



Facilitating Tourism Recovery in the Aftermath of COVID-19 **Croatia** Measuring the Sustainability of Tourism

21/04/22



Measuring the Sustainability of Tourism: Scope and outcomes of the consultancy

Tourism sustainability is about how tourism should use natural and social resources to gain economic benefits. From an economic and social perspective the tourism industry is an extensive employer. To enhance the social dimensions of sustainable tourism (which will support economic recovery) we suggest to investigate the potential of this dimension via accounting approach.

This proposal is in line with SDG 8 Decent work and economic growth and SDG 12 Responsible Consumption and Production .

We believe this approach could contribute to the achievement of all other SDGs related to the tourism sector . Besides, in light of the challenges posed by the COVID-19 crisis EU policies emphasize the orientation towards a more social and inclusive Europe .

Measuring the Sustainability of Tourism: Scope and outcomes of the consultancy

- 1) Define Survey and KPIs related to social and environmental sustainability (e.g. design the Survey related to Social innovation, in tourism or/and Survey to conduct KPIs: Number of tourism organization involved in CSR, Number of tourism organization with an eco-label and/or eco-certificate etc.)
- 2) According to available statistics, assess and evaluate social impacts on how residents feel about tourism in their area (Quality of life) and the impact caused by the COVID-19 crisis on the local population in tourist destinations in relation to pre-crisis statistics (key industries, segments and destinations). An example of good practice is Survey on satisfaction and attitudes of local population towards tourism development (ETIS).

Measuring the Sustainability of Tourism: Scope and outcomes of the consultancy

- 3) Explore trends in digital/technological innovation for the smart management of social impacts of tourism (e.g. Survey on fair digital business practices – Collaborative economy).
- 4) Single out examples of good practice from similar tourist countries for both 1), 2), and 3).
- 5) Review the Croatian statistical system in tourism in order to provide advice on statistical procedures and adjustments to be made so as to better collect data on tourism sustainability (a, b and c), and to create Surveys/KPIs (a, b, and c).
- 6) Develop tailor-made guidance document for Croatian stakeholders who collect and process data on the mainly social, but also environmental and economic aspects of tourism sustainability, including guidance for conducting Surveys and develop KPIs (a, b, and c), created by this project.

Measuring the Sustainability of Tourism: Training contents Day 1 – 21 April

10 h AM – 12 h AM:

1. Opening and presentations
2. Covid-19 and sustainable tourism
3. Tourism 4 SDG
4. INSTO
5. ETIS Toolkit
6. Global Destination Sustainability Movement
7. Developments in Croatia

