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Sustainable Tourism Indicators: Data-Driven Strategies for Destinations

Ana Moniche
Turismo y Deporte de Andalucía

Sustainable Tourism Indicators: Data-Driven Strategies for Destinations
Vienna, 12-13 September 2024

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Spain Tourism TSI Project: Support to Spain's tourism ecosystem: towards a more sustainable, resilient and digital tourism

Regions: How to align with essential priorities such as the Tourism Transition Pathways, EU Green Deal, the EU Climate Law, the Sustainable Development Goals?

Difficulties to implement a system of indicators for implementing policies for sustainable tourism related with: tools, data, actors and resources

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Spain Tourism TSI Project: Support to Spain's tourism ecosystem: towards a more sustainable, resilient and digital tourism

European Commission (DG Reform) / OECD technical assistance

Assisting Andalusia, Catalonia, Navarra and Valencia to develop and pilot a system of indicators to design policies for the sustainability of tourism.

Develop a tool allowing to benchmark between destinations and compare progress

Bottom-up approach: NUTS2 but local integration.

Capacity-building exercise, collaborative learning

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TSI Actors

- European Commission (DG Reform) / OECD technical assistance
- National Level: Spain Government
- Regional level: Ministry of Tourism, Culture and Sports (Andalusia), Directorate General of Tourism (Catalonia), Directorate of Tourism (Navarra) and Directorate of Tourism (Region of Valencia)
- External actor: Tourism of Tomorrow Lab providing support

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Spain Tourism TSI Project: Support to Spain's tourism ecosystem: towards a more sustainable, resilient and digital tourism

October 22	March 23	Jul 23	Sep 23- Feb 24	Apr 24-Aug 24
Kick-off meeting and roundtable	**Joint, coherent system of indicators** for measuring and monitoring the sustainability of tourism at regional level	**Draft compilation guide** to implement a core set of sustainable tourism indicators	**Pilot implementation** in selected destinations	**Compilation guide** to implement a core set of sustainable tourism indicators

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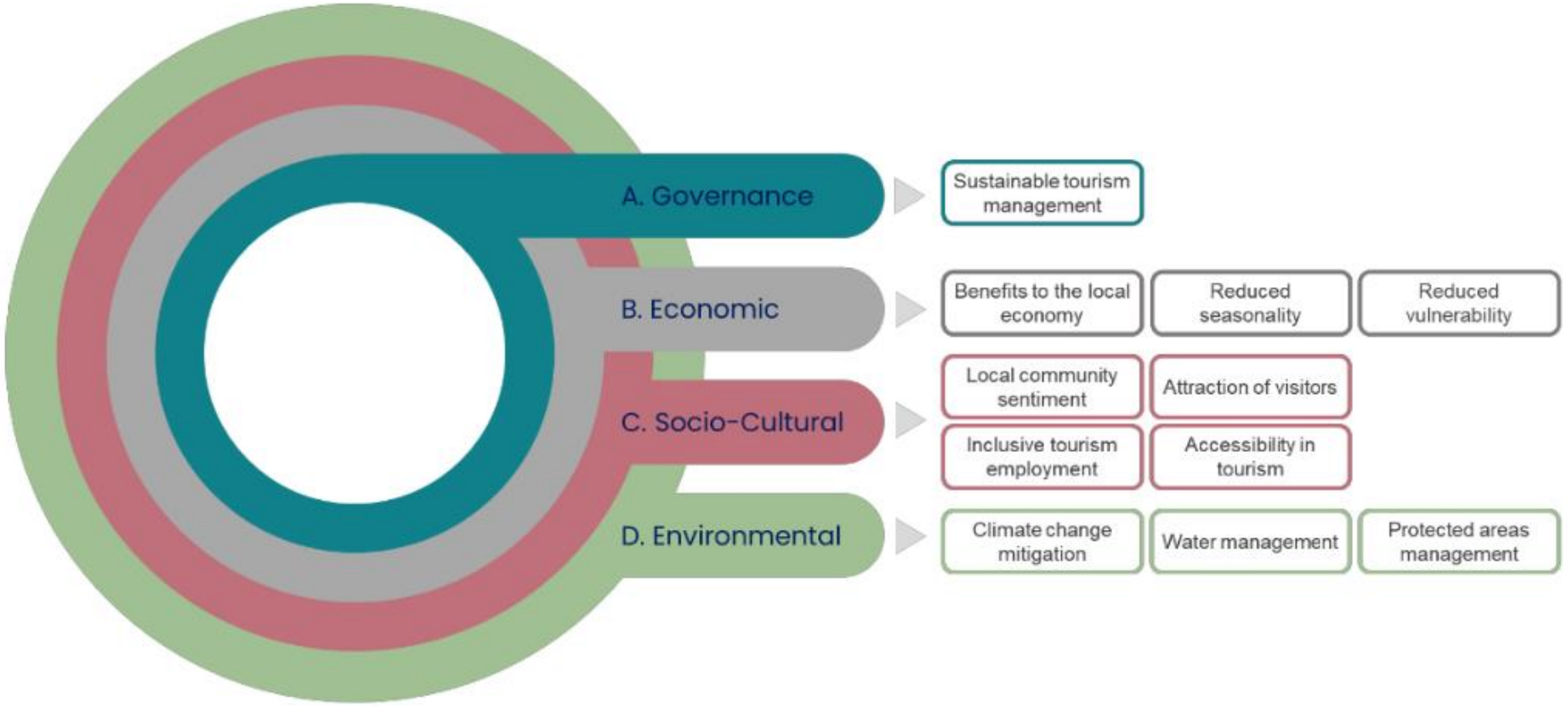
Spanish regions tourism sustainability indicator framework: Current thinking on pillars and key policy issues



