Measuring Sustainable Tourism (MST)

Pilot Study - 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” (BMWFW) and UNWTO.
- However, the present “Pilot Study” and its conclusions will serve as a basis for further investigations in this respect.

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.
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.

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; 
- fines 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

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 €)

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 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.

www.statistik.at
Environmental sustainability
Energy sources used for "hotels and similar establishments" and "buildings for culture, leisure, education and health" 2001

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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**Measuring Sustainable Tourism (MST) Pilot Study - Austria**

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