Summary of the Global Consultation on the Statistical Framework for Measuring the Sustainability of Tourism
I. Introduction

1. The development of the Statistical Framework for Measuring the Sustainability of Tourism (SF-MST) is part of a wider Measuring the Sustainability of Tourism (MST) program of work being led by UNWTO, in partnership with leading countries, and with the support of the United Nations Statistics Division (UNSD), the International Labour Organization (ILO), Eurostat, the Organisation for Economic Co-Operation and Development (OECD), and others. The development of SF-MST was led by the Expert Group on Measuring the Sustainability of Tourism under the auspices of the UNWTO Committee on Statistics, the intergovernmental body dealing with tourism statistics globally, and in coordination with the Committee of Experts on Environmental-Economic Accounting (UNCEEA). Over the past 7 years since the program’s inception, the development of SF-MST benefited from wide engagement and a transparent, consultative and consensus-building process. With the support of an editorial board and several research teams, the Expert Group on MST took into account the experiences of numerous pilots in countries and comments from various rounds of consultation, all having fed the various drafts of SF-MST. The report presented to the 55th session of the United Nations Statistical Commission (UNSC) by UNWTO, available under agenda item 4(a) on tourism statistics, outlines the process employed in developing SF-MST. The final draft of SF-MST is also available as background document under the same UNSC agenda item.

2. Using all of this strong technical input referred above, including discussion at the 4th meeting of the Expert Group on MST in September 2023, a draft SF-MST was finalised for global consultation. The global consultation was conducted in October and November 2023, directed at both the statistical community and the tourism community—the two main stakeholder groups involved in tourism statistics. The Statistics Division and the chief statisticians of Austria and Spain, representing their countries as Co-Chairs of the UNWTO Committee on Statistics, invited the heads of national statistical offices and the chief statisticians of international organizations to participate in the global consultation. The UNWTO Secretary-General, together with the Minister of Labour and Economy of Austria and the Minister of Industry, Commerce and Tourism of Spain, also representing their countries as Co-Chairs of the UNWTO Committee on Statistics, addressed the invitation to the global consultation to ministries in charge of tourism.

3. The global consultation resulted in widespread endorsement of SF-MST both in terms of its measurement ambition and its technical content. In total, over 60 responses were received from statistical offices, ministries of tourism and international agencies. They were received from countries in the following regions, with different levels of development, economic structure and degrees of tourism and statistical development: Africa (Botswana, Equatorial Guinea, Lesotho, Nigeria, Senegal and South Africa), the Americas (Bolivia (Plurinational State of), Canada, Colombia, Dominican Republic, Ecuador, Guatemala, Jamaica, Mexico, Panama, Paraguay, Peru and United States), Asia (Azerbaijan, Bangladesh, China, Indonesia, Iran (Islamic Republic of), Japan, Kazakhstan, Kyrgyzstan, Lebanon, Malaysia, Maldives, Oman, Philippines, Saudi Arabia and Viet Nam), Europe (Belarus, Bulgaria, Czechia, Finland, Greece, Hungary, Italy, Lithuania, Malta, Montenegro, Norway, Poland, Portugal, Romania, Serbia,

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1 Before the Global Consultation, several rounds of consultation on the different versions of SF-MST have been carried out among the Expert Group on MST and the UNWTO Committee on Statistics. See https://www.unwto.org/tourism-statistics/consultation-past-versions-sf-mst.
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Slovenia, Switzerland and Ukraine) and the Pacific (Fiji and Tonga). It is worth noting that Small Island Developing States and African countries were generally highly supportive. Organizations such as ILO, the International Union for the Conservation of Nature and the Pacific Community also provided constructive and positive feedback. For transparency purposes, all comments are available on the global consultation website4.

4. Many constructive suggestions were received, all of which were carefully considered in the refinement of the draft SF-MST. This background document serves as a synthesis of the feedback received, highlighting the modifications incorporated into the final draft. The responses, along with the specific adjustments made to the draft SF-MST, have been discussed and endorsed by the MST Editorial Board5.

5. Following the Global Consultation, the opportunity was also taken to undertake an initial round of editing aimed at enhancing clarity in expressing technical concepts and ensuring consistency in language and terminology, both within the document and in alignment with other statistical documents. This process did not lead to any substantive technical changes in the draft. It is expected that the process of official editing will further refine the text ahead of publication.

II. Summary of feedback and responses

6. Overall, the feedback from the Global Consultation was overwhelmingly positive. Many respondents indicated their strong appreciation for the work and their confidence that SF-MST would prove an important tool to support more sustainable management of tourism.