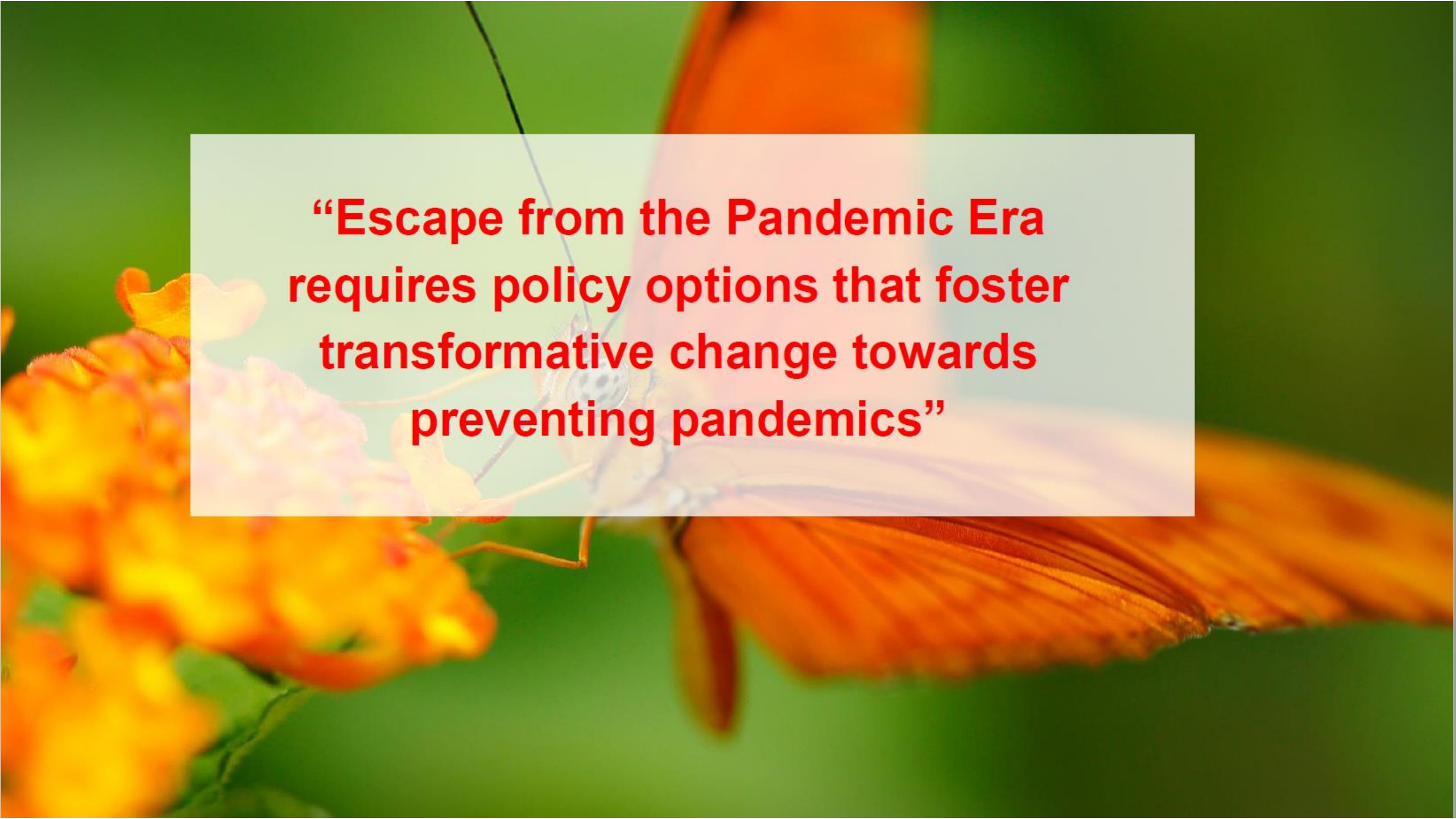
Workshop: where we are / where we want to stay: brakes and accelerators

12 h AM – 13 h PM: Lunch


Measuring the Sustainability of Tourism: Training contents Day 1 – 21 April

12 h AM – 15 h AM:

6. MST methodological framework
7. Defining the territorial units of analysis
8. The role of national statistical and tourism institutions
9. Measuring the economic dimension
10. Measuring the environmental dimension
11. Measuring the social dimension
12. MST Accounts

A close-up photograph of a butterfly with orange and white wings perched on a bright yellow flower. The background is a soft, out-of-focus green. A semi-transparent white rectangular box is centered over the image, containing red text.

**“Escape from the Pandemic Era
requires policy options that foster
transformative change towards
preventing pandemics”**



“The underlying causes of pandemics are the same global environmental changes that drive biodiversity loss and climate change. These include land-use change, agricultural expansion and intensification, and wildlife trade and consumption..”

Measuring the Sustainability of Tourism: COVID-19 and Sustainable Tourism

Sustainability principles refer to the environmental, economic and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

Thus, sustainable tourism should:

1. **Make optimal use of environmental resources** that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity.
2. **Respect the socio-cultural authenticity of host communities**, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
3. **Ensure viable, long-term economic operations**, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation.

Measuring the Sustainability of Tourism: COVID-19 and Sustainable Tourism

- ✓ Sustainable tourism development requires the informed **participation of all relevant stakeholders.**
- ✓ As well as **strong political leadership** to ensure wide participation and consensus building.
- ✓ Achieving sustainable tourism is a **continuous process and it requires constant monitoring of impacts**, introducing the necessary preventive and/or corrective measures whenever necessary.
- ✓ Sustainable tourism should also maintain a **high level of tourist satisfaction and ensure a meaningful experience to the tourists**, raising their awareness about sustainability issues and promoting sustainable tourism practices amongst them.

