

# Working Group of Experts on Measuring the Sustainability of Tourism



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## Measuring the social sustainability of tourism (draft Chapter 4)

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### Social Dimension of the Sustainability of Tourism

#### 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

### 1) What is the social dimension of tourism?

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.

### 2) Purpose of Chapter 4 of the SF-MST

To establish a relevant set of social indicators

so...



This chapter proposes an organization and presentation of social aspects appropriate for the assessment of sustainable tourism from a social point of view

### 3) Conceptual approaches to the social dimension: DEFINITIONS

#### 1) Social Inclusion



Tourism as a way of social inclusion of disadvantaged groups (disabled, low-income, women, etc.)

#### 2) Social Capital



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

#### 3) Social Equity



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.

#### 4) Individual and community well-being



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)**

### 3) Conceptual approaches to the social dimension: STATISTICAL FRAMEWORKS

#### 1) Social Inclusion



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

#### 2) Social Capital



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

#### 3) Social Equity



No information

#### 4) Individual and community well-being



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)**

## Social Dimension of the Sustainability of Tourism

### 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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## Social Dimension of the Sustainability of Tourism

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

#### Aspects

(areas, topics and themes mostly used for measurement in social dimension)

Income distribution      Social equity  
Poverty      Safety, crime

Education, Skills      Social Capital  
(networks, tolerance, trust, institutions, corruption)

Decent work  
(opportunities, decent hours, security, child labor, equity in remunerations)

Perceptions of destinations

Well-being      Health      Accessibility  
(roads, transport systems, basic services, environmental space)

Cultural Heritage

#### Population groups

(discussion is richer when each aspect is analyzed within its relevant population group)

Women, gender      Elderly      Families

Children and Youth      Persons with disabilities

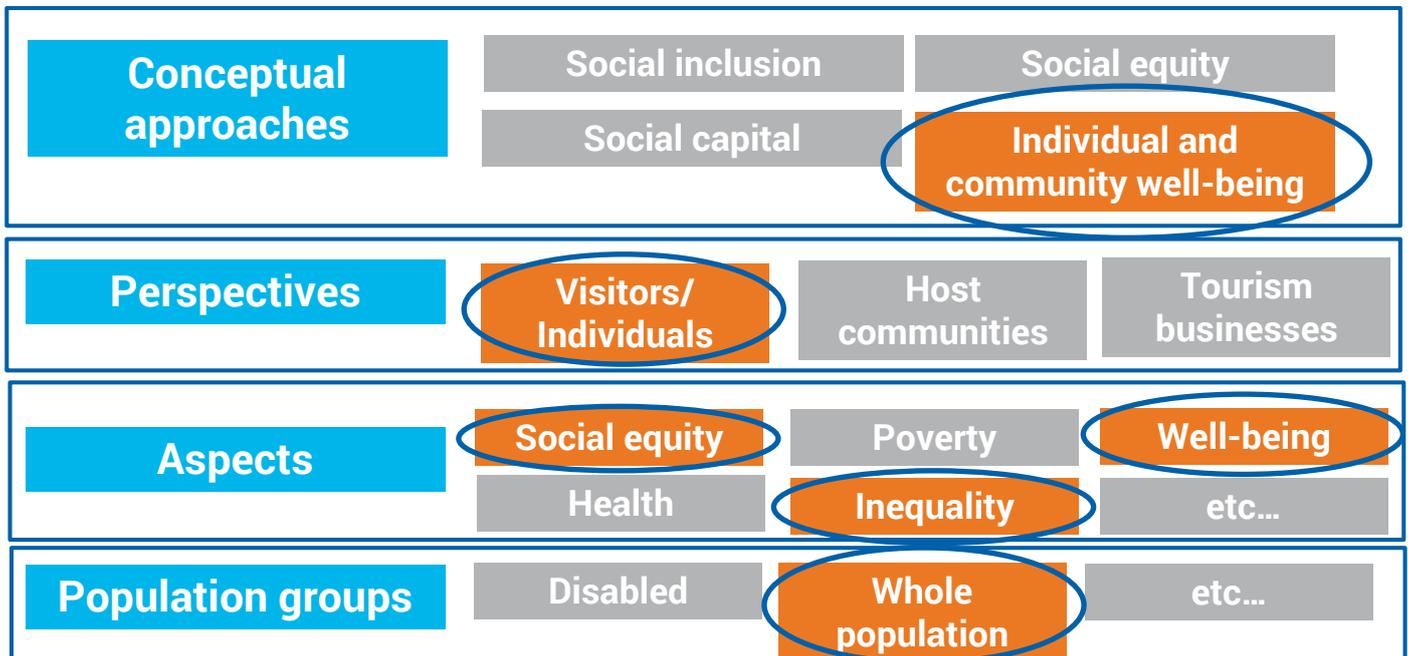
Indigenous groups      Ethnic and religious minorities