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Spanish regions tourism sustainability indicator framework: Compilation readiness

Dimension	Policy issue	Indicator	Compilation readiness before pilot	Compilation readiness after pilot
Governance	Sustainable tourism management	A.1 Sustainable tourism development strategy	●	●
Economic	Benefits to the local economy	B.1 Tourism employment	●	●
		B.2 Tourism value-added	●	●
		B.3 Tourism expenditure	●	●
		B.4 Accommodation occupancy	●	●
	Reduced seasonality	B.5 Tourism seasonality	●	●
	Reduced vulnerability	B.6 Market dependency	●	●

Colour coding for compilation readiness:	
●	Indicator can be measured as of now (data is available for at least one of the metrics)
●	Data sources have been identified, but methodology needs refinement
●	Data sources still need to be identified

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Spanish regions tourism sustainability indicator framework: Compilation readiness

Dimension	Policy issue	Indicator	Compilation readiness before pilot	Compilation readiness after pilot
Socio-cultural	Local community sentiment	C.1 Residents' perception of tourism	🟡	🟡
		C.2 Tourism pressures on local population	🟡	🟢
	Attraction of visitors	C.3 Tourist satisfaction	🟢	🟢
	Inclusive tourism employment	C.4 Gender equality	🟡	🟢
		C.5 Youth employment	🟡	🟢
		C.6 Job security	🟡	🟢
	Accessibility in tourism	C.7 Accessibility in tourism	🟡	🟢
Environmental	Climate change mitigation	D.1 Carbon emissions	🟡	🟡
		D.2 Green mobility infrastructure	🔴	🟡
		D.3 Renewable energy use	🔴	🟢
	Water management	D.4 Tourism water use	🔴	🟡
		D.5 Bathing-water quality	🟢	🟢
	Protected areas management	D.6 Tourism pressure in protected areas	🔴	🟡
		D.7 Management of natural parks	🔴	🟡

Colour coding for compilation readiness:	
🟢	Indicator can be measured as of now (data is available for at least one of the metrics)
🟡	Data sources have been identified, but methodology needs refinement
🔴	Data sources still need to be identified

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- **Insightful Discussions:** Explore the experiences, results, and key learnings from the piloting of sustainability indicators in the four regions.

- **Future Outlook:** Discover how these regions plan to implement and utilize these indicators to shape more sustainable tourism policies.