Measuring the Sustainability of Tourism: COVID-19 and Sustainable Tourism

The COVID-19 crisis is a watershed moment to align the effort of sustaining livelihoods dependent on tourism to the SDGs and ensuring a more resilient, inclusive, carbon neutral, and resource efficient future.

A roadmap to transform tourism needs to address five priority areas:

1. **Mitigate socio-economic impacts on livelihoods**, particularly women's employment and economic security.
2. **Boost competitiveness and build resilience**, including through economic diversification, with promotion of domestic and regional tourism where possible, and facilitation of conducive business environment for micro, small and medium-sized enterprises (MSMEs).
3. **Advance innovation and digital transformation of tourism**, including promotion of innovation and investment in digital skills, particularly for workers temporarily without jobs and for job seekers.

Measuring the Sustainability of Tourism: COVID-19 and Sustainable Tourism

4. Foster sustainability and green growth to shift towards a resilient, competitive, resource efficient and carbon-neutral tourism sector. Green investments for recovery could target protected areas, renewable energy, smart buildings and the circular economy, among other opportunities.

5. Coordination and partnerships to restart and transform sector towards achieving SDGs, ensuring tourism's restart and recovery puts people first and work together to ease and lift travel restrictions in a responsible and coordinated manner.

Measuring the Sustainability of Tourism: COVID-19 and Sustainable Tourism

In the context of the **United Nations 2030 Agenda and the SDGs**, aimed to foster a change in policies, business practices and consumer behavior for a more sustainable tourism sector. It explored and highlighted tourism's role in five key areas:

- i. Inclusive and sustainable economic growth
- ii. Social inclusiveness, employment and poverty reduction
- iii. Resource efficiency, environmental protection and climate change
- iv. Cultural values, diversity and heritage
- v. Mutual understanding, peace and security

Measuring the Sustainability of Tourism: European Commission

Priorities for 2021-2027

In 2021-2027 EU cohesion policy has set a shorter, modern menu of **5 policy objectives** supporting growth for the period 2021-2027.

1. a more **competitive** and **smarter** Europe
2. a **greener**, low-carbon transitioning towards a net zero carbon economy
3. a more **connected** Europe by enhancing mobility
4. a more **social** and inclusive Europe
5. Europe closer to **citizens** by fostering the sustainable and integrated development of all types of territories

Funds priorities

- The **European Regional Development Fund** will support investments all 5 policy objectives, but **1** and **2** are the main priorities
- The **European Social Fund+** main priority is **4**
- The **Cohesion Fund** supports policy objectives **2** and **3**
- The **Just Transition Fund** provides support under **dedicated specific objectives** (art. 8 of JTF regulation)
- The **Interreg** programmes have 2 additional policy objectives at their disposal (art. 14, Interreg regulation) : “A better cooperation governance” and “A safer and more secure Europe”







INSTO

World Tourism Organization
International Network
of Sustainable Tourism
Observatories

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A NETWORK OF TOURISM OBSERVATORIES monitoring sustainable tourism development AT DESTINATION LEVEL

The UNWTO International Network of Sustainable Tourism Observatories (INSTO) is a network of tourism observatories monitoring the economic, environmental and social impact of tourism at the destination level. The initiative is based on UNWTO's long-standing commitment to the sustainable and resilient growth of the sector through measurement and monitoring, supporting the evidence-based management of tourism.

