

Sustainable Tourism Indicators

Saudi Arabia's Ongoing
Commitment to the SF-MST



Overview

- Project objectives and scope
- International best practice and gap assessment
- Indicator framework and reporting
- Governance and knowledge transfer

Project objectives





Project objectives

To help the Ministry of Tourism (MT) develop an indicator framework to monitor and evaluate tourism sustainability in KSA and to provide the basis for making incremental improvements to the framework in the long-term, the project aims to:



Assess international experiences and best practices, current KSA practice, and conduct a gap assessment



Establish a standardised indicator **framework** to measure sustainability of tourism and report results



Transfer knowledge as part of the continued journey to build the evidence base over the long-term

*The overarching goal is to establish a framework using currently available data which MT and the KSA Government can use to monitor and evaluate progress at a **national level** and make better informed decisions using the United Nations' Statistical Framework – Measuring Sustainable Tourism (SF-MST). The framework will not set policy objectives but provide MT with the evidence base to evaluate policy performance. As more data becomes available, the framework can be updated by MT to improve evaluation for future iterations.*



Adopted a holistic research approach

To deliver on the project objectives the Ministry of Tourism has developed a holistic approach, incorporating insights from key stakeholders and international practice and using insights from several key sources

International practice



10+ reviews of SF-MST adoption

20+ reviews of international frameworks

Document reviews



30+ reviews of international and domestic reports

Data sources



20+ data sets

Stakeholder engagement

KSA Government stakeholders



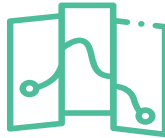
Internal 15+



External 15+



Industry



EcoTourism Operators

5



Project workshops



Data sessions 10+



Working group and SteerCo 20+



International best practice and gap assessment



Adopting the SF-MST

To support the adoption of the SF-MST framework and to contextualise and align it with KSA reporting priorities, the Ministry conducted a three-part review





International best practice

The countries selected for benchmarking provide various insights on approach, reporting, and indicator scope to reflect national priorities that can guide the further adoption of tourism sustainability reporting in KSA

Example of country-specific application			
Country reviewed	Framework	Alignment with SF-MST Indicators	Success factors
 Germany	TSA-EE	✓	Utilises SEEA approach, demonstrating the direct impact of tourism activity on environmental impact
 Australia	LIVE framework	✓	- Inspired by SF-MST - Data reported in dashboard - Well-integrated with national and investment strategy
 Portugal	SITS	✓	- Informed by ETIS - Governance plan in place to make future improvements
 Canada	Wealth & Wellbeing Index	✓	- Demonstrates application of SF-MST framework - Focuses on key reporting metrics that align with national priorities
 Spain	OECD Framework	✓	Demonstrates how OECD incorporated existing international frameworks (SF-MST and ETIS)

 **Implication for KSA**

The KSA can learn from the selected countries in terms of the following:

- Consider following Germany's approach of utilizing available data from national accounts to arrive at data required for indicators
- Consider following Australia's approach that includes a detailed investment monitor to incorporate future potential dynamic changes
- Each country has developed a different set of indicators that can be referenced by the KSA
- Consider the relative importance of indicators based on national priorities for balanced decision-making
- There appears to be a lot of flexibility in terms of which themes/ indicators that countries are focusing on

Indicator framework and reporting





Identifying key measurement themes and indicators

MT has developed three principles for identifying the key measurement themes and corresponding indicators to be incorporated in the KSA indicator framework, so the outputs are relevant to decision-making and can be updated in the future

Starting points

Starting with the measurement themes and then potential indicators suggested under the UN SF-MST and taking into consideration those in other frameworks*

1. Relevant

Priorities and alignment:

- Are priorities aligned with national strategies and global objectives (SDGs)?
- Agreed with relevant ministries?

2. Traceable

Data availability and source:

- Is national, KSA-based data available?
- Is data held within the government?
- Is annual data available or can it be inferred through robust assumptions?

3. Replicable

Ease of calculation:

- Standalone indicator?
- Can it be derived from simple calculation or with reasonable assumptions?
- Independently replicable in the future?

Recommended framework for KSA

The proposed indicators in the framework should be:

- measured with data held within the government or
- estimated using proxies or reasonable assumptions.

Where data limitations remain, knowledge transfer will include discussion on how to improve data to expand reporting.

We followed a rigorous process using three main guiding principles to determine the indicators to be developed and maintained for KSA

*For example, indicators measuring the extent of cultural exchanges.



Development of an indicator framework

An indicator framework based on the UN SF-MST has been developed to monitor and evaluate tourism sustainability, with the model adapted to KSA's requirements through the inclusion of a governance dimension



General

Inform the activity and description of tourists

Focuses on the tourist activity that contributes to sustainable outcomes or identifies market risks.

Examples of indicators:

- Length of stay - average number of nights by types of visitor
- Tourism concentration - visitor pressure on land
- Tourism seasonality - nights spent in the 3 most visited months



Economic

Ensure viable, long-term economic operations, providing socio-economic benefits to stakeholders

This may include tourism-related impacts on businesses, investors, suppliers, employees and governments.