Migrant workers      LBGTQI

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## 6) Argentine's contribution

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



## 6) Argentine's contribution

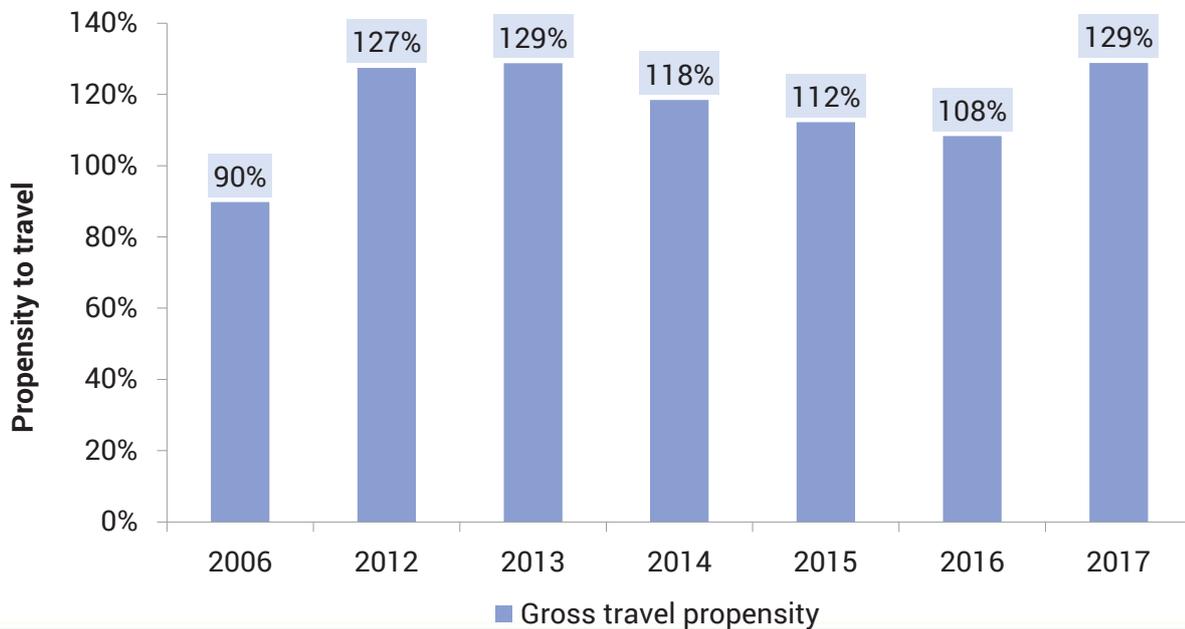
### ARGENTINE'S TOURISM HOUSEHOLD SURVEY

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 <b>tourism trips of argentine residents</b> 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

### GROSS TRAVEL PROPENSITY

Argentina, 2006, 2012-2017



## 6) Argentine's contribution

### Capability Approach

(Amartya Sen's approach)



