

## Summary of MST Country Pilots

Carl Obst, UNWTO Consultant  
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### ***Background***

Building on the positive momentum of the Measuring the Sustainability of Tourism (MST) project through 2017 from the UN Statistical Commission, the Manila conference, and the UNWTO General Assembly, the 2018 meeting of the UNWTO Committee on Tourism Statistics and TSA not only reinforced the potential for the development of a statistical framework but also recognized the need for consideration of approaches to implementation at country and sub-national levels.

To support this aspect of the MST project, already a range of countries have initiated pilot studies that focus on some aspects of the overall MST framework that are of relevance in their context. These pilot studies have been presented at the meetings of the UNWTO Committee on statistics and at the Manila conference.

This short note summarises feedback from six pilot studies who responded to a series of questions aimed at summarizing the key aspects of the pilot studies. The template is provided in Annex 1.

### ***Overall findings***

#### *Tourism in the pilot countries*

The six pilot studies were conducted in the Austria, Italy, Mexico, Netherlands, the Philippines and Saudi Arabia<sup>1</sup>. The countries generally indicated high levels of tourism's contribution to overall value added and employment with the Philippines having a tourism share of around 12% of GDP and 13% of employment.

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<sup>1</sup> Other MST pilot studies are: Canada, Fiji, Germany, Sweden and the UK (Wales).

## *Objectives and scope of studies*

Generally, the pilots focused on national level connections between tourism activity and environment flows such as energy, water and greenhouse gas (GHG) emissions. At the same time work in Mexico focused more on the contribution of nature based tourism and related activities at regional level and in Austria there was derivation of sustainability indicators across all three dimensions at regional levels.

All studies recognized that they were, in part, testing out the feasibility of methods and availability of data for establishing the links between tourism activity and the environment, in particular, and more broadly all studies saw important links to the UN Sustainable Development Goals and the need for measures to assess progress. Establishing a clear basis for policy discussion and assessment also emerged as an important objective.

## *Organisations involved*

National Statistical Offices were involved in five of the six pilot studies and National Tourism Administrations were involved in four of the six studies. Three of the studies involved collaboration between these two agency types. In the Mexican and Filipino studies, the Ministry of Environment was also involved.

In all cases the need for collaboration was highlighted even where only one agency was involved since often data and discussions needed to be held across different areas of expertise – e.g. across tourism statistics and environmental statistics.

## *Methods, data and frameworks*

All countries indicated having a range of tourism statistics and TSA data and all except Saudi Arabia had an existing range of environmental data and SEEA accounts, particularly in relation to environmental flows.

Notwithstanding this similarity, a range of techniques were applied. In the Netherlands and Italy the combination of SEEA and TSA accounts was used to determine tourism shares for selected environmental flows. The Dutch assessed 12 environmental flows, whereas the Italians considered various air emissions and energy use. The Philippines followed a similar approach but used input-output tables to establish coefficients for water and energy use for tourism industries.

In Saudi Arabia, the intent was similar as for the Netherlands, Italy and the Philippines but without SEEA accounts they developed direct estimates of various environmental flows (water, energy, fuel, GHG emissions) for two tourism activities – accommodation and land transport.



For Mexico, the focus was on defining a particular type of tourism activity – nature-based tourism (hiking, camping, exploring, visiting archaeological sites) – and associated activity near those areas (accommodation, restaurants). To apply this approach the focus was on a specific region in Mexico.

For Austria, the approach was to first define a series of tourism regions within the country and then, for each region, derive five indicators covering various aspects of the economic, environmental and social dimensions of tourism.

### *Findings and outcomes*

There is not the space here to describe all of the findings from each project. This short summary points as some of the key points that emerged for each country. Importantly, all countries considered that their pilot study was successful and had achieved the intended objectives.

Austria: The findings from this work on sustainability indicators at sub-national level was able to provide support for policy with respect to tourism density, renewable energy and public transport thus highlighting the relevance of the study. The need for a framework to support data development was another finding.

Italy: For different environmental flows, the study found different intensities relative to value added for tourism activity and overall the contribution of tourism to the selected environmental pressures was greater than its economic contribution. The study noted the relevance of the emerging SF-MST and the need for collaboration, especially with respect to data.

Mexico: This work highlighted the importance of the spatial dimension as well as the potential to link to policy around conserving biodiversity and archaeological sites. The importance, and challenge, of communication was noted together with the potential benefit of a framework to support collaboration by providing a common language.

Netherlands: Tourism activities had relatively high rates of environmental taxes, GHG emissions, energy use and water use relative to their contributions to overall GDP however for eight other environmental flows the rates were relatively low, there was large variation in rates for different activities within tourism and there was generally a poor alignment at industry level between the rates of payment of environmental taxes and associated environmental flows (e.g. energy, GHG emissions). The relevance of the link between TSA and SEEA in supporting the work was clearly highlighted.

Philippines: This study was able to estimate a time series of relative shares of energy and water consumption with the data showing both shares increasing over time (2012-2016) as tourism activity grew but noting declines in energy use per visitor and rises in water use per visitor. The work highlighted the importance of having robust baseline data to underpin analysis.



