



Jürgen Weiß

Statistics Austria


“Measuring Sustainability in Tourism - Opportunities and Limitations.”)

Berlin , 02-03 April 2019

Sustainability Indicators for a Future-oriented Tourism in Austria

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We provide information



Background

- New Masterplan for Tourism in Austria
 - How to measure tourism?
- The way to indicators measuring sustainability
- Selection of indicators
- Whats new?

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Tourism Masterplan for Austria – Main Idea



Out Now!
March 2019

Austrian Federal Ministry for Sustainability and Tourism
www.bmnt.gv.at/masterplan-tourismus

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Tourism Masterplan for Austria – Main Idea



➤ 1 Rethink Tourism

- Strengthen awareness for tourism
- Enable a culture of cooperation
- Use digital potential

➤ 2 Advance the leading branche of the 21st century

- Make tourism destinations more attractive
- Strengthen job and education possibilities
- Secure livelihood in a sustainable way

➤ 3 Bundle Forces

- Create value added on regional level for all stakeholders
- Advance tourism marketing successfully
- Finance and promote flexible

**Measure
success via a
future
oriented set
of tourism
related
indicators**

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The way to „new“ indicators for measuring tourism in Austria



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The way to „new“ indicators for measuring tourism in Austria



➤ Shift in political responsibility – a change of politics

- Tourism agenda changed from Federal Ministry of Economics to Federal Ministry for Sustainability and Tourism in 2018.
- The National Tourism Strategy was at last updated in 2010 – A „**New Masterplan for Tourism**“ was planned to be developed right after the new Austrian administration was set in.
- New focus on tourism should be more holistic and not economical driven only!

➤ Make tourism success measurable

- Austrian's Tourism Master plan demands a new system for measuring tourism.

➤ Get away from „counting“ arrivals and overnights

- No information about other forms of tourism (especially day trips).
- No information about economic soundness of accommodation establishments.
- Reduces the complex phenomenon of tourism to basic indicators.
- Does not tell anything about **cultural/social or ecological** impacts!

Main driving force!

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Process of development



➤ Launch of the development of sustainable tourism indicators

- To measure the economical success .
- To measure the cultural, social and ecological impact of domestic and inbound tourism.
→Need for new indicators
- In 2018 Statistics Austria was invited to explore the possibilities of setting up a system for sustainable tourism indicators.
- The outcome of this process gave input to the Tourism Masterplan which was presented on March 21, 2019 by the Federal Ministry.

➤ Steps of developing the indicator set

1st Internal stock taking in tourism unit of Statistics Austria focusing on available data sources:

- Accommodation Statistics
- Sample Survey for national tourism
- TSA
- Travel item of the Balance of Payments
-taking additionally into account the use of data sources which are so far not part of the traditional tourism statistics

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Process of development



2nd Involvement of other experts of Statistics Austria to explore further data sources for sustainability indicators:

- Social statistics
- Environmental statistics
- Energy statistics

3rd Bilateral talks, consultations and group discussions with external experts from:

- Market and economical research institutes
- Austrian tourism board
- Chamber of commerce 
- Universities
- Financing institute for hotel and tourism industry

→Based on these internal and external fact finding exercises a first draft of a sustainable tourism indicator set was developed!

This draft was discussed in a **4th** step in the frame of a Workshop with the most important stakeholders of Austrian tourism.

The indicators which were subject to be discussed had to meet the following criteria:

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Criteria for indicators



- Significance
- Timeliness
- Measurability
- Continuity
- Quality
- Cost efficiency

- Many „creative“ ideas produced in the process of development did not meet most of the important criterias.
- The finally proposed indicators follow a very pragmatic approach keeping in mind that most criterias are widely met.
- It was also tried to use existing data sources in order to avoid expensive large scale surveys.

Examples for economical sustainability



Indicator	Data Source
Occupancy rate of beds and rooms	Tourism Statistics
Seasonality	Tourism Statistics
Degree of internationalisation	Tourism Statistics
Hotel star categories	Tourism Statistics
Booking information	Tourism Statistics
Diversity of tourism demand by products	TSA
Tourism Value Added	TSA
Revenue per Available Room (RevPaR)	Hotel Financing Institute
Debt relief duration of hotels	Hotel Financing Institute
Market share in Travel Exports	Travel Statistics
Tourism influence on the external equilibrium	TravelStatistics/GDP

Examples for ecological sustainability



Indicator	Data Source
Energy consumption per overnight stay	Tourism Statistics /Energy Statistics
Renewable energy sources	Energy Statistics
Greenhouse gas emissions	Air Emissions Accounts
Air pollutants	Air Emissions Accounts
Environmentally friendly mobility	Tourism Statistics
Environmentally friendly arrival and departure	Tourism Statistics
Average length of stay	TSA
Degree of Internationalisation	Tourism Statistics
Quality of water	EU-Commission

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Examples for social and cultural sustainability



Indicator	Data Source
Involvement of women in tourism jobs	Social statistics
Open jobs statistics	Employment office
Overlong working hours in tourism industry	Social statistics
Average weekly working time in tourism industry	Social statistics
Educational Background of employees	Social statistics
Participation in tourism	Tourism Statistics
Tourism intensity	Tourism Statistics
Unbalanced tourism („overtourism“)	-(survey of day trips)
Tourism density	Tourism Statistics
Vulnerability	Tourism Statistics
Guest satisfaction	Tourism survey
Employees' satisfaction	Survey among employees

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Political selection



➤ Obstacles:

- Additional cost
- Respondents' burden
- Data Gaps
- Complex to measure
- Complex to understand
- No political will as indicators might contradict political agenda

➤ Formal outcome



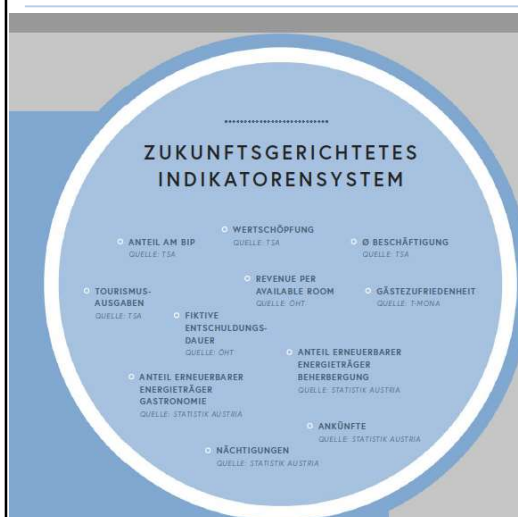
- Integral Part of the new National Masterplan for Tourism, officially presented on March 21, 2019:

Source: https://www.bmmt.gv.at/dam/jcr:980ea72b-aa6c-47a2-97ae-c7d18ec47aef/PLAN%20T%20-%20MASTERPLAN%20F%20C%3%9CR%20TOURISMUS_FINAL.pdf

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What now is the plan to be measured:



➤ Economical sustainability indicators

- Tourism share in GDP
- Value added
- Employment in tourism sector
- Expenditure of tourists
- Revenue per available room
- Debt relief duration of hotels
- Arrivals and Overnights

➤ Ecological sustainability indicators

- Renewable Energy sources

➤ Social and cultural sustainability indicators

- Guest satisfaction

Source: Masterplan for Tourism

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Questions Welcome!

Please address queries to:
Jürgen Weiß

Contact information:
Guglgasse 13, 1110 Vienna
phone: +43 (1) 71128-7974
fax: +43 (1) 4934300
juergen.weiss@statistik.gv.at

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