

A NEW INDICATOR FRAMEWORK FOR AUSTRALIA'S VISITOR ECONOMY

*Measuring to manage and
shape the future of our
Visitor Economy*



Executive summary

Tourism is important beyond its economic value. Done well, it can bring many benefits to communities and the environment, but done poorly it can erode the very basis of its existence. Getting it right, is therefore critically important for all Australians.

The anticipated growth projections for the Visitor Economy bring considerable economic and socio-cultural opportunities, but also increasing social and environmental pressures – with some destinations becoming over crowded and available resources becoming scarce.

Current performance measures are narrowly focussed on the economic benefits and achieving a balance between supply and demand. As a result they have a tendency to measure past performance – limiting understanding and preventing the wider impacts for society and the environment to be understood. This limits the information available for assertive forward looking decision-making and policy action.

The current approaches to performance measurement need to change, to ensure what is being measured is fit for the future. Generating a new indicator framework for Australia's Visitor

Did you know?

That current tourism performance measures are primarily economic, reviewing past performance, with little prediction and largely ignoring other important industry and societal considerations.

Economy will build on the current suite of measures, allowing a broader range of issues to be considered, and help in identifying and directing the policy levers required to enact change to realise our full potential.

There are a growing number of examples globally where wide-reaching tourism indicators and holistic accounting frameworks have been developed with positive outcomes. Examples include the European Tourism Indicator System, Global Sustainable Tourism Dashboard, Global Destination Sustainability Index, and the United Nations Sustainable Development Goals as applied to tourism.

Whilst Australia has predominantly had an economic focus, there has been research and work undertaken to explore new indicators. There is also work in progress to expand the assessment focus. This includes a project by the Queensland Government to extend the Tourism Satellite Account to include environmental data and a project driven by the New South Wales Government to develop a Visitor Economy Index.

Drawing together a new indicator framework that is easy to use and understand, we can help inspire government and industry collaboration for a more sustainable and competitive visitor economy that benefits Australian communities.



Measuring to manage and shape the future of our Visitor Economy

The importance of performance measurement

Best practice planning and decision-making requires understandable, concise and accessible information.

For long-term strategy, this information can be presented as a range of indicators measuring different performance aspects, examining the interaction between supply and demand, and providing a signal for well informed, better targeted policy interventions.

However, to be effective as a policy tool (see Figure 1), the design and choice of indicators is important. Therefore, they need to:

- have a clear purpose aligned with the long-term strategic objectives;
- be sufficiently robust to enable performance to be measured and improved over time;
- encourage accountability through public reporting.

Having the right indicators and applying them in the right way **can then describe prevailing conditions, monitor progress toward key goals, identify areas of concern and inform suitable policy responses.**

A good example of this is the multi-party long-term Great Barrier Reef Sustainability Plan. The identification of the right indicators and regular report cards has led to planned changes in legislation and regulatory frameworks.

Applying these concepts to the Government's strategy for the Visitor Economy, it is critical that a broad range of activities are measured, with clear accountabilities so that appropriate and timely action can be taken.

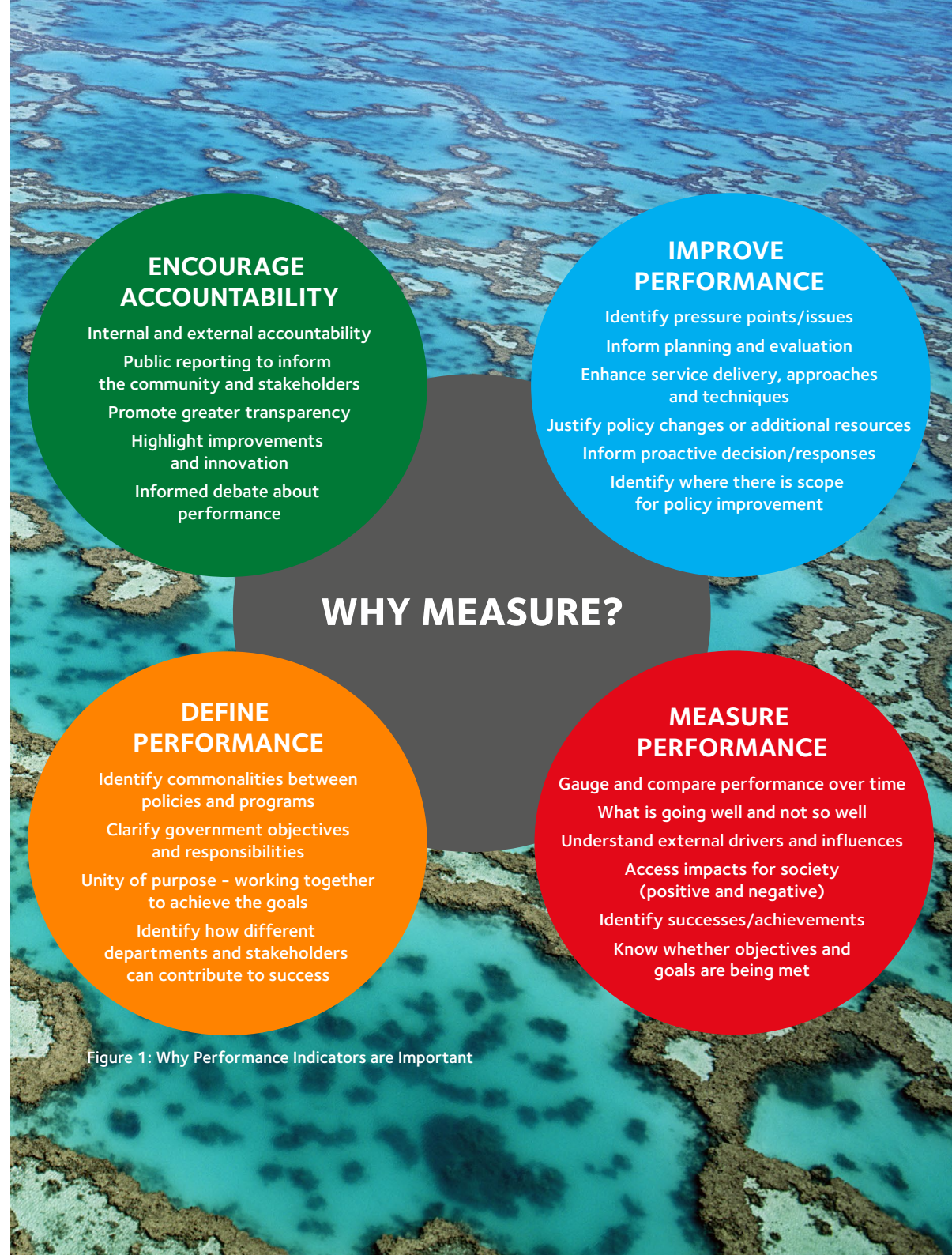


Figure 1: Why Performance Indicators are Important

A critique of the current approach

Current measures of tourism’s performance, including the targets set for the Tourism 2020 strategy, are largely volumetric in nature and lagging (focusing on past performance).