Meet the Members



31 Committed Partners



3 World Regions



11 Common Issue Areas



Measuring the Sustainability of Tourism: INSTO tools and resources

A Repository of Tools and Resources

on the 11 mandatory issue areas that
INSTO Observatories are required to
monitor



Tourism Seasonality



Employment



Destination Economic Benefits



Energy Management



Water Management



Waste Water (Sewage)
Management



Solid Waste Management



Climate Action



Accessibility



Local Satisfaction



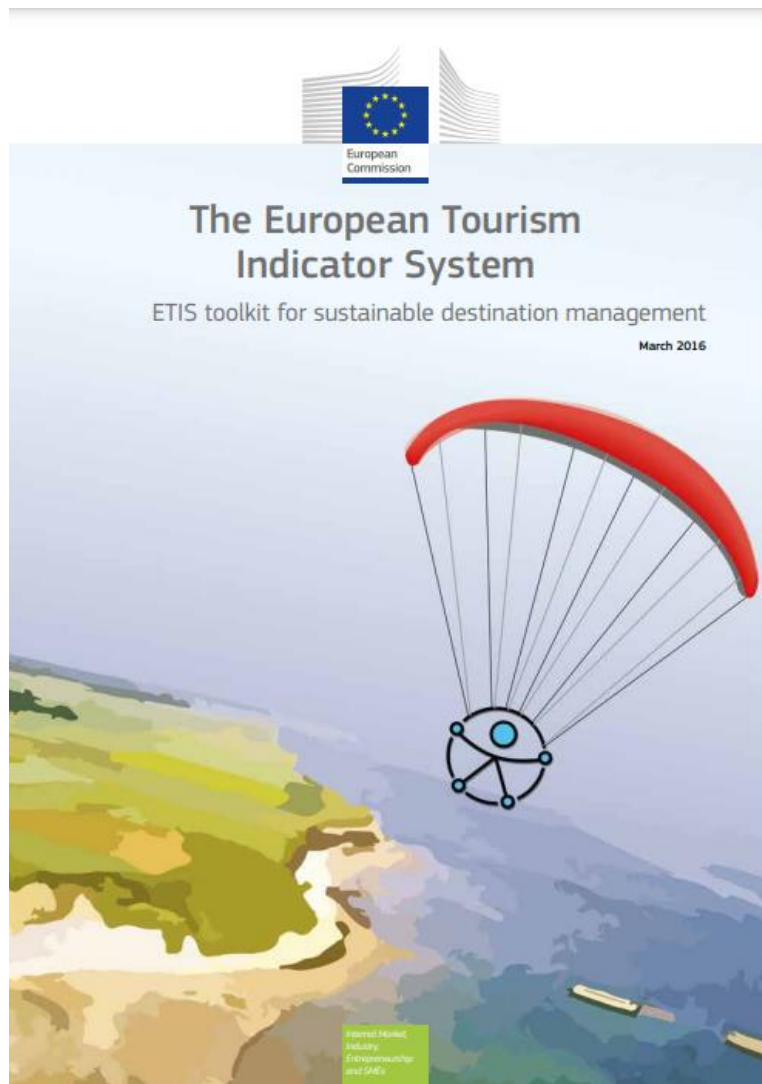
Governance

On other areas of usefulness for Observatories



General Destination Performance Criteria

Measuring the Sustainability of Tourism: ETIS Toolkit 2016




What is ETIS?

ETIS is a system of indicators suitable for all tourist destinations, encouraging them to adopt a more intelligent approach to tourism planning. It is

- **a management tool**, supporting destinations that want to take a sustainable approach to destination management
- **a monitoring system**, easy to use for collecting data and detailed information and to let destinations monitor their performance from one year to another
- **an information tool** (not a certification scheme), useful for policymakers, tourism enterprises and other stakeholders.

Measuring the Sustainability of Tourism: [Global Destination Sustainability Movement](#)




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Instituto Nacional de Estadística

Castellano

Electoral Census

Electronic Office

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INEbase / **Goals and targets (from the 2030 Agenda for Sustainable Development)**

[Download SDG Summary \(xlsx\)](#) [Press release](#) [Metodología](#) [Full publication](#). March 2021

The 2030 Agenda for Sustainable Development consists of 17 goals and 169 targets. In order to monitor its progression, 232 indicators have been designed that can be measured using the statistical data contained herein. These indicators are updated continuously and this action includes information from both the INE and other official sources that are incorporated progressively



Measuring the Sustainability of Tourism: UNWTO, a history of measuring tourism





**ONE PLANET VISION FOR
A RESPONSIBLE RECOVERY OF
THE TOURISM SECTOR**



“It is imperative that we rebuild the tourism sector in a safe, equitable and climate friendly manner”