7. Analysis of the comments identified five broad types of comments (i) highly positive support expressed; (ii) no specific comment; (iii) request for implementation and compilation support; (iv) suggestions for improved presentation and/or editorial comments; and (v) technical comments. In some cases, the comments featured a combination of these types of comments. There were roughly the same number of comments across each of the five types.

8. In relation to the first four types of comments, no detailed discussion is made in this document. The comments of positive support are much appreciated and indicate the widespread and enthusiastic support for SF-MST. Comments concerning implementation and compilation are noted but not addressed in the final draft SF-MST, as that is not the role of this framework document. Instead, these comments will be taken up as part of the implementation plan led by UNWTO in partnership with countries and international organizations. The MST implementation plan includes the drafting of compilation guidance and tools, as well as capacity development activities around the world6. Comments concerning presentation and editorial matters will be considered in the editing process of the document. This includes suggestions to incorporate additional examples into the text. The next section considers in more detail the technical comments.

5 The MST Editorial Board is composed of an editor and experts on tourism statistics, the Tourism Satellite Account, national accounts and environmental-economic accounting from Austria, Cabo Verde, Canada, Mexico, the Philippines, Saudi Arabia, Spain, Eurostat, ILO, UNSD and UNWTO.
6 See section on “Measuring the sustainability of tourism: the way forward” of the UNWTO report available under UNSC agenda item 4(a).
III. Technical comments and proposed responses

9. There were 24 responses that provided technical comments. Some were very detailed and covered a range of topics across SF-MST while some highlighted just a single issue. All the technical comments were constructive, often providing suggestions for refinements. None of the comments required significant changes to the structure nor to the content of SF-MST, indicating that the nature of the document, its focus for measurement and its approach to describing concepts and definitions, were endorsed through the Global Consultation process. Further, there was only one topic for which there were multiple comments – i.e. each technical comment focused on a different part of SF-MST. Thus, any changes incorporated have been made on the basis that they either improve the explanation of the relevant measurement theme or correct technical and definitional aspects, including consistency across the document and with other statistical documents.

10. The following paragraphs summarise the technical comments structured by chapter and associated responses endorsed by the MST Editorial Board.

11. Chapter 1: Introduction. There were no substantive comments on this chapter. Some refinement has been made to further clarify the role of SF-MST and the context for measuring the sustainability of tourism.

12. Chapter 2: Key features of SF-MST. A range of comments were made in relation to the content of Chapter 2. The substantive comments concerned the following issues.

   • Comment: Request to highlight better the role of and impact of tourism on different values and beliefs.
     o Response: This is an important issue but a challenging one from a statistical measurement perspective. No substantive additions have been made in Chapter 2, but some additional text on these and related issues concerning indigenous groups and cultural heritage has been incorporated in Chapter 5 on the measurement of the social dimension.

   • Comment: Request to develop definitions and classes for tourism products (e.g. eco-tourism).
     o Response: This issue had been discussed at various points during the development of SF-MST, but it has not been incorporated pending further discussion and standardisation within the wider tourism community.

   • Comment: Request to clarify the potential for tourism specific sites in the spatial framework.
     o Response: The text on the delineation of spatial areas has been refined to better describe the potential for compilers to identify a complete range of different tourism areas.

   • Comment: Request to better highlight and explain the role of SF-MST in the context of natural disasters.
     o Response: Some text has been included to highlight the relevance of measuring a range of dimensions to provide a more systemic view of tourism activity and hence understand a more complete range of implications that arise from natural disasters.

   • Comment: Request to consider the role of digitalisation as part of the sustainable tourism agenda
     o Response: This is considered more relevant in the discussion of the policy response.

   • Comment: Request to better highlight links to existing work (e.g. European Union and OECD) on spatial data.
Response: The links to existing work on spatial areas have been included. Further discussion of the use of existing data sources and methods will be included in compilation guidance.

Comment: Concern that the various indicators will not be comparable.

Response: This is indeed a challenge facing all statistical measurement. Beyond establishing common concepts and definitions in SF-MST, it is intended that compilation guidance will be developed to support the production of comparable data and indicators.

Comment: Concern about the potential effects of the new ISIC Rev5 (and NACE).

Response: SF-MST builds upon the two statistical standards on tourism: the International Recommendations for Tourism Statistics (IRTS) and the Tourism Satellite Account: Recommended Framework (TSA: RMF), both of them impacted by the revision of ISIC. SF-MST is not directly impacted, although implementation of SF-MST will take into account the outcomes of these wider discussions.

Comment: Request to explicitly identify cultural indicators in the proposed indicator list.

Response: The development of a set of indicators derived from the statistical framework for international comparability purposes is a separate process currently underway and led by the Expert Group on MST. The cultural indicators will be considered therefore as part of this separate process.

Comment: Request to move away from a capitals framing as it is not appropriate for statistical purposes.

