tyrolean sustainable tourism observatory.

Preliminary study

MCI The Entrepreneurial School

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ARA	Altstoff Recycling Austria
DMO	Destination Management Organization
GSTC	Global Sustainable Tourism Council
GSTC-DC	Global Sustainable Tourism Council – Destination Criteria
INSTO	UN Tourism International Network of Sustainable Tourism Observatories
MST	Statistical Framework for Measuring the Sustainability of Tourism
RTSA	Regional Tourism Satellite Account
SDGs	Sustainable Development Goal
STOST	Sustainable Tourism Observatory of South Tyrol
TTA	Tyrolean Tourism Act
TTB	Tyrol Tourism Board
TTR	Tirol Tourism Research
TYSTO	Tyrolean Sustainable Tourism Observatory
VTT	Federation of Tyrolean Tourism Associations

1   introduction

Tourism is the outstanding competence of the Alpine region of Tyrol and a very important factor for prosperity in Austria. With more than 12 million arrivals and over 48 million overnight stays in the tourism year 2022/2023, Tyrol is the strongest tourism region in the entire Alpine region as well as the nine Austrian provincial states, and a global benchmark for successful tourism development. Since the 1970s, the living space for more than 771.000 people and the recreational area for guests have been linked in a remarkable way through strategic concepts developed in participatory processes. Tyrol's long-standing experience in the careful management of its tourism development through strategies that take into account the quality of life of local people and the preservation of nature is a result of a participatory approach based on scientific expertise. The Tourism Department of MCI | The Entrepreneurial School® (MCI Tourism), a renowned institution well-known in Tyrol and Austria, as well as in the Alpine region and beyond, focuses on transferring academic knowledge into practical applications and has played a crucial role in the development of these strategies for decades.

The experiences of the past decades have been incorporated into "The Tirolean Way - perspectives for the responsible development of tourism", Tyrol's tourism strategy as of June 2021, which the Province of Tyrol developed along with MCI Tourism under active participation of multiple stakeholder groups. With this tourism strategy the measurement of responsible and sustainable development of the regional tourism sector, which was previously focused purely on economic indicators, has been expanded to include the social and ecological dimension. As of February 2022, this clear strategic orientation is also reflected in the Tyrolean Tourism Act, which provides for mandatory sustainability coordination and reporting in the Tyrolean Tourism Associations. Based on these existing initiatives, the framework concept of a "Multidimensional Sustainability Strategy for Tirolean Destinations" developed by MCI Tourism in collaboration with the Federation of Tyrolean Tourism Associations includes a monitoring system with nine fields of actions and indicators among all three dimensions of sustainability and serves as a blueprint for future sustainability monitoring and reporting.

The *Tyrolean Sustainable Tourism Observatory* (TYSTO) and thus its membership in the International Network of Sustainable Tourism Observatories of UN Tourism was proposed by MCI Tourism to the stakeholders involved as a logical consequence of these initiatives, and it was jointly agreed. With the establishment of TYSTO, these initiatives will be brought together under a common umbrella using existing structures, ensuring systematic sustainability monitoring and reporting in Tyrol with the objective to promote resilience and sustainability of the tourism sector and to create accessible information for targeted, evidence-based decisions. In accordance with "The Tirolean Way", TYSTO will carry out its responsibilities under the overarching premise that sustainable development is a process as well as a collective attitude which must be mainstreamed in the industry and throughout businesses to build up resilience and resistance in all three dimensions of sustainability. The long-term vision is to create a regenerative tourism, where net-positive activities are pursued instead of just "sustaining" what we have. It aims at providing information and support to the tourism sector in its transformation process towards a smart destination Tyrol.

2 tourism in austria

2.1 GENERAL CHARACTERISTICS

Tyrol is one of the nine federal states of the Republic of Austria, which is located in south-central Europe. Austria, a European Union member state since 1995, has historically served as a crucial North-South transit route for trans-European trade over the Alps due to its borders in the north with Germany and the Czech Republic, in the east with Slovakia and Hungary, to the south with Italy and Slovenia as well as in the west with Liechtenstein and Switzerland.[1]

Figure 1: Austria within Europe
Source: VectorStock. Map of Europe with highlighted Austria vector image. Image ID 18695188. https://www.vectorstock.com/royalty-free-vector/map-of-europe-with-highlighted-austria-vector-18695188.

Despite its small size and population, Austria is amongst the 15 most visited countries worldwide. Offering a wide range of touristic products, guests appreciate the Alpine regions with its beautiful lakes and rivers with drinking water quality, as well as lively cities, a long history of cultural heritage, and culinary delights. The small-structured infrastructure with many family-run businesses is one of the core competencies of Austrian hospitality. Tourism plays an important role for Austria's economy. This can be measured both by its contribution to the GDP (7.6%) in 2019 and by domestic and foreign guests' spending of nearly 38 billion euros in 2019 and 36 billion euros in 2022. This creates a direct and indirect added value of 30 billion euros in 2019 and 28 billion euros in 2022. Tourism also contributes a total full-time employment rate (direct and indirect) of 8.3% in 2019 and 7.8 % in 2022.[2]

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[1] Statistik Austria. Österreich: Zahlen Daten Fakten. Wien 2023. p. 8-9. https://www.statistik.at/fileadmin/user_upload/OZDF-DE-2022-23.pdf.
[2] Federal Ministry of Labour and Economy. Tourism in Austria. Facts and Figures. June 2023, p. 1.

In 2019, 46 million guests made 153 million overnights, which marks a historic record. While the COVID-19 pandemic had a severe impact on the Austrian tourism industry (mainly during the winter), the industry recovered in 2022 reaching 40 million guests and 137 million overnights. The main three source markets Germany, Austria and the Netherlands generate around 75 % of all overnights. Guests stay for 3.4 days on average (2022). Tyrol is the most visited Austrian federal state followed by Salzburg and Vienna.[3]

Austria traditionally has two main seasons. The summer season statistically runs from May to October, the winter season from November to April. Peaks are reached in August and February. While historically tourism in the Alps started off with the summer season only, the invention of skiing also brought more guests to alpine destinations like Austria during the winter season. Over the past years, the winter season has thus gained more importance. Before the COVID-19 pandemic, overnight stays between summer and winter were nearly equal (79.0 million in summer vs. 72.9 million in winter). During the winter season 2020/2021 accommodation facilities remained closed for a total of almost half a year (January to mid-May, mid-November to mid-December). The winter season 2021/2022 generated again 53 million overnight stays, while during summer 2022 78 million overnights were recorded. Austria's goals is to spread the season and push the low season months in order to become a year-round destination and offer all-year employment for staff.[4]

2.2 STRUCTURE OF TOURISM IN AUSTRIA

Austria is a Federal Republic with a parliamentary democracy and has nine federal provinces. The legislative and executive competencies for tourism affairs lie within those nine federal states. With tourism being a crosscutting sector, European and federal laws also apply. The structure of tourism politics thus follows a federalist model:

- At the national level, the Federal Ministry of Labour and Economy is responsible for tourism policy with a State Secretary for Tourism.
- At the federal province level, each province has its own tourism strategy and tourism organisation.
- At the regional level, municipalities or local tourist offices are responsible for the regional marketing and destinations strategies, provide the necessary touristic infrastructure, coordinate the touristic product and take care of guests while on holiday.

All three levels cooperate with each other for a continuously successful tourism development. In 2019, the Federal Ministry responsible for Tourism published a new national tourism strategy, the "Plan T - Master Plan for Tourism". It lays down guidelines for sustainable development of tourism and serves as a base for political decisions at all levels. Sustainability in all its dimensions and a culture of cooperation are central considerations to achieve a new quality of tourism policy. The "Plan T" is complemented by action plans with measures and activities. [5]

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[3] Federal Ministry of Labour and Economy. Tourism in Austria, p. 3-4.
[4] Ibid, p. 5.
[5] Ibid, p. 6-7.
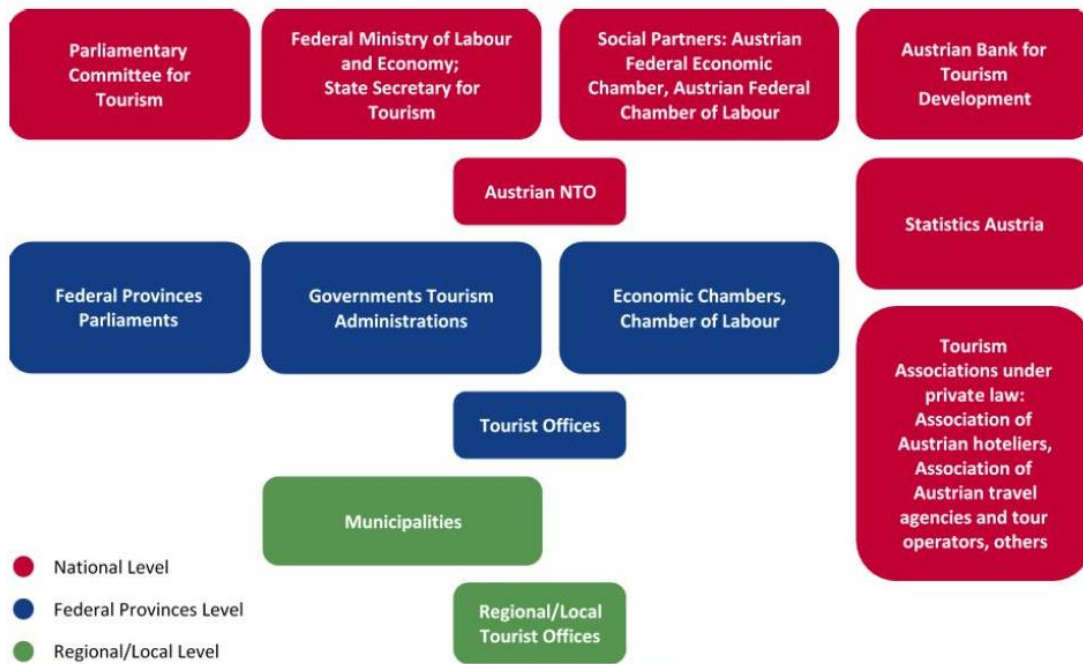
Figure 2: Tourism Organisation and Governance in Austria. Photo: BMAW.
Source: Federal Ministry for Labour and Economy. Tourism in Austria, p. 6.

3   destination profile tyrol

The following chapter provides a general overview of Tyrol as a province of Austria and the specific structure of Tyrolean tourism.

3.1   GENERAL CHARACTERISTICS

The province of Tyrol is home to 771.304 people (2023) and covers an area of 12.648,42 km² - which makes it the third-largest of the nine Austrian federal states - but only about 12% of this area is permanent settlement area.[6] A total of 87 designated protected areas cover 3,413 km² or 27% of the region.[7] The federal state is bordering the Austrian provinces of Vorarlberg in the West and Salzburg in the East. Furthermore, Tyrol shares a common border with Germany in the North, Italy in the South as well as Switzerland in the West.[8]
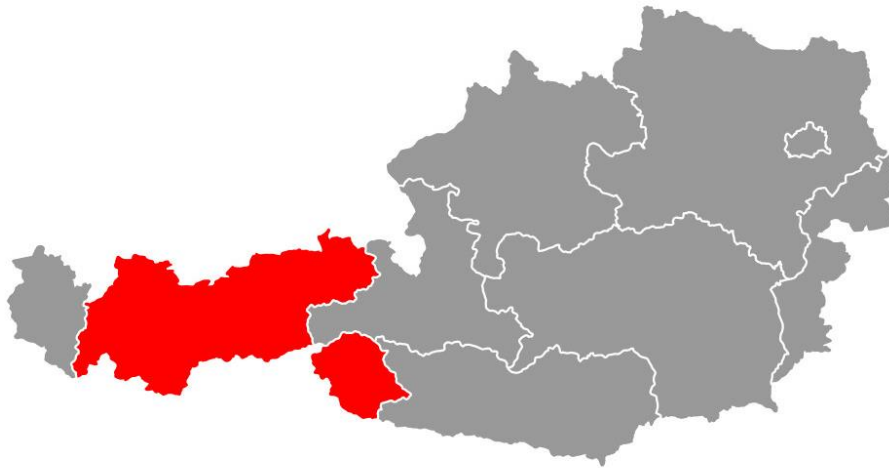
Figure 3: Province of Tyrol in Austria
Source: VectorStock. Austria of Tyrol map symbol shape travel web flat vector image. Image ID 51263905. https://www.vectorstock.com/royalty-free-vector/austria-of-tyrol-map-symbol-shape-travel-web-flat-vector-51263905.

Tyrol is known worldwide for its majestic peaks with 573 summits over 3,000 meters above sea level[9], crystal-clear mountain lakes and winter sports resorts such as Kitzbühel, Ischgl, Sölden or St. Anton located within its borders. It is divided into nine political districts and 277 municipalities.[10] The capital city of Innsbruck is the fifth-largest city in Austria and lies in the middle of the province[11].It has become an internationally renowned alpine-urban sports destination. The Winter Olympic Games were

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[6] Statistik Austria. Österreich, p. 9, 134; Landesstatistik Tirol. Tirol in Zahlen 2023, p.2. https://www.tirol.gv.at/fileadmin/themen/statistik-budget/statistik/downloads/Folder/stat-fold23.pdf.
[7] Land Tirol. Schutzgebiete in Tirol – Welche Schutzgebiete gibt es in Tirol? https://www.tiroler-schutzgebiete.at/faq/.
[8] Statistik Austria. Österreich, p. 9.
[9] Ibid, p. 134.
[10] Ibid.
[11] Ibid, p. 12-13.

held in Innsbruck twice in 1964 and 1976 as well as the Winter Paralympic Games in 1984 and the Youth Olympic Games in 2012.[12]

3.2   TOURISM SECTOR: CHALLENGES, STRATEGIES AND VISION

The Tourism sector is of immense economic importance for Tyrol. With 12,1 million arrivals and 48,5 million overnight stays in the tourism year 2022/23 (November 2022-October 2023)[13], Tyrol is the strongest tourism region in the entire Alpine region.