They also have a strong economic leaning and are predicated on a continuous growth scenario, without taking into account the consequences of that growth (Figure 2).

Risks of the Current Approach

1. **Relying almost exclusively on traditional economic indicators could create serious consequences for the broad-based sustainability of the tourism industry and its long term economic performance.** This includes profitless volume, suboptimal productivity, community backlash and excessive environmental footprints.
2. The heavy reliance on lagging indicators **reduces the opportunity for government and industry to respond pro-actively** to a rapidly changing external environment. For example the ongoing impacts brought about through digital disruption and the rise of the sharing economy.

While the current targets have been successful as they are specific, readily understood and have

INDICATOR	UNIT	TARGET 2020	Mar-19	% OF 2020 TARGET ACHIEVED
OVERNIGHT VISITOR EXPENDITURE				
All sectors	\$ billion	140.0	118.9	69.3
International expenditure	\$ billion	63.4	44.3	49.7
Domestic overnight expenditure	\$ billion	76.6	74.5	93.3
ACCOMMODATION				
Room supply*	Rooms ('000)	151.7	166.2	172.4
AVIATION				
Domestic air capacity	Available seat kilometres (billion)	94.2	87.7	72.2
International air capacity	Seats available (million)	24.8	27.0	126.2
LABOUR				
Tourism employment*	Persons employed ('000)	658.4	646.0	91.8

Note: * numbers are based on 2017-18 data

Figure 2: Tourism 2020 Performance Indicators

strong buy-in from State Governments and industry, they only demonstrate performance against a narrow set of growth targets largely ignoring other important industry and societal considerations. As a result, they do not provide a **comprehensive assessment of the performance of Australia’s Visitor Economy.**

Australia benefits significantly from a Visitor Economy that is managed well, generates jobs, investment and growth in communities throughout Australia. Therefore, a rethink of the current performance assessment approach in Australia is long overdue. The new ten year strategy provides the perfect opportunity to formulate a fresh and flexible performance measurement framework, that expands on current approaches and is fit-for-purpose and in line with international best practice.

This means that more work is needed to produce **leading indicators that can predict future performance**, to complement the wealth of existing lagging indicators. This could include measuring the exponential rise of digital technologies and the sharing economy which have rapidly transformed travel behaviours – something not detected with existing monitoring mechanisms.

It is important to ensure that these benefits are realised **whilst undesirable effects** on the natural, historic, cultural and social environments are reduced. Deeper insights into the health of the sector are at the core of questions around social license and ensuring the Visitor Economy improves the lives of Australians.

Did you know?

That hotels, restaurants and destinations are now basing their future decisions on insights from social media and google search analytics? [e.g. using ReviewPro]

A dynamic, forward-looking measurement approach

The world is changing rapidly and the pace of change looks set to accelerate, but is the Australian Visitor Economy ready for these changes?

Future strategies need to provide relevant and appropriate policy guidance for the Visitor Economy in the coming years.

Therefore, while straightforward indicators such as yield or market share are important to informing economic challenges, indicators should cover a much broader spectrum of activities, including:

- Political and socio-cultural change;
- Environmental challenges;
- Changing perceptions and expectations;
- New trends and shocks.

This approach requires a framework that captures the impact of key challenges, and is sufficiently adaptable to consider new trends (see Figure 3).

Whilst many of these issues are global in nature, Australia is not sheltered, with a changing world continuing to shape consumer choices, investment decisions, business operations, and competitiveness all of which are vital to the Visitor Economy.



Figure 3: Key Trends and Challenges Toward 2030



Closer to home, visitors and communities are becoming increasingly aware of the negative affects of tourism. Responsible practice is fast becoming an expectation. Issues such as overtourism are taking their toll on individual communities including Penguin Island, Byron Bay and Noosa.

Indicators can monitor the socio-cultural aspects of visitation to help manage destinations appropriately and to avoid community backlash. For example, research has been conducted in Australia to monitor resident sentiment.

A healthy Visitor Economy is dependent on a quality environment, cultural distinctiveness and social interaction, security and well-being. These qualities need to be protected and enhanced, with the industry used as a tool to drive regeneration and facilitate appropriate development and conservation while benefiting communities.

Understanding these requirements has seen Visit Flanders in Belgium reposition their strategic framework for tourism, basing it around a flourishing community and destination (Figure 4).



Figure 4: Visit Flanders – Travel to Tomorrow

Despite their importance, these broader public value benefits are generally poorly understood and do not form a part of tourism’s current performance measurement framework. **If not measured, these areas will not be managed, and the sector will not be prepared for the challenges ahead, both known and unknown.**

Did you know?

That companies, such as Lufthansa, now include carbon emissions as part of the CEOs KPIs?

“Flying shame” - is a growing anti-flying movement that has come from Europe and is a reaction to the large carbon footprint of air travel. Being a long-haul market, Australia is vulnerable to this changing behaviour from international travellers.

Principles of an indicators framework

Achieving fair and balanced reporting across a range of issues will be critical.

Economic contribution, prosperity and social and environmental integrity are all of critical importance. Therefore a relatively even distribution of indicators can help ensure **an optimum balance**. Consideration must also be given to the selection of indicators – too many indicators may result in overlapping coverage or contradictory information, leading to policy confusion.

Whilst this is a new way of thinking for Australia, it is not ground breaking globally. Suites of globally standardised indicators which reflect readily measurable performance criteria already exist, including the SO37120 – Sustainable Cities and Communities: Indicators for city services and quality of life. **Examples of broad-based indicator sets or frameworks** that are in use for tourism, include:

- Global Sustainable Tourism Dashboard (Case Study 1 - page 11)
- New Zealand Tourism Sustainability Commitment (Case Study 2 - page 11)
- European Tourism Indicator System (Case Study 3 - page 12)
- Global Destination Sustainability Index (Case Study 4 - page 12)
- United Nations Sustainable Development Goals – as applied to tourism (Case Study 5 - page 13)

Integration and alignment of performance information within and across Government agencies will assist in strengthening its value, and ensuring a common understanding about accountability and delivery of results. This can aid in the process of policy integration across departmental agencies.

The initial indicator framework would build on a core set of indicators **where data and information are already available or could be available in the short-term**. This enables the framework to be delivered quickly, whilst at the same time identifying work streams to address data gaps and indicators that need further development.



