



# Implementation of the Statistical Framework for Measuring the Sustainability of Tourism (SF-MST) within the GCC Region

21st meeting of the Committee on Statistics

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GCC-STAT



## Outline

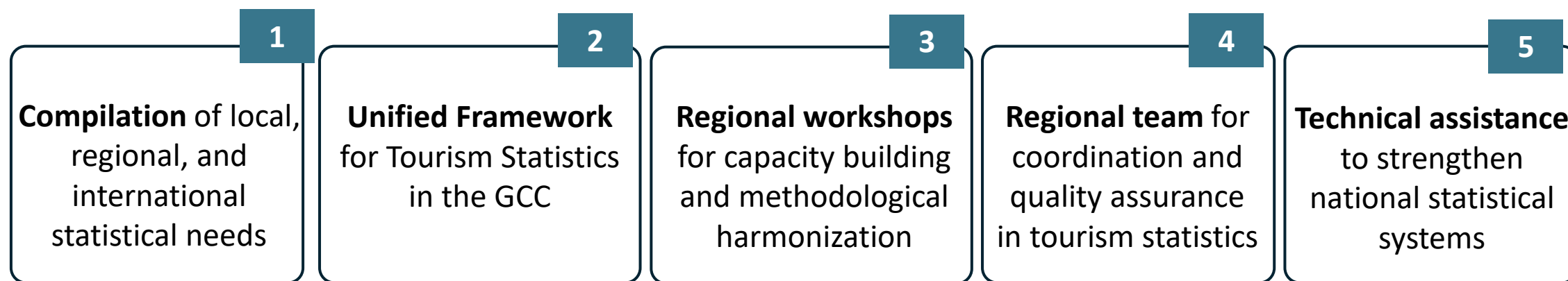
1. **GCC-STAT: Background**
2. Overview of **Tourism Statistics Project**
3. **Implementation of the UN SF-MST** within the GCC Region
4. **Key Results**
5. **Key Achievements**
6. **Aspirations**

