

RESPONSIBLE TOURISM: ARE ITALIANS INTERESTED?

Main Results

Objectives of the study

As part of the Fondazioni4Africa - Senegal initiative - responsible tourism section and part of the project E.A.R.T.H., funded by the European Commission, in March 2009 the first quantitative study was carried out to gauge the interest of the Italian population in responsible tourism.

The study was coordinated by ONG CISV in Turin and carried out by ISNART, the Italian national institute for tourism research (a joint-stock consortium of the Italian Union of Chambers of Commerce, Handicraft and Agriculture) and Ciset, the international centre for the study of the tourist economy at Ca' Foscari University in Venice.

The aim of the study was to examine the attitude of Italians towards "responsible tourism", i.e. the kind of tourism motivated by the principles of social and economic justice, and the desire to safeguard the environment, heritage and culture of host communities.

The official definition of responsible tourism as adopted in 2005 by the Italian Responsible Tourism Association reads:

"tourism practiced in accordance with the principles of social and economic justice, and in full respect for the environment and host cultures. Responsible tourism recognizes the importance of local host communities and their right to be involved in the development of sustainable and socially responsible tourism in their homelands. It acts to promote positive interaction within the tourism industry. It acts to promote positive interaction between the tourism industry, local communities and tourists."

Assessing awareness of the phenomenon, understanding the main problems it faces and any factors affecting willingness and/or the decision to practice this type of tourism provided the necessary input to understand the state-of-the-art of responsible tourism in Italy.

The study also included an in-depth look at Senegal, given the scope of the Fondazioni4Africa project which looks at how familiar Italians are with Senegalese culture and their resultant interest in a responsible tourism experience in this country.

The main benefit of a study of this kind is to give operators useful insights that will help them to provide more effective information and organise more effective promotional campaigns going beyond the here and now, and engendering a more far-reaching and open sense of cooperation and interaction.

The interest of Italians in responsible tourism

The main results that emerged underlined how 52.3% of the respondents indicated they had already heard of responsible tourism; awareness of the phenomenon was higher among

respondents aged 25-34 (55% of people in this age group indicated that they knew what responsible tourism was), women (55%), couples and single people with no children (59% and 55% respectively), degree holders (65%) and people living in Northern Italy (57% in the northwest and 56% in the northeast).

It is interesting to note that, on hearing the official definition of responsible tourism as indicated by AITR, the results obtained in the previous question were further substantiated: 6 Italians out of 10 claimed to be familiar with the definition, compared with the just over 5 out of 10 who had heard of the phenomenon. Of these, young people were the most familiar (63% of respondents aged 18 to 24 answered that they knew the definition), followed by couples with no children (66%), university students or degree holders (72%) and people living in northwest Italy. This would appear to indicate that about 1 respondent in 10 is familiar with the concept of responsible tourism only when the underlying pillars are outlined for them, as explained in the AITR definition.

Significant interest in booking a responsible tourism holiday was recorded: 23.1% stated they were "very interested", and 61.8% "fairly interested". This result suggests there is much room for actions to win and "convert" new market shares. Looking more closely for patterns in respondents answers, it emerged that the 25-34 age group had the highest percentage of RT-interested respondents (27% of the age group), followed by young people (age 18-24) and the "elderly" (age 65 and over) who were equally interested (25% of the total segment). This is an important sign that interest in responsible tourism transcends age.

Furthermore, 15.3% of the respondents claimed they had already been on a responsible tourism holiday. This may come as a surprise when you consider the niche role that this type of tourism still has in Italy. It could be due to misunderstanding among interviewees of what a responsible tourism holiday actually is, which would mean that more information and clearer explanations of the concept are needed.

As regards the defining features of responsible tourism (minimize impact on environment, involvement of the local population and travel with operators supporting local associations), it has to be underlined how the majority of these appeared to be clearly understood, although the "ecological" side emerged as the more dominant feature. The statement "respect and experience nature" was in fact recognized by 72.4% of respondents as a defining feature of responsible tourism (response: yes definitely), whilst 24.2% thought it was probably a defining feature (yes probably). Significantly lower percentages of respondents chose "interacting with the local population" (yes definitely 49%), yes probably 40.9%) and "travelling with an operator that supports local associations" (yes definitely 41.5%, yes probably 43.6%).