UN Secretary-General Antonio Guterres

**A Responsible Recovery
of the Tourism Sector**



Green Transition for PLANET, PROSPERITY and PEOPLE

Planet: Biodiversity, Climate Action

Prosperity: Circular Economy, Governance
and Finance

People: Public Health, Social Inclusion



Global Tourism
Plastics Initiative

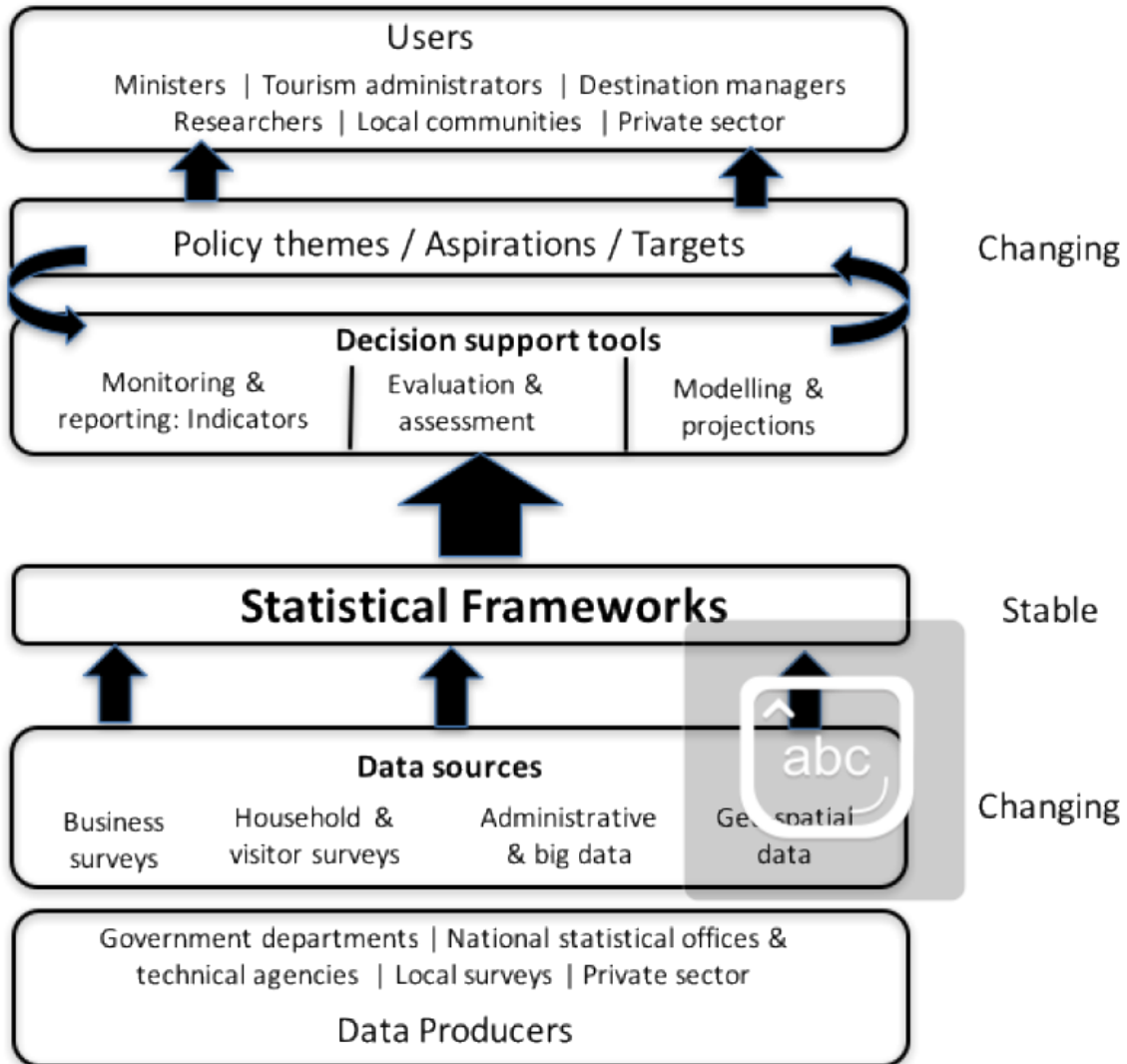
Measuring the Sustainability of Tourism: SF-MST, Statistical Framework for Measuring the Sustainability of Tourism