3.2.1   Tourism Awareness

Tourism awareness and the general attitude towards tourism among Tyroleans were the main area of interest of a study conducted by MCI Tourism in 2019. The individual Tyrolean municipalities were categorized according to their tourism intensity and divided into "high", "moderate" and "low" tourism intensity. The results of the study provided important insights that were incorporated into the tourism strategy "The Tirolean Way".[14]

The study revealed that the relevance of tourism in Tyrol, both in terms of economic benefits and as a factor that prevents depopulation of the valleys, is rated as very high overall. Respondents also agreed that without tourism, important facilities and infrastructure measures such as swimming pools, cable cars and public transport would not exist. Additionally, the importance of tourism as a sector that offers attractive employment opportunities is rated as very high by the respondents.[15]

The overall attitude towards tourism and guests is positive. However, regional differences are evident. In areas with high tourism intensity, residents generally view tourism more favorably and experience less disturbance from tourists. In regions with lower tourism intensity, there is a decline in the perceived positive contribution of tourism to quality of life, with 15% of Tyroleans feeling "disturbed by tourists in everyday life".[16]

With 73% of respondents agreeing with the statement that traffic caused by guests has a negative impact on their quality of life, the study revealed that guest traffic is viewed particularly critical in Tyrol. Almost three quarters of respondents in all regions stated that the number of annual guests should remain the same, 18% would like to see fewer guests in Tyrol, only 8% would like to see more guests. With regard to the further development of tourism in Tyrol, respondents placed particular emphasis on nature conservation, environmental protection and sustainability.[17]

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[12] Olympiastadt Innsbruck. Aufbruch in die Moderne. https://www.olympiastadt.at/index.php?pageID=7&lang=de; International Paralympic Committee. Innsbruck 1984 Paralympic Winter Games. https://www.paralympic.org/innsbruck-1984.
[13] Tirol Tourism Research. Tourismusjahr 2022/2023. https://www.ttr.tirol/statistik/tiroler-statistik/tourismusjahr-202223.
[14] Siller, H. & Leitner, T. Kernergebnisse. Tourismusbewusstsein in Tirol. MCI Tourismus, 2019, p. 3. https://www.ttr.tirol/sites/default/files/2020-01/Kurzfassung_Kernergebnisse%20Tourismusbewusstsein%20Tirol_TTR_20200128.pdf.
[15] Ibid, p. 3-4.
[16] Ibid, p. 4-5.
[17] Ibid, p. 6-8.
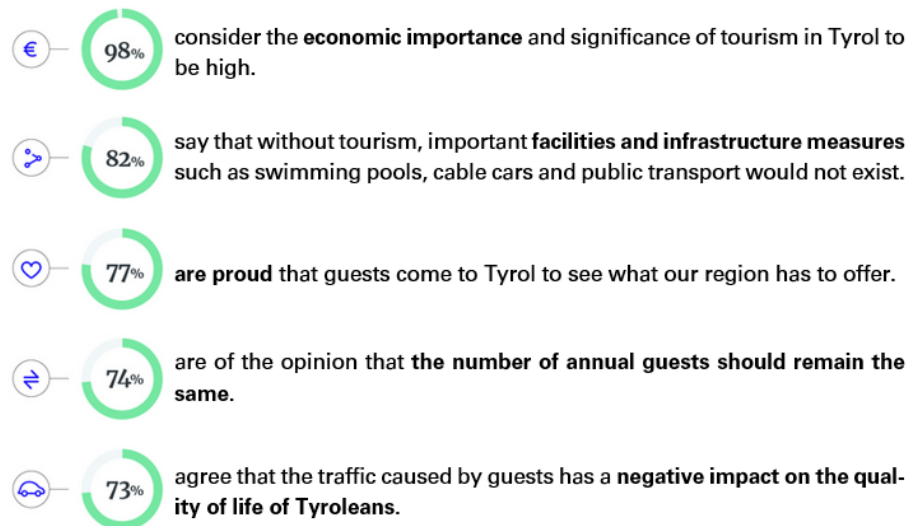
Figure 4: Tourism awareness in Tyrol
Source: Tirol Tourism Research. Tourismusbewusstsein in Tirol. Was denken die Einheimischen über den Tiroler Tourismus? (2018-2019). https://www.ttr.tirol/tourismusforschung/forschungsprojekte/abgeschlossene-projekte/tourismusbewusstsein-tirol. Translation by the authors.

3.2.2 Economic Relevance

The latest Regional Tourism Satellite Account (RTSA, as of 2021, recalculation for 2018) provides information on the overall economic importance of tourism in Tyrol in monetary terms.[18] The direct value added of tourism in Tyrol amounted to 14.3% or EUR 5 billion. Direct and indirect value added amounted to 16.9% or EUR 5.9 billion.[19]
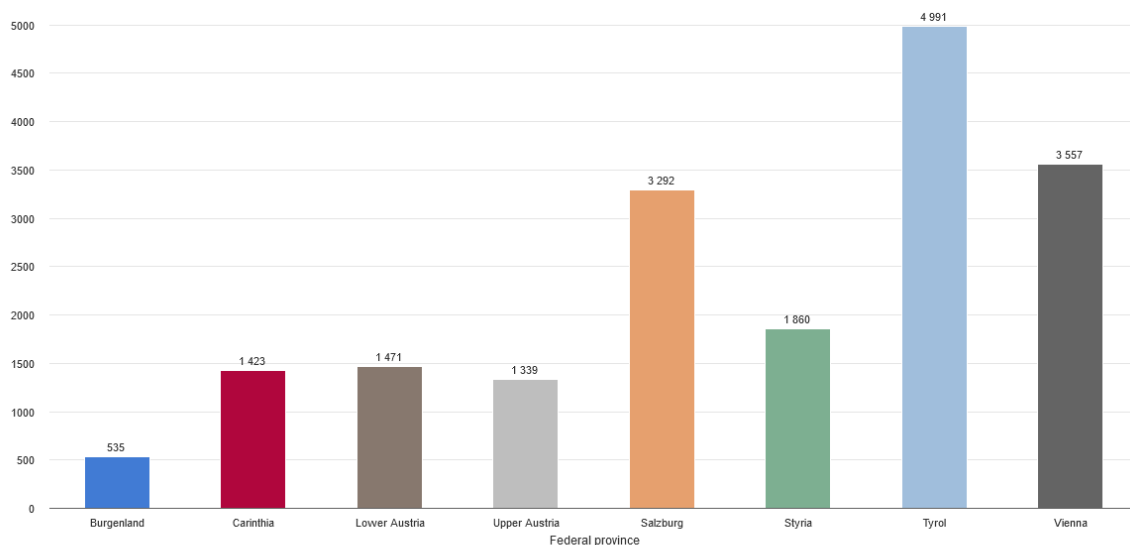
S: STATISTICS AUSTRIA, Regional tourism satellite accounts, WIFO, based on "Recommended Methodological Framework (RMF) 2008". Compiled on 11 November 2021. – Rounding errors were not adjusted. – Values represent effects of tourism in the respective federal province on the federal province itself.

Figure 5: Direct value added of Tourism in million Euro in eight federal provinces 2018.
Source: Statistik Austria. Regional tourism satellite accounts).

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[18] Statistik Austria. Regional tourism satellite accounts (2023). https://www.statistik.at/en/statistics/tourism-and-transport/tourism/tourism-satellite-accounts/regional-tourism-satellite-accounts.
[19] Statistik Austria. Regional tourism satellite accounts – Table: Regional economic importance of tourism in eight federal states 2018. https://www.statistik.at/fileadmin/pages/73/regional_economic_importance_in_federal_states2018.ods.

According to the RTSA, EUR 6.9 billion were generated from overnight tourism in Tyrol and EUR 1.4 billion from day tourists – amounting to approximately EUR 8.3 billion in revenue in 2018.[20]
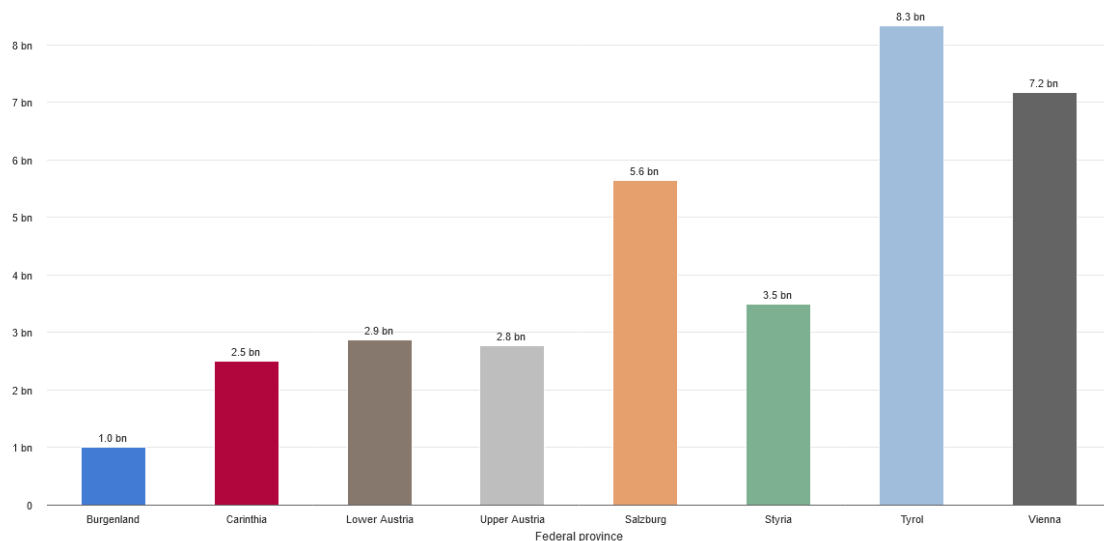
S: STATISTICS AUSTRIA, Regional tourism satellite accounts, WIFO, based on "Recommended Methodological Framework (RMF) 2008". Compiled on 11 November 2021. – Rounding errors were not adjusted.

Figure 6: Total expenditures of holiday and business travelers (including visiting of friends and relatives) in Euro in eight federal provinces 2018.
Source: Statistik Austria. Regional tourism satellite accounts.

Tyrol's leading role in comparison with the other federal states is also evident in terms of direct and indirect employment effects: tourism in Tyrol accounts for the largest share of total employment, at 13.8% and 16.3% respectively.[21]

RTSAs have so far only been collected at irregular intervals in Austria and were available for eight federal states for the first time for the reporting year 2018.[22] While the RTSA gives an insight into the economic importance of tourism in Tyrol, it only does so in retrospective for the "pre-COVID" year 2018. Furthermore, the "Tourism Satellite Account: Recommended Methodological Framework 2008" states that "[…] the impact of tourism on the economy is not fully reflected in the Tourism Satellite Account […]"[23] as it "[…] does not include any measurement of the indirect and induced effects of tourist consumption on the economic system as a whole"[24] while "The overall economic impacts of tourism on the economy are a combination of direct, indirect and induced effects […]"[25].

Other indicators that provide insights into the economic importance of tourism in Tyrol using non-monetary values are, however, collected on a regular basis. The tourism year 2022/2023 (November 2022 to October 2023) concluded with 48.5 million overnight stays and 12.1 million guest arrivals, with the average length of stay being four days. Although Tyrol is still slightly below the pre-COVID-

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[20] Statistik Austria. Regional tourism satellite accounts.
[21] Statistik Austria, WIFO. Tourismus als regionaler Wirtschaftsfaktor. Ergebnisse der regionalen Tourismus-Satellitenkonten für das Berichtsjahr 2018, p. 8. https://www.ttr.tirol/sites/default/files/2021-11/2021_Factsheets_Tourismus%20als%20regionaler%20Wirtschaftsfaktor.pdf.
[22] Statistik Austria. Regional tourism satellite accounts.
[23] United Nations, Department of Economic and Social Affairs. Tourism Satellite Account: Recommended Methodological Framework 2008. ST/ESA/STAT/SER.F/80/Rev.1 (2010), p. 3. https://unstats.un.org/unsd/publication/seriesf/seriesf_80rev1e.pdf.
[24] United Nations. Tourism Satellite Account, p. 3.
[25] Ibid, p. 102.

19 figures of 2018/2019 with -2.5% in arrivals and -2.4% in overnight stays, it is also a significant improvement on the previous year with an increase of 15.4% in arrivals and 11.8% in overnight stays.[26] Tyrol has suffered from the COVID-19 pandemic mainly during the winter seasons, especially the season of 2020/21 where all tourist accommodation remained closed. Since then, numbers have steadily increased again, as the following chart shows.
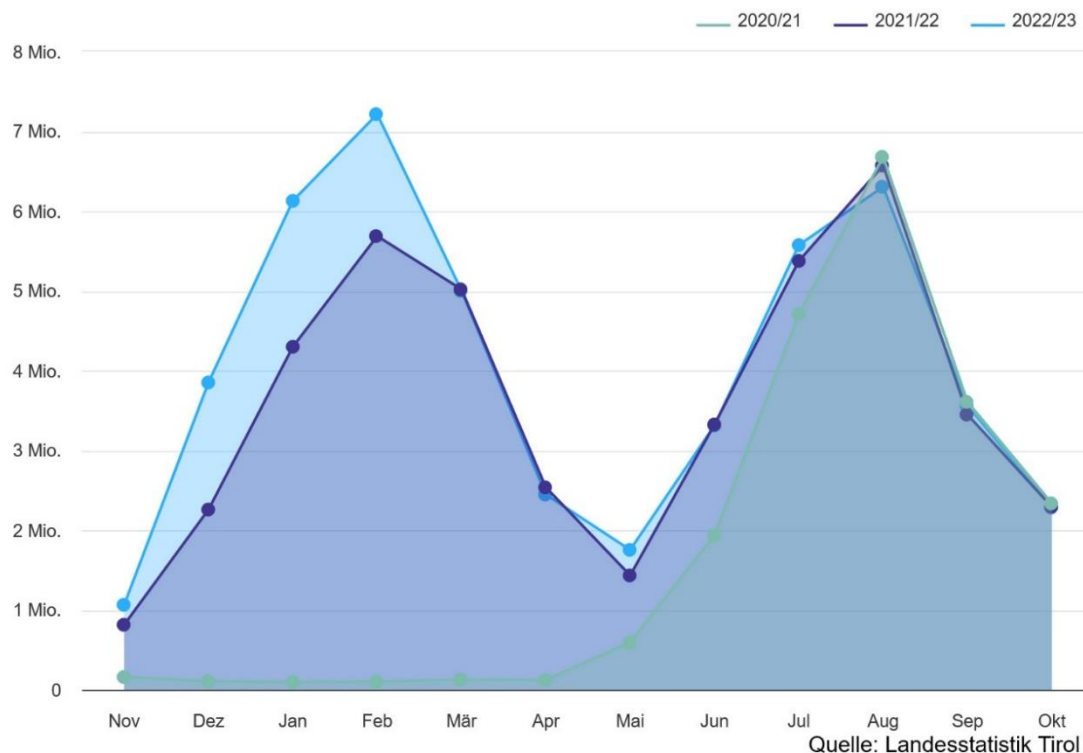
Figure 7: Comparison of tourism year 2022/23 to 2020/2021 and 2021/22.
Source: Tirol Tourism Research. Tourismusjahr 2022/2023.