- **Actionable Insights:** Learn how data can be transformed into actionable strategies for a more sustainable tourism future in Spain and beyond.

- **Interactive Breakout Groups:** For those attending in person, engage in peer learning sessions to discuss the use of indicators in addressing crucial policy issues.

TSI SPAIN
DISSEMINATION EVENT

Andalucía Lab Headquarters
N-340, Km 189, 6,
29604 Marbella, Málaga

Indicators to measure and monitor the sustainability of tourism at the regional level in Spain

Organised by:

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Consejería de Turismo, Cultura y Deporte

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Some examples on how this system of indicators incorporates various approaches for generating policy-oriented insights

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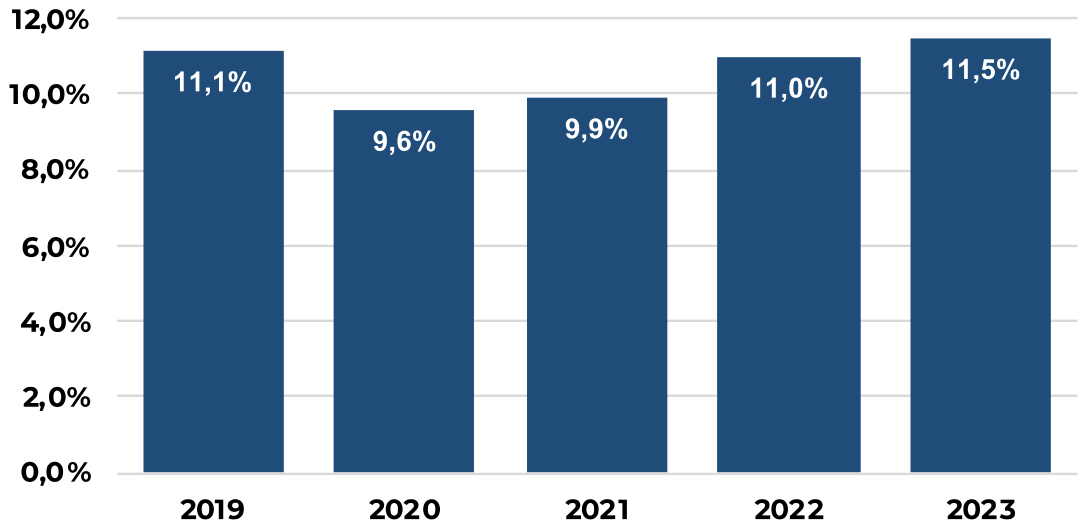
Policy oriented indicator using year-over-year analysis of calculated relevant indicators using official data sources.