Ensure the whole population can **achieve their rights**

**Tourism Consumption** is one of those rights



- Economic
- Social
- Political
- Cultural



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

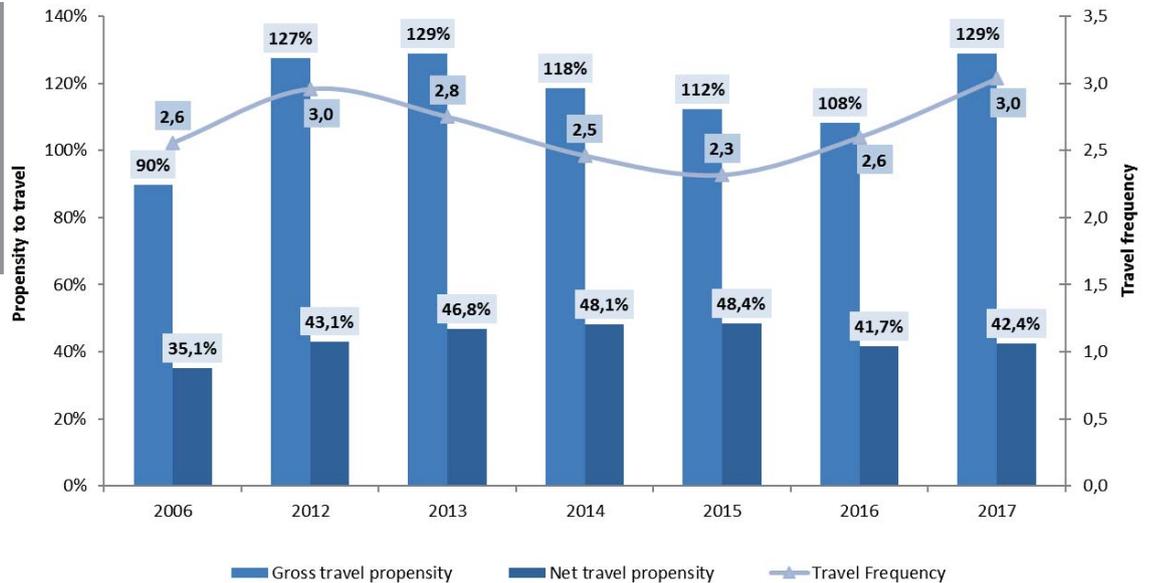
ACCESS  
TO  
TOURISM

### Argentine Tourism Household Survey

Argentina, 2006, 2012-2017

Growth of residents with at least one tourism trip in a year

NET  
TRAVEL  
PROPENSITY  
plus  
other  
indicators



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

## 6) Argentine's contribution

### Statistical Framework of Argentine's contribution

- 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

$$R = \frac{1}{\mu} (y_m - y_1)$$

2) Kuznets index (20:20 Ratio)

$$\mathcal{K} = \frac{\sum y \text{ (20\% more poor)}}{\sum y \text{ (20\% more rich)}}$$

3) Mean absolute deviation

$$\mathcal{M} = \frac{1}{\mu n} \sum_{i=1}^m n_i |y_i - \mu|$$

4) Coefficient of variation

$$CV = \frac{1}{\mu n} \sqrt{\sum_{j=1}^m n_j (y_j - \mu)^2}$$

5) Gini coefficient:

