



TOWARDS MEASURING THE SUSTAINABILITY OF TOURISM

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#EUTourism

TOGETHER FOR EU TOURISM

STAKEHOLDER EVENT

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Do we know what we want to measure?

⇒ Need for an internationally agreed conceptual framework



UN Adopts a New Global Standard to Measure the Sustainability of Tourism

All Regions | 5 Mar 2024

A groundbreaking statistical framework, developed under the leadership of UN Tourism, has been adopted by all 193 UN member states.

The **Statistical Framework for Measuring the Sustainability of Tourism (MST)** thus becomes the internationally agreed reference framework for measuring the economic, social and environmental aspects of tourism.

The adoption by the **UN Statistical Commission** at its 55th session (27 February – 1 March 2024) marks a historical milestone towards harnessing the full potential of the sector, providing a solution to the pressing need for a harmonized methodology to effectively assess the sustainability of tourism.

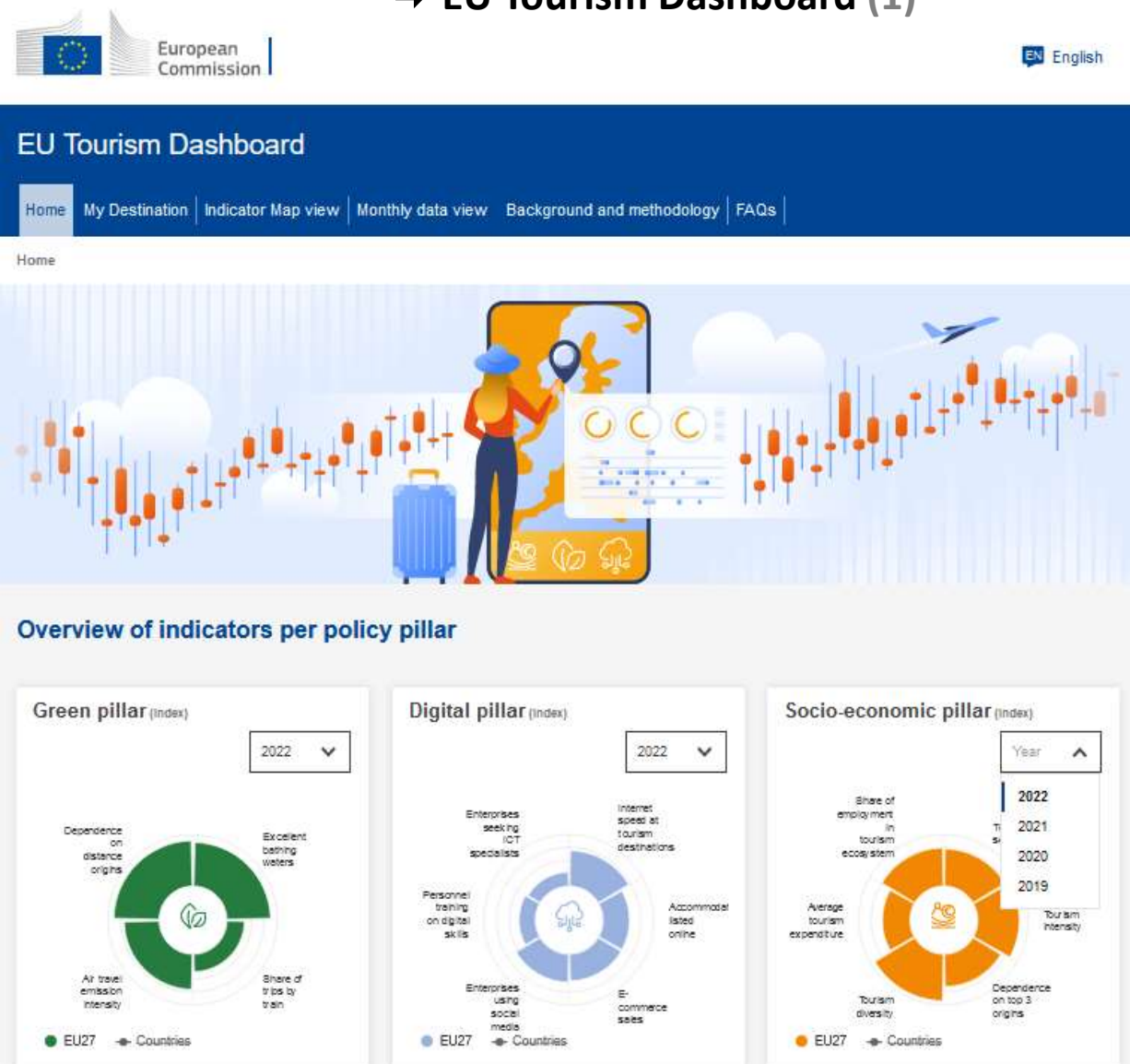
"Tourism is a powerful force for positive change when managed responsibly and sustainably," says Zurab Pololikashvili, UN Tourism Secretary General. "The adoption of the Statistical Framework for Measuring the Sustainability of Tourism marks a paradigm shift, going beyond GDP by enabling the measurement of what matters most to people and planet."