Contribution of tourism employment

Direct tourism employment as percentage of total employment



Source: Social Security

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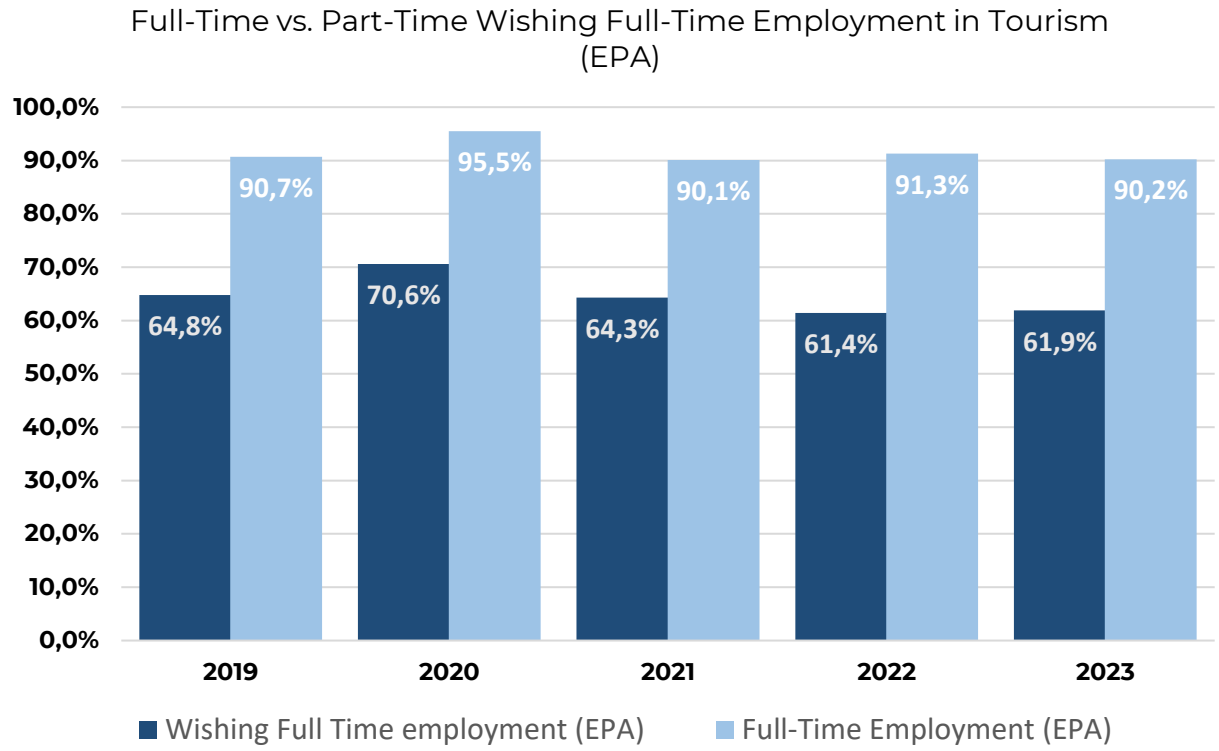
Social Dimension

Policy oriented indicator using year-over-year analysis of calculated relevant indicators using official data sources.

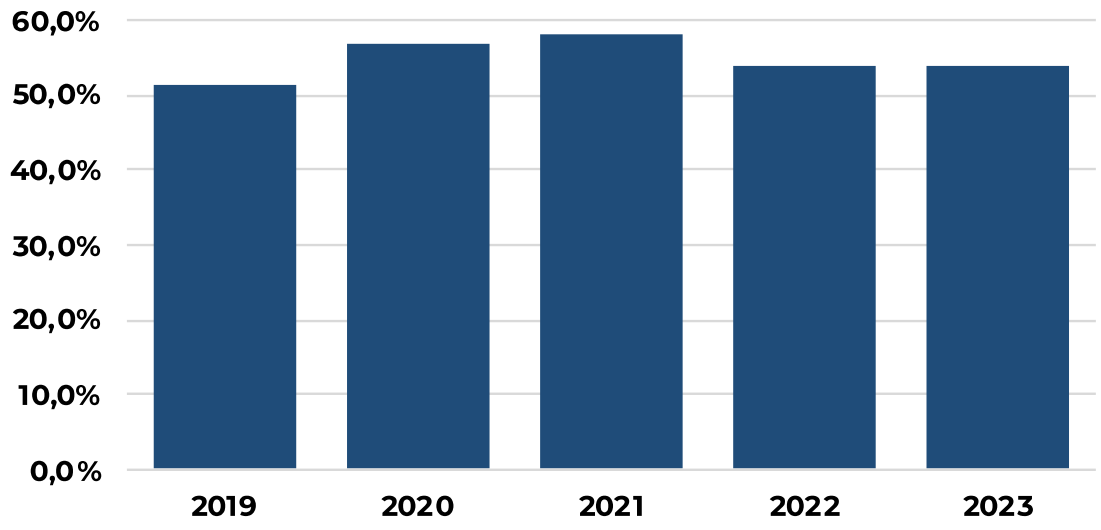


Source: Labour Force Survey

Policy oriented indicator using Ad-Hoc indicators using official data sources to provide more detailed insights beyond basic metrics

