.5	17	0.4	-	-	313	7.9	702	17.8
Upper Austria	2.824	640	22.7	12	0.4	146	5.2	3	0.1	130	4.6	898	31.8	55	1.9	-	-	465	16.5	477	16.9
Salzburg	992	290	29.2	2	0.2	15	1.5	-	-	18	1.8	224	22.6	5	0.5	2	0.2	204	20.6	152	15.3
Styria	2.458	698	28.4	18	0.7	178	7.2	-	-	151	6.1	447	18.2	10	0.4	-	-	526	21.4	430	17.5
Tyrol	1.369	640	46.7	11	0.8	28	2.0	-	-	76	5.6	182	13.3	11	0.8	-	-	117	8.5	304	22.2
Vorarlberg	704	310	44.0	6	0.9	31	4.4	2	0.3	21	3.0	308	43.8	10	1.4	1	0.1	81	11.5	69	9.8
Vienna	1.777	134	7.5	10	0.6	1	0.1	3	0.2	22	1.2	437	24.6	2	0.1	-	-	921	51.8	247	13.9
Austria	19.393	9.769	50.4	116	0.6	627	3.2	15	0.1	816	4.2	4.287	22.1	138	0.7	6	0.0	2.809	14.5	2.788	14.4

Source: Statistics Austria, Austrian Housing Census

Tourism Policy Goal: Using of renewable energy sources

- Data showing still a rather low share of alternative heat sources in 2001 (0.6%) and a high share of hotels heating with fuel oil (53.5%).
- **But:** Due to lack of data more recent developments cannot be presented; in the Austrian Housing Census 2011 these questions weren't considered anymore.

Conclusions (1)



- Tourism development has an impact on the **social, ecological and economic environment** since tourism destinations and regions have a sensitive and fragile environment which is increasingly threatened by the tourism industry itself.
- Sustainability and its **measurement is a regional phenomenon**; an evaluation of sustainability on higher aggregated (national) level is not feasible since in general the regions are too heterogeneous. Tourism policy goals are established by each region and destination; a general benchmark-system does not seem reasonable, therefore.
- **Sustainability can never be measured by indicators alone** (regardless of qualitative or quantitative or both): Profound knowledge of the whole region/destination, its resources, geographic circumstances, economic pillars, (tourism) infrastructure, the cultural and historical framework etc. is necessary to interpret the figures and draw reasonable conclusions from them.
- A **solid group of experts** is demanded in order to gain feasible results which consists of experts from tourism policy (on federal, regional level), (tourism) statisticians and other relevant governmental and non-governmental organisations.

Conclusions (2)



- Doing analysis based on sustainable indicators requires a **regular monitoring system** which provides information on continuous basis revealing trends over time. Based on indicators' results which signal unacceptable levels of impact or stress to the economic, social and ecological environment, standards governing tourism activities have to be developed.
- But the **measurement of sustainability should not only monitor and display developments but encourage regional policy-makers** to establish a set of target-values and a catalogue of measures that should be taken in order to achieve satisfactory results.
- Those efforts **require data comparable over time and space**; in other words, it is important to ensure that data collection and compilation is done in a consistent way, according to internationally accepted standards and methodological rules. Indicators can only be built up when the data is not only available but also highly reliable.
- More investigations are needed related the measurement of **social sustainability**. A more clearer definition is necessary, therefore.

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Tourism Satellite Accounts:
http://www.statistik.at/web_en/statistics/tourism/tourism_satellite_accounts/index.html

Environment Statistics:
http://www.statistik.at/web_en/statistics/EnergyEnvironmentInnovationMobility/energy_environment/environment/index.html

Measuring Sustainable Tourism (MST)

Pilot Study - Austria