Statistical Framework for Measuring the Sustainability of Tourism (SF-MST)

- Prepared by UNWTO (2017-2023)
- Multidisciplinary effort, led by a global Expert Group (incl. EC)
- Recently adopted by the UN Statistical Commission
- = conceptual framework, laying down internationally agreed principles, concepts and definitions
- ≠ list of operational, measurable indicators

Sustainability indicators: initiatives at the EC

⇒ EU Tourism Dashboard (1)



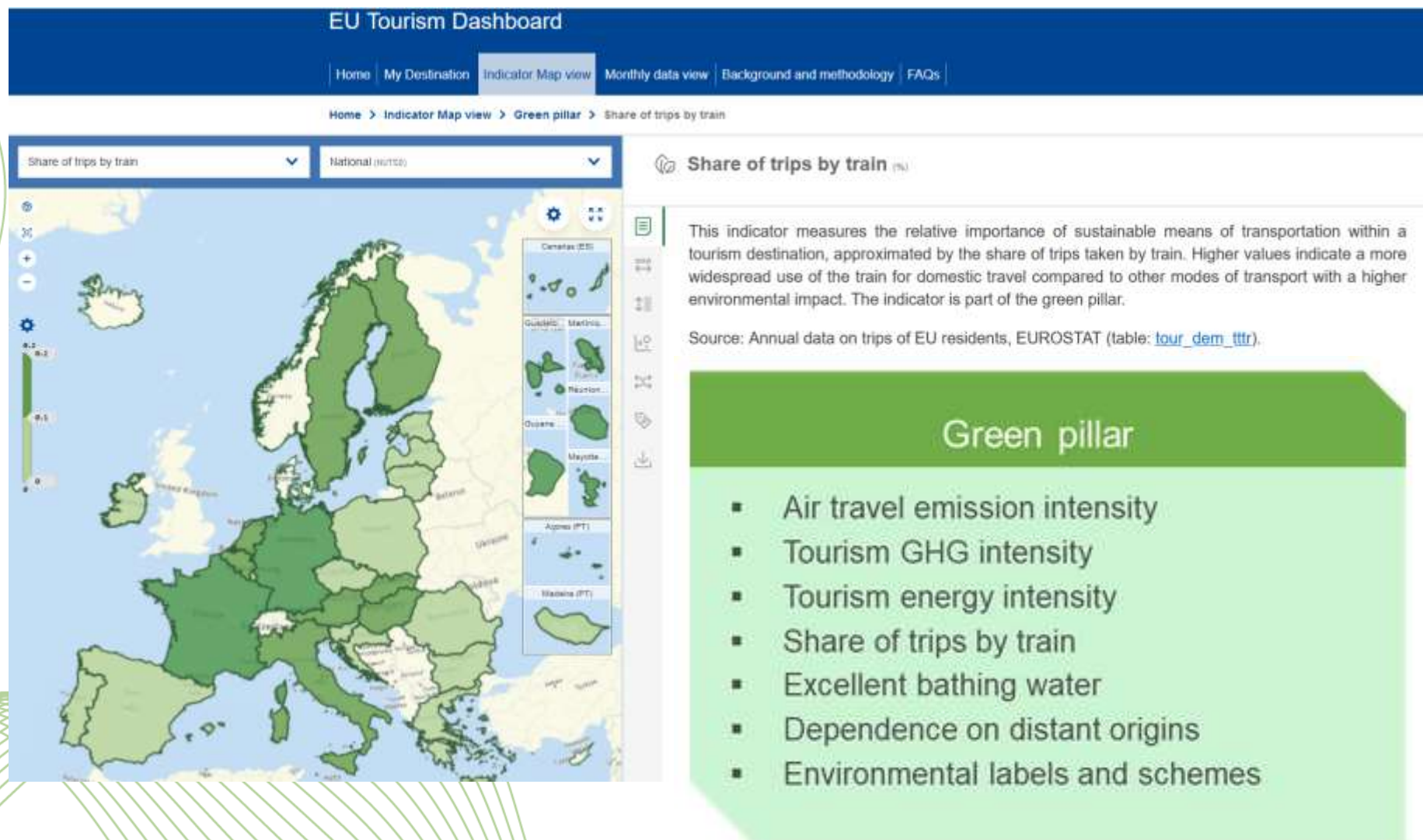
The **EU Tourism Dashboard** is an **online knowledge portal** characterising European tourism destinations in relation to three pillars: **green and digital transition**, and **socio-economic resilience**.