Airline dependency/ vulnerability

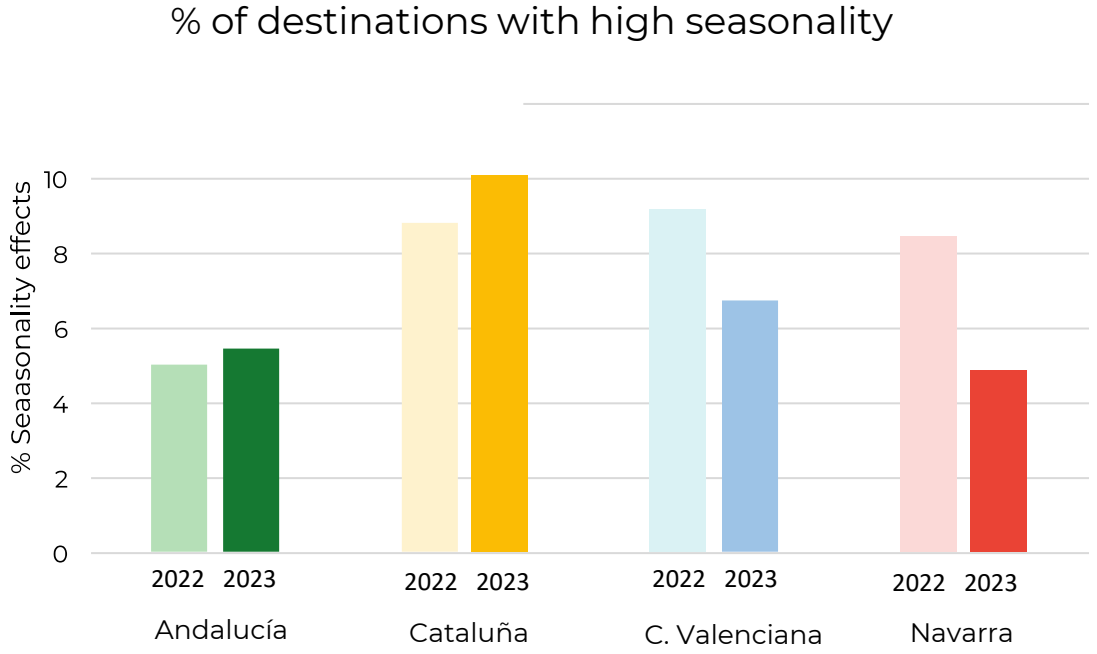
Share of the passengers from the top three airlines in relation to the total air travel passengers



