Measuring the social sustainability of tourism (draft Chapter 4)

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AGENDA

1) What is the social dimension of tourism?
2) Purpose of Chapter 4 of the SF-MST
3) Conceptual approaches to the social dimension (Emanuela Recchini’s contribution)
4) Different perspectives on the social dimension
5) Aspects mostly associated with social dimension and different population groups
6) Argentine’s contribution
7) Measuring tools
According to the Statistical Framework for Measuring Sustainable Tourism (SF-MST) the social dimension...

...covers a range of social aspects related to tourism activity. It includes:

- local, traditional and indigenous cultural aspects that can support tourism activity or may be impacted by tourism.
- the outcomes of tourism production processes in terms of the provision of decent work and occupational health and safety (and hence links to employment);
- the contribution to individual and community health and well-being;
- performance in relation to gender equality, income equality and other aspects of equality;
- the development of social capital reflected in the strength of community networks and institutional arrangements.

This chapter proposes an organization and presentation of social aspects appropriate for the assessment of sustainable tourism from a social point of view.
Tourism as a way of social inclusion of disadvantaged groups (disabled, low-income, women, etc.)

Tourism as a generator of social relationships that strengthen community identity and create networks and associations

Tourism as a way to gain skills, increase in understanding of different cultures and improve standards of living of host communities: contributing to equity and social justice.

Tourism as a way to improve quality of life through tourist infrastructure development and to expand individuals’ opportunities/capabilities (emotional, psychological, cognitive, spiritual dimensions).

Emanuela Recchini’s contribution (Italy)

Still at a developing stage. The focus is mainly on labor market discrimination.

There are no international standards yet on the measurement of social capital.

No information

Significant initiatives to incorporate subjective reports of well-being. The OECD framework for measuring well-being, conceptually, reflects elements of the capabilities approach, with many dimensions addressing the factors that can expand people’s choices and opportunities to live the lives that they value.

Emanuela Recchini’s contribution (Italy)
4) Different perspectives on the social dimension

**Host community**

- The impact of tourism activity in the host community: social networks, infrastructure, new skills, poverty alleviation, social equity and justice

- Tourism is seen as a way to achieve community development.

**Tourism businesses**

- Particular analysis of the impact of tourism business in the host communities, mainly through creation of decent work (opportunities, adequate earnings, safety, etc.)

- Tourism is seen as a way to achieve community development via job creation.

**Visitor/Individual**

- The experiences at the place visited and the enhancement of well-being because of having access tourism

- Tourism is seen as a way for people to gain capabilities/opportunities

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5) Aspects mostly associated with social dimension and different population groups

**Aspects**

- Income distribution
- Social equity
- Education, Skills
- Decent work (opportunities, decent hours, security, child labor, equity in remunerations)
- Perceptions of destinations
- Health
- Accessibility (roads, transport systems, basic services, environmental space)
- Cultural Heritage

**Population groups**

- Women, gender
- Elderly
- Families
- Children and Youth
- Persons with disabilities
- Indigenous groups
- Ethnic and religious minorities
- Migrant workers
- LBGQTI

**Social Capital** (networks, tolerance, trust, institutions, corruption)
6) Argentine’s contribution

The set of indicators proposed are framed by the following aspects from Chapter 4 of the SF-MST:

<table>
<thead>
<tr>
<th>Conceptual approaches</th>
<th>Social inclusion</th>
<th>Social equity</th>
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<tbody>
<tr>
<td></td>
<td>Social capital</td>
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<td>Individual and community well-being</td>
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<th>Perspectives</th>
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<th>etc...</th>
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6) Argentine’s contribution

ARGENTINE’S TOURISM HOUSEHOLD SURVEY

START YEAR

- 2006: first experience. 2012: continues until today

TEMPORALITY

- Continuous monthly surveys since 2012

SAMPLING SCOPE

- 2,500 household surveys per month. Aprox: 30,000 households and 90,000 persons per year.

OBJECTIVE

- Measure and characterize the evolution of tourism trips of argentine residents and their expenses associated, either within the country (domestic tourism) or abroad (outbound tourism).

TARGET POPULATION

- Provinces capital cities and urban centers with more than 100,000 inhabitants. A total of 32 clusters grouped into 7 touristic regions.

METHODOLOGY

- Telephone survey
6) Argentine’s contribution

Social Dimension of the Sustainability of Tourism

Argentina, 2006, 2012-2017

Propensity to travel


Capability Approach
(Amartya Sen’s approach)

Ensure the whole population can achieve their rights
- Economic
- Social
- Political
- Cultural

Tourism Consumption is one of those rights

This is a perspective of Tourism as a right and as a way to expand people’s choices and opportunities to live the lives they value.
6) Argentine’s contribution

Argentine Tourism Household Survey
Argentina, 2006, 2012-2017
Growth of residents with at least one tourism trip in a year

Source: National Department of Tourism of Argentina based on the Tourism Household Survey (EVyTH) 2018.