Germany (54% of total overnight stays), the Netherlands (11%), Austria (8%), Switzerland (5%) and Belgium (3%) were the most important source markets in the tourism year 2022/23 for Tyrol.[27] Taking all EU countries together, 95.4% of overnights are generated from markets within the EU and only 4.6% from overseas markets with the US and Israel being the strongest ones amongst them.[28]

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[26] Tirol Tourism Research. Tourismusjahr 2022/2023.
[27] Tirol Werbung. Zahlen und Fakten zum Tiroler Tourismus. Das Tourismusjahr 2022/23. https://www.tirolwerbung.at/tiroler-tourismus/zahlen-und-fakten-zum-tiroler-tourismus.
[28] Tirol Tourism Research. Herkunftsmärkte im Tiroler Tourismus. https://www.ttr.tirol/maerkte-und-themen/herkunftsmaerkte-im-tiroler-tourismus.
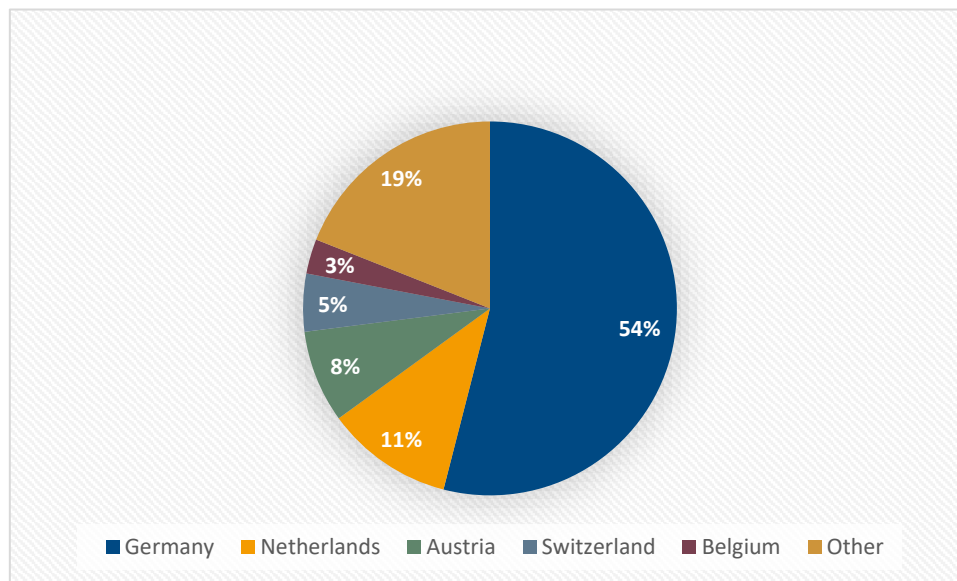
Figure 8: Primary source markets, tourism year 2022/2023

Source: Own illustration, data taken from Tirol Werbung. Zahlen und Fakten zum Tiroler Tourismus.

53% of guests come to Tyrol during the winter season (November to April) and 47% in summer (May to October) and stay on average 4,5 days and 3,6 days respectively. Guests also spend more during winter than during summer. While they mainly come for skiing (76%) and winter hiking (43%) during the winter, the main activities in summer are hiking (90%), swimming (45%) and biking (30%). Compared to other alpine competitors, Tyrol has much more overnights during the winter season, and around the same number of overnights as South Tyrol during the summer season.[29]

A total of 328,000 beds are registered in winter, and slightly less in summer (325,000) in around 21.430 accommodation businesses. In total 50,000 people are employed in the tourism industry. The whole industry is rather small-structured and mainly characterized by many family-run businesses. 87% of all Austrian businesses in accommodation and gastronomy have less than 10 employees.[30]

3.2.3   Regional Tourism Strategy: "The Tirolean Way"

The economic success and pioneering role of the Tyrolean tourism are the result of decades of strategic management and continuous development through a colloborative approach. The opportunities offered by tourism, along with the potential negative effects due to the industry's interaction with other economic sectors, society and the environment, were recognized early on and corresponding measures were taken. The Tyrolean Tourism Act of 1911 and its amendments, particularly that of 1932, can be mentioned as the earliest regulatory actions. In the reconstruction phase after World War II, tourism concepts and guiding principles gained importance as planning instruments, which is reflected in the Tyrolean Tourism Concepts I and II of 1972 and 1982 respectively. This development towards prioritising quality of life over quantitative growth

[29] Tirol Tourism Research. Statistiken und Infos zum Tiroler Tourismus. Alles auf einen Blick. https://www.ttr.tirol/statistik.
[30] Ibid.

culminated in the concepts named "The Tirolean Way" starting from 1991 as comprehensive tourism development strategies that go beyond mere marketing concepts.[31]
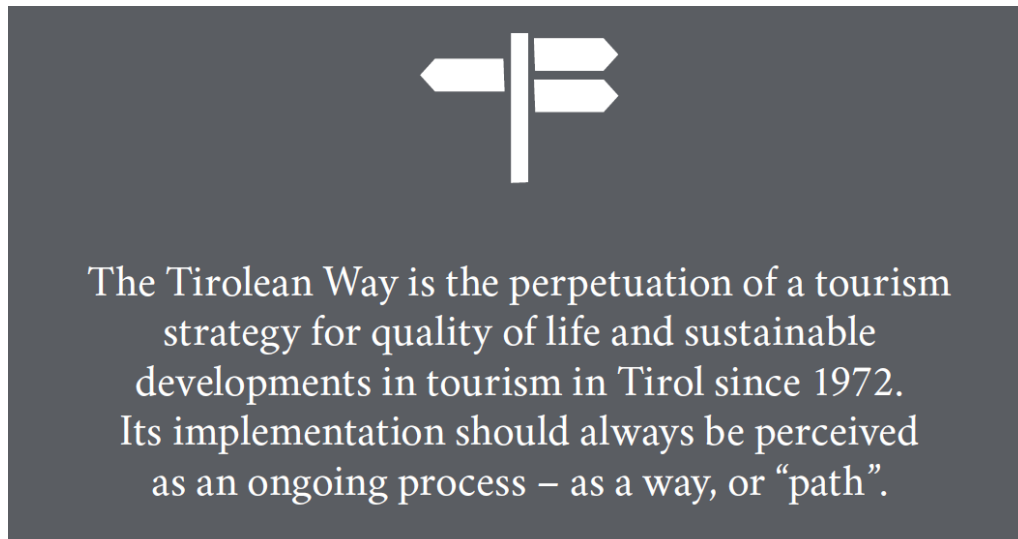
Figure 9: Opening statement of "The Tirolean Way"
Source: Province of Tirol et al. (Ed.). The Tirolean Way - perspectives for the responsible development of tourism (2021), p. 2.
https://www.tirolwerbung.at/_Resources/Persistent/c/8/d/0/c8d002197b490a6579157ec4807c447b161dabe9/Tir-oler%20Weg%20Brosch%C3%BCre%20Englisch.pdf.

3.2.3.1   Tyrolean tourism identity

The latest version, "The Tirolean Way - Perspectives for the responsible development of tourism", was launched in June 2021 after the COVID-19 pandemic confronted the Tyrolean tourism industry with unprecedented challenges - but also provided an opportunity to reevaluate developments and to outline the way forward. In addition to quality of life, the main focus is on sustainability in all three dimensions - ecological, economic and social - and on **monitoring sustainability**.[32] This thematic focus corresponds with the results from the tourism awarness study among the local population (see chapter 2.2.1).

Like its predecessors, this strategy has been developed in a collaborative effort by the relevant stakeholders and experts, including MCI Tourism as strategic lead, the regional tourism board Tirol Werbung, the Province of Tyrol, the Tyrolean Chamber of Commerce, the Federation of Tyrolean tourism assocations (Verband der Tiroler Tourismusverbände VTT), Standortagentur Tirol and Tirol

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[31] Siller, H., & Leitner, T. Der Tiroler Weg – Leitender Gedanke und strategische Orientierung für den Tiroler Tourismus. In: Siller, H., & Zehrer, A. (Ed.): Entrepreneurship und Tourismus. Unternehmerisches Denken und Erfolgskonzepte aus der Praxis (2nd ed.). Linde, p. 327-334.
[32] Province of Tirol et al. (Ed.). The Tirolean Way, p. 3-7.

Tourism Board.[33] Based on the overarching aim of reconciling sustainability and qualitative growth with the quality of life of the local population and the aspiration to remain a competence leader and Alpine model region, the self-image of Tyrolean tourism was reformulated. In line with the established approach of participatory processes in strategy development, stakeholders from tourism and other sectors of the economy were actively involved through surveys and discussions. As a result, three core elements of the Tyrolean tourism identity were identified[34]:
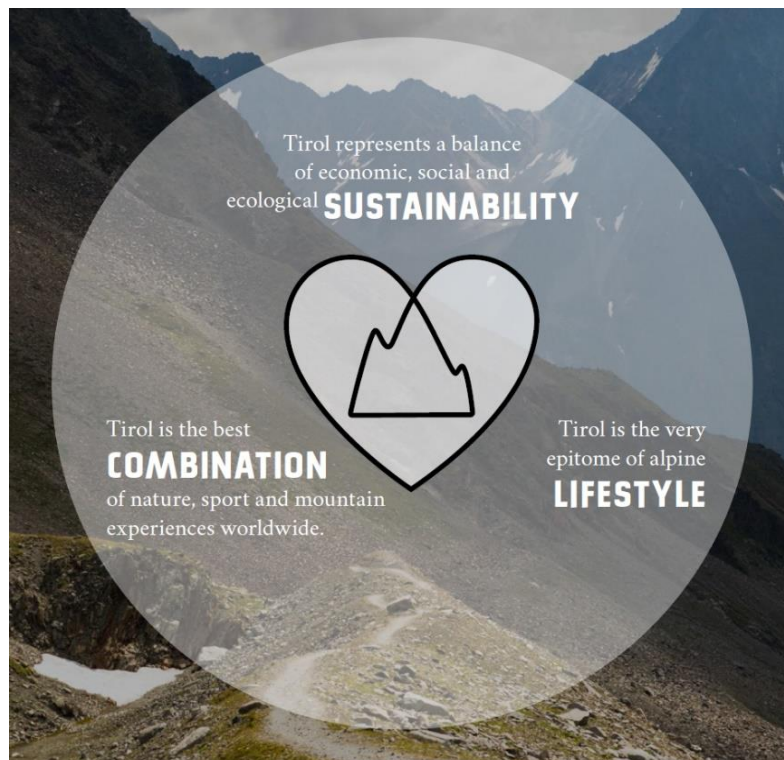
Figure 10: Three elements of the Tyrolean tourism identity

Source: Province of Tirol et al. The Tirolean Way, p. 16.

The importance of the tourism industry for Tyrol's economic well-being and prosperity has already been explained. In accordance with the Sustainable Development Goals (SDGs), "The Tirolean Way" assigns the ecological and social dimensions of **sustainability** equal importance. Tyrol's popularity as a living and recreational area can be explained by the unique **combination** of scenic beauty with a wide range of sporting, cultural and other activities on offer all year round in a way that is unmatched. Another factor in Tyrol's popularity is the authentic **alpine attitude to life**, which is exuded by locals, appreciated by visitors and, in addition to a positive and straightforward approach to life, includes an element of constant self-reflection.[35]

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[33] Province of Tirol et al. The Tirolean Way, p. 2.
[34] Ibid, p. 11-17.
[35] Ibid, p. 17.

3.2.3.2   Guiding principles of tourism development

Based on this self-conception, "The Tirolean Way" formulates four major pillars and guiding principles for tourism development to serve as starting points for corresponding measures as illustrated in Figure 11:
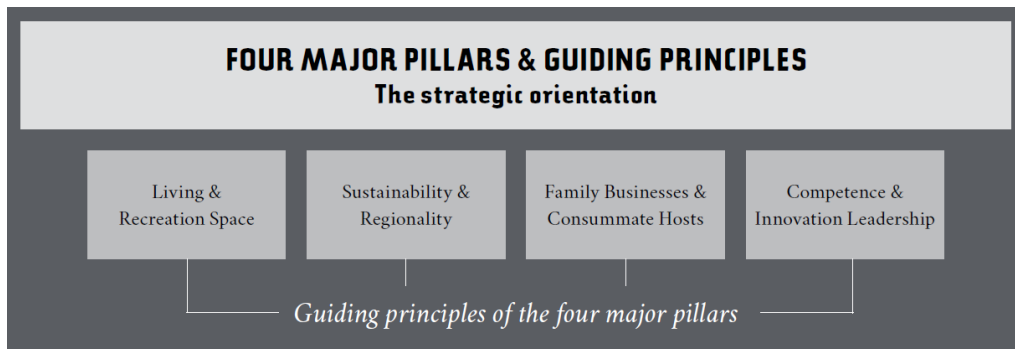
Figure 11: Four strategic pillars and principles of "The Tirolean Way".
Source: Province of Tirol et al. The Tirolean Way, p. 51.