Regarding where the respondents first learned about the concept of responsible tourism, of the 52.3% that claimed to have already heard about it, the main sources of this information appeared to be Internet and magazines/newspapers (almost equal at 45%), followed by television (43%) and much less common, word of mouth from relatives and friends (23%). Associations had less of an impact (18.6%), along with radio (17%) and attending conferences/seminars/exhibitions (9.5%).

It should be underlined however, how the strong influence of the Internet could be related to the fact that the survey was conducted online and therefore to a subject group already receptive to this media, even if other surveys carried out recently over the phone or by written questionnaire, etc. showed increasing use of the web among consumers as a source of information.

As regards responsible tourism destinations, the southern hemisphere was by far the most popular location. Africa as a whole came out on top followed by other specific countries such as India, Australia, Brazil and Mexico, whilst European destinations appeared to be proportionally less desirable. This result can probably be linked on the one hand to the image tourists have of

individual countries and how this relates to their knowledge of responsible tourism; on the other, it may also depend on how they learned about the phenomenon, as some channels may promote some destinations more than others.

On examining respondents' expectations regarding responsible tourism, one of the factors indicated as most important was the need for clear, detailed information on where and how the cost of the holiday is spent (very important: 67.6%), followed by interaction with the host community (very important 50%), and involvement in social projects (education, health). Transparent prices is therefore a key factor, in association with the scope of the interaction and the need to feel useful for the host country, which are the defining features of responsible tourism. Information continued to play a decisive role in actions which could encourage respondents to choose responsible tourism in the future. In particular, the need for a breakdown of the price (very important 59.3%), and more information on the packages on offer (locations, accommodation, etc.): 52%) as well as details of the relevant authorities (30.5%) belied an underlying need for guarantees (rated as very important by 56% of respondents).

Senegal in the eyes of Italians

Some areas stand out as being the cradle of responsible tourism, and Senegal is one of these. The economy of this western African state in fact depends to a large extent on tourism (it accounts for 4.6% of GDP). It is the second largest source of income after fishing and in recent years, a major review of the sectors believed to be the driving force of the industry has been completed. Senegal is the tenth most popular African holiday destination and the most popular French-speaking Sub-Saharan African nation.

This study looked at the how familiar / integrated Italians are with Senegalese culture, and their interest in going there on holiday which would mean first-hand contact with Senegalese people and with factors that would make them want to go on a responsible tourism holiday.

Firstly, almost 2 out of 10 Italians claimed they had already had a first-hand experience with Senegalese culture. In 72% of the above cases, this contact was in Italy, mainly through employment or study situations/needs rather than out of curiosity or a deep-rooted interest. This is worth thinking about, considering that the Senegalese community is the biggest African population in Italy and for obvious (employment) reasons, is also concentrated primarily in North Italy. Interaction with traditional Senegalese culture (26.2%) and the mass media (21.1%) provided more mediated, but evidently more informative contacts, which would subsequently lead to a first-hand contact with Senegalese people. Less than 10 respondents in 100 had travelled to Senegal.

30% of all respondents had already thought of Senegal as a potential holiday destination, and 61% of these would choose a tour around the country as a whole, 27% a nature holiday/tour and 13% a holiday village. Nevertheless, out of all respondents who'd either had or hadn't had any contact with Senegalese culture, 67% declared an interest in a responsible tourism holiday to the country.

This group of respondents are tourists whom, on the one hand, are already relatively aware of the need to travel in accordance with the principles of responsible tourism and social responsibility, but who haven't travelled to Senegal yet; others are new to responsible tourism and who want to go on a responsible tourism holiday to Senegal (perhaps their first ever RT trip) and who support this kind of travel.

This bodes well for the promotion of this kind of trip, as it could form the basis of more specific marketing and communication actions. Besides, while it may be true that economic considerations are not always the main concern when planning a responsible tourism holiday, