Measuring the Sustainability of Tourism in Austria

Recent developments

Outline

- Preliminaries
- Master Plan for Tourism and Indicators
- Tourism Report 2019
The outbreak of the pandemic COVID-19 has increased the awareness that tourism - due to its multidisciplinarity - has an impact on economic but also on the social and ecological environment.

Already before the crises in many countries sustainable tourism policies have been more or less well developed in order to maintain a solid environmental and social environment for the coming touristic generations.

However, related to the available data and the measurement of overall impacts there has still been a lack of guidance and information on how to monitor this progress and of standardization of measurement in order to achieve some degree of comparability amongst destinations and harmonization.

A reliable and coherent measurement system might be achieved through a statistical approach, which builds on established standards and which also carefully involves policy and other stakeholders to ensure both relevance and feasibility.
STARTING POINT:

➢ In the past the success of tourism has been measured mainly by physical indicators such as overnight stays and arrivals which only reflect one aspect of the whole tourism industry.

➢ A target oriented tourism policy requires instruments which allow a comprehensive picture and a holistic view.

➢ Within the new Austrian “Master Plan for Tourism” – elaborated by the main stakeholders of the Austrian tourism industry under the supervision of the “Federal Ministry of Agriculture, Regions and Tourism” (BMLRT) in 2018/19 – a new set of indicators has been proposed.

MASTER PLAN FOR TOURISM AND INDICATORS

FUTURE ORIENTED SYSTEM OF INDICATORS

- Value-Added
- Employment
- Tourist Expenses
- Fictitious Debt Repayment Period
- Share of GDP
- Revenue Per Available Room
- Guest Satisfaction
- Share of Renewable Source of Energy in Accommodation
- Overnight Stays
- Arrivals

SOURCE: STATISTICS AUSTRIA
Master Plan for Tourism and Indicators (3)

**The ECONOMIC dimension**

- Based on TSA the **value added** and the **employment** effects are estimated, and the **monetary importance** of the tourism industry becomes obvious.
- TSA does not only consider overnight tourism, but also **same-day tourism** and shows the **integration of tourism with other economic sectors**.
- Since the reference year 2000, TSA data are available at the **national level**.
- Beginning with the reference year 2018 **Regional TSAs (RTSA)** will be available for **8 Austrian Federal States** (mid 2021).

*See also Statistics Austria, Tourism Satellite Accounts.*

Master Plan for Tourism and Indicators (4)

**The ENVIRONMENTAL dimension**

- Based on **Energy Accounts** (EA) the share of the renewable energy use in the hotel and restaurant sector is estimated.
- EA are a system of total accounts and are compiled by using a **multitude of data sources**.
- They provide information about the **supply and use of energy commodities** in physical and energetic units.
- Since the reference year 1999, EA based data are available at the **national level** considering the energy use by about 100 industries.

*See also Statistics Austria, Energy Accounts.*
Master Plan for Tourism and Indicators (4)

**The SOCIO-CULTURAL dimension**

- The **satisfaction of the guests** is an important criterion, which together with employment constitutes the socio-cultural dimension of the TSA.
- Key statements about the **satisfaction of guests** staying in Austria, based on Tourism Monitor Austria done by the **Austrian National Tourist Office (T-Mona)**; current destination based survey.
- An appropriate indicator for measuring **people's acceptance and awareness of tourism** has not existed, so far.
- A market research company has been commissioned by the BMLRT with creating a prototype to collect data with regard to the **acceptance of tourism**.
- In addition: Figures related to **tourism intensity** (nights spent per capita) by municipality might reflect on the implication of tourism on local population.

Master Plan for Tourism and Indicators (5)

**Indicators related to competitiveness of Austrian tourism**

- In order to measure the **popularity and competitiveness** of the tourism destination, data on arrivals and overnight stays are collected according to European legal bases.
- The **following indicators** are considered:
  - Arrivals and nights spent
  - Overnights by federal states
  - Duration of stay
  - Overnights by countries of origin
  - Development of market share in Europe
- Furthermore, worldwide development of **international arrivals** is taken into account (UNWTO).
Tourism Report 2019

The BMLRT is publishing annual “Tourism Reports”; the report 2019 was discussed and presented to the members of the “Tourism Committee” of the Austrian Parliament on 10 June 2020.

The Tourism Report summarizes the most important and recent developments of Austrian tourism throughout a year, including the most recent statistical results.

Based on the new set of indicators many aspects of the development of Austrian tourism are considered, which – based on the definition of sustainable tourism – take into account the economic, socio-cultural and ecological dimensions.
Considering the **economic dimension** of Austrian tourism, in 2018 and 2019 tourism activity in Austria accounted for 7.3% of total GDP (direct and indirect contributions), or 28.3 and 29.2 billion EUR respectively. The Revenue Per Available Room has remained stable over the last five years for 3-star hotel establishments, but has shown a notable increase for 4-5-star hotels, from 140 EUR in 2014 to 175 EUR in 2019.

Taking into account the **environmental aspect**, in 2017 the Austrian tourism sector accounted for 1.15% of total Austrian final energy consumption. In the accommodation and restaurant sector electricity accounted for more than half of all energy consumption. The share of renewable energy sources in accommodation and restaurant sector amounted to 49%, an increase of 16 percentage points when compared to 2008.

In order to collect more information about the **social impact** of the sector, in January 2020, public perception of tourism among resident populations was surveyed for the first time in Austria. The tourism perception index amounted to 78 points on a scale from 0 to 100.

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**See also** UNWTO, Pilot Studies.
Conclusions

The desire to travel will not change in the short- to medium-term or will remain relevant, as it has been evident from past crisis events.

However, the impact of COVID-19 related shutdown might stimulate the use of sustainable measures and instruments for monitoring the development.

Also against the background of the increasing number of elderly persons travelling - the status quo and the quality of on site health care system will gain increasing importance.

New relevant indicators describing the pandemic situation and the health system in a destination region/country might become more relevant.

With additional and a comprehensive set of indicators, the status quo of the tourism destination can be better reflected in many aspects and serve as a basis for decisions making in politics, and as a basis for a regular screening of tourism and its environment.

Austrian Tourism Policy and Tourism Statistics have done the FIRST STEP…..further STEPS have to follow!
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