Saudi Arabia: The key finding from this work was that estimating environmental flows was possible without the availability of SEEA accounts and using a variety of data sources and methods. The study also concluded that having TSA was fundamental to progress and supported the development of a measurement framework and associated guidance.

### *Future work*

All of the pilot studies recognize that these pieces of work are just the beginning of a measurement process and more discussion on concepts, data sources and compilation methods will be required. At the same time, all countries except the Netherlands who have no plans for further work at this stage, expressed interest in expanding their studies in a variety of directions. The expansions included increasing coverage of regions or trialing at regional level within the country (Mexico, Philippines, Saudi Arabia); broadening the range of environmental flows (Italy) and increasing the coverage of tourism industries (Saudi Arabia). In Austria, the proposal is to incorporate sustainability indicators in the development of tourism masterplans and a number of the countries are looking to undertake wider engagement. Italy noted its desire to regularize the production of the estimates in statistical releases.

Overall, the six pilot studies highlight that a single framework can be applied in different circumstances and linked to a range of different policy contexts and objectives.

### **Next steps**

Based on this summary and the more detailed descriptions of each pilot study, it is proposed to prepare a short report that provides short descriptions of each pilot study and an overall summary comparing these studies and outlining the key lessons and findings. It is intended that this report would be used both to promote the potential for MST among senior officials around the world and to demonstrate to technical experts the types of data collation, organization and analysis that may be possible using the MST framework.



## Annex 1: Pilot study summary template

Background & Introduction	1. Provide a brief background of the importance of tourism activity in the country or region
	2. The main focus areas for the tourism policy in the context of sustainable tourism <ul style="list-style-type: none"> <li><input type="checkbox"/> Economic</li> <li><input type="checkbox"/> Environment</li> <li><input type="checkbox"/> Social</li> <li><input type="checkbox"/> Cultural</li> <li><input type="checkbox"/> National level</li> <li><input type="checkbox"/> Regional level</li> <li><input type="checkbox"/> Destination level</li> </ul> Any other, please specify _____
	3. Have you implemented any of the below mentioned framework <ul style="list-style-type: none"> <li><input type="checkbox"/> IRTS (<u>The International Recommendations for Tourism Statistics 2008</u>)</li> <li><input type="checkbox"/> FDES (<u>Framework for the Development of Environment Statistics</u>)</li> <li><input type="checkbox"/> TSA (<u>The Tourism Satellite Account: Recommended Methodological Framework 2008</u>)</li> <li><input type="checkbox"/> SEEA (<u>System of Environmental Economic Accounting</u>) <ul style="list-style-type: none"> <li><input type="checkbox"/> Energy</li> <li><input type="checkbox"/> Water</li> <li><input type="checkbox"/> Air Emissions Accounts</li> <li><input type="checkbox"/> Land Accounts</li> <li><input type="checkbox"/> Material Flow Accounts</li> <li><input type="checkbox"/> Environmental Activity Accounts</li> <li><input type="checkbox"/> Ecosystem Accounts</li> <li><input type="checkbox"/> Agriculture, Forestry and Fisheries</li> </ul> </li> </ul>
	4. What is the main objective to conduct the MST pilot study?
	5. Does this pilot study also have synergies with other international programs and development activities? (e.g. SDGs)
	6. Who has been involved in conducting the pilot study? <ul style="list-style-type: none"> <li><input type="checkbox"/> National tourism administration</li> <li><input type="checkbox"/> National statistical office</li> <li><input type="checkbox"/> Ministry of Environment</li> <li><input type="checkbox"/> Sub national administration</li> <li><input type="checkbox"/> International organization</li> <li><input type="checkbox"/> Private entities</li> <li><input type="checkbox"/> Civil society</li> <li><input type="checkbox"/> Academia</li> <li><input type="checkbox"/> Others:</li> </ul> Lead institution(s):  Provide a brief description in terms of their involvement and interactions (For example – Functional support, institutional support)



Description of pilot study	1. A brief description of methods and approach
	2. What were your data sources?
Key findings	1. Did you achieve your set objective from the pilot study? (Yes/No)
	2. Please provide data captured?
	3. Additionally please provide a brief summary of key finding in terms of: <ul style="list-style-type: none"> <li>• Description of outputs – e.g. tables, indicators, charts, maps.</li> <li>• Comment on relative significance of the findings, e.g. in relation to other activities, usefulness in policy and decision-making.</li> <li>• Comment on quality of data and potential improvements in method.</li> </ul>
	4. Please list 3 main findings of your pilot study that point to key policy implications ( <i>Note – UNWTO may use this information for infographics</i> )
Challenges & learnings	1. How would you characterize the challenges faced?
	2. Please summarize the learnings from this pilot project
Next steps	1. How do you intend to take this pilot forward? (E.g. including more regions/dimensions)
	2. A brief summary of potential opportunities for further work, including key research questions, policy issues and potential stakeholders
	3. A brief summary of your next steps or future recommendation.