- 30+ indicators / descriptors, updated annually
- EU27 + CH, IS, NO, at national and regional level
- Web-interface
- Developed jointly by **DG GROW** and the **EC's Joint Research Centre (JRC)**, in consultation with **Member States (TAC)**
- Largely built on official statistics (**Eurostat**) but enhanced with additional (big) data sources & modelling.

<https://tourism-dashboard.ec.europa.eu/>

Sustainability indicators: initiatives at the EC

⇒ EU Tourism Dashboard (2)



Sustainability indicators: initiatives at the EC

⇒ EU Tourism Dashboard (3)

Green pillar

- Air travel emission intensity
- Tourism GHG intensity
- Tourism energy intensity
- Share of trips by train
- Excellent bathing water
- Dependence on distant origins
- Environmental labels and schemes

Digital pillar

- E-commerce sales
- Enterprises using social media
- Personnel training on digital skills
- Enterprises seeking ICT specialists
- Internet speed at tourism destinations
- Accommodations listed online

Socio-economic pillar

- Tourism intensity
- Tourism seasonality
- Dependence on top 3 countries of origin
- Tourism diversity
- Average tourism expenditure
- Economic contribution of tourism

Tourism descriptors (demand & supply)

- Nights-spent
- Arrivals
- Tourism capacity
- Occupancy rate
- Average duration of stay

- Tourism density
- Dominant tourism typology
- Share of foreign tourists
- Progress of tourism recovery

- Presence of blue flags
- UNESCO sites
- Share of protected/designated land
- High nature-based tourism opportunities

Sustainability indicators: initiatives at the EC

⇒ Eurostat tourism statistics

Key aspects

- Approach
 - Build on existing indicator systems, build on existing data and frameworks
 - Stepwise work: first indicator set of ‘low hanging fruits’ **based on existing harmonised (official) statistics**; then gradually expanding contents and/or granularity
 - First indicator set to be seen as a kick-off, with known shortcomings (bias in terms of dimensions covered)
 - Interoperability with the EU Tourism Dashboard (through intensive collaboration with the JRC)
 - Aligned as much as possible to the SF-MST, but focusing on a concrete, operational set of indicators that should work for all EU countries (by relying on available harmonised data)