UNWTO, in collaboration with the UN Statistics Division, is propelling the development of the Measuring the Sustainability of Tourism (MST) programme to provide to all countries in the world a common framework to measure the impacts and contributions of tourism on the economy, society and the environment, at both the national and sub-national levels



Measuring the Sustainability of Tourism: SF-MST, Statistical Framework for Measuring the Sustainability of Tourism

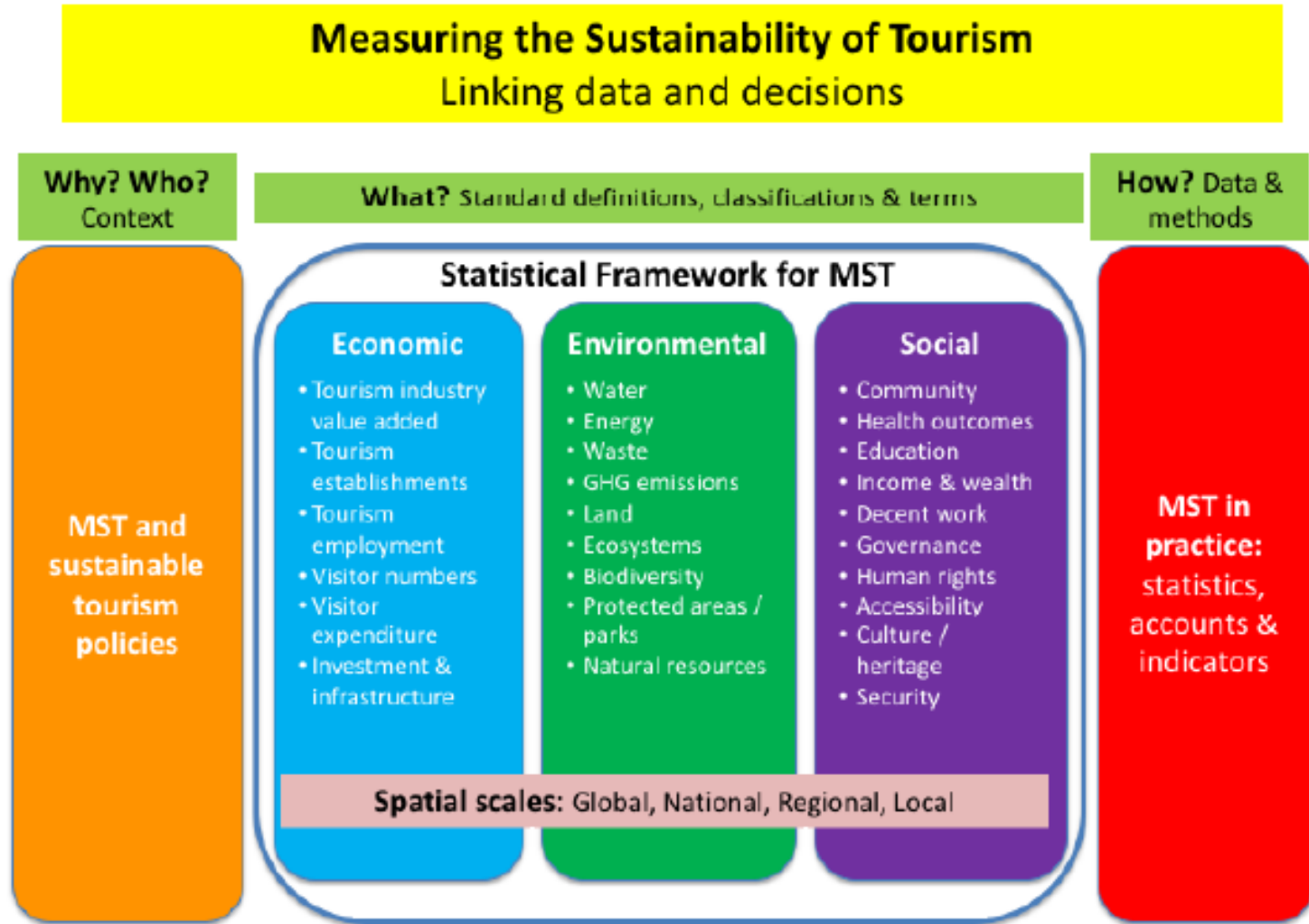


Measuring the Sustainability of Tourism: SF-MST, Statistical Framework for Measuring the Sustainability of Tourism