Principles for Performance Indicators

A robust approach to indicator selection is important to ensure they are useful and can inform change. Five key guiding principles to assist with indicator selection for a new indicator framework, are:

1. **Relevant** – reflect what the user is trying to achieve, not simply what is easy to measure
2. **Repeatable and timely** – produced regularly enough to track progress and timely to be of value
3. **Reliable** – produce data that is accurate for its intended use and able to be measured consistently
4. **Credible** – improve public services and be supported by research and stakeholders
5. **Well-defined and understandable** – unambiguous and easy to understand and use, comparable with past periods and providing a benchmark against which future performance can be compared

Credible performance reporting requires:

- Balanced accounting and fair interpretation, reporting regularly on both the positive and negative achievements;
- Credible information that focuses on the critical aspects of performance;
- Both forward and historical perspectives, with comparative information;
- Explanation of key risks and capacity considerations as well as other factors critical to performance;
- Consolidation of indicators into a consistent output report, so that no single issue dominates to assist with communicating the whole performance story;
- Appropriate interpretation that can be aided by report cards, traffic light systems and spider diagrams.

Applying an indicators framework to tourism strategies

Developing a broader framework that includes a balanced set of indicators is critical to transition the Visitor Economy toward a more competitive, inclusive and sustainable model - one that is future-proofed.

There are a wide range of successful examples and applications globally, along with guidance and direction developed by the UN World Tourism Organisation.

Several examples of more holistic accounting frameworks include:

- Gross Happiness Index in Bhutan;
- Social Progress Index in Costa Rica;
- Well-being framework and budget in New Zealand;
- National Performance Frameworks in Scotland and Wales.

Additionally, some countries, like **Canada**, have started to amend their Tourism Satellite Account (TSA) to include environmental data (e.g. carbon, water and waste).

Tourism agencies are actively seeking to catalyse new ways of 'doing tourism'. For example, the Faroe Islands in **Denmark** organise their tourism sector

Did you know?

The European Tourism Indicator System was successfully implemented in Sardinia, Italy. An evaluation found that the toolkit can be further improved by allowing it to be more adaptive to new pressures.

around a "Join the Preservolution" campaign and a four-pillar strategy that focuses on sustainability. Similarly, Visit Flanders (**Belgium**) and its Tourism to Tomorrow strategy builds around positive community impacts and presents measures of engagement and governance.

Such shifts in thinking, parallel innovative approaches to developing new measurement frameworks, that are built on different conceptualisations of the Visitor Economy ecosystem. Progressive countries, such as **Portugal**, drive new ways of measuring tourism using 'Big Data'. While big data is a wide reaching and diverse field, some of these innovations have already been trialled in Australia, including the [Tourism Tracer](#) in Tasmania.

Industry is already diversifying and broadening its approach to performance measurement, and as a result some governments are in 'catch up' mode. Examples of tourism companies that are leading the way include Air New Zealand, China Air and Intrepid Travel (Case Study 6 - page13).

As new strategies are being developed, new indicators are continually being introduced. Some recent examples include:

- **The United Nations World Tourism Organisation** is expanding the current range of tourism statistics to cover both economic and social dimensions. This will bridge the UN standards of the TSA with the System of Environmental Economic Accounting through their Measuring Sustainable Tourism Framework (Case study 7 - page14).
- **The South West Tourism Alliance (England)** modelled carbon impacts of different tourism policies to identify how to reduce sectoral emissions alongside growth in value. This resulted in targets to increase visitor expenditure while decreasing emissions (Case Study 8 - page 14).
- **The New South Wales Government** is using a mix of quantitative and qualitative metrics to establish three indices to track industry conditions, industry perceptions and the future industry outlook over time. The three indices will be used to create a composite Visitor Economy Index (Case Study 9 - page 15).

A tourism indicators framework needs to reflect the 'triple bottom line' of **People, Planet and Profit**, to transition decision-making to a more sustainable economic model for the future. As the external environment changes quickly, an indicators solution must be adaptable enough to bring in new data and new indicators as required.

A sound framework needs to be underpinned by both **lagging** and **leading indicators** (table 1).

- Lagging indicators are excellent at assessing past performance in relation to the strategy and its targets, but they offer little insight as to what the future holds in store.
- Leading indicators, are less precise but provide guidance on future trends and expectations, for example Tourism Research Australia's forecasts of visitor numbers and revenue by market.

	LAGGING INDICATOR	LEADING INDICATOR
Timeframe	Retrospective	Forward looking
Purpose	Performance	Planning and strategy
Data Source	Historical data	Often modelling based
Policy Response	Reactive and corrective	Proactive and preemptive
Examples	Visitor numbers, expenditure, employment, airline capacity, visitation to key attractions	Future arrivals, predicted contribution to GDP, forward bookings, sentiment-informed predictions

Table 1: Difference between lagging and leading indicators

Leading indicators in tourism still fall short of producing *predictive* information across a range of issues. Big Data analytics might offer different types of leading indicators, for example visitor or resident sentiment which has been found to be superior in predicting future consumer decisions compared with traditional forecasting.

A new performance measurement framework for future tourism strategies is proposed at Figure 5, which encompasses the integral triple bottom

line elements: *economic, environment and socio-cultural*. This complements the current spend and supply side targets.

The approach differentiates between leading and lagging indicators, recognising the need to utilise both for different purposes. The use of composite indicators that compile individual indicators into a single index or summary indicator are also recognised.