Examples of indicators:

- Visitor expenditure
- Direct and indirect output and profits
- Wages paid
- Tourism investment



Social

Respect the socio-cultural authenticity of host communities

Outlines the contribution tourism has on social and community outcomes, including providing social mobility for employees.

Examples of indicators:

- Decent work – growth in average wages
- Decent work – average pay gap
- Visitor satisfaction and community perceptions



Environment

Make optimal use of environmental resources

Assesses the impact tourists have on the responsible consumption of products.

Examples of indicators:

- Energy consumption
- Water flows and use
- Wastewater
- Greenhouse gas emissions
- Land-use



Governance

Track statistical preparedness for measuring sustainability in tourism for future improvement

Outlines the extent to which KSA has the required information to report on, monitor, and evaluate sustainable tourism outcomes.

Examples of indicators:

- Statistical preparedness, including supporting analysis and artifacts, such as System of Environmental and Economic Accounts or Tourism Satellite Accounts.



Reporting on the progress in KSA

Develop several reports to showcase the progress KSA has made to enhance tourism sustainability and how the monitoring and evaluation framework can improve regional business and national reporting



**Tourism Sustainability
Reports for 2023 and
2024**

Using the SF-MST
indicators to report on
tourism sustainability in
2023 and 2024.



**A case study: Adoption of
the SF-MST for the Imam
Abdulaziz bin Mohammed
Royal Reserve**

Demonstrate how the SF-
MST framework can
support sustainable
outcomes at a regional
level.



**ESG for measuring
tourism sustainability in
the private sector**

Assess the progress
businesses have made in
ESG reporting and
highlight areas for
improvement.



**Mapping tourism
indicators to SDG
reporting (*outlined in
more detail on the next
page*)**

Demonstrate how
sustainable tourism can
accelerate progress
towards the SDGs.

Mapping the sustainable tourism indicators to the SDGs



The sustainable tourism indicators from the indicator framework can be mapped to the 17 UN SDGs under the three categories of Economy, Society, and Biosphere

The purpose of the mapping is to illustrate the key linkages between sustainable tourism and the Sustainable Development Goals (SDGs), showing where sustainable tourism can have the largest impact on achieving specific SDGs.

Overview of mapping approach



1

SDG Classification: The 17 SDGs were grouped into *Economy*, *Society*, and *Biosphere* based on the Stockholm Resilience Centre framework.*

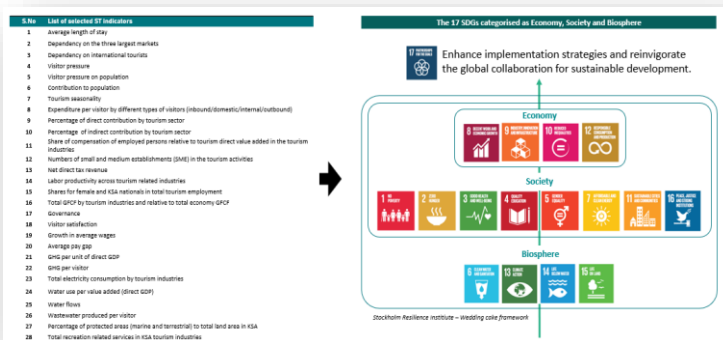
2

SDG indicator mapping: The 28 sustainable tourism indicators from the indicator framework were mapped against the 17 SDGs based on alignment with overall SDG themes and specific sub-targets.

3

Literature Cross-Check: Relevant literature was reviewed to validate the results and identify additional SDGs frequently associated with sustainable tourism but not captured by the mapping.

Indicator mapping



Results will be summarised in a report on sustainable tourism in KSA

- Providing an overview of the SDGs and their relevance to sustainable tourism in KSA.
- Setting out how sustainable tourism growth can contribute to multiple SDGs simultaneously.
- Highlighting key SDGs across economic, social, and environmental dimensions, informed by outputs from the mapping exercise.
- Providing KSA case studies illustrating progress on relevant SDGs in sustainable tourism.

*The grouping by the Stockholm Resilience Centre framework is not a formal categorisation

Governance and knowledge transfer

Knowledge transfer

Provide a structured governance model and clear operational guidance to enable the Ministry of Tourism to independently manage, update, and expand future sustainability reporting



Stakeholder mapping

A comprehensive table identifying internal and external entities involved in data provision and use — including contacts, departments, data frequency, and transmission channels.



1

Operational Guidance

Draft escalation mechanisms, transmission methods, and data update cycles to support smooth ongoing reporting.



2

RACI Matrix

A role assignment framework (Responsible, Accountable, Consulted, Informed) for each key indicator to guide internal MT ownership and coordination.



3

Recommendations

UN-aligned Recommendations: Integration of international best practices (e.g., UNWTO, TSA, SEEA) on governance, data quality, and environmental accounting.



4





Thank you