Sustainability indicators: initiatives at the EC

⇒ Eurostat tourism statistics

Key aspects

- Sustainability of tourism >> environmental dimension:

1. Economy

- e.g. Tourism direct gross value added in basic prices [% of total gross value added in the economy] (*)
- e.g. Travel balance (Balance of Payments travel item – credit minus debit, or receipts minus expenditure) [euro]
- e.g. Nights spent by visitors from the top3 foreign markets in tourist acc. est. [% of total nights spent] (*)
- e.g. Survival rate in year t of enterprises in selected tourism industries, newly born in year t-5 [%]

2. Labour market

- e.g. Female workers in selected tourism industries [% of employment in selected tourism industries]
- e.g. Gross hourly earnings in selected tourism industries [euro]
- e.g. Job vacancy rate in accommodation and food services [euro]

(*) : already included in the EU Tourism Dashboard

Sustainability indicators: initiatives at the EC

⇒ Eurostat tourism statistics

Key aspects

- Sustainability of tourism >> environmental dimension:

3. Social and cultural impact

- e.g. Participation in tourism by residents [number of tourists as % of the total population (aged 15+)]
- e.g. Tourism intensity - Nights spent in rented accommodation per inhabitant [number] (*)

4. Environment

- e.g. Trips by train as main means of transport [% of total number of trips] (*)
- e.g. Coastal bathing waters classified as excellent or good quality [% of all coastal bathing waters] (*)

5. Digitalisation

- e.g. Ratio of annual increase in nights spent in short-term rentals booked via online accommodation platforms and annual increase in total nights spent in tourist acc. establishments [ratio]
- e.g. Value of e-commerce sales in selected tourism industries [% of turnover] (*)

(*) : already included in the EU Tourism Dashboard

Sustainability indicators: initiatives at the EC

⇒ Eurostat tourism statistics

Key aspects

- Challenges (linked to using existing European statistics)
 - **Representativeness** : possibly skewed picture due to imbalanced coverage of the dimensions
 - **Bias** or under-estimation due to low coverage of same-day visitors or tourist staying at non-rented accommodation (or non-registered, non-observed rented accommodation)
 - Sectoral (NACE), geographical (NUTS, LAU) and temporal **granularity**
 - Lack of **'subjective' indicators** (locals' attitudes towards tourism, satisfaction of tourists)
 - Limitations should be clearly communicated to users
- Timetable
 - Work-in-progress in the course of **2024**

Sustainability indicators: initiatives at the EC

⇒ Eurostat environmental statistics

Statistics of environmental impacts with possible relevance for tourism

- Emissions of greenhouse gases
- Energy use (with breakdowns by type of energy product)
- Waste generation
- Air pollution

↪ available broken down by economic activity

↪ but very tricky to identify the “tourism part” within an economic activity

↪ Holy Grail: linking TSA and SEEA ?

[Tourism Satellite Accounts and System of Environmental Economic Accounting]

Sustainability indicators: initiatives at the EC

⇒ Eurostat environmental statistics

Environmental accounts

- Air emissions accounts by NACE activities
 - Economy broken down into 64 NACE categories plus households – e.g.
 - Accommodation and food service activities
 - Air transport but including freight and business travel
 - Transport activities by households but including commuting
- Air emissions accounts related to road transport (CO₂, PM, NO_x, NMVOC)

Sustainability indicators: initiatives at the EC

⇒ Eurostat environmental statistics

Other environmental statistics

Physical energy flow accounts

- Supply and use of 37 energy products – economy broken down into 64 NACE activities plus households

Carbon footprint

- CO2 footprint of final consumption by households – economy broken down into 64 NACE activities

Waste generation

- Generation of waste – economy broken down into 9 NACE activities plus households

Water use

- Water use by economical sector - economy broken down into 10 NACE activities plus households

Questions?