$$G = \frac{1}{2n^2\mu} \sum_{j=1}^m \sum_{k=1}^m n_j n_k |y_j - y_k|$$

## 6) Argentine's contribution

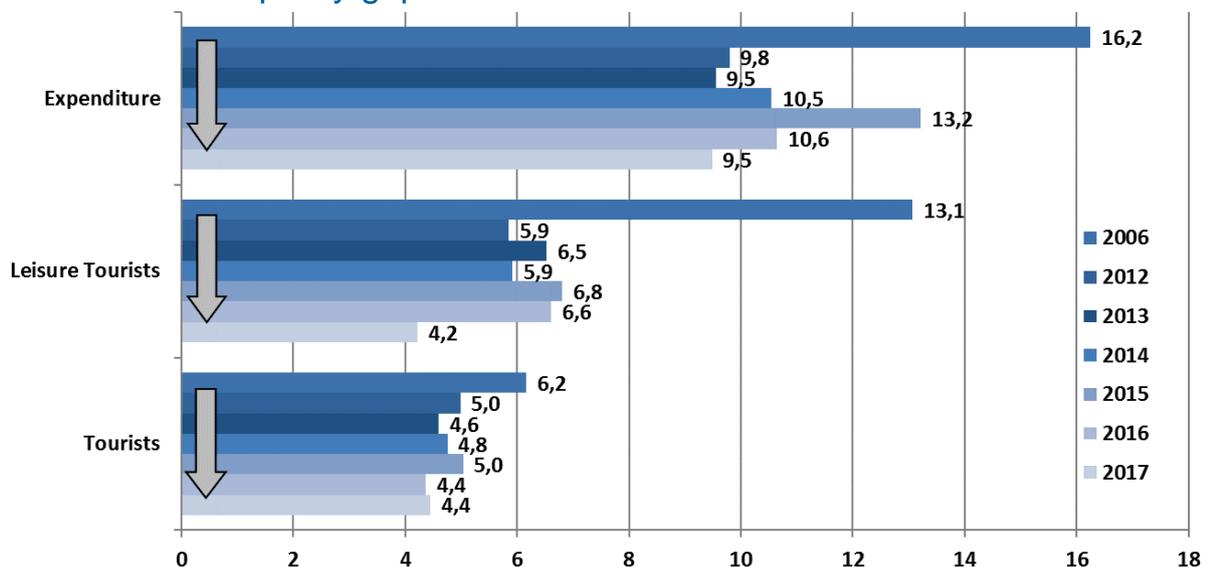
### INEQUALITY

#### Results from Argentine Tourism Household Survey

#### KUZNETS INDEX

Argentina, 2006, 2012-2017

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



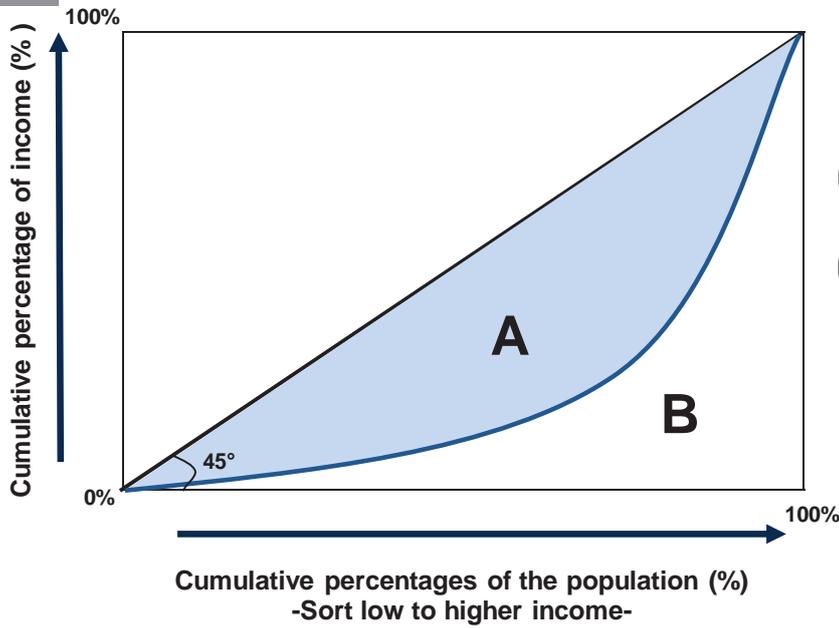
Source: National Department of Tourism of Argentina based on the Tourism Household Survey (EVyTH) 2018.

6) Argentine's contribution

INEQUALITY

GINI COEFFICIENT

GINI COEFFICIENT FOR INCOME DISTRIBUTION (reminder)