Response: While one comment requested this move, a number of other comments indicated a general support for the use of a capitals framing to provide a broad narrative and context for the discussion of sustainability in SF-MST. Consequently, reference to a capitals framing has been retained but streamlined in Chapter 2. At the same time, the description of the capitals framing in the context of SF-MST has been positioned to more clearly follow the wider need to apply a systems-based approach.

Comment: Request to better highlight and incorporate the concept of carrying capacity.

Response: Some additional content on this topic has been included in the context of describing a systems-based approach but the measurement of carrying capacity itself is considered an application of the data organized following the SF-MST rather than a specific output of SF-MST.

Comment: Request to prescribe indicators for reporting purposes.

Response: It has been agreed that it is not the role of SF-MST to prescribe indicators and a separate process is currently underway to consider this matter (see comment above on cultural indicators).

Comment: Request to better explain the application of nested systems in MST.

Response: The text describing nested systems has been refined.

Comment: Request to refine discussion on the measurement of stocks of assets especially recognising seasonal variation.

Response: Additional content has been included.

13. Chapter 3: Measuring the economic dimension. A range of comments were made in relation to the content of Chapter 3. The substantive comments concerned the following issues.

Comment: Request to clarify and make more consistent the use of the terms tourism industries, activities and establishments.
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14. **Chapter 4: Measuring the environmental dimension.** A range of comments were made in relation to the content of Chapter 4. The substantive comments concerned the following issues.

- **Comment:** Request to provide more explicit mention of a complete range of air pollutants.
  - **Response:** This has been included and a reporting table has been incorporated.
- **Comment:** Request to provide an improved description of environmental pressures and impacts (and their attribution to jurisdictions), in particular concerning biodiversity.
  - **Response:** Some changes have been made to improve these descriptions in specific sections although it was considered that, for the chapter as a whole, the discussion was relatively complete.
- **Comment:** Request to recognise the link between cruise ships and water use.
  - **Response:** A sentence has been added.
- **Comment:** Request to refine and improve the discussion of ecosystems and biodiversity in relation to tourism, in particular to ensure alignment with the SEEA Ecosystem Accounting.
  - **Response:** A range of improvements as recommended in the comments have been incorporated in relation to the measurement of ecosystem and biodiversity. As SEEA Ecosystem Accounting is a new area of statistical measurement, methods and data sources continue to be developed and further development of the links to tourism will be investigated as part of the SF-MST Research agenda.
- **Comment:** Concern raised on the potential to identify meaningfully the tourism component of environmental flows.
  - **Response:** This is a compilation challenge, but a range of measurement approaches have been developed and the conceptual basis described in the SF-MST is considered appropriate.
- **Comment:** Request to better reflect various compilation challenges in the compilation of environmental flows and refine the presentation of the tables.
  - **Response:** Some refinements have been incorporated noting that resolving compilation challenges are primarily for discussion in compilation guidance.
• Comment: Request to discuss the potential to estimate environmental/restoration costs.
  o Response: A sentence has been added.
• Comment: Request to improve the content concerning Environmental Goods and Services Sector (EGSS) and related material on environmental transactions.
  o Response: This comment identified a misrepresentation in the text of the relationship between environmental protection expenditure accounts and EGSS measurement and how they are relevant in the context of tourism. The relevant section and table have been revised to provide a focus on environmental protection expenditure and reduce focus on EGSS since tourism industries are far less likely to be producers of EGSS.
• Comment: Request to clarify the discussion of the allocation of environmental flows in Annex 4.1.
  o Response: Some important refinements to the proposed approach have been incorporated on the basis of these comments including clarification of the treatment of environmental flows generated by visitors staying with households (visiting friends and relatives) and the connection of these flows to the presentation of data following the production or consumption perspective.

15. **Chapter 5: Measuring the social dimension.** A range of comments were made in relation to the content of Chapter 5. The substantive comments concerned the following issues.
• Comment: Request to recognise the role of Tourism Collective Consumption expenditure in relation to the social dimension.
  o Response: Additional content has been included.
• Comment: Request to explicitly recognise indigenous and first nations perspectives and cultural matters generally in relation to host community perspectives.
  o Response: Some additional content has been included, although it is also recognised that more investigation of the measurement requirements and options in this area are required and hence additional text has also been included in the research agenda.
• Comment: Request for more detail on measuring the perspectives of tourists.
  o Response: While this is a legitimate request additional content has not been included recognizing that addressing compilation difficulties is mainly intended for discussion within the compilation guidance and pending further research and international harmonisation of measurement techniques.

16. **Chapter 6: Implementation and application of SF-MST.** There were no substantive comments on this chapter. Some refinement has been made to further clarify the distinction between direct, indirect and induced effects of tourism.