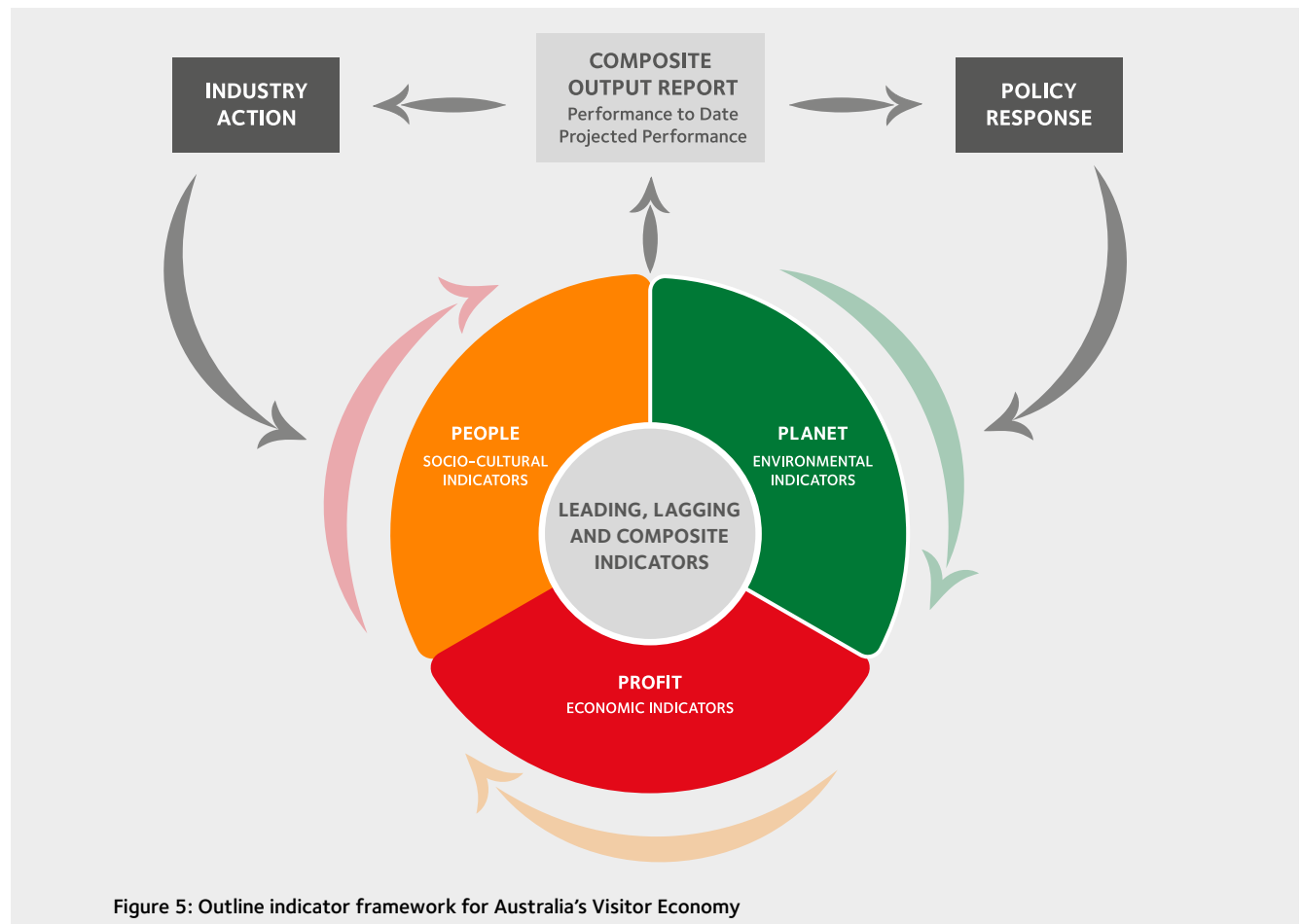


Figure 5: Outline indicator framework for Australia's Visitor Economy

This approach generates a comprehensive set of consistent indicators for understanding economic and environmental outcomes, while incorporating forecasts for the Visitor Economy at both national and state levels.

It also aligns with best practice globally, allowing us to understand the dynamic interaction of tourism with wider issues and the rest of the economy. In combination, these allow policy analysis to identify potential challenges for the sector and the economy in advance.

As a starting point, existing innovative and tested socio-cultural and environmental indicators could be adapted for Australia including the Ecological Footprint indicator for tourism in South West England (UK). As tourism interacts with multiple areas of the economy, broader measurement of indicators will need to link with other policy areas – such as transport, border control, climate change, employment and accessibility.

Engagement of key stakeholders is an important part of the process for developing and designing a more useful performance measurement framework and indicator suite. This aids in understanding the limitations and opportunities for the various audiences, and how they can be directly engaged in improving and using the outcomes.

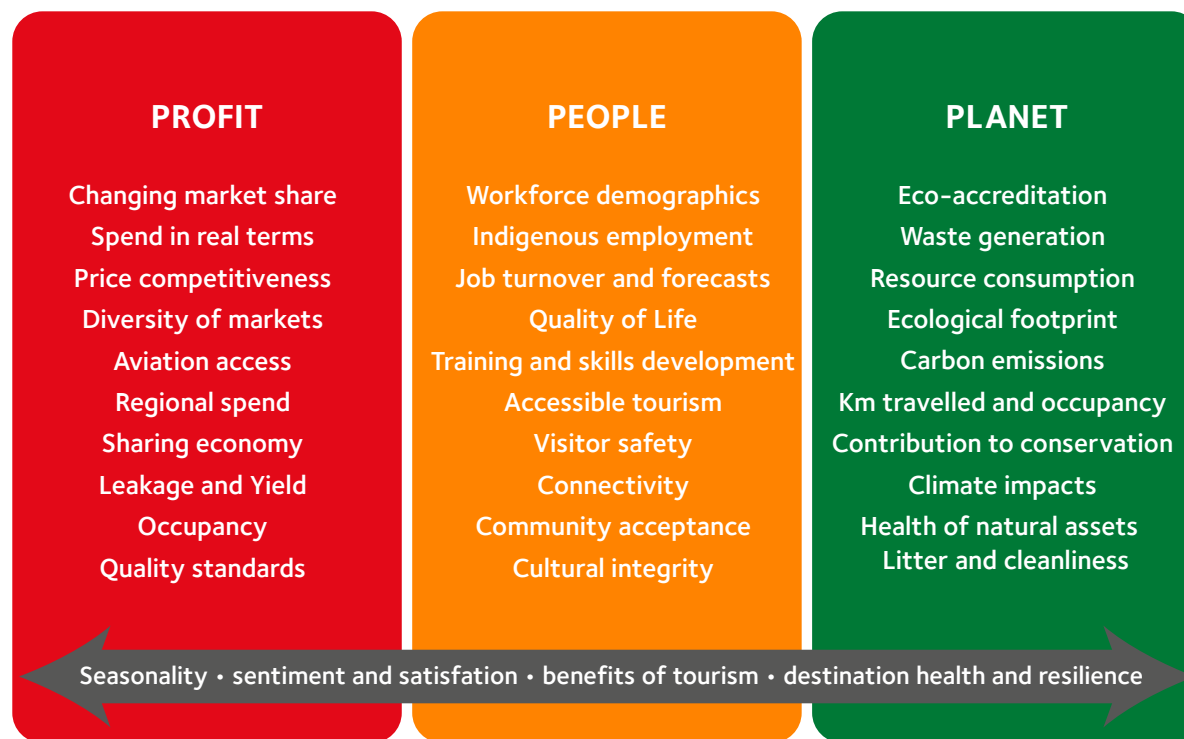


Figure 6: Potential indicators that can be explored for the framework

Subject to consultation and further investigation, Figure 6 illustrates a number of example indicators for tourism. Most of the indicators listed are lagging, so a suite of leading indicators would need to be developed.

Even with a suite of broad-based indicators, there is the risk that more emphasis is given to the economic indicators as these tend to be more easily measured and people are generally more familiar with the meaning of these particular measures. To avoid this, **it is critical that all indicators are monitored and reported collectively**. The presentation of the results will be important

and may involve an overall index or composite visualisation that incorporates all three areas at the aggregate level. However, policy can not be made on aggregate information alone, and the performance reporting of underlying indicators for each of the three pillars must remain.

For government to assist the tourism industry realise its full and sustainable potential, it is critical that a broad suite of indicators are used to monitor all dimensions of the industry's performance. It should consider a range of issues and how the Visitor Economy feeds into, or performs against national indicators in general.

What's Next?

A new comprehensive performance measurement framework is proposed that positions the Visitor Economy in the context of wider environmental, cultural, geopolitical and social concerns. This follows industry's lead in this area, and the framework would assist both government and industry.

The framework will assist future Tourism strategies to:

- meets its objectives;
- actively shape and co-create appropriate tourism markets and products;
- ensure policy responses are fit for the future;
- maintain competitiveness;
- understand market failures.

It is recommended that the framework (see Figure 5) should be further developed to align with the future Tourism Strategy.

It should also consider other relevant strategic priorities for Australia (illustrated in Figure 7), and the United Nations Sustainable Development Goals, which Australia has committed to as a Member State.

What is required?

There are two key stages of work as illustrated in Figure 8. The **first is the detail and design**, to review and identify robust indicators for the framework developed through a consultative process in partnership with stakeholders, including state governments, Commonwealth agencies and industry. This would build on work already done in Australia and extend international best practice, to ensure appropriate and complete coverage. Indicators will be identified in accordance with the principles described, covering the different aspects of the industry and against the three categories of People, Planet and Profit.

The **second stage is implementation**, to develop and deliver the working indicator framework, which would include collating and presenting the data. Although this will build on existing and readily available data, it is likely that adjustments will need to be made to existing processes for data capture, as well as setting up new indicators and data capture mechanisms. Interpretation and reporting, and training delivered to enable effective application and use will also be needed.

What does good look like?

A national performance measurement framework with the right balance of indicators is a critical component for creating, nurturing and evaluating tourism in order to achieve better long-term policies and economic growth that is inclusive, sustainable and innovation led. Therefore an appropriate and robust indicator framework that embraces the triple-bottom-line, and comprises both leading and lagging indicators is long overdue.

“You can’t manage what you don’t measure”

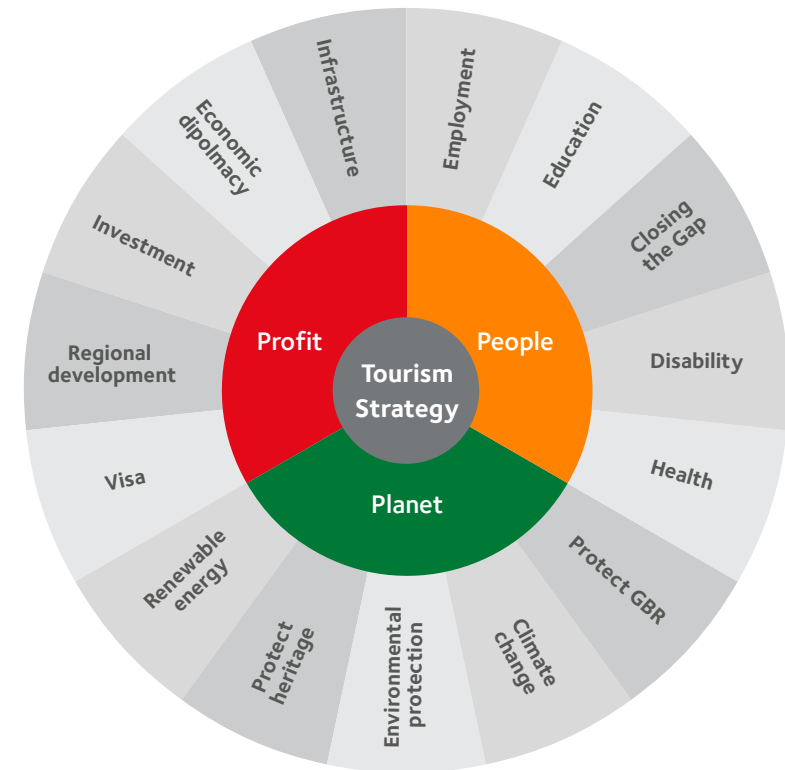


Figure 7: Alignment to Australian strategic priorities

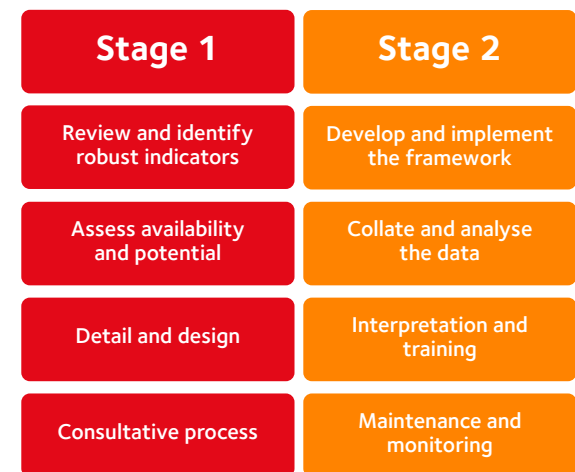


Figure 8: Stages to develop and implement a new indicator framework

Case Study 1

Global Sustainable Tourism Dashboard

tourismdashboard.org

Purpose:

To share data on tourism's contribution to progress along the Sustainable Development Goals and complement existing economic indicators. The audience is global decision makers related to tourism.

Metrics:

Poverty alleviation, Distribution, Carbon emissions, Gender equity and employment, World Heritage Areas, Safety.

Developer:

Griffith University and University of Surrey with support from WTTC, Amadeus and EarthCheck.

Success factors:

Since 2015, the Dashboard has consistently provided data on core challenges. It is the only tool of its kind globally to facilitate a deeper discussion about tourism impacts. It resonates also with regional decision makers and Governments (e.g. the Mekong Tourism Region, Mexican Government and ICIMOD Himalayas) who see the benefits of the tool in comprehensively measuring tourism. The Dashboard has also been referred to as the 'myth buster' as it reveals some unknown facts about tourism.



Case Study 2

The New Zealand Tourism Sustainability Commitment

sustainabletourism.nz

Purpose:

To see every New Zealand tourism business committed to sustainability by 2025 and develop a system to measure progress. The audience is all tourism businesses in New Zealand, as well as visitors who are reassured that the industry is 'doing their part'.

Metrics:

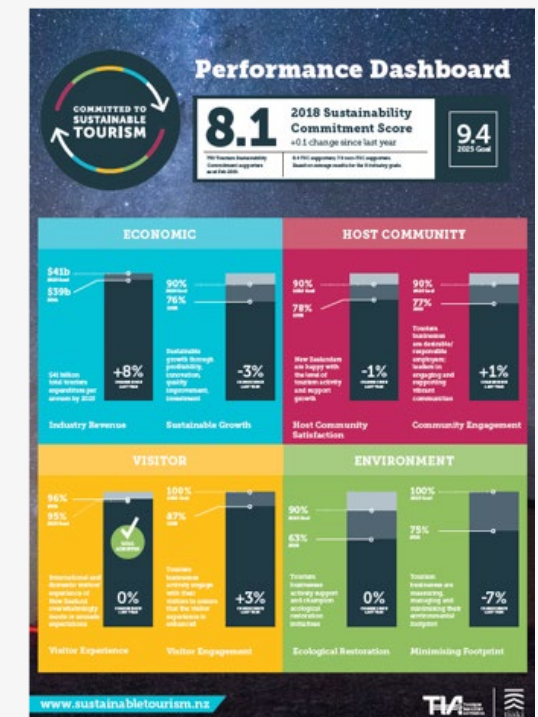
The framework covers all four dimensions of the quadruple bottom line. Across these, industry goals/targets are defined. Operators are required to report against 14 commitments (indicators), and these are reported on in an annual Dashboard. For indicator measures, see: sustainabletourism.nz/about-us/about-sustainable-tourism-commitment/targets/

Developer:

Industry-led by Tourism Industry Aotearoa.

Success factors:

The Commitment is owned by industry but complements Government strategy. It is purposefully bottom-up and collects data from 1200 businesses in NZ. The underlying idea is to increasingly step up efforts in measurement and reporting to arrive at a collective assessment of the overall success of the industry.



Case Study 3

European Commissions 'European Tourism Indicator System' (ETIS)

ec.europa.eu/growth/sectors/tourism/offer/sustainable/indicators_en

Purpose:

A European wide comparable system of indicators for the Sustainable Management of European Destinations. To help measure and monitor sustainability management processes and performances. Comprising a toolkit and guide to implementation, a final set of indicators were developed after two piloting phases.

Metrics:

There are 43 core indicators and a range of supplementary indicators. Balancing the need to be comprehensive, realistic and integrated. Indicators are organised into four categories: destination management; social and cultural impact; economic value; and environmental impact.

Success factors:

There were 60 destinations across Europe that tested the ETIS in the second pilot-testing phase in 2014. The process is led by the destination and is purposefully bottom-up with the destination collecting the data.

Section D: Environmental impact		
Criteria	Indicator reference	ETIS core indicators
D.1 Reducing transport footprint	D.1.1	Percentage of tourists and same-day visitors using different modes of transport to visit all the tourists and
	D.1.2	Percentage of tourists and same-day visitors using low-carbon mobility/public transport services to get around the destination
	D.1.3	Average travel time by tourists and same-day visitors from home to the destination
	D.1.4	Average carbon footprint of tourists and same-day visitors traveling from home to the destination
D.2 Climate change	D.2.1	Percentage of tourism enterprises involved in climate change mitigation schemes (such as CO ₂ offset, low energy systems etc.) and education, resources and actions
	D.2.2	Percentage of tourism accommodation and attraction infrastructure located in sustainable zones
D.3 Solid waste management	D.3.1	Waste production per tourist night compared to general population waste production per person day
	D.3.2	Percentage of tourism enterprises separating different types of waste
D.4 Sewage treatment	D.4.1	Percentage of toilet waste required per tourist consumed to treat waste required per person per year
	D.4.2	Percentage of sewage from the destination treated to at least secondary level prior to discharge
D.5 Water management	D.5.1	Water consumption per tourist night compared to general population water consumption per resident night
	D.5.2	Percentage of tourism enterprises taking actions to reduce water consumption
	D.5.3	Percentage of tourism enterprises using recycled water
D.6 Energy usage	D.6.1	Energy consumption per tourist night compared to general population energy consumption per household day
	D.6.2	Percentage of tourism enterprises that take actions to reduce energy consumption
D.7 Landscape and biodiversity protection	D.7.1	Percentage of annual amount of energy consumed from renewable sources (MWh) compared to overall energy consumption at destination level per year
	D.7.2	Percentage of local enterprises in the tourism sector actively supporting protection, conservation and management of local biodiversity and landscapes

Section A: Destination management		
Criteria	Indicator reference	ETIS core indicators
A.1 Sustainable tourism policy	A.1.1	Percentage of tourism enterprises established in the destination using a sustainable policy aligned to international sustainability-related standards
	A.1.2	Percentage of tourism enterprises that are certified with GRI water management or ISO 26000
A.2 Customer satisfaction	A.2.1	Percentage of repeat visitors within 3 years
	A.2.2	Percentage of repeat visitors within 3 years

Section B: Economic value		
Criteria	Indicator reference	ETIS core indicators
B.1 Tourism flow (volume and seasonality)	B.1.1	Number of same-day visitors per capita
	B.1.2	Relative contribution of tourism to the destination's economy (GDP)
	B.1.3	Daily spending per overnight tourist
	B.1.4	Daily spending per same-day visitor
B.2 Tourism enterprises performance	B.2.1	Number of jobs in tourism enterprises
	B.2.2	Occupancy rate in tourism accommodation per month and average for the year
B.3 Quantity and quality of employment	B.3.1	Percentage of jobs in tourism that are seasonal
	B.3.2	Percentage of jobs in tourism that are seasonal
B.4 Tourism supply chain	B.4.1	Percentage of jobs in tourism that are seasonal
	B.4.2	Percentage of jobs in tourism that are seasonal

Section C: Social and cultural impact		
Criteria	Indicator reference	ETIS core indicators
C.1 Community/cultural impact	C.1.1	Number of tourists per capita per day
	C.1.2	Percentage of repeat visitors who are satisfied with their visit (destination)
	C.1.3	Number of beds available in non-tourism accommodation establishments per 100 residents
	C.1.4	Number of hotel beds per 100 houses
C.2 Health and safety	C.2.1	Percentage of tourism enterprises that are certified with ISO 9001
	C.2.2	Percentage of tourism enterprises that are certified with ISO 14001
C.3 Gender equality	C.3.1	Percentage of tourism enterprises where the general manager position is held by a woman
	C.3.2	Percentage of tourism enterprises where the general manager position is held by a woman
C.4 Inclusion/accessibility	C.4.1	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information schemes
	C.4.2	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information schemes
	C.4.3	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information schemes
	C.4.4	Percentage of tourism enterprises that are accessible to people with disabilities and/or participating in accessibility information schemes
C.5 Protecting and enhancing heritage, culture, identity and assets	C.5.1	Percentage of repeat visitors within 3 years
	C.5.2	Percentage of repeat visitors within 3 years

Case Study 4

Global Destination Sustainability Index (GDS-Index)

gds-index.com

Purpose:

It is aimed at measuring, benchmarking and improving a destination's sustainability performance aligned to the 2030 Agenda. The audience is all those involved in meeting, event and business tourism destinations.

Metrics:

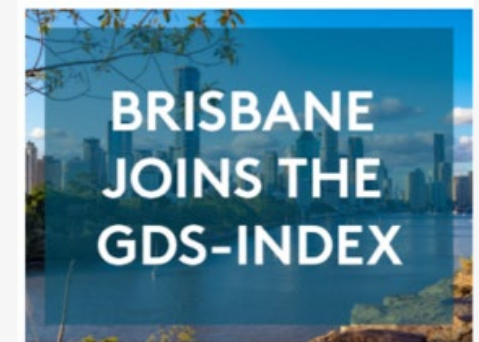
Benchmarking evaluates the destination's sustainability performance using 73 indicators across four main areas, namely Environmental performance, Social performance, Supplier performance, and Destination management performance.

Developer:

It is operated as a multi-stakeholder partnership founded and endorsed by IMEX, MCI, the International Congress and Convention Association (ICCA) and European Cities Marketing.

Success factors:

The GDS-Index has become a 'must' for cities who seek to position themselves as sought-after convention/event destinations. In particular, the ranking has attracted considerable (media) interest and stimulates greater effort amongst cities. The Index is built around ongoing improvement with a move towards more tourism-specific measures, in addition to city-specific ones.



17 JUL ANNOUNCEMENT:
BRISBANE JOINS THE GDS-INDEX
778 Views

The GDS-Index is delighted to announce that Brisbane has become the 50th city to join the GDS-Index. As such, the city will actively participate in the collaborative platform to: • Benchmark the...

[Read more](#)

Case Study 5

UNWTO Tourism for SDGs Platform (Sustainable Development Goals)

tourism4sdgs.org

Purpose:

A platform with a wide range of resources to help facilitate tourism to be a driver for realising the 17 Sustainable Development Goals (SDGs). The SDGs are a framework comprising 17 goals and 169 targets, to guide and measure contributions to sustainable development towards 2030.

The Australian Government is committed to the SDGs and submitted their first voluntary national review in 2018. The SDGs are used by government, civil society and the private sector as a framework for measuring progress. Tourism has the potential to contribute to all of the goals, directly or indirectly – and tourism has been included as targets in goals 8, 12 and 14.

Developer:

UNWTO

Metrics:

Set of 17 SDGs and 169 associated targets which aim to be people-centred, transformative, universal and integrated.



Case Study 6

Intrepid Travel

intrepidgroup.travel

Purpose:

One of very few tourism companies that release integrated reports that bring together financial and other performance. The 2018 full and transparent report aims to illustrate how Intrepid business creates value, both in the short-term and long-term. The report is targeted at a wide range of stakeholders, including employees, customers, communities, supply chain partners and others.

Metrics:

Reporting focuses on six capital inputs, and also connects business performance to the Sustainable Development Goals.

Success factors:

Intrepid now employs a Purpose Manager and has set targets for returning profit to sustainability initiatives. It is globally recognised as a leader, not at last because it is carbon neutral in its operations and has a high integrity with visited communities.



Case Study 7

UNWTO Statistical Framework for Measuring the Sustainability of Tourism

unwto.org/mst

Purpose:

With the support of the United Nations Statistics Division (UNSD), UNWTO has launched the initiative Towards a Statistical Framework for Measuring the Sustainability of Tourism (MST). The aim is to develop an international statistical framework for measuring tourism's role in sustainable development, including economic, environmental and social dimensions. The statistical framework from the MST will provide an integrated information base to better inform sustainable tourism, to facilitate dialogue between different sectors and encourage integrated, locally relevant decision-making.

Metrics:

The focus is coverage of economic and environmental statistics and some social statistics such as employment. A feature of the statistical framework will be the connections between the established accounting framework for tourism, TSA and accounts from the System of Environmental-Economic Accounting (SEEA) framework. In using an accounting basis for the statistical framework, the initiative seeks to harness the benefits from accounting approaches in ensuring internal coherence, the ability to understand data gaps and place different information in context, and the potential to derive indicators based on consistently defined economic and environmental information.



Case Study 8

Principles for Success - South West Tourism Alliance, UK

swtourismalliance.org.uk

Purpose:

South West Tourism in England developed a tool and modelled carbon impacts of different tourism policies across the region to identify how to reduce sectoral emissions alongside growth in value. This resulted in two core indicators and targets – to increase staying visitor expenditure alongside a target to decrease emissions as set out in their 'Principles for Success' document.

Metrics:

Ten indicators were set out, alongside an aim, data source, baseline (including year) and 2020 target. These comprise:

- Two headline core indicators for visitor expenditure and carbon emissions;
- Three contributory indicators for length of stay, energy consumed and km travelled;
- Five supplementary indicators for seasonality, employment, community acceptance, quality of the local destination environment, and bathing water quality.

Core Indicator	Aim	Source	Baseline (inc. year)	2020 Target
Visitor Expenditure	3% increase per year (5% including inflation) in staying visitor expenditure	UKTS/IPS	£4,622m (2008)	£8,300m
Carbon Emissions	18% decrease (tonnes CO ₂) by 2020	REAP Tourism	10m tonnes (2008)	8.2m tonnes
Contributory Indicators	Aim	Source	Baseline (inc. year)	2020 Target
Domestic visitor car km travelled to the region	15% decrease by 2020	UKTS	3,934m km (2008)	3,344m km
Energy consumption of commercial tourism accommodation	13% decrease by 2020 (GWh)	REAP Tourism	1,298 GWh (2008)	1,129 GWh
Length of stay	1 day increase in average length of stay by 2020	UKTS/IPS	4.33 nights (2008)	5.33 nights
Supplementary Indicators	Aim	Source	Baseline (inc. year)	2020 Target
Seasonality	Decrease the variance between peak and shoulder season visits by 45% ²¹ by 2020	UKTS	Total trips per month – average deviation 0.42 (2008)	0.23 average deviation
Employment	Increase the number of FTE jobs supported by tourism expenditure by 3%pa	Value of Tourism	198,457 FTE jobs (2008)	282,952 FTE jobs
Community acceptance	Maintain the proportion of residents who believe that overall "tourism is good for the area" by 2020	Community Attitudes Survey	96% residents in agreement (2006)	96% residents in agreement
Quality of local destination environment	5% increase in Local Environmental Quality (LEQ) rating for South West England	Keep Britain Tidy – Local Environmental Quality Survey	70% LEQ rating (2008/09)	75% LEQ rating
Bathing water quality	7.5% increase in proportion of SW bathing waters achieving 'Sufficient' or higher classification	DEFRA	89.5% of SW bathing waters (2009)	97% of SW bathing waters

²¹ Based on SW Monitoring and Evaluation Framework, KPMG (2005)

Case Study 9

New South Wales – Visitor Economy Index

industry.nsw.gov.au/___data/assets/pdf_file/0003/172092/Visitor-Economy-Industry-Action-Plan-2030.pdf

Purpose

To provide a more comprehensive richer story to determine the success of the NSW Visitor Economy. Moving beyond the focus on a single target (overnight expenditure).

Metrics

Use a mix of quantitative and qualitative metrics to determine success of the Visitor Economy. The metrics will be used to establish three indices to track 1) industry conditions, 2) industry perceptions and 3) the future industry outlook over time. The three indices will be used to create a composite Visitor Economy Index as depicted.

Audience

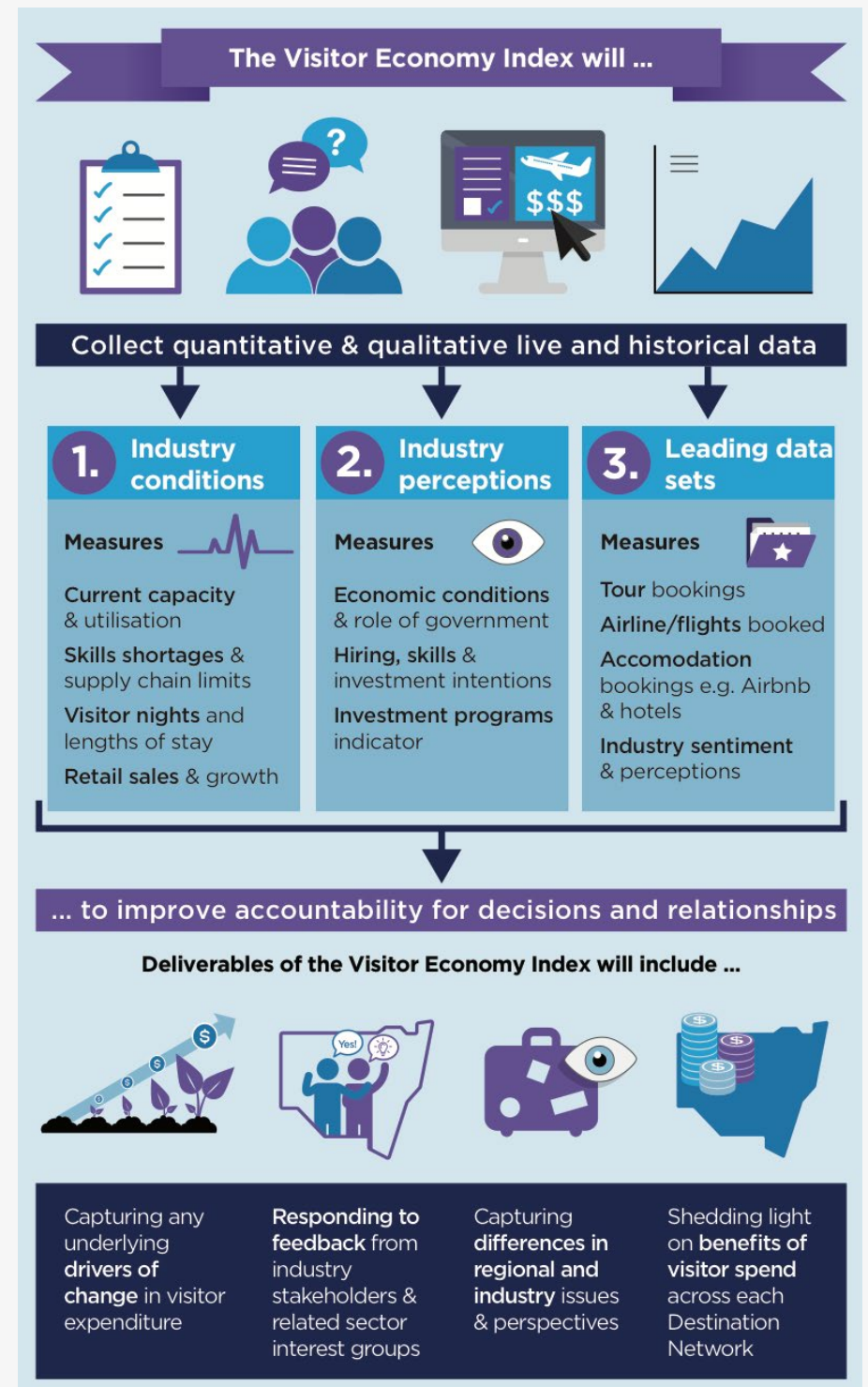
To enable the NSW Government to track industry conditions, industry perceptions and the future industry outlook over time. The intention is to provide quarterly reports to the Team NSW Tourism Taskforce based on the three indices. Each report will also be electronically published online for industry use to provide valuable insights to the sector on trends and growth.

Process

The NSW Government, working in partnership with Destination NSW is leading the work, which is in early stages of development. Led by a Team NSW Tourism Taskforce that includes key industry stakeholders to test the new index options. Following a consultation phase, the new indices will be implemented using staged pilot studies in each Destination Network.

The indices will also capture changes over time in aspects such as regional dispersal rates or other measures of visitor composition and behaviour. The sustainability of visitation can also be monitored and tracked by new index metrics.

The three indices will provide deeper understanding of business conditions and industry sentiment across regional areas. This will help the NSW Government respond to regional issues efficiently and identify opportunities to invest in the regional Visitor Economy.



GRIFFITH INSTITUTE FOR TOURISM

Griffith is Australia's leading tourism university, ranked number one in Australia and number two in the world in the most recent Shanghai Ranking's Global Ranking of Academic Subjects. It is one of only two universities in Australia to receive the maximum ranking assessing Griffith's tourism research as well above world standard from the Australian Research Council.

Griffith Institute for Tourism (GIFT) offers specialised consultancy to all levels of the tourism industry and maintains extensive partnerships. GIFT has delivered projects for global tourism leaders, Global Trade Policy Analysis Project network, Pacific Asia Travel Association, United Nations World Tourism Organisation and World Travel and Tourism Council. GIFT also works closely with Australian-based industry partners, such as Tourism Australia, Tourism and Events.

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