Pillar I: Living and Recreation Space
The first guiding principle considers that there is **no separation between the living, recreational and economic area** in Tyrol. Consequently, tourism does not take place in a bubble, but within the local population's daily lives. This creates potential for conflict and highlights the need of implementing measures towards resource-conserving spatial compatibility that considers not only mobility but also nature (including agriculture and forestry), capacity limits and local stakeholders. Planned measures to address these challenges include quantitative restrictions on growth (e.g. upper limit on the number of beds), as well as authentic, space- and ecosystem-conserving architecture. To ensure a common understanding between all stakeholders on the local, regional and superregional level and to create space for discourse, dialogue forums are crucial and highlight once again the importance of participatory processes for sustainable tourism development.[36]

Pillar II: Sustainability and Regionality
The pillar "Sustainability and Regionality" puts emphasis on **strengthening regional economic cycles and sustainable resource management** in order to live up to Tyrol's ambition to "play a pioneering role in sustainable Alpine tourism development on economic, social and ecological level"[37]. The crucial importance of involving the local population and other stakeholders is once again highlighted. One stakeholder group is identified as particularly important for steering sustainability at the destination level: the Tyrolean tourism associations as destination management organizations (DMOs), which are tasked with developing and implementing regional sustainability strategies to implement institutionalized standards and achieve the Austrian environmental quality certification for destinations. Furthermore, special emphasis is placed on sustainable mobility initiatives to achieve climate neutral ski resorts by 2035 and significant reductions of CO_2 in on-site mobility.   Sustainable

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[36] Province of Tirol et al. The Tirolean Way, p. 20-24.
[37] Ibid, p. 26.

development also includes recognizing regional characteristics such as family businesses and agri-cultural structures as strengths and promoting them to foster strong regional economic cycles in Tyrol.[38]

Pillar III: Family Businesses and Consummate Hosts

The third pillar refers to the importance of **family businesses** as a success factor of Tyrolean tourism and a decisive factor for practised hospitality and the high level of service orientation. Entrepreneurial families have played a crucial role in the development of Tyrolean tourism and are still the backbone of the industry. Multi-generational thinking has fostered the sustainable development of the region as family businesses do not think in short-term but rather in long-term strategies. Many of those businesses are now managed by the third generation. This younger generation has a profound tourism education together with international experience and therefore combines professionalism with hospitality, innovation and alpine lifestyle. In the next 15 years, around 2,600 of those enterprises will be handed over to the next generation. "The Tirolean Way" thus strengthens once more the importance of preserving these family-run structures in the long-run by supporting them in crisis resilience, digital competences, succession planning, networking and coaching. The Tyrolean Chamber of Commerce advisory network with its support of the Tyrolean Advisory Fund is increasing the subsidy rate to 80% until 2025. Employees nowadays play a decisive role in times of skilled work shortage. Hence, strengthening employer branding, the image of the industry as an attractive workplace and ensuring top training quality is another main aspect of this third pillar. This includes vocational training programs and apprenticeships, hotel management schools and tourism-specific universities.[39]

Pillar IV: Competence and Innovation Leadership

The fourth pillar stresses the importance of **competence, innovation and leadership** for Tyrol and the over 100-year-old industry, where cable-cars have played a major role in development. Also, in the future skiing will remain the key activity, however, alternative activities and non-snow-based activities will become more important. Developing year-round tourism is a key element of the new strategy pushing both the spring and autumn season as well as the pre-Christmas period. Services should be available to all people, regardless of gender, age, race or mobility impairments. While tourism associations have long focused on marketing, they nowadays have become destination management organisations (DMOs) taking responsibility beyond purely touristic activities for guests. Nearby markets will remain the focus of this strategy generating 80% of overnights from the German, Dutch, Austrian and Swiss markets. Furthermore, guests with longer length of stay are at the centre stage. Also, the high rate of returning guests with 60% in summer and 75% in winter should be retained in the future. To follow up on current trends and development, innovation has to be linked to research. "The Tirolean Way" therefore aims at developing a dashboard for Tyrol providing key performance indicators (KPIs) for all three dimensions of sustainability. Lastly, for making the twin transformation possible, the sustainabile transformation has to go hand in hand with a digital and smart transformation. This includes a holistic and high-quality mapping of the tourism infrastructure as well as a data-driven visitor management or an electronic reporting system for sustainability.[40]

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[38] Province of Tirol et al. The Tirolean Way, p. 26-30.
[39] Ibid, p. 32-36.
[40] Ibid, p. 38-43.

3.2.3.3   Multi-dimensional evaluation of success

Two of the challenges the Tyrolean tourism industry is facing are the shortage of skilled labor and the digitalization of the sector. In order to cope with the multiple crisis, small-scale enterprises need to stay competitive by leading innovations and adapting their products to the changing needs of future guests. Based on this strategy, the measurement of the tourism success is crucial for the future development of the industry. Following the claim "You can't manage what you can't measure", the monitoring system has to be adapted to a wider, multiple-dimensional approach as proposed in the new framework.[41] This is also in line with the national tourism strategy called "Plan T – Master Plan for Tourism" of the Austrian Federal Ministry for Labour and Economy from 2019.

Therefore, a multi-dimensional evaluation will replace the purely economic consideration of success into a much more holistic approach (see chapter 4.4.1). Besides the existing economic, also social, ecological and satisfaction indicators are considered in the future. The development of this new monitoring system was based on existing approaches such as the destination criteria of the Global Sustainable Tourism Council (GSTC-DC) and the Sustainable Development Goals (SDGs). The end-goal of this process is a data- and evidence-based governance of fundamental tourism processes transforming Tyrol into a smart destination.[42]
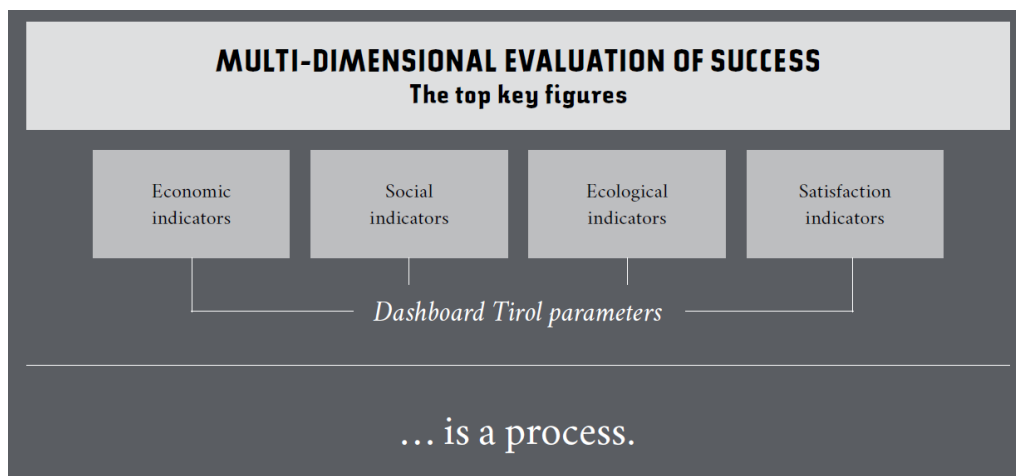
Figure 12: The Multi-dimensional approach to evaluate success in Tyrolean tourism.
Source: Province of Tirol et al. The Tirolean Way, p. 51.

The indicator system includes five **economic indicators** including overnight stays, arrivals, average length of stay, the bed occupancy rate and the turnover per bed or overnight stay. **Social indicators** include the tourism intensity of the ration of the total population to the number of overnight stays, the tourism awareness of the local population and the proportion of year-round jobs in tourism. The **ecological indicators** include the calculation of the tourism CO_2 footprint per visitor or overnight stay in Tyrol, the proportion of public transport used for on-site mobility and the percentage of renewable energy consumption in tourism. As a fourth dimension, **satisfaction** of both employees and guests is

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[41] Province of Tirol et al. The Tirolean Way, p. 47-49.
[42] Ibid, p. 47-49.

measured through the net promoter score as a recommendation rate. All those indicators will be made available in a dashboard.[43]

This first set of indicators is considered as a starting point, which will be further developed and additional indicators will be included along the way. "The Tirolean Way" itself is a journey, rather than a destination and therefore will never end. The ongoing process of achieving goals, revising them and constantly adapting to new circumstances and conditions will continue in the future.[44] An INSTO-Membership is crucial in this process, as it provides access to an international and dynamic forum of partners. Through this network, there is a robust transfer of knowledge, allowing members to benefit from regular exchange of experiences and best practices. These interactions are essential for making evidence-based decisions, as they provide an array of insights and data, helping to refine and improve indicators and strategies. Moreover, TYSTO's membership in INSTO will contribute its unique perspectives and successful sustainability practices, enriching the collective knowledge and further enhancing the collaborative efforts of the network.

3.2.4   Tourism Associations

To ensure effective management, tourism destinations in Tyrol are organized into associations, which in turn are members of the Federation of Tyrolean Tourism Associations (VTT) and work closely with the "Tirol Werbung", the regions tourism (marketing) organization. With growing demand for the Tyrolean Alps as a recreational area and the increasing complexity of regional tourism, the high number of 247 Tyrolean tourism associations was reduced to 34 (as of 2015) through mergers, initiated by an organizational reform as part of the "New Tyrolean Way" tourism strategy of 1997 and through the subsequent strategy "Tirolean Way 2002-2005".[45]

Figure 13: Tyrolean Tourism Associations.
Source: Land Tirol. Tourismusverbände. https://www.tirol.gv.at/tourismus/tourismusverbaende/.

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[43] Province of Tirol et al. The Tirolean Way, p. 47-49.
[44] Ibid, p. 50.
[45] Siller, Leitner. Der Tiroler Weg. p. 33-335.

Organized as corporations under public law accordance with § 1 (2) of the Tirolean Tourism Act (TTA), the tasks, organizational and membership structure of these DMOs are laid down in detail in the TTA, according to which the associations are responsible for

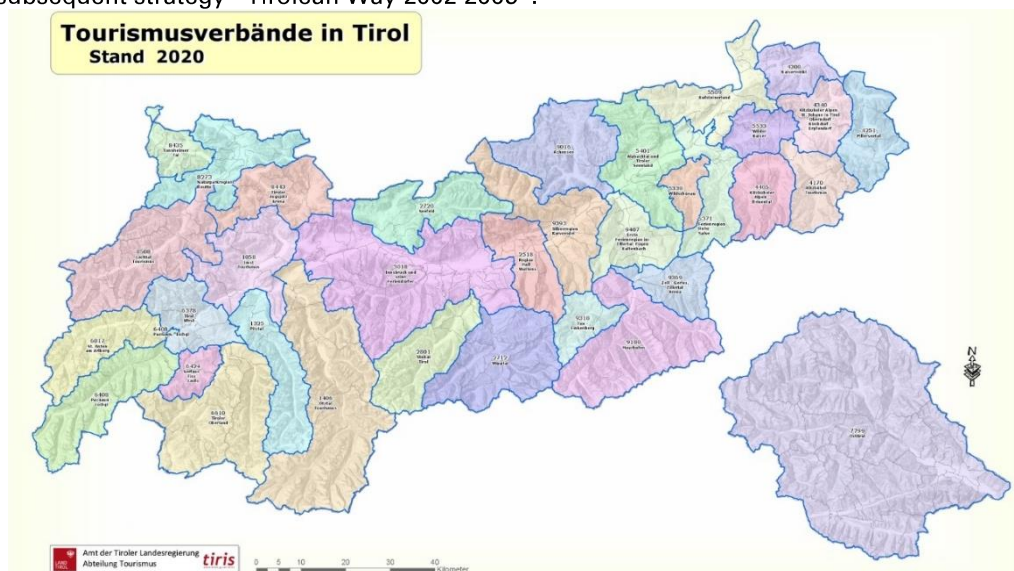> "safeguarding, promoting and representing the local and regional interests of tourism, taking into account its economic, social, cultural, ethical and ecological effects. The tourism associations must ensure the responsible, sustainable and resource-conserving development of tourism and, in doing so, be guided by the requirements of regionality, an appropriate balance between market and competitive interests and the needs of the local population as well as the spatial compatibility of tourism offers, as expressed in basic tourism strategy work and strategy papers of nationwide significance."[46]

The TTA also clearly defines the obligatory membership of all businesses in the tourism associations that carry out an activity on the territory of the tourism association through which they profit from tourism, either directly or indirectly.[47]

With the amendment to the TTA of 9 February 2022, which was carried out in close connection with "The Tirolean Way", the organizational structure of the tourism associations received a crucial update: the associations are now obliged to appoint a **Sustainability Coordinator** covering one or multiple destinations according to § 17a TTA . Support from Land Tirol for these positions is available from the Tyrolean government to a limited extend. In most cases, sustainability coordinators are existing, internal staff. Additionally, a **regional sustainability strategy** must be developed and an **annual sustainability report** must be prepared by each association starting from 2023 as stipulated e.g. in § 17 (2) c) TTA. This new approach is unique in Austria and the entire Alpine region. The tasks of the sustainability coordinator are defined as follows:

> "The Sustainability Coordinator must support the managing director in the creation of a regional sustainability strategy as an integral part of the strategic tourism principles of the association area, prepare an annual sustainability report on the status of implementation and the measures taken in the association area and present this at the general assembly. The Sustainability Coordinator is also responsible for making the sustainability criteria known to the members, employees and partners of the tourism association as well as to the general public and for ensuring that the sustainability criteria are implemented in the marketing activities and cooperations as well as in infrastructural projects of the tourism association. Finally, the Sustainability Coordinator is responsible for guiding the relevant information and participation processes and communicating the guidelines of basic tourism strategy work and strategy papers with nationwide implications."[48]

The responsibility for the implementation of sustainable tourism development is assigned to the VTT. Additionally, the task of training and further education for the sustainability coordinators, along with the consolidation of the annual regional sustainability reports of the associations into a regional sustainability report encompassing the whole province and its submission to the state government, falls under the purview of the VTT. The chairmen of the Tyrolean tourism associations are members of the VTT, which is financed by annual membership fees.[49]

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[46] § 3 (1) TTA, translation by authors.
[47] § 2 (1) TTA.
[48] § 17a TTA, translation by authors.
[49] § 20 TTA.

The VTT as a network of all Tyrolean tourism associations represents their interests to external stake-holders. One of these stakeholders is the "Tirol Werbung". As tourism (marketing) organization for the whole province, the Tirol Werbung is responsible for the region's tourism marketing, infrastructure and strategic development. The Tyrolean tourism associations work closely with the Tirol Werbung to ensure the consistent implementation of regional tourism and common marketing strategies.[50]

A prime example of the close collaboration between the individual associations, VTT and Tirol Werbung is the implementation of the tourism strategy "The Tirolean Way" and the training program for the association's sustainability coordinators – a collaborative effort MCI Tourism is actively involved in, too. Under the leadership of the VTT, this tailor-made training program for sustainability coordinators in Tyrol was offered for the first time from 2024 in cooperation with WIFI Innsbruck and MCI Tourism.[51] The aim is to provide the coordinators with the general basics of sustainability management along with practical knowledge and tools, and thus with the best possible support in their daily work.