# GCC-STAT: Background



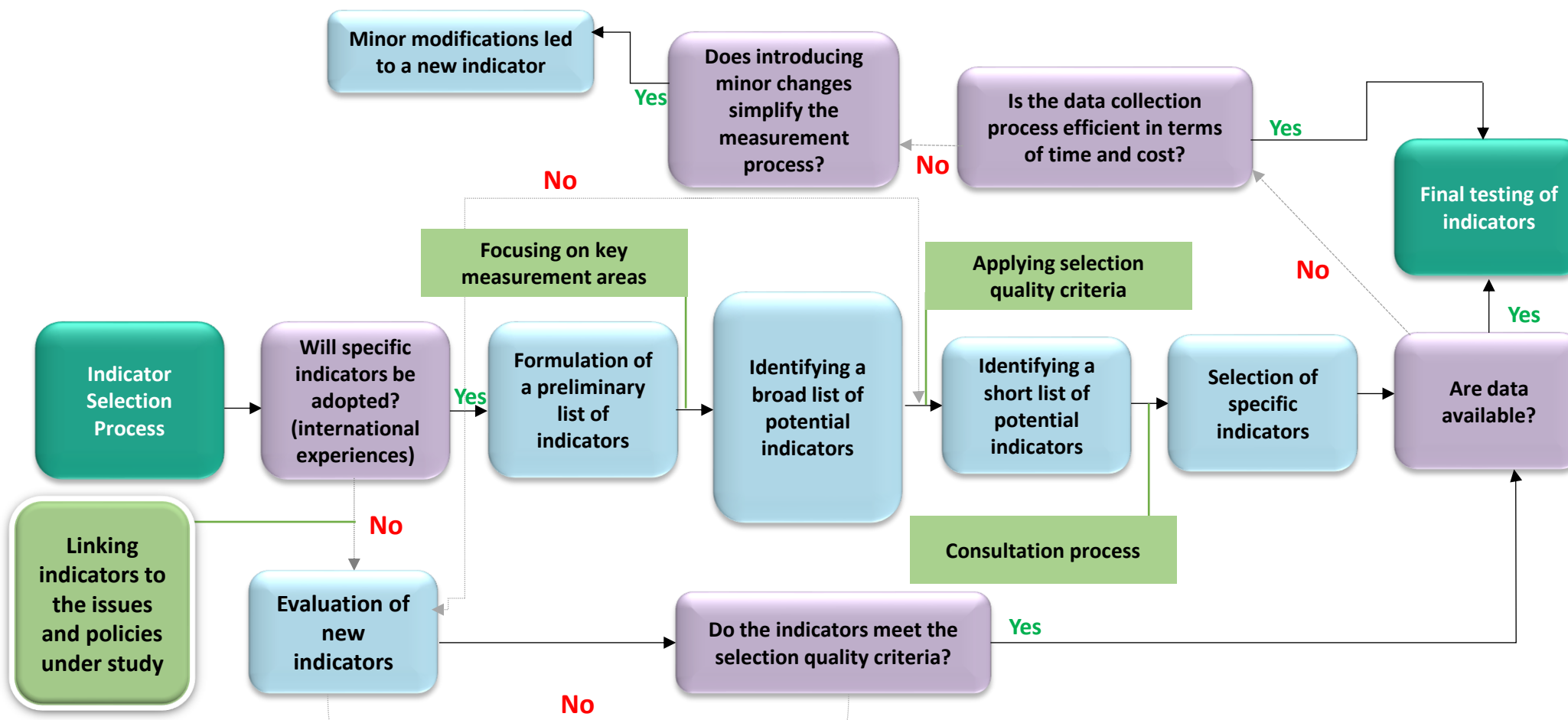


## Key Milestones in Developing the GCC Tourism Statistics Framework



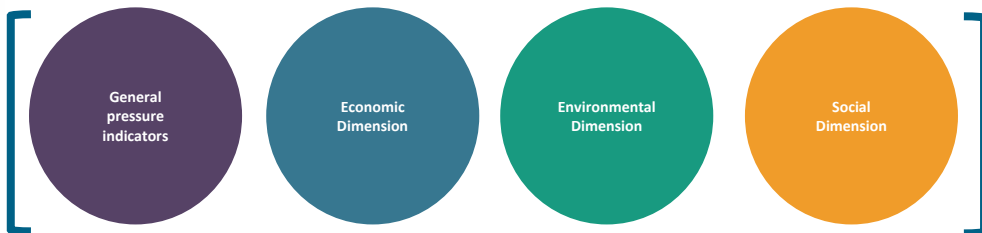
**Building on this unified foundation**, the GCC moves toward the implementation of the UN Statistical Framework for Measuring the Sustainability of Tourism (SF-MST)

## Operational Steps for Identifying Tourism Sustainability Indicators



# Implementation of the UN SF-MST within the GCC Region

## Proposed Unified List of Tourism Sustainability Indicators in GCC Countries



**Phase 1: 18 indicators adopted**

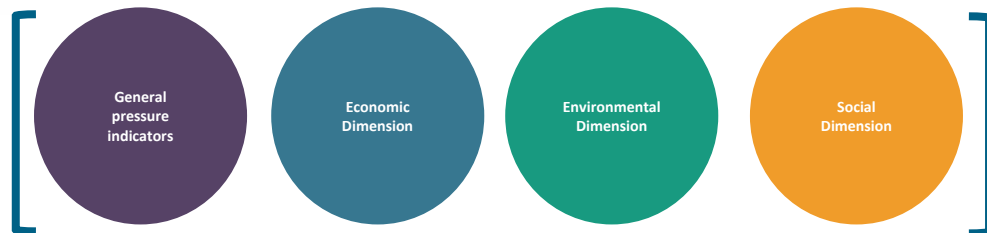
**Source: derived from 34 input variables**

**General  
pressure  
indicators**

**4** indicators

| Topic / Issue                                           | Indicator Code | Indicator                        | Measurement Method                                                                    | Unit                       | Data Source                                                                                                         |
|---------------------------------------------------------|----------------|----------------------------------|---------------------------------------------------------------------------------------|----------------------------|---------------------------------------------------------------------------------------------------------------------|
| General patterns of visitor flows and related pressures | 101            | Average stay of inbound tourists | Number of tourists / Number of nights spent                                           | Night                      | Inbound tourism surveys - administrative records of border authorities - accommodation establishments data - others |
|                                                         | 102            | Visitor pressure                 | Number of tourists / Population × 100                                                 | Tourists per 100 residents | Number of tourists from national tourism authorities; population data from census - others                          |
|                                                         | 103            | Visitor density                  | Number of tourists / Area of inhabited land (m <sup>2</sup> ) × 10,000 m <sup>2</sup> | Tourists per hectare       | Number of tourists from national tourism authorities; land area data from spatial or geographic statistics - others |
| Tourism seasonality phenomenon                          | 104            | Tourism seasonality              | Percentage of inbound tourists during peak months or quarters out of the annual total | %                          | Monthly distribution data of inbound tourists from national tourism authorities - others                            |