• There is a generally accepted set of indicators to measure themes like distribution, inequality, poverty. These are often calculated by the Statistical Institute of each country.
**6) Argentine’s contribution**

**Statistical Framework of Argentine’s contribution**

**INCOME DISTRIBUTION METRICS:**

1) **Gap index**

\[ R = \frac{1}{\mu} (\bar{y}_m - \bar{y}_1) \]

2) **Kuznets index (20:20 Ratio)**

\[ K = \frac{\sum Y (20\% \text{ more poor})}{\sum Y (20\% \text{ more rich})} \]

3) **Mean absolute deviation**

\[ M = \frac{1}{\mu n} \sum_{i=1}^{m} n_i |\bar{y}_i - \mu| \]

4) **Coefficient of variation**

\[ CV = \frac{1}{\mu n} \sqrt{\sum_{j=1}^{m} n_j (\bar{y}_j - \mu)^2} \]

5) **Gini coefficient:**

\[ G = \frac{1}{2n^2 \mu} \sum_{j=1}^{m} \sum_{k=1}^{m} n_j n_k |\bar{y}_j - \bar{y}_k| \]

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**Results from Argentine Tourism Household Survey**

Argentina, 2006, 2012-2017

Comparing extreme income quintiles, a sharp reduction in the inequality gap is observed between 2006 and 2017.

Source: National Department of Tourism of Argentina based on the Tourism Household Survey (EVyTH) 2018.
6) Argentine’s contribution

**GINI COEFFICIENT FOR INCOME DISTRIBUTION** (reminder)

![Graph showing Gini coefficient for income distribution]

\[ \text{GINI} = \frac{A}{(A+B)} \]

\[ 0 < \text{GINI} < 1 \]

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**GINI COEFFICIENT ADAPTED TO MEASURE TOURISM INCLUSION**

![Graph showing adapted Gini coefficient for tourism inclusion]

\[ \text{GINI}_{\text{tur}} = \frac{A}{(A+B)} - \frac{D}{(D+C)} \]

\[ -1 < \text{GINI}_{\text{tur}} < 1 \]
6) Argentine’s contribution

**RESULTS FOR DOMESTIC TOURISM OF ARGENTINA IN TERMS OF TOURISTS**
Argentina 2006, 2012-2017

![GINI COEFFICIENT Bar Graph](image1)

**GINI COEFFICIENT**
- 2006: 0.34
- 2012: 0.28
- 2013: 0.28
- 2014: 0.30
- 2015: 0.29
- 2016: 0.29
- 2017: 0.28

**LORENZ CURVE**

Source: National Department of Tourism of Argentina based on the Tourism Household Survey (EVyTH) 2018.

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6) Argentine’s contribution

**RESULTS FOR DOMESTIC TOURISM OF ARGENTINA IN TERMS OF EXPENDITURE**
Argentina 2006, 2012-2017

![GINI COEFFICIENT Bar Graph](image2)

**GINI COEFFICIENT**
- 2006: 0.53
- 2012: 0.43
- 2013: 0.43
- 2014: 0.44
- 2015: 0.46
- 2016: 0.44
- 2017: 0.44

**LORENZ CURVE**

Source: National Department of Tourism of Argentina based on the Tourism Household Survey (EVyTH) 2018.
6) Argentine’s contribution

The set of indicators proposed are related to the perspective of a person and not to the perspective of the host communities which is mostly related to job creation and is the main focus of the SF-MST.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Why</th>
<th>Indicator</th>
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<tr>
<td>Social equity</td>
<td>Individuals who cannot travel (mainly for economic reasons) have less access to fully develop their capacities.</td>
<td>Net Travel Propensity</td>
</tr>
<tr>
<td>Inequality</td>
<td>Concentration of tourist consumption constitutes inequality regarding tourist activity.</td>
<td>Kuznets index, Gini coefficient, Others not income related</td>
</tr>
</tbody>
</table>
7) Measuring tools

To have this kind of indicators it is a must to have a well-designed measuring tool. This tool should include the following criteria:

- Survey households, not visitors at tourism destinations.
- The unit of analysis is people, not visitors.
- Gather information about:
  - quantity of touristic trips,
  - a mechanism to identify how many touristic trips made a person within a year,
  - expenditure while traveling,
  - family income, etc.

2 ways to achieve

- General Household Surveys with a subset of touristic questions
- Tourism Household Surveys: surveys to characterize touristic trips of households

Final Conclusions

- It is necessary to include a capabilities approach in tourism. Subjects such as tourist inclusion or tourist inequality should be measured as well as the growth of tourism activity.

- With this goal, our proposal is to incorporate to the SF-MST the set of social indicators we presented: 1) net travel propensity 2) Kusnetz Index and 3) Gini Coefficient.

- It is highlighted that specific data is needed in order to use the above statistical tools. Therefore, it is mandatory to identify the needed data, and construct and implement appropriate data scoping methods to gather it.
Thank you

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https://www.argentina.gob.ar/turismo