Source: AENA

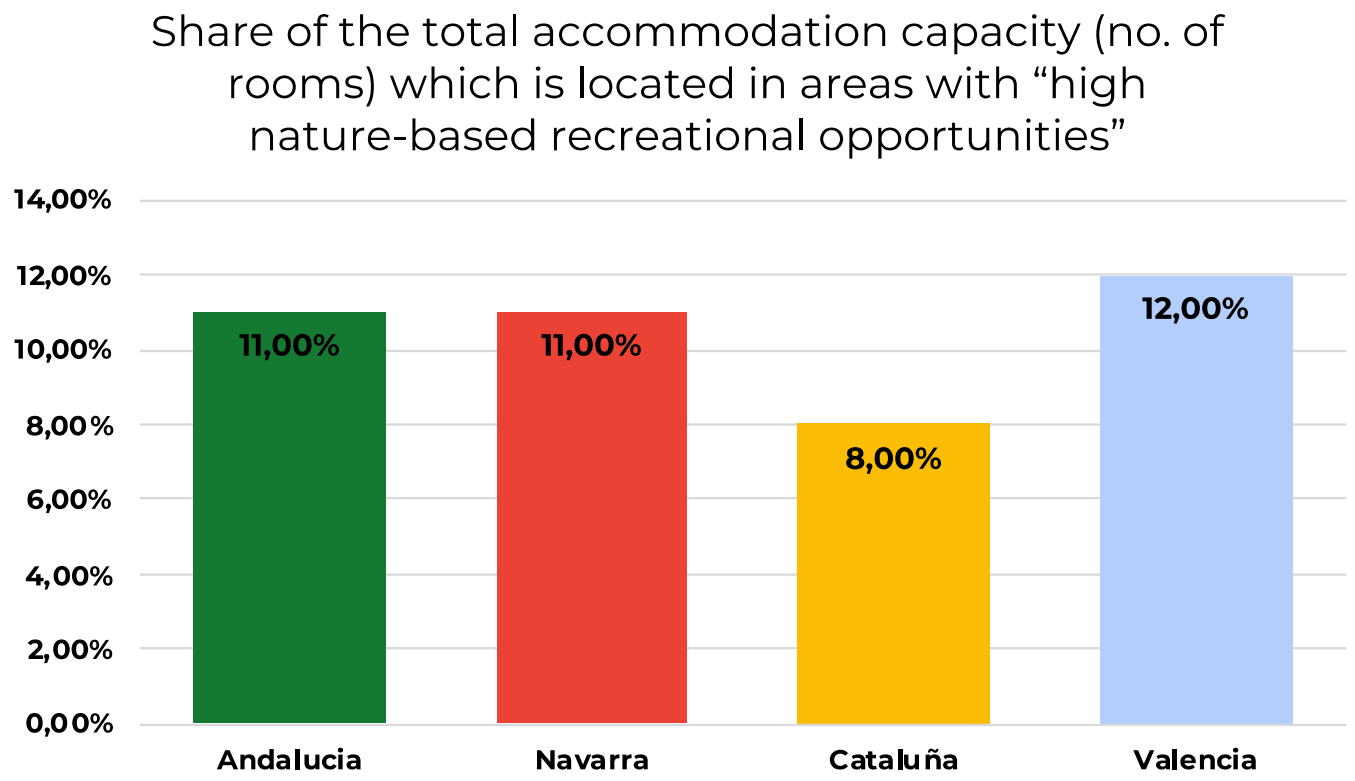
Policy oriented indicator using official data sources to benchmark across regions, while integrating local contexts through a bottom-up approach (NUTS2 level with local integration).

Tourism Seasonality



Source: ToT Lab based on data from INE

Policy oriented indicator from JRC EU Tourism Dashboard: Facilitates both cross-region and EU-wide comparisons.



Source: EU Tourism Dashboard. JRC.