$$GINI = A / (A+B)$$

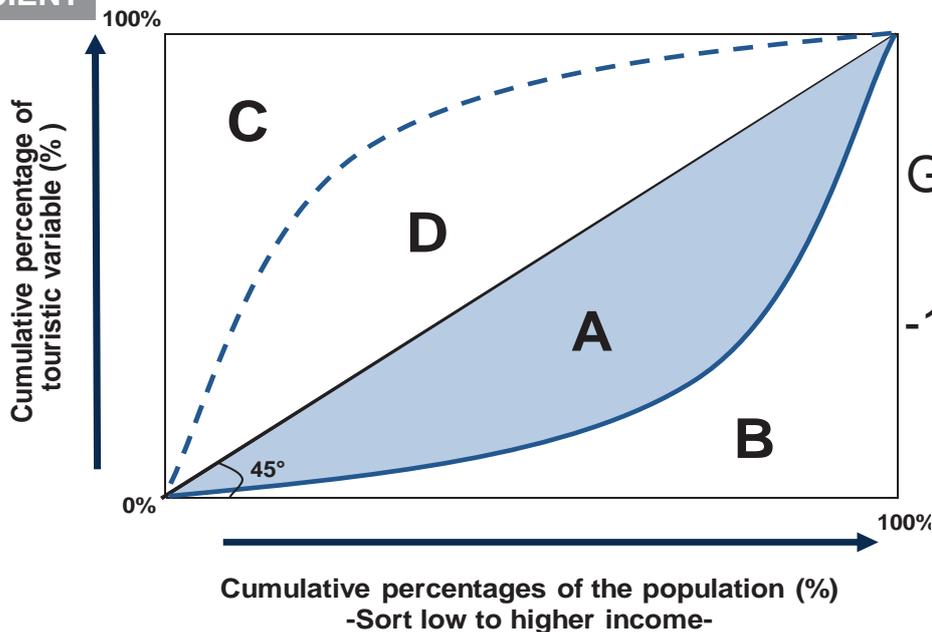
$$0 < GINI < 1$$

6) Argentine's contribution

INEQUALITY

GINI COEFFICIENT

GINI COEFFICIENT ADAPTED TO MEASURE TOURISM INCLUSION



$$GINI_{tur} \begin{cases} A / (A+B) \\ -D / (D+C) \end{cases}$$

$$-1 < GINI_{tur} < 1$$

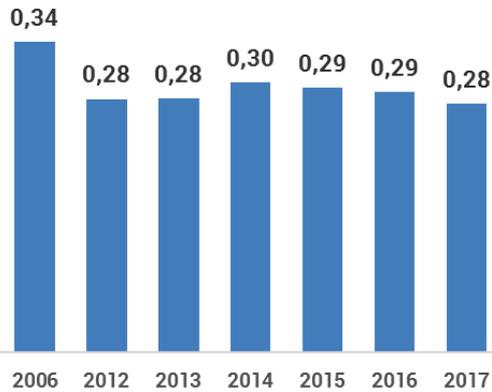
6) Argentine's contribution

INEQUALITY RESULTS FOR DOMESTIC TOURISM OF ARGENTINA IN TERMS OF TOURISTS

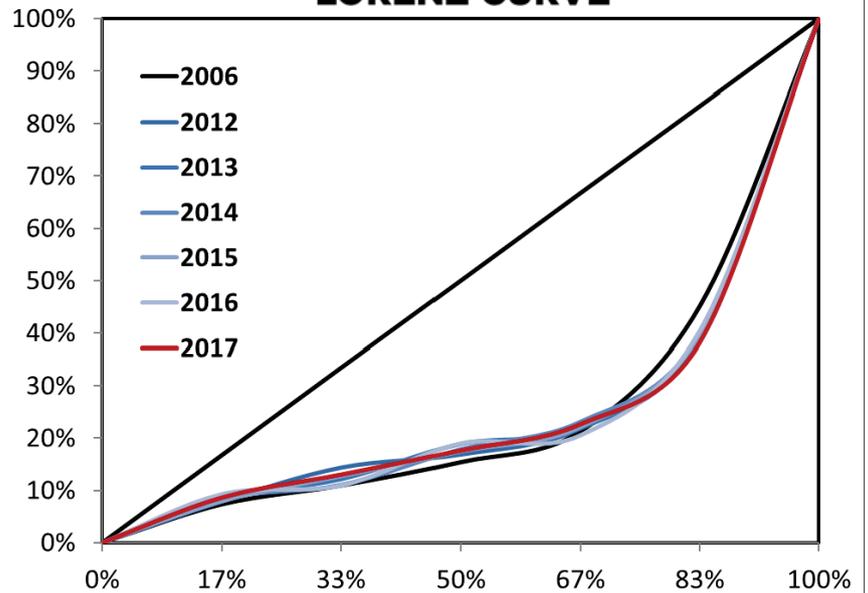
GINI COEFFICIENT

Argentina 2006, 2012-2017