## Proposed Unified List of Tourism Sustainability Indicators in GCC Countries



**Phase 1: 18 indicators adopted**

**Source: derived from 34 input variables**

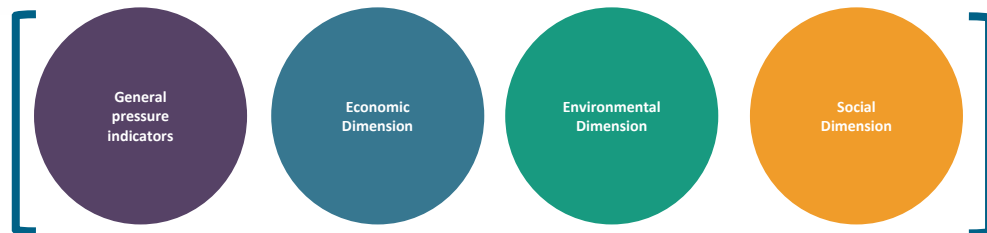


**7 indicators**

| Topic / Issue                             | Indicator Code | Indicator                                      | Measurement Method                                                                                 | Unit | Data Source                                                                                              |
|-------------------------------------------|----------------|------------------------------------------------|----------------------------------------------------------------------------------------------------|------|----------------------------------------------------------------------------------------------------------|
| Economic benefits for the local community | 201            | Average expenditure of inbound tourists        | Total expenditure of inbound tourists / Number of inbound tourists                                 | USD  | Inbound tourism surveys or travel item data from balance of payments, central banks – others             |
|                                           | 202            | Tourism contribution to employment             | Number of employees in tourism industries / Total number of employees in the economy               | %    | Tourism establishment surveys – economic surveys – labor force surveys – administrative records – others |
|                                           | 203            | Economic contribution of tourism               | Direct tourism GDP / Total GDP (current prices)                                                    | %    | National accounts data – others                                                                          |
|                                           | 204            | Labor productivity                             | Total gross value added of tourism industries / Number of employees in tourism industries          | USD  | National accounts data – others                                                                          |
|                                           | 205            | Structure of tourism enterprises               | Number of small and medium tourism establishments / Total number of tourism establishments         | %    | Tourism establishment surveys – economic surveys – others                                                |
|                                           | 206            | Ownership structure of tourism enterprises     | Number of tourism establishments owned by local investors / Total number of tourism establishments | %    | Tourism establishment surveys – economic surveys – others                                                |
|                                           | 207            | Occupancy rate of accommodation establishments | Total rooms sold / Total rooms available in all accommodation establishments                       | %    | Accommodation establishments data – others                                                               |

# Implementation of the UN SF-MST within the GCC Region

## Proposed Unified List of Tourism Sustainability Indicators in GCC Countries



**Phase 1: 18 indicators adopted**

**Source: derived from 34 input variables**

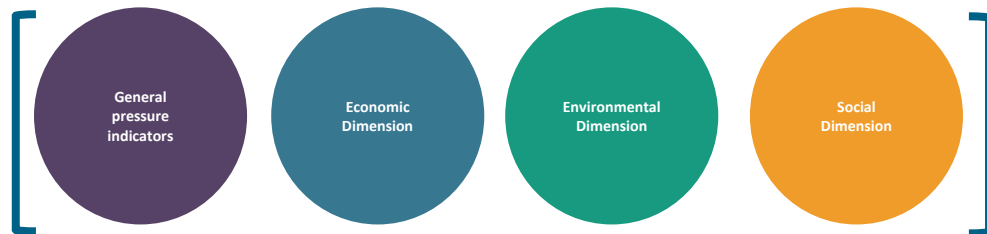
### Environmental Dimension

**4 indicators**

| Topic / Issue               | Indicator Code | Indicator                                               | Measurement Method                                                        | Unit                    | Data Source                                                                                                      |
|-----------------------------|----------------|---------------------------------------------------------|---------------------------------------------------------------------------|-------------------------|------------------------------------------------------------------------------------------------------------------|
| Energy and water management | 301            | Fuel consumption in accommodation establishments        | Fuel expenses / Average fuel price per liter / Number of guests           | Liter per guest         | Tourism establishment surveys – economic surveys – energy-related authorities – accommodation data – others      |
|                             | 302            | Electricity consumption in accommodation establishments | Electricity expenses / Average price per kilowatt-hour / Number of guests | Kilowatt-hour per guest | Tourism establishment surveys – economic surveys – electricity-related authorities – accommodation data – others |
|                             | 303            | Water consumption in accommodation establishments       | Water expenses / Average water price per liter / Number of guests         | Liter per guest         | Tourism establishment surveys – economic surveys – water-related authorities – accommodation data – others       |
| Tourism-related ecosystems  | 304            | Area of natural reserves                                | Area of natural (marine and terrestrial) reserves / Total land area       | %                       | Environment-related authorities – specialized environmental associations – others                                |