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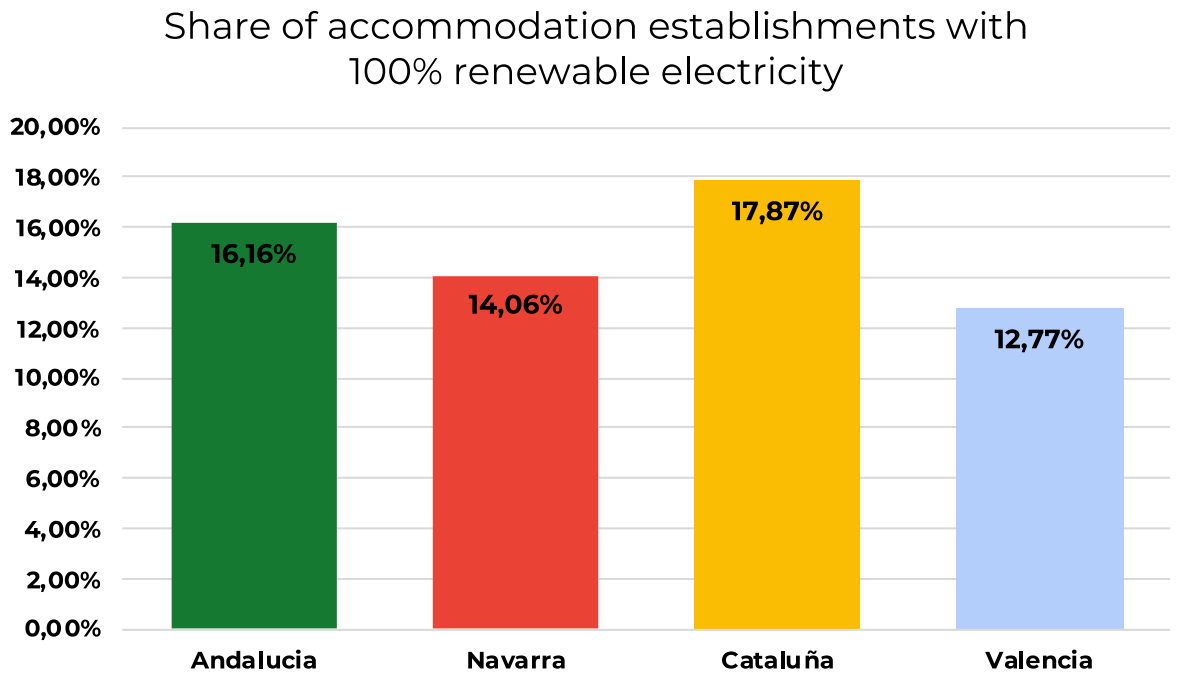
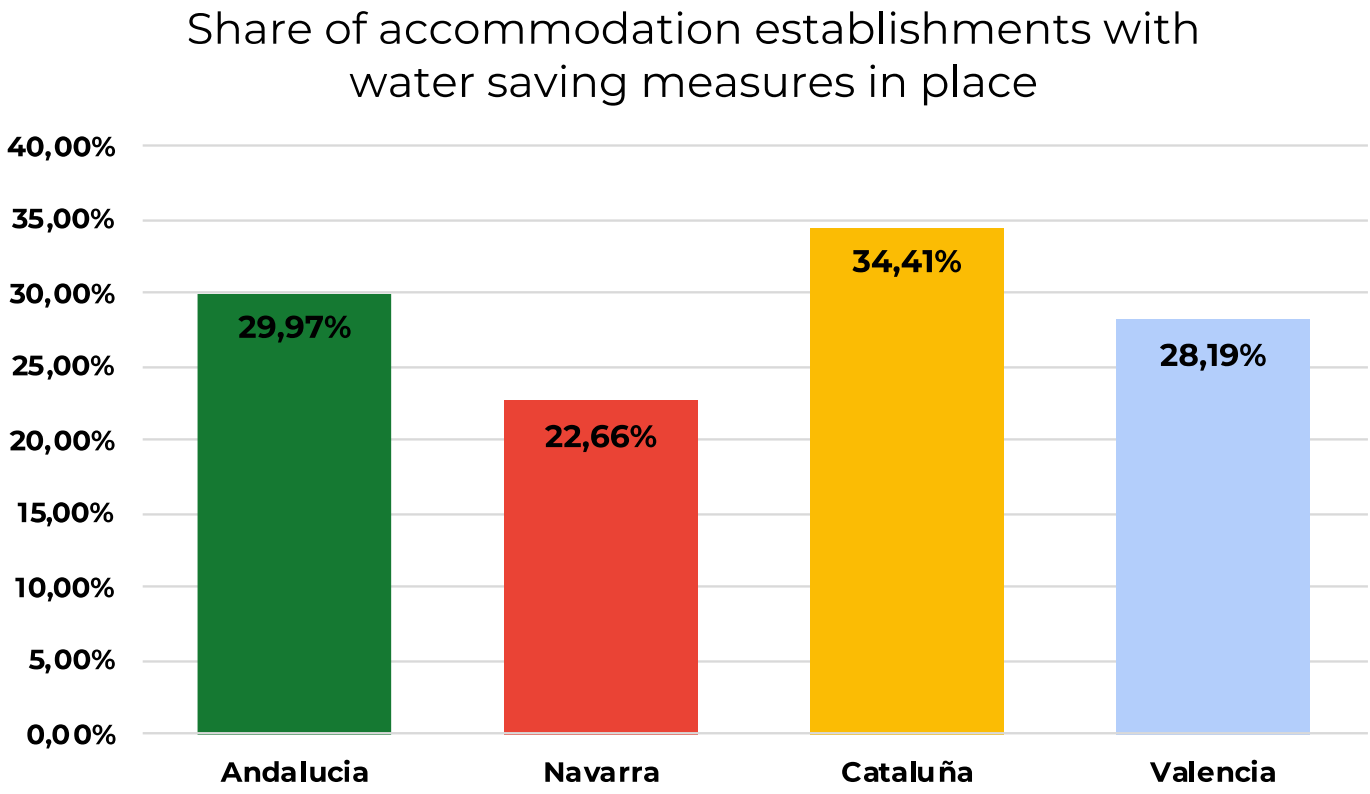
Environmental Dimension