This includes three training modules in sustainability management (I and II) as well as a module in sustainability in tourism destinations. The first two modules focus on fundamentals of sustainability and corporate social responsibility (CSR), SDGs and the Agenda 2030, tools and methods in sustainability work, regionality and circular economy as well as funding opportunities. The third module carried out by MCI tourism introduced "The Tirolean Way" at a glance, and specialized on sustainability in destinations (incl. certifications at national and international level), the sustainability strategy cycle, fields of action for sustainability in destinations, destination sustainability governance, multidimensional KPIs for measuring sustainability in destinations and sustainability monitoring and reporting. Upon finishing all 3 modules, participants are equipped with the necessary knowledge to implement a sustainability strategy including the necessary governance structures in their respective destination. On a voluntary basis, participants can also decide to take a written and oral exam to obtain the title of "Certified Sustainability Expert in Tourism".[52]
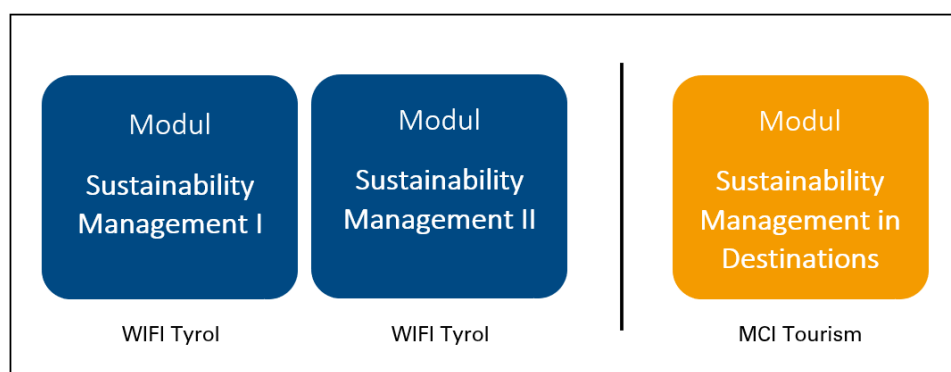
Figure 14: Modules of the Sustainability Coordinator training

Source: Authors' own illustration.

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[50] § 4 TTA ; Land Tirol. Tourismusverbände.
[51] Tourismuspresse. Pionierarbeit im Tourismus: 40 Nachhaltigkeitskoordinator:innen schließen ihre Ausbildung ab. 30. April 2024. https://www.tourismuspresse.at/presseaussendung/TPT_20240430_TPT0004/pionierarbeit-im-tourismus-40-nachhaltigkeitskoordinatorinnen-schliessen-ihre-ausbildung-ab-bild.
[52] Sustainability Management Course for Tyrolean Tourism Associations. 2024, 4-6 & 18-20 March, 22-24 April [lecture notes].

4   tyrolean sustainable tourism observatory

The establishment of a *Tyrolean Sustainable Tourism Observatory* is a logical next step in advancing Tyrol's sustainable tourism development. The abbreviation "TYSTO" is a combination of the first letter(s) of each word of the long title:

TYROLEAN
SUSTAINABLE
TOURISM
OBSERVATORY

4.1   VISION AND OBJECTIVES

MCI Tourism has played a leading role in developing the tourism strategy of Tyrol, the most intense touristic region among all Austrian provinces, for decades. As part of the latest version of said strategy, "The Tirolean Way" has - for the first time - stipulated in regional law that the 34 tourism associations must appoint a Sustainability Coordinator (it is possible that one Sustainability Coordinator covers multipe associations) and, starting from 2023, must report on their sustainability activities. These reports will be consolidated into a single report encompassing Tyrol as a whole, and will be submittet to the Province of Tyrol.

Based on these existing initiatives, the current framework for a "Multidimensional Sustainability Strategy for Tyrolean Destinations" developed by MCI Tourism in collaboration with the VTT includes a monitoring system covering nine fields of actions and indicators among all three dimensions of sustainability, serving as a blueprint for future sustainability reporting. The indicators were developed in cooperation with five pilot regions in Tyrol, which have already incorporated sustainability in their local strategies. This includes the Kaunertal, the first Austrian destination to have received the UNWTO Best Tourism Village Award in 2021, and Seefeld as the first destination to have received the Austrian Ecolabel for Destinations together with Wagrain-Kleinarl in 2023.

TYSTO aims at fostering sustainable tourism initiatives in Tyrol and to serve as a role model for other Austrian and Alpine regions. The existing knowledge in the field of sustainability and the leading role of Tyrol will help TYSTO together with its partners to initiate lighthouse projects that balance economic viability, ecological protection and social welfare. Utilizing synergies with the "Tirol Tourism Research" platform (TTR), these projects will be communicated and promoted as best practices in order to help small-scale Tyrolean tourism enterprises and organizations in their transformation process toward becoming carbon-neutral, net-zero and ultimately climate-positive.

Following "The Tirolean Way" as the strategy for the Tyrolean tourism industry, TYSTO as the first Austrian member of INSTO will establish a detailed monitoring system. Through a dashboard, the outcome of sustainability initiatives of the whole sector covering all 34 Tyrolean tourism regions based on the SDGs and other national and international indicator sets will be evaluated. The dashboard is to be a further development of the current "Sustainability Check" platform, in which the Tyrolean tourism associations enter the data for their respective destinations for the 2023 reporting year. From 2025 (i.e. for the 2024 reporting year), there will be a new digital input platform depeloped by VTT. On the basis of this new platform the TYSTO Dashboard will be developed to

display the aggregated Tyrol-wide data. This TYSTO platform will also be linked to the TYSTO subpage of the UN Tourism INSTO website.

Figure 15: Sustainability Check Dashboard for the reporting year 2023

Source: Linge, M. (2024, 24 April). Nachhaltigkeitscheck für Tourismusverbände. Kennzahlen-Berechnung und Eingabeplattform Handlungsfelder [lecture notes]. Tirol Werbung, S. 10.

TYSTO will thus support the implementation of the sustainability strategy for the sector and the establishment of the necessary governance structure (see chapter 2.2.4 and 3.4.1.8) as a **short-term objective**. Timely and regular reporting will provide stakeholders with essential data for effective decision-making, allowing for better understanding of tourism's sustainable development impacts and early detection of potential threats (see chapter 3.4.2). An initial workshop after being accepted as an INSTO member will bring together all necessary stakeholders, who have already been engaged and are involved in TYSTO. This will help secure a critical mass of supporters from the outset, establishing a self-sustaining foundation for TYSTO and agreeing on regular communication structures and channels (see chapter 3.4.3).

Visualization plays a decisive role in this process, as data will be made available to the public on a website. The MCI has 15 years of experience in delivering knowledge to the tourism industry through the TTR platform. Applying this knowledge and experience will help in developing a TYSTO website and dashboard, leveraging the synergies with TTR. The focus is on providing comprehensive data, particularly emphasizing data visualization through tools like infographics or animated data, along with a collection of best practices. Being the leading university of applied sciences in the field of tourism, MCI will additionally include TYSTO results into relevant Bachelor´s and Master´s programs. For example, TYSTO will be incorporated in the newly constructed joint Ulysseus Master's program on responsible tourism management. This will help foster MCI's vision of bridging university and business and to translate academic work into practical application of sustainable development in the tourism industry.

Based on the first monitoring results, the **mid-term goals** encompass the improvement of both the quantity and quality of data. The exchange with other INSTO members as well as the involved

stakeholders from in- and outside the tourism industry will allow TYSTO to establish better monitoring of all 11 INSTO key issue areas and beyond. Through extended cooperation, further indicators beyond these defined areas should be included in the yearly monitoring process reflecting Tyrol's priorities and needs for sustainable tourism development.

TYSTO – just as "The Tirolean Way" – is considered to be a process, meaning continuous evaluation of the project and constant adaption to changing circumstances. The existing INSTO network and UN Tourism´s experience in the area will help Tyrol and MCI Tourism to adapt the monitoring system to include further indicators as well as to deepen and improve data quality. Being a part of INSTO is not, however, limited to an enhancement of data quality and indicators. It is a platform that facilitates collaborative eploration by providing an international forum for discussion, exchange and mutual learning. The network will allow Tyrol to learn from global insights, enhancing the effectiveness of its own initiatives, to stay up to date with latest developments, improve the accuracy and comprehensiveness of its sustainability data, identify areas for improvement regarding visitor experience and to develop policies and strategies that are aligned with global best practices while tailored to the specific needs of Tyrol. TYSTO is therefore dedicated to becoming an active and reliable INSTO member by contributing to a global knowledge pool on sustainable tourism through a collaborative effort.

The **long-term vision,** which can be derived from "The Tirolean Way" and will be adapted and further developed with each subsequent tourism strategy, is to mainstream sustainability in all tourism sectors, businesses and in the mindset of all people working in the tourism industry. By continuously improving performance across the three dimensions, TYSTO envisages to enhance sustainability and resilience in the Tyrolean tourism sector. Measuring and evaluating central performance indicators for sustainable tourism plays a crucial role in this process, as does the networking of experts in the fields of sustainability and tourism and the exchange of ideas. The aim is to not only "sustain" social and ecological resources, but to build on a regenerative tourism development for the region, which goes beyond "not harming society and nature", but creating win-win situations for all stakeholders involved (guests, staff, inhabitants and nature) in the long-run. Sustainable development is therefore understood as a collective attitude and thus must be mainstreamed in the industry and throughout businesses to build up resilience and resistance in all three dimensions of sustainability.

In the long-run, the aim of TYSTO is to implement the already mentioned vision of creating a regen-erative form of tourism in Tyrol, where net-positive activities are pursued instead of just "sustaining" what we have. This includes providing information and support to all relevant stakeholders and the general public in its transformation process towards a smart destination Tyrol. Additionally, a stronger network amongst existing and newly established INSTO Observatories within the Alpine or mountainous regions will allow to commonly address challenges of tourism regions in mountain areas.

Through all these measures and participatory practices, TYSTO aims to raise awareness amongst local stakeholders, create a common understanding of what sustainability in Tyrolean and Austrian tourism means and set priorities for the implementation of sustainable tourism practices. This will help to foster the already existing networks of relevant stakeholders and join forces in the long-term development process.

4.2 STRUCTURE

The structure of the TYSTO network is divided into four layers.
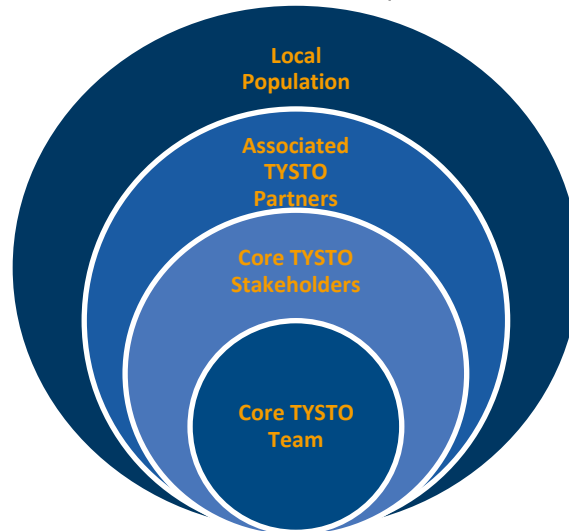
Figure 16: TYSTO structure.
Source: Authors' own illustration.

The inner circle is formed by the **Core TYSTO team**, which is composed of three staff members of MCI Tourism as well as one representative from the regional government of Tyrol and the CEO of the VTT. The Tourism Department of the Tyrolean Regional Government has been a longstanding strategic partner of MCI Tourism in the development of the regional tourism strategy. Both Landesrat Mario Gerber as well as Gerhard Föger as head of the Department support the TYSTO implementation as a logical consequence of the year-long cooperation for a sustainable development of tourism in Tyrol. The Regional Development Department, which is responsible for sustainability and climate coordination, is also important in this context. Additionally, the VTT is a key partner for the new framework of a multi-dimensional sustainability measurement and consequently also for TYSTO. The core team is responsible for the development of TYSTO governance, monitoring, communication and networking.
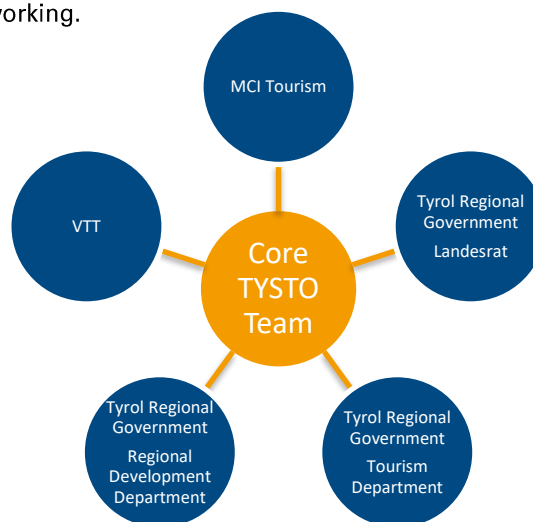
Figure 17: Core TYSTO team.
Source: Authors' own illustration.

The next circle of **Core TYSTO stakeholders** includes the main players of the tourism industry such as accommodation providers, food and beverage businesses, tourism, transport and cable-car associations, travel agencies, sports and cultural services (see Figure 18). This also comprises the main players for each sub-sector in the tourism industry being the Regional Government, the Lebensraum Tirol Holding - esp. the Tirol Werbung as one company operating under the umbrella of the holding as well as the Tyrol Tourism Board, the Tyrolean Chamber of Commerce - Tourism and Leisure Industry Division with its various departments for accommodation, gastronomy, travel agencies, leisure, sports and cultural businesses, and the Tyrolean Specialist Group for Cable Cars.

Figure 18: Core TYSTO Stakeholders.
Source: Authors' own illustration.

All those stakeholders will be invited to the annual TYSTO stakeholders' workshop, which will take place within the first year of being accepted as an INSTO member by UN Tourism. Bilateral meetings with stakeholders have already taken place as part of the INSTO application process, using existing structures for exchange.

The third layer of the **Associated TYSTO Partners** includes the wider network of tourism stakeholders as well as partners from other industries, which will be invited to join the wider TYSTO network, to contribute data and best practices from their respective fields and to exchange ideas in the yearly workshops. Additionally, an event will be carried out to present TYSTO and its activities to them, and to explain how the stakeholders can participate in, contribute to and benefit from the TYSTO network and activities. Furthermore they are requested to support the further development of data accessibility from their respective industries.

This can further include the following partners (*TBC*): Accommodation services (e.g. Private room landlords, Holidays on the Farm Tyrol, Camping Tirol, Change Maker Hotels, Bio Hotels Tirol etc.), gastronomy (e.g. Tiroler Wirtshaus, Bioalpin, United against food waste etc.), transportation (ÖBB, VTT), leisure, sports & cultural businesses (Cluster Kreativland Tirol of Standortagentur Tirol, TKI Tiroler Kultur Initiativen Tirol, Weisraum Tirol Designforum Tirol, aut. architekturforum etc.), environmental agencies (Tyrolean Environmental Ombuds Office, Energy Agency Tyrol, Agrarmarketing Tirol, Circular Hub Tirol at Standortagentur Tirol, Inno.circle, Tyrolean Government, Klimabündnis Tirol, Impact Hub Tirol).

Figure 19: Associated TYSTO Partners.

Source: Authors' own illustration.

However, it is important to point out that the allocation of stakeholders to a specific group (Stakeholder, Associated Partner) is somewhat flexible – depending on the thematic focus of discussion and the workshops. Additionally, when new fields of actions and indicators are added to the monitoring framework, the list of Stakeholders/Associated Partners might be extended.

Anyone interested in joining the TYSTO network can participate in a yearly TYSTO event, which will also be open to the **local population**- the fourth layer of the TYSTO network. These events will discuss changing topics of sustainability, serve as networking meetings and will help to raise awareness as well as ensure inclusiveness and transparency (see chapter 3.4.3).

4.3 LOCAL WORKING GROUP

The history of sustainable tourism development in Tyrol, which has reached its temporary peak with "The Tirolean Way" and its implementation, shows that participatory processes involving politics, the local population, the tourism industry and scientific experts have always played a decisive role. The establishment of TYSTO is embedded in this process and involves all relevant stakeholders. Up to this point, the communication of and exchange on TYSTO has been done using existing structures, e.g. during the Sustainability Coordinator training and through the presentation of TYSTO to relevant stakeholders as part of the application process for funding from the Tyrolean Tourism Promotion Fund (TTFF) by MCI Tourism, which was granted. Additionally, the Tyrol Tourism Board (TTB) has been informed. The TTB consists of three representatives from each of the following organizations: Province of Tirol, VTT and Tyrolean Chamber of Commerce. Additionally, the managing director of Tirol Werbung is also a member.[53]

Due to the integration of TYTO into the process of sustainable tourism development in Tyrol, a well-established Local Working Group already exists, which is responsible for coordinating with other stakeholders and the further development of monitoring.

4.4 AREAS OF RESPONSIBILITY

Monitoring sustainable tourism in Tyrol will only be one field of action of TYSTO (see chapter 3.4.1). In addition, TYSTO will contribute to the establishment of a sustainability governance structure (see chapter 3.4.1.8), to sharing information with stakeholders and the local population (see chapter 3.4.2), will serve as a local networking platform (see chapter 3.4.3), and will integrate itselve in and contribute to the UN Tourism Network of Observatories (see chapter 3.4.4), as elaborated below.

4.4.1 Sustainability monitoring: INSTO key issue areas and destination specific fields of action

The main activitiy will be the already mentioned implementation of the region-wide monitoring system. So far, the monitoring is done by Tyrol's Federal Statistical Office and Tirol Werbung. This data, however, mainly covers the economic dimension of sustainability. In the so-called "TTR Poster" economic data for all 34 tourism associations are published.

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[53] Tirol Werbung. Structure and Committees. Tyrol Tourism Board. https://www.tirolwerbung.at/en/company/structure-and-committees.
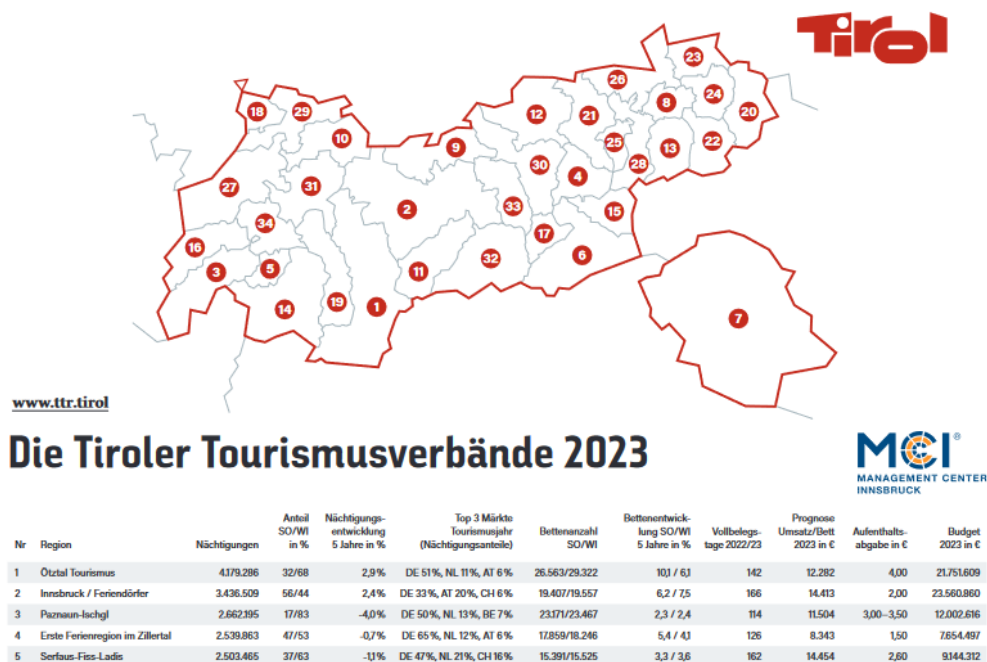
Figure 20: TTR Poster structure
Source: Tirol Tourism Research. Die Tiroler Tourismusverbände 2023, p. 2. https://www.ttr.tirol/sites/default/files/2024-03/TTR%20Poster%202023.pdf.

Various studies were carried out on the social impact of tourism (regarding life quality of tourism, tourism awareness, the image of tourism amongst young people etc.), but theses were undertaken on a project rather than on a regularly basis.

The amendment to the TTA of 9 February 2022 which determines that the Tyrolean Tourism Associations are now obliged to submit an annual sustainability report starting from 2023 serves as a fundament for TYSTO's sustainability monitoring. Based on multiple international, national and regional indicator sets (including INSTO), a framework with nine fields of action has been developed that reflects Tyrol's priorities and needs for sustainability monitoring.

Table 1: Indicator sets and frameworks that serve as the basis for TYSTO

Source: Tschiderer, F. & Mitterer-Leitner, T. (2024, 22 April). Nachhaltigkeitsstrategie für Tiroler Destinationen: Handlungsfelder [lecture notes]. MCI | The Entrepreneurial School, p. 6.

International Sustainable Development	International and Alpine Sustainable Tourism Development	Sustainable Tourism Development in Austria and Tyrol
SDGs	INSTO	The Tirolean Way
	Global Sustainability Council Destination Criteria (GSTC-DC)	Austrian Ecolabel for Destinations Criteria
	European Tourism Indicators System for sustainable destination management (ETIS)	Exchange in the development of the "RESY" criteria (Regional Information and Monitoring Systems in Tourism Regions)
	Alpine Convention Guidelines	Current studies
	Scientific literature and studies	Specific Tyrolean topics (e.g. alpine forage areas)
		Expert discussions
		Workshops with pilot regions

These nine fields of action the Tyrolean Tourism Associations are monitoring and reporting on cover all three dimensions of sustainability. In accordance with the INSTO requirements, TYSTO will additionally monitor KPIs in the field of "Governance". TYSTO's monitoring framework thus builds on a monitoring approach that has evolved in Tyrol in a participatory manner and is embedded in "The Tirolean Way" and TTA. The INSTO key issue areas are therefore subdivided in the TYSTO framework into nine fields of action specific to the destination Tyrol, as shown in the following table. Through TYSTO's INSTO membership, this process is supported by in-depth knowledge and best practices gained from other Observatories which TYSTO shares with regional stakeholders.

Table 2: TYSTO monitoring framework

Source: Authors' own illustration, data on fields of action and KPI from Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 16-58; Siller, H., Mitterer-Leitner, T. (et al.). Framework concept of a "multi-dimensional sustainability strategy for Tirolean destinations" & sustainability report 2023. Summary, July 2023, p. 11-13.

Dimension	INSTO key issue area	Field of Action	Key Performance Indicator	Status	Data source
ECOLOGICAL	ENERGY MANAGEMENT CLIMATE ACTION	1a Climate protection	Greenhouse gas emissions (Co2e) from accommodation/gastronomy	Available	Energy mosaic Austria
			Greenhouse gas emissions (Co2e) from leisure facilities		
			Energy sources (renewable/non-renewable)	Not yet available	tbd
			Energy consumption of core service providers		tbd
		1b Mobility	Choice of transportation on site	Available	T-MONA
			Inbound mobility	Not yet available	tbd
			On-site mobility		tbd
	SOLID WASTE MANAGEMENT	2 Waste management	Total amount of waste/inhabitant or inhabitants plus guests	Not yet available	Municipalities, tbd
			Share of residual and bulky waste in the total amount of waste, or share of the various fractions in the total amount of waste		
	CLIMATE ACTION	3 Biodiversity & landscape conservation	Land use in % of the total area and in % of the permanent settlement area	Available	Austrian Conference on Spatial Planning; Province of Tyrol - tourism associations' regional profiles
			Alpine pasture forage areas in ha and in % of the agricultural area		Municipal database
			Number of farms		Province of Tyrol - tourism associations' regional profiles
			Protected areas in % of the total area		
			(Net) slope area in ha		Cable car associations

SOCIAL	**EMPLOYMENT**	**4** **Employees**	Number of people employed in accommodation and food services	Available	Province of Tyrol - tourism associations' regional profiles
	LOCAL SATISFACTION	**5** **Local population**	Tourism intensity		
			Percentage of the population for whom the advantages of tourism in their destination outweigh the disadvantages	Planned	Short survey by Tyrolean Tourism Associations at destination level
			Tourism attitude according to tourism intensity of the home municipality	Planned	Central periodic survey of tourism attitudes/acceptance; standardized questionnaire
	LOCAL SATISFACTION **CLIMATE ACTION** **DESTINATION ECONOMIC BENEFIT**	**6** **Regionality**	Regionality certified businesses in the destination	Planned	Survey by Tyrolean Tourism Associations at destination level
			Absolute number of accommodation and catering establishments certified as Bewusst Tirol, QHS or Bio Austria		
			Proportion of accommodation and catering establishments with the above-mentioned certification in relation to all establishments in the destination		
			Share of regional (Tyrolean/Austrian) products in the categories of milk, meat and eggs in the hospitality industry as a % of the Tyrolean-wide use of goods at provincial level	Not yet available	tbd
ECONOMICAL	**DESTINATION ECONOMIC BENEFIT** **TOURISM SEASONALITY**	**7** **Offer**	Number of beds summer/winter	Available	Tyrolean Regional Statistics Division
			Summer/winter bed development over the last 5 years in %		
		8 **Demand**	Arrivals tourism year/summer/winter		Datalove.tirol / Tyrolean Regional Statistics Division
			Overnight stays tourism year/summer/winter		
			Full occupancy days tourism year		
		9 **Added Value**	Forecast turnover/bed Tourism year		MCI Tourism – Destination Research

GOVERNANCE	GOVERNANCE	Coordina-tion	Appointed Sustainability Coordinators covering all Tyrolean Tourism Associations	Available	Tyrolean Tourism Associations / VTT
			Existence of Sustainability Committees in all Tyrolean Tourism Associations		
			Existence of Regional Sustainability Boards in all Tyrolean Tourism Associations		
			Local TYSTO Working Group meetings		MCI Tourism
		Strategy	Regional sustainability strategies developed and implemented by all Tyrolean Tourism Associations (incl. reporting)		Tyrolean Tourism Associations / VTT
		Exchange	Sustainability Coordinator exchange meetings		Tyrolean Tourism Associations / VTT / Tirol Werbung
			TYSTO Workshops (core team/stakeholders, associated partners, local population, incl. collection and documentation of best practices)		MCI Tourism

A large number of existing indicator systems have been incorporated into the development of this sustainability monitoring framework (see Table 2). The **nine destination specific fields of action have been designed to reflect the Tyrolean priorities and needs as sub-categories to the eleven INSTO key issue areas**, as will be discussed below.

It is essential to highlight the ongoing need to review and adjust fields of action, key figures, targets, and measures to ensure they remain relevant and accurate, considering changing conditions and circumstances.[54] In order to meet this challenge, it is essential from Tyrol's point of view that TYSTO and MCI Tourism, as the host institution of TYSTO, become part of the INSTO community in order to exchange ideas internationally, share and learn from the experiences of other Observatories. This applies in particular to those INSTO key issue areas for which TYSTO has yet to develop specific fields of action and indicators.

4.4.1.1   Climate Protection and Mobility

A key focus of Tyrol's sustainability strategy is mobility and the reduction of greenhouse gas emissions associated with tourism, particularly from transportation. Emissions from energy use in accommodation and transport constitute the largest portion of greenhouse gases in Tyrolean tourism, making them crucial targets for meeting climate goals (Umweltbundesamt, 2018).[55] This field of action corresponds with the INSTO key issue areas "**Energy Management**" and "**Climate Action**".

The primary goals include the ongoing reduction of energy consumption by the DMO, service providers, and guests; an increase in the share of energy derived from renewable sources; a decrease in greenhouse gas emissions from all tourism-related activities (such as dining, lodging, guest activities, inbound and on-site transportation); and the assessment of energy use and greenhouse gas emissions by core service providers and guest mobility, along with implementing measures to reduce these factors.[56]

INSTO	Field of Action	Key Performance Indicator	Data source
ENERGY MANAGEMENT CLIMATE	**1a Climate protection**	Greenhouse gas emissions (Co2e) from accommodation/gastronomy	Energy mosaic Austria
		Greenhouse gas emissions (Co2e) from leisure facilities	
		Energy sources (renewable/non-renewable)	tbd
		Energy consumption of core service providers	tbd

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[54] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 13.
[55] Ibid, p. 18.
[56] Ibid, p. 20.

	1b Mobility	Choice of transportation on site	T-MONA
		Inbound mobility	tbd
		On-site mobility	tbd

Accurately measuring greenhouse gas emissions resulting from energy consumption and mobility related to tourism activities, and attributing these emissions to a specific destination, is currently unfeasible due to insufficient data. Therefore, the above-mentioned KPIs from the Energy Mosaic Austria and the Tourism Monitor Austria (T-MONA) are used as a temporary measure.[57] The Energiemoaik is a detailed database modeling greenhouse gas and energy consumption based on data from official statistics. It is a reliable source for the KPIs mentioned, as it uses a dedicated model that breaks down energy consumption by municipality, use, purpose, and energy source.[58] The Tourism Monitor Austria (T-MONA), an Austria-wide guest survey project carried out in different formats since 2004, collects information in a permanently accessible online survey on guest structure, inspiration, information, decision-making and booking behavior before the trip, travel behavior on site, satisfaction and recommendation, as well as perceived image.[59]

As this is an extremely complex area that is difficult to measure, international exchange with other INSTO Observatories is essential for TYSTO to create and further develop a reliable data basis and to integrate the following KPIs in this field of action: Energy consumption of core service providers, energy sources (renewable/non-renewable), inbound mobility, and on-site mobility[60].

4.4.1.2   Waste Management

Packaging of goods, construction activities, cleaning agents and food waste are only a few areas of tourism services in which harmful waste is generated. As tourism activities often take place outdoors, the challenge of (harmful) waste being distributed in sensitive areas arises. While people do not pay much attention to waste avoidance/separation while on vacation, they expect careful waste management by service providers.[61] Corresponding with the INSTO key issue area "**Solid Waste Management**", the following general objectives will be pursued while monitoring waste production: Promoting waste reduction across all aspects of tourism, including inputs, materials, and guest behavior, is crucial. This involves encouraging reuse, proper waste separation, and recycling,

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[57] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 21.
[58] Energiemosaik Austria. Das Energiemosaik Austria verstehen. Stand März 2022, p. 1. https://www.energiemosaik.at/assets/downloads/Energiemosaik_Wissenswertes_final.pdf.
[59] Österreich Werbung. T-MONA Urlauberbefragung. https://www.austriatourism.com/tourismusforschung/t-mona/; Österreich Werbung: T-MONA Urlauberbefragung. Allgemeine Projektinformation. S. 2. https://www.austriatourism.com/fileadmin/user_upload/Media_Library/Downloads/Tourismusforschung/2018I_Allgemeine_Projektinformation_T-MONA.pdf.
[60] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 22.
[61] Ibid, p. 27.

alongside raising awareness and implementing incentives among suppliers, employees, and guests. Establishing and enhancing waste management systems, fostering partnerships between tourism stakeholders and other parties, and investing in research and innovation are also essential steps.[62]

Due to a lack of data and unreliable data bases, TYSTO intends to start monitoring the following indicators for the reporting year 2024 in accordance with the key objectives of preventing waste and reusing waste:[63]

INSTO	Field of Action	Key Performance Indicator	Data Source
SOLID WASTE MANAGEMENT	Waste management	Total amount of waste/inhabitant or inhabitants plus guests	Municipalities, tbd
		Share of residual and bulky waste in the total amount of waste, or share of the various fractions in the total amount of waste	

Collecting data for these indicators requires cooperation with the municipalities, which are important stakeholders.[64] Other important stakeholders for data collection in this context are the Federal Ministry for Climate Action, Environment, Energy, Mobility, Innovation and Technology, the Tyrolean provincial government, waste management institutions e.g. waste management associations, collection and recycling centers, the Austrian Building Materials Recycling Association (BRV), the Association of Austrian Waste Management Companies (VÖEB), Agrarmarkt Austria (AMA), the Austrian Federal Economic Chamber (WKÖ), the Austrian Water and Waste Management Association (ÖWAV) and the Federal Environment Agency. The Federal Environment Agency already operates a waste management dashboard based on data from these stakeholders, which shows the generation, treatment and cross-border shipment of waste, but only for Austria as a whole.[65]

Here too, the exchange of knowledge with other Observatories is essential for TYSTO in order to review and further develop the KPIs, the data quality, as well as the data collection process.

4.4.1.3 Biodiversity and Landscape Conservation

Corresponding to the INSTO key issue area "**Climate Action**", Tyrols approach on sustainable tourism monitoring goes beyond the mere measurement of CO_2 emissions. It also encompasses aspects of biodiversity and landscape conservation. Striving at a use of space that is taking not only the natural

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[62] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 28.
[63] Ibid Destinationen, p. 30.
[64] Ibid.
[65] Umweltbundesamt. Dashboard zur Abfallwirtschaft. https://www.umweltbundesamt.at/abfall/dashboard.

environment but also agriculture and forestry into account, the goal is to preserve the main pull factors in Alpine tourism (the natural landscape and biodiversity) as well as the crucial ecosystem services of Alpine agriculture and forestry (cultural landscape, the network of trails, high-quality food, protection against natural hazards, etc.) which are essential for Tyrol's tourism product.[66]

TYSTO aims to achieve the following objectives: increasing awareness and understanding of biodiversity and landscape preservation; fostering dialogue among industry stakeholders, including agriculture, forestry, guests, cable car associations, leisure service providers, municipalities, and DMOs; contributing to the preservation of biodiversity and the protection of natural and cultural landscapes; and addressing the overall quality of recreational areas, including aspects such as urban planning, development, and spatial design.[67]

KPIs in this field of action include:

INSTO	Field of Action	Key Performance Indicator	Data Source
CLIMATE ACTION	Biodiversity & landscape conservation	Land use in % of the total area and in % of the permanent settlement area	Austrian Conference on Spatial Planning; Province of Tyrol - tourism associations' regional profiles
		Alpine pasture forage areas in ha and in % of the agricultural area	Municipal database
		Number of farms	Province of Tyrol - tourism associations' regional profiles
		Protected areas in % of the total area	
		(Net) slope area in ha	Cable car associations

The data necessary to monitor this field of action is readily available. Data on land use can be derived from the Austrian Conference on Spatial Planning (ÖROK) which conducts an ongoing, nationwide monitoring of land use and sealing for settlement and transportation purposes, leisure and recreation, supply and disposal purposes and thus provides robust data as a basis for evidence-based decisions.[68] The regional profiles of the tourism associations, which can be accessed via the Province of Tyrol Website and are updated regularly, provide basic information and statistical data on municipalities in the tourism association, land use, nature conservation areas, building development, resident population, economy and employment, agriculture and forestry, in addition to tourism data.[69] Information on the Alpine pasture forage areas and on the (net) slope area can be derived from municipal databases and cable car associations, respectively.

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[66] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 31.
[67] Ibid, p. 32.
[68] Österreichische Raumordnungskonferenz. ÖROK-Monitoring von Flächeninanspruchnahme und Versiegelung. https://www.o-erok.gv.at/monitoring-flaecheninanspruchnahme.
[69] Land Tirol. Regionsprofile – Tourismusverbände. https://www.tirol.gv.at/statistik-budget/statistik/regionsprofile/.

4.4.1.4   Employees

In Tyrol, tourism is a significant employer, with about 42,000 people working in accommodation and gastronomy as of 2022, with the majority being women according to Statistics Austria (2023). Employees are a key factor in the success of tourism services, which is why it is particularly worrying that attracting suitable employees is one of the biggest challenges facing the industry. Therefore, creating the appropriate conditions for attractive jobs is a core objective of sustainable tourism development in Tyrol.[70]

Monitoring the INSTO key issue area "**Employment**" and associated KPIs is crucial to understanding these challenges and for taking appropriate, targeted measures. Tyrol aims to adopt cooperative strategies to address these challenges, focusing on various aspects like recruitment, employee housing, training, and benefits. Engaging stakeholders, including the local population and schools, and fostering partnerships with other industries are also emphasized.[71]

For TYSTO, the input of other Observatories will be valuable for developing a reliable data basis for evaluating the status quo and deriving measures, in addition to basic data such as employee satisfaction, workforce requirements within the destination, etc.

INSTO	Field of Action	Key Performance Indicator	Data Source
EMPLOY-MENT	Employees	Number of people employed in accommodation and food services	Province of Tyrol – tourism associations' regional profiles

For the time being, TYSTO will only monitor the number of people employed in accommodation and food services, using the already mentioned regional profiles of the tourism associations as a reliable data source. Based on learnings from exchange with other Observatories and stakeholders, additional indicators will be introduced in this field of action, e.g. nationality of employees at the core service providers or seasonal fluctuations in employment relationships by core service providers via centralized surveys of social insurance institutions or employment statistics at municipal level[72].

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[70] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 39.
[71] Ibid, p. 40.
[72] Siller & Mitterer-Leitner (et al.). Framework concept, p. 11.

4.4.1.5   Local Population

Tourism in Tyrol must be designed in a way that it contributes to the quality of life of the population (Tyrolean Tourism Concept II, 1982; The Tirolean Way). As already briefly described in chapter 2.2.1, the attitude of the population towards tourism is influenced by the perceived positive and negative effects as well as their participation and involvement. The attitude of the population towards tourism is essential for the perceived quality of life and the tourism development potential. In line with the INSTO key issue area "**local satisfaction**", this field of action includes surveys on the population's perception and attitude towards tourism; considerations on the local population as a target group, and measures for balanced tourism.[73]

In addition to tourism intensity (defined as the ratio between the number of tourists and the population, whereby calculations on a monthly basis are required to record seasonal fluctuations[74]), two further KPIs will be measured in the upcoming reporting years:

INSTO	Field of Action	Key Performance Indicator	Data Source
LOCAL SATISFACTION	Local population	Tourism intensity	Province of Tyrol - tourism associations' regional profiles
		Percentage of the population for whom the advantages of tourism in their destination outweigh the disadvantages	Short survey by Tyrolean Tourism Associations at destination level
		Tourism attitude according to tourism intensity of the home municipality	Federal Ministry for Labour and Economy - survey on tourism acceptance

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[73] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 45.
[74] Siller & Mitterer-Leitner (et al.). Framework concept, p. 11.

4.4.1.6   Regionality

Regional foods, combining social, ecological and economic aspects of sustainable development, are the focus of this field of action as guests in Tyrol associate sustainability with regional food (MCI Mountain Profile Study 2023), and regional ingredients in gastronomy are expected (Tschauko, 2023). Hence, the credibility of the tourism product is related to regional offerings and influences the relationship between tourism and agriculture. Strengthening regional economic cycles is therefore anchored as an objective in "The Tirolean Way".[75]

Key aspects in this regard include increasing awareness and facilitating discussions within the sector and with stakeholders regarding the significance of local food production for sustainable development. This involves establishing a consistent definition of "regional" and implementing origin labeling, enhancing data availability, fostering collaboration between producers and the tourism industry, and incorporating educational content on Alpine agriculture and regional food production into various educational programs and training initiatives.[76]

While "Regionality" is not a dedicated INSTO issue area, the KPIs measured by TYSTO will give important insights into INSTO key issue areas such as "**Local satisfaction**" and "**Destination economic benefit**" by strengthening regional economic cycles as well as "**Climate Action**" (as preservation of the environment, responsible use of natural resources etc. are certification criteria).

INSTO	Field of Action	Key Performance Indicator	Data Source
LOCAL SATISFACTION CLIMATE ACTION DESTINATION ECONOMIC BENEFIT	Regionality	Regionality certified businesses in the destination	Survey by Tyrolean Tourism Associations at destination level
		Absolute number of accommodation and catering establishments certified as Bewusst Tirol, QHS or Bio Austria	
		Proportion of accommodation and catering establishments with the above-mentioned certification in relation to all establishments in the destination	
		Share of regional (Tyrolean/Austrian) products in the categories of milk, meat and eggs in the hospitality industry as a % of the Tyrolean-wide use of goods at provincial level	tbd

TYSTO will gather data in this field of action with the help of the tourism associations, which as important stakeholders of TYSTO will provide the necessary input based on surveys they conduct in their destination. Within the INSTO network, TYSTO is especially interested to learn if other

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[75] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 49.
[76] Ibid, p. 50.

Observatories consider regionality in their respective monitoring processes and will be happy to exchange knowledge on the importance of this matter.

4.4.1.7   Demand, Offer and Added Value

The fundamental objective in Tyrol is a balanced tourism development, i.e. an approach that does not value economic stability as more important than ecological sustainability and social justice. Nevertheless, monitoring the quantitative evolution of supply, demand, and added value is crucial as a means of measuring economic success and provides a foundation for making informed decisions within the economic realm of sustainability.[77]

The KPIs monitored for this purpose provide insights on the INSTO key issue areas of "**Destination Economic Benefit**" and "**Tourism Seasonality**":

INSTO	Field of Action	Key Performance Indicator	Data Source
DESTINATION ECONOMIC BENEFIT TOURISM SEASONALITY	Offer	Number of beds summer/winter	Tyrolean Regional Statistics Division
		Summer/winter bed development over the last 5 years in %	
	Demand	Arrivals tourism year/summer/winter	Datalove.tirol / Tyrolean Regional Statistics Division
		Overnight stays tourism year/summer/winter	
		Full occupancy days tourism year	
	Added Value	Forecast turnover/bed Tourism year	MCI Tourism – Destination Research

For this INSTO key action area, TYSTO can work with a well-established data basis: The KPIs mentioned under "Offer" and "Demand" are measured on a monthly basis by the Tyrolean Regional Statistics Division, based on which the "Added Value" is calculated and publicized on TTR by MCI Tourism.

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[77] Tschiderer & Mitterer-Leitner. Nachhaltigkeitsstrategie für Tiroler Destinationen, p. 54-55.

4.4.1.8   Sustainability Governance

In order to implement "The Tirolean Way" and adhere to the legal obligations of the TTA, dedicated structures need to be developed to define the necessary responsibilities for implementation of the sustainability strategy and to ensure a broad commitment both at the regional and the destination level. This includes, in addition to the establishment of Sustainability Coordinators in each tourism association, a Sustainability Board consisting of representatives of all stakeholders on the regional level. On the destination level, the aim is to form a Sustainability Committee including management, sustainability coordination and an operational team of the tourism association.[78] A "Sustainability Process Model" encompassing these governance structures and how to achieve a more sustainable destination management has been part of the third module of the Sustainability Coordinator trainings at MCI Tourism. This ensures that all tourism associations have a well-trained staff member who promotes the implementation of these requirements and regularly exchanges experiences and best practices with the other Sustainability Coordinators.

Based on this approach to sustainable destination management, which is unique in the Alpine region, TYSTO will measure the INSTO key issue area of "**Governance**", divided into three fields of action, as follows:

INSTO	Field of Action	Key Performance Indicator	Data Source
GOVERNANCE	Coordina-tion	Appointed Sustainability Coordinators covering all Tyrolean Tourism Associations	Tyrolean Tourism Associations / VTT
		Existence of Sustainability Committees in all Tyrolean Tourism Associations	
		Existence of Regional Sustainability Boards in all Tyrolean Tourism Associations	
		Local TYSTO Working Group meetings	MCI Tourism
	Strategy	Regional sustainability strategies developed and implemented by all Tyrolean Tourism Associations (incl. reporting)	Tyrolean Tourism Associations / VTT
	Exchange	Sustainability Coordinator exchange meetings	Tyrolean Tourism Associations / VTT / Tirol Werbung
		TYSTO Workshops (core team/stakeholders, associated partners, local population, incl. collection and documentation of best practices)	MCI Tourism

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[78] Tschiderer, F. Das Nachhaltigkeits-Prozessmodell (2024, 22 April). Nachhaltigkeitsstrategie für Tiroler Destinationen [lecture notes]. MCI | The Entrepreneurial School, p. 24.

4.4.1.9 (Waste) Water Management

Due to favorable geographical, meteorological, topographical and geological factors that come to-gether in Tyrol, water supply is not an urgent challenge.[79] Nevertheless, the province of Tyrol is aware of the particular importance of a crisis-proof supply of water for the region as well as of safeguarding water quality and public health through responsible waste water management as an essential aspect for all areas of life, including tourism.[80] Securing strategic water resources is therefore a political priority, and the tourism industry is becoming increasingly aware of its own role in conserving this resource and is implementing corresponding measures. This is also reflected in the fact that "The Tirolean Way" and the multi-dimensional measurement system are oriented towards international (GSTC) and national (Austrian Ecolabel for Destinations) frameworks for sustainable destination cer-tification which include criteria on the responsible use of drinking water, the management of water risks and the monitoring of water quality as well as on waste water management.[81]

To identify suitable KPIs and data sources for monitoring in this INSTO key issue area within the next two years, TYSTO will:

- carry out a **status quo analysis** for these fields of action in Tyrol, including the **identification of important stakeholders** as well as **data sources,** and
- based on the **exchange with other INSTO members** and **workshops with local stakeholders** (Wasser Tirol, Wastewater associations etc.),
- ➢ **develop a set of indicators** that is specifically tailored to (waste) water management in Tyrol. In particular, the MST framework and the indicators mentioned therein as well as the indica-tor sets of (inter)national certification frameworks will be taken into account.

However, it is already evident that improvements in the quality of data on (waste) water management are necessary in order to create a reliable database that goes beyond a mere estimate of, for instance, water consumption in tourism businesses.

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[79] Energieagentur Tirol. Das Tiroler Wasser. https://ressourcen.energieagentur.tirol/wassertirol/tirolerwasser/.
[80] Energieagentur Tirol. Aufgaben / Rolle der Energieagentur Tirol. https://ressourcen.energieagentur.tirol/wassertirol/aufgaben-rolle/.
[81] Province of Tirol et al. The Tirolean Way, p. 47; Global Sustainable Tourism Council. GSTC Destination Criteria. Version 2.0 (6 December 2019), Section D6-D8. https://www.gstcouncil.org/wp-content/uploads/GSTC-Destination-Criteria-v2.0-with-SDGs.pdf; Österreichisches Umweltzeichen. Richtlinie UZ 82 – Tourismusdestinationen. Version 1.1 (1. Jänner 2022, geändert mit 1. Jänner 2023), Nr. UM13- UM16, https://www.umweltzeichen.at/file/Richtli-nie/UZ%2082/Long/UZ%2082%20Tourismusdestinationen%202022.pdf.

4.4.1.10   Accessibility

The accessible design of a tourism destination, which enables the inclusive enjoyment of the beauty of its landscape and its cultural attractions for people of all abilities, contributes to the social dimension of sustainability and is aligned with several SDGs. In Austria, all businesses are legally obliged to design their offers in an inclusive and accessible manner since 2016, corresponding information is available for the tourism and leisure industry under the slogan "Tourism for all".[82]

In Tyrol, the Kaunertal has established itself as a showcase destination for accessible vacations.[83] On "Barrier-free Holidays in the Alps", a platform operated by Tirol Werbung, guests can find a wealth of information on accessible accommodation (hotels, guesthouses, apartments as well as hotels for blind, visually impaired, deaf and hard of hearing) and tips for accessible leisure activities (monoski areas, adaptive Nordic skiing, accessible attractions, handcycling routes, wheelchair accessible hiking trails) in the province.[84] In addition, companies like the "gabana - Agency for Accessibility" provide recommendations for accessible hotels in Tyrol and offer consulting for businesses that want to make their services accessible.[85] However, the declaration or recommendation of certain businesses as accessible is not based on standardized criteria. Although checks tailored to the respective business (Barriere-Check) and certificates like "FAIR FÜR ALLE" (fair for all) exist, they are not widely used and there does not appear to be a central source that lists all businesses certified as accessible in Tyrol and categorizes them by type of business and/or certification type.

To identify suitable KPIs and data sources for monitoring in this INSTO key issue area within the next two years, TYSTO will

- carry out a **status quo analysis** for this field of action in Tyrol, including the **identification of important stakeholders** as well as **data sources**, and
- based on the **exchange with other INSTO members** and **workshops with local stakeholders**,
- ➤ **develop a set of indicators** that is specifically tailored to accessibility in Tyrol.

Indicators currently being considered include the number of accessible accommodations, restaurants and cultural institutions as well as the number of these establishments that can be reached by accessible public transport; the number of accessible ski resorts, hiking trails, attractions and the number of tour operators offering accessible tours. The exchange with other INSTO members and events like the "INSTO INSIGHTS Webinar on Measuring Accessibility at the Destination Level" will be crucial for TYSTO to develop its monitoring approach in the field of accessibility.

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[82] Bundesministerium für Arbeit und Wirtschaft. Barrierefreiheit im Tourismus. https://www.bmaw.gv.at/Themen/Tourismus/tourismuspolitische-themen/nachhaltige-entwicklung/barrierefreiheit-tourismus.html.
[83] Österreich Werbung (Ed.). Nachhaltigkeit in Österreich. Touristische Vorzeigeprojekte, p. 20. https://www.austriatourism.com/fileadmin/user_upload/Media_Library/NETA/Nachhaltigkeit/Sustainia_Publikation/Nachhaltiges-OEsterreich_Web_DE-21MB.pdf.
[84] Tirol. Barrier-free Holidays in the Alps. https://www.tyrol.com/things-to-do/barrier-free.
[85] Gabana. Die Agentur für Barrierefreiheit. https://www.gabana.net/ueber-uns/.

4.4.2   Sharing Information and Reporting

Based on the already existing knowledge platform TTR, TYSTO will further develop a digital dashboard for sharing all the information on sustainability in Tyrolean tourism and its monitoring activities, thereby providing a platform with conclusive, transparent and reliable data as a basis for decision-making. The dashboard will be an enhancement of the current "Sustainability Check" platform (see chapter 4.1). Benchmarking will be possible similar to the existing interactive statistics section of the TTR platform. Visualization will play a key role here for making information easily understandable and accessible. Following the quote "Knowledge is the only resource that increases when it is shared" the aim is that the provided data can be downloaded and integrated into other presentations or reports, providing a reliable decision-making basis for a wide range of users.

Additionally, the monitoring results will be gathered in an annual progress report on activities, findings, lessons learned and next steps. The report will be provided to UN Tourism and publicised on TTR and the digital TYSTO dashboard to facilitate effective, evidence-based decision making. The preparation of the annual progress report is integrated into the process of sustainable destination development in Tyrol as illustrated in Figure 21:
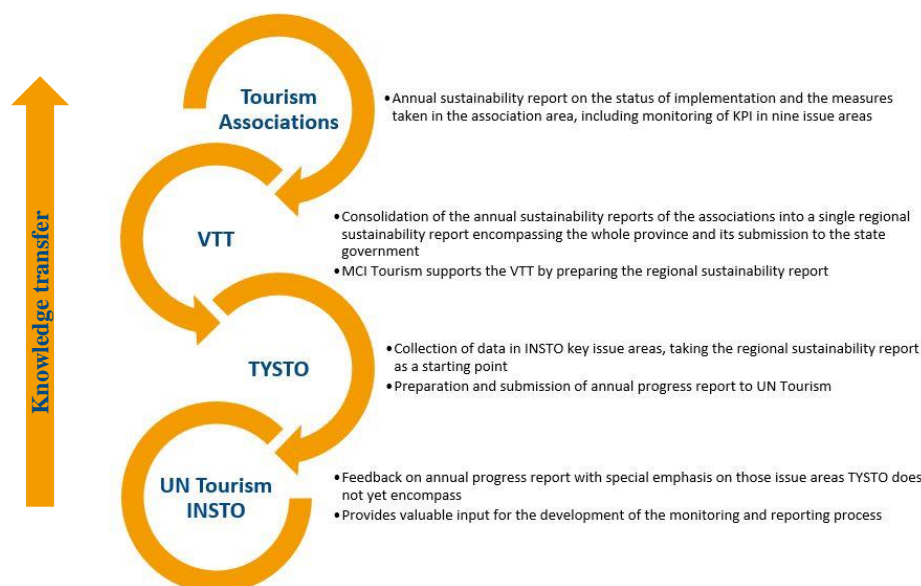

Figure 21: TYSTO annual progress report process.
Source: Authors' own illustration.

As already described in chapter 2.2.4, the Tyrolean Tourism Associations are obliged to prepare a sustainability report for their respective association area. This includes the fields of action displayed in table 3 (fields 1-9). These destination-specific reports are to be summarized by the VTT in an overall report and submitted to the Province of Tyrol, whereby MCI Tourism prepares the overall report in support of the VTT. This report in turn serves TYSTO as the starting point for the annual progress report, which is enriched with further data collected by TYSTO (e.g. on governance). UN Tourism provides feedback on the report and in particular on those key issue areas that are not yet covered by TYSTO. This feedback and the knowledge gained from the exchange with INSTO members is in turn passed on by TYSTO to the stakeholders in Tyrol in order to further develop the monitoring system and the quality of the available data. This ensures a continuous and transparent exchange of knowledge and constant evaluation of the monitoring framework in both directions (see Figure 21).

However, it should be noted that the aim is not to directly compare the monitoring results in all fields of actions of the individual tourism associations with each other and to encourage competition between them. For this reason, the province-wide report by VTT and the annual progress report by TYSTO will contain data broken down by tourism association only on selected, limited indicators (demand, offer and added value). The main insights gained at both association and provincial level lie in the identification of developments, challenges, opportunities and trends and in the creation of a reliable dataset and thus decision-making basis in order to derive suitable strategic measures for the continuous sustainable development of tourism in Tyrol.

4.4.3   Local Networking Platform

Considering the different levels of stakeholder involvement and the participatory approach, the aim of TYSTO is to involve as many people as possible in the process towards sustainable tourism development. Thus, TYSTO should serve as a platform for local networking with all kinds of stakeholders inside and outside of tourism. Therefore, a yearly event will be organized focusing on the connection of tourism with other industries, e.g. agriculture and tourism, architecture and tourism, water management and tourism, culture and tourism, biodiversity and tourism, mountaineering and tourism, or health and tourism. These events will serve as platforms to explore synergies with other industries, to exchange ideas, learn from each other, build awareness and apply a co-creative approach. This approach will aid in building a robust network of TYSTO facilitators and also contribute to knowledge-sharing and transparency.

To implement this approach, a series of Stakeholder Workshops will be organized in adherence with the UN Tourism Rules of Operation and Management of INSTO:

- **First Stakeholder Workshop** within the first year of establishment as an INSTO member
  - Presumably in fall/winter 2024
  - All relevant TYSTO stakeholders (Core Team, Stakeholders, Associated Partners)
  - Agenda: Presentation and discussion of preliminary report; presentation of INSTO key issue areas and synergies with destination-specific fields of action; identification of challenges concerning data needs and quality; definition of roles and responsibilities including establishment of Local Working Group; agreement on regular communication structures and channels and on next steps.

- **Annual Stakeholder Workshops**
  - First Annual Workshop presumably in summer 2025.
  - All relevant TYSTO stakeholders (Core Stakeholders, Associated Partners, Local Working group members).
  - Agenda: presentation of measurement activities; discussion of insights and advancements; reflection of challenges and lessons learned; adjustment of monitoring methods if necessary.

- **Yearly Workshops on crossectoral sustainability issues**
  - Starting from 2025.

- All relevant TYSTO stakeholders, stakeholders and experts from industries other than tourism as outlined above, local population.
- Agenda: Presentation of INSTO and TYSTO, exploration and discussion of synergies with other industries.

4.4.4 International Networking Platform

Given the international nature of the UN Tourism Network of Observatories, TYSTO will also actively participate in INSTO meetings and webinars to learn from other Observatories, exchange ideas and connect with like-minded people having the same vision in mind. This will help to further develop the monitoring process, improve data quality, add additional indicators, and provide aggregated data to all relevant stakeholders on the TYSTO website. To foster exchange on the specific challenges of sustainable tourism development in the Alps, meetings with the other regional INSTO member, the Sustainable Tourism Observatory of South Tyrol (STOST), will be organized once a year.

5   conclusion and outlook

Tyrol has already come a long way in developing sustainable tourism strategies and implementing them step by step. With the last "Tirolean Way" a milestone was reached by setting up governance structures within the 34 Tyrolean Tourism Associations and introducing the newly created role of sustainability coordinators, which receive a special tailor-made training program. This forms the basis of a new way of evaluating tourism success, which was so far only focusing on economic success. With the new multi-dimensional monitoring system, Tyrol sets new standards in measuring sustainability on a destination level. Becoming an INSTO member and building up TYSTO is therefore the logical next step to facilitate sustainable tourism development and resilience of the tourism sector as well as effective, evidence-based decision making. With the support of both the national and regional governments and the main tourism players, TYSTO aims to become the first INSTO member of Austria and thus to be a role model for other Austrian and Alpine tourism destinations.

In the future, further aspects will be included and evaluated such as physical and mental health (SDG 3), gender equality (SDG 5), (waste) water management (SDG 6), renewable energy and circular economy (SDG 7), and diversity (SDG 10, 16). "The Tirolean Way" and TYSTO are an ongoing process. Consequently, the monitoring methodology is undergoing continuous evaluation and further development. The newly adopted Statistical Framework for Measuring the Sustainability of Tourism (MST) by the UN Statistical Commission will play a crucial role in this regard. As the fields of action are defined to reflect Tyrol's priorities and needs, the addition of indicators to TYSTO's monitoring framework that go beyond the INSTO key issue areas can be expected.

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7 annexes

1. Plan T – Master Plan for Tourism

2. The Tirolean Way - perspectives for the responsible development of tourism

3. Framework Concept for a "Multi-dimensional sustainability strategy for Tyrolean Destinations" and sustainability report 2023

4. Tourismusbewusstsein in Tirol *(only available in German)*

5. Die Tiroler Tourismusverbände 2023 – „TTR Poster" (*only available in German*)

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As at July 2024 - Despite careful research, all information is provided without guarantee of accuracy.