DIMENSION	
ECONOMIC	Tourism industry value added
	Tourism GDP
	Tourism establishments
	Tourism expenditure
	Tourism infrastructure assets
	Employment in tourism
	Demographics of tourism establishments
	Investment & Infrastructure
ENVIRONMENTAL	Water use in tourism industries (including wastewater flows)
	Energy use in tourism industries
	GHG emissions generated by tourism industries
	Solid waste generated in tourism industries
	Land use (including marine areas)
	Ecosystem condition and services for tourism related areas
	Wildlife in protected areas/parks
SOCIAL	Green jobs
	Culture/heritage
	Health outcomes
	Education
	Community
	Visitor perception
	Tourism governance
	Accessibility
	Decent work

Measuring the Sustainability of Tourism: SF-MST, Statistical Framework for Measuring the Sustainability of Tourism



Measuring the Sustainability of Tourism: SF-MST, The benefits of a statistical framework

- ✓ **A common language for discussing the sustainability of tourism** within the tourism sector itself and with other key policy areas such as planning, industry, infrastructure, environment, social affairs, finance and central banks;
- ✓ **The ability to compare the performance of the tourism sector and the impacts** of different policies on a consistent basis with other sectors and in different destinations and countries;
- ✓ **The basis for improving co-ordination in data collection and organization**, identifying opportunities to use new and alternative data sources, improving the effectiveness of training and capacity building, and improving institutional arrangements for the governance and management of statistics on tourism;
- ✓ The foundation for a **single, coherent and complete picture of the sustainability of tourism and its trends.**

Measuring the Sustainability of Tourism: The spatial scale

The term tourism destination might refer to any of these scales (except perhaps global). a destination might be a country, a region, a municipality or a location.

- **Global** – referring to all countries and marine areas
- **Supra-national areas** – referring to groupings of countries
- **National** – referring to countries
- **Regional** - referring to the level of administrative unit directly below the national level (corresponds to the NUTS 2 level in the EU territorial classification scheme)
- **Municipal or city-region** - referring to the level of administrative units corresponding to localised but relatively large populations.
- **Local** - referring to the areas or zones within a given municipality that exhibit particularly concentrations or clusters of commonly purposed or aligned activities and businesses. It is not expected that administrative units would be defined at this spatial level.

Measuring the Sustainability of Tourism: SF-MST Accounts

Dimension	SF-MST accounts
Economic	Tourism activity SUA
	Visitor movements
	Tourism expenditure
	Tourism infrastructure asset account
	Employment in tourism
	Demographics of tourism establishments
Environmental	Water SUA (including wastewater flows)
	Energy SUA
	GHG emissions SUA
	Solid waste SUA
	Land use asset account (incl marine areas)
	Land cover asset account (incl marine areas)
	Water resources asset account
	Ecosystem condition account for tourism related areas
	Ecosystem services SUA for tourism related areas
Social	Social and community indicators (e.g. crime, health, congestion, decent work, local perceptions of tourism)
	Visitor perception indicators
	Tourism governance indicators

Measuring the Sustainability of Tourism: Accounting the Economic Dimension

The economic dimension covers the production and consumption associated with tourism activity in terms of associated goods and services. This will commonly be reflected in measures such as visitor consumption and the output of tourism industries. The economic dimension also includes description of the characteristics of tourism industries and the production processes of tourism industries. It thus captures investments in produced capital (hotels, transport infrastructure, etc.); employment in tourism and human capital (including skills and experience); and information on the size, industry class and ownership of tourism establishments.