Policy oriented indicator using non-traditional/official data sources: Enabling cross-region comparisons, though with limitations due to reliance on web-based data



Source: ToT Lab based on data from Booking.com

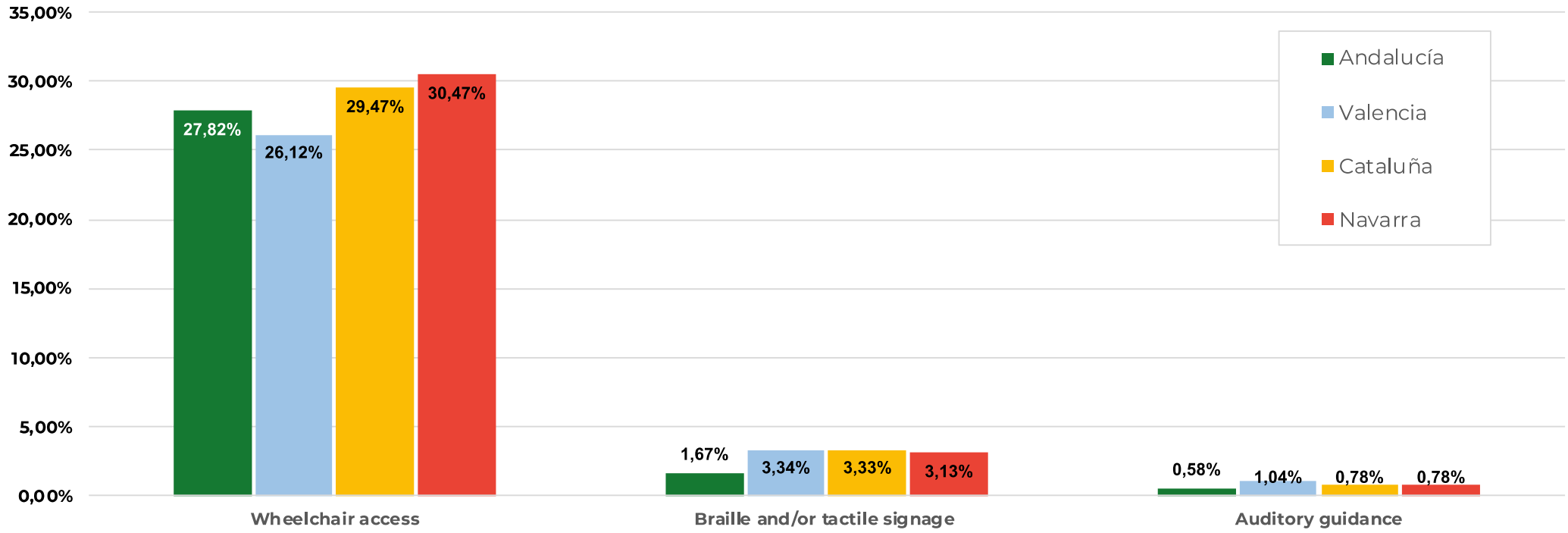
Policy oriented indicator using non-traditional/official data sources: Enabling cross-region comparisons, though with limitations due to reliance on web-based data



Source: ToT Lab based on data from Booking.com

Policy oriented indicator using non-traditional/official data sources: Enabling cross-region comparisons, though with limitations due to reliance on web-based data

Share of accommodation establishments with Accesibility Features (2024)



Source: ToT Lab based on data from Booking.com

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Future Ambition

- System to evolve into a shared framework
- Interest by many other regions expressed: observers
- Role of NECSTouR Tourism of Tomorrow Lab: future evolution
- D3Hub designing European Competence Center
- Alignment with UN Tourism and JRC EU Tourism Dashboard

Joseph Stiglitz:

“What we measure affects what we do and if we measure the wrong thing, we will do the wrong thing”.

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