GINI COEFFICIENT



LORENZ CURVE



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

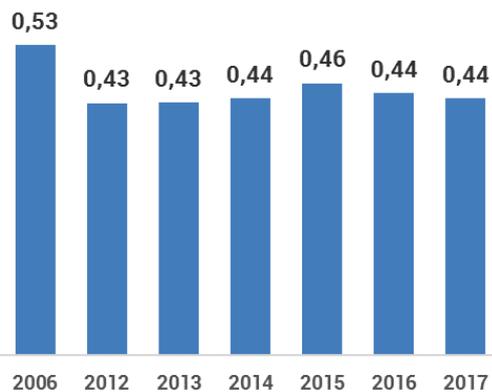
6) Argentine's contribution

INEQUALITY RESULTS FOR DOMESTIC TOURISM OF ARGENTINA IN TERMS OF EXPENDITURE

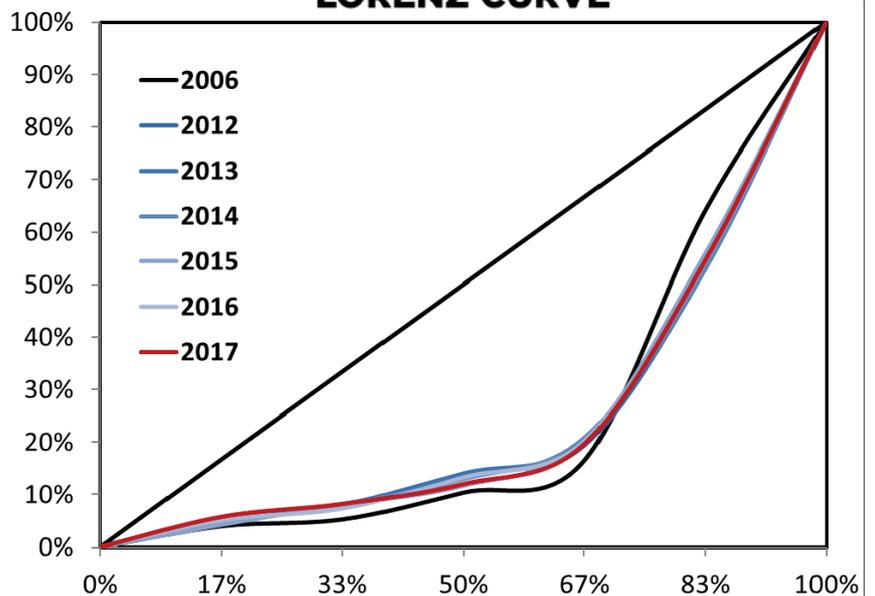
GINI COEFFICIENT

Argentina 2006, 2012-2017

GINI COEFFICIENT



LORENZ CURVE



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

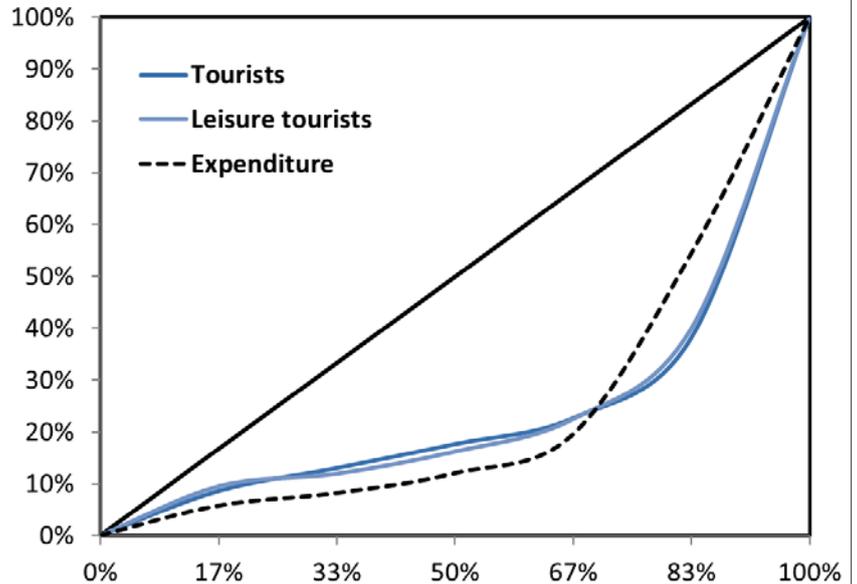
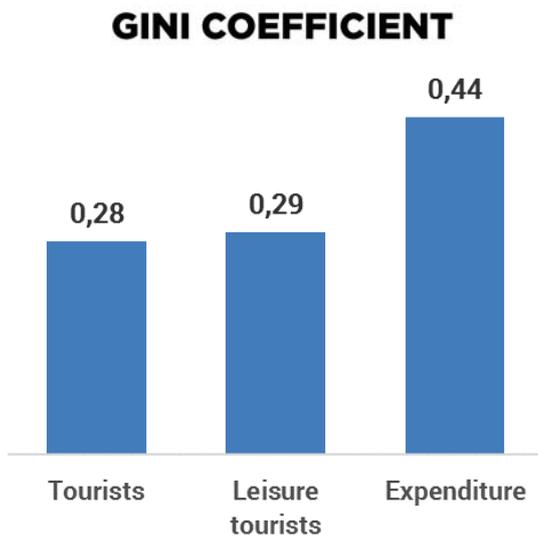
## 6) Argentine's contribution