Visitor movements: INBOUND, DOMESTIC, OUTBOUND

Tourist EXPENDITURE

TSA FRAMEWORK

TOURISM INDUSTRIES

EMPLOYMENT

INFRASTRUCTURE AND INVESTMENT

SEASONALITY

SHARING ECONOMY

Measuring the Sustainability of Tourism: Accounting the Economic Dimension

Consumption products	Activities
1. Accommodation services for visitors	1. Accommodation for visitors
2. Food and beverage serving services	2. Food and beverage serving activities
3. Railway passenger transport services	3. Railway passenger transport
4. Road passenger transport services	4. Road passenger transport
5. Water passenger transport services	5. Water passenger transport
6. Air passenger transport services	6. Air passenger transport
7. Transport equipment rental services	7. Transport equipment rental
8. Travel agencies and other reservation services	8. Travel agencies and other reservation services activities
9. Cultural services	9. Cultural activities
10. Sports and recreational services	10. Sports and recreational activities
11. Country-specific tourism characteristic goods	11. Retail trade of country-specific tourism characteristic goods
12. Country-specific tourism characteristic services	12. Other country-specific tourism characteristic activities
Source: IRTS 2008, Annex 3 and 4.	

Tourism Industries

Measuring the Sustainability of Tourism: Accounting the Environmental Dimension

The environmental dimension concerns the stocks and changes in stock of environmental assets, often referred to as natural capital, that support tourism activity through the provision of ecosystem services or are affected by tourism activity. Natural capital includes land, beaches, coastal and marine areas, national parks, rivers, etc. As well, the environmental dimension incorporates measurement of the flows of natural inputs to tourism production processes, such as flows of water and energy, and the flows of residuals that are generated from tourism production and consumption including GHG emissions, solid waste, wastewater and other pollutants.

ENERGY

SOLID WASTE

GHG EMISSIONS

TOURISM LAND ACCOUNTS (protected areas, national parks...)

TOURISM ECOSYSTEMS AND BIODIVERSITY

NATURAL RESOURCES

WILD LIFE

AIR QUALITY

WATER

Measuring the Sustainability of Tourism: Accounting the Environmental Dimension

Some key points in the measurement of the environmental dimension:

1. The available statistical information on environmental flows does not make reference to tourism, though environmental flows related to tourism activity are embedded in the estimates. What is required therefore, are techniques to estimate the proportion of a given environmental flow that is attributable to visitor activity (directly collected data or ratios estimation).
2. Distinguishing the consumption and the production perspectives.
3. There is a very substantial quantity of data and expertise about environmental assets. The challenge from an ongoing measurement perspective: ways of gathering, standardizing and presenting the information.
4. Accounting for environmental assests:
 - a. assessing the stock of the particular environmental asset at a point in time
 - b. measuring changes in the stock of the asset, both additions and reductions, over an accounting period (3-5 year periods)

Measuring the Sustainability of Tourism: Accounting the Social Dimension

The social dimension covers a range of social aspects related to tourism activity. It includes the local, traditional and indigenous cultural aspects that can support tourism activity or may be impacted by tourism. It also includes 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; and the development of social capital reflected in the strength of community networks and institutional arrangements.

SOCIAL CAPITAL

SOCIAL INCLUSION

SOCIAL EQUITY

DECENT WORK

EDUCATION

ACCESIBILITY

CULTURAL HERITAGE

Measuring the Sustainability of Tourism: Accounting the Social Dimension

Some key points in the measurement of the social dimension:

1. From a statistical perspective, the standardization and co-ordination of data on social aspects is much lower compared to the economic and environmental dimensions.
2. The different perspectives on the social dimension of tourism primarily the visitor, the host community and tourism businesses.
3. Different externalities affect the results and make comparability between destinations difficult: cultural factors, economic factors.
4. Visitor perspective vs host community perspective vs tourism sector perspective.

Measuring the Sustainability of Tourism: Road Map for a Croatia's sustainable tourism measurement system

Some previous considerations:

1. It is expected that in the implementation of the SF-MST, countries will adopt a flexible and modular approach, ultimately working towards the compilation of a core set of data for assessing the sustainability of tourism that can be used for international comparison.
2. The breadth and detail of the SF-MST will likely raise significant concerns among data providers as to the potential to identify relevant data sets and to maintain a time series of accounts. It is therefore recommended that initial work on the compilation of SF-MST accounts focus on the use of currently available data rather than considering the development of new data sources.
3. It should be expected that there will be a considerable lack of coherence among the data sets being used as inputs to the SF-MST accounts, especially spatially.
4. In practice, the compilation of accounts as required for SF-MST requires the same skills sets as for the compilation of tourism satellite accounts, national accounts and similar accounts and experts from these areas will be able to provide useful support and advice.



Puno ti hvala!