# Implementation of the UN SF-MST within the GCC Region

## Proposed Unified List of Tourism Sustainability Indicators in GCC Countries



**Phase 1: 18 indicators adopted**

**Source: derived from 34 input variables**

**Social  
Dimension**

**3 indicators**

| Topic / Issue     | Indicator Code | Indicator                             | Measurement Method                                                                                 | Unit | Data Source                                               |
|-------------------|----------------|---------------------------------------|----------------------------------------------------------------------------------------------------|------|-----------------------------------------------------------|
| Decent work       | 401            | Average wages                         | Average wages in tourism activities / Average wages in other economic activities                   | %    | Tourism establishment surveys – economic surveys – others |
| Gender equality   | 402            | Gender wage gap                       | Average wages of females in tourism activities / Average wages of males in tourism activities      | %    | Tourism establishment surveys – economic surveys – others |
| Women empowerment | 403            | Share of female employment in tourism | Number of female employees in tourism activities / Total number of employees in tourism activities | %    | Tourism establishment surveys – economic surveys – others |

## 1. General Pressure Indicators

### (General patterns of visitor flows and related pressures<sup>1</sup>)

Average stay of inbound tourists,  
2024

8.4

Night

+41.4%

Average Growth rate  
(%) from 2019 to 2024

Visitor pressure,  
2024

117.4

Tourist / 100  
residents

+33.9%

Average Growth rate  
(%) from 2019 to 2024

### (Tourism seasonality phenomenon<sup>2</sup>)

Tourism seasonality in GCC, 2024

16.2%

4.5% ▲

Average Growth rate (%) from 2024 to 2019



Tourism recovery is evident, but rising visitor pressure and seasonality call for stronger sustainability measures.

1- Preliminary data

2- Includes data for 3 countries only

## 2. Economic Indicators

### (Economic benefits for the local community)

Average expenditure of inbound tourists<sup>1</sup>,  
2024

674.6

USD

+28.8%

Average Growth rate  
(%) from 2019 to 2024

Tourism contribution to employment<sup>2</sup>,  
2024

7.9%

+1.5%

Growth rate (%)  
compared to 2023

Economic contribution of tourism<sup>2</sup>,  
2024

3.8%

+9.4%

Average Growth rate (%)  
from 2019 to 2024

Labor productivity<sup>2</sup>,  
2024



39,163

USD

+12.3%

Average Growth rate (%)  
from 2019 to 2024

Occupancy rate of accommodation  
establishments<sup>2</sup>, 2024

52.5%

+22.7%

Average Growth rate (%)  
from 2019 to 2024



**Tourism continues to drive economic growth**, with notable gains in employment, productivity, and accommodation performance, reinforcing its role in supporting local economies.

1- Preliminary data  
2- Includes data for 3 countries only

## 3. Environmental and Social Indicators

### Environmental Dimension (Tourism-related ecosystems)

Percentage of Natural Protected Areas (Terrestrial and Marine) of the Total GCC Area<sup>1</sup>, 2023

**%19.0**



**%7.5** ▲

Growth rate (%) compared to 2022

### Social Dimension (Women's Empowerment)



**13.2%**

Percentage of Female Employees in the Tourism Sector of the Total Workforce<sup>2</sup>, 2024



**+73.2%**

Growth rate (%) in the number of female employees in the tourism sector Compared to 2019 <sup>2</sup>

**The GCC demonstrates progress toward sustainable and inclusive tourism**, with expanded protected areas supporting environmental resilience and rising female participation advancing social empowerment goals.

1- Preliminary data

2- Includes data for 4 countries only



## Key Achievements

1

Established a **regional framework** aligned with the UN Statistical Framework for Measuring the Sustainability of Tourism (SF-MST).

2

Compiled **34 input variables** and derived **18 harmonized indicators** across economic, environmental, and social dimensions.

3

Strengthened **regional collaboration** among GCC countries through unified methodologies and capacity-building workshops.

4

Produced the **first baseline results** to support evidence-based tourism sustainability policies.

### Toward a Comprehensive GCC Tourism Sustainability Framework

01

Expand the implementation of the **UN SF-MST** across all GCC member states.

02

Complete the **remaining sustainability indicators** under all dimensions (economic, social, environmental, and pressure).

03

Strengthen **data harmonization and integration** between tourism, environment, and Social systems.



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