### INEQUALITY

#### GINI COEFFICIENT

RESULTS FOR DOMESTIC TOURISM OF ARGENTINA IN TERMS OF TOURISTS (general purposes and leisure/recreation) AND EXPENDITURE. Argentina 2006, 2012-2017

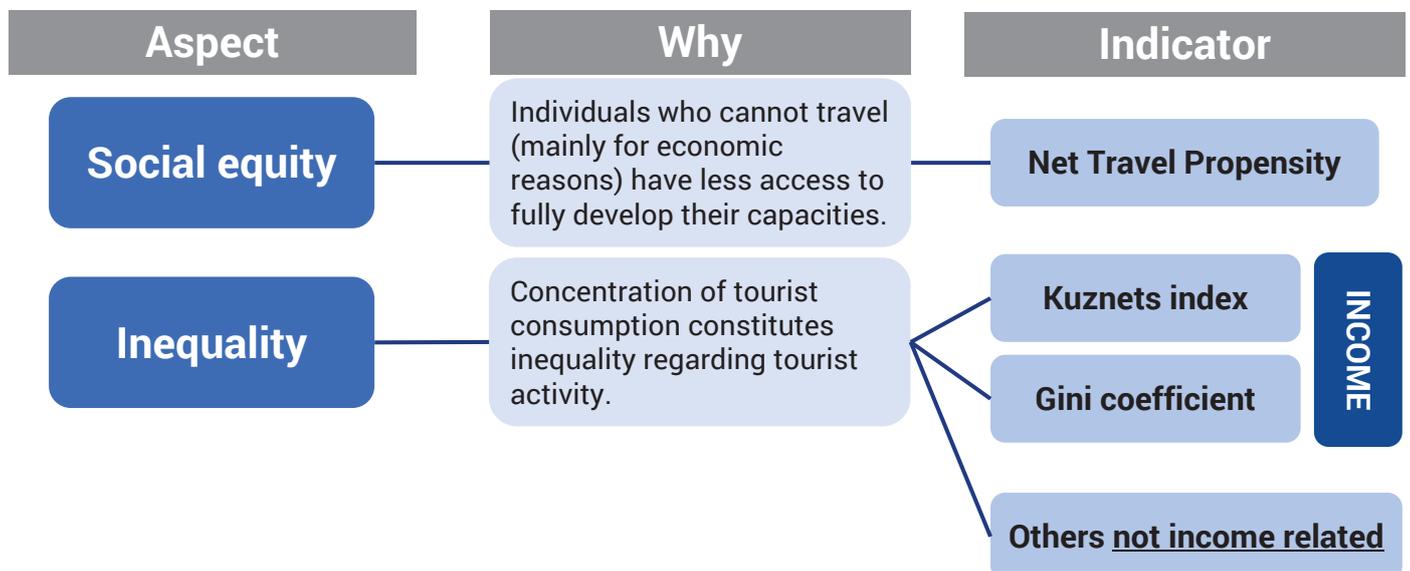
#### LORENZ CURVE



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.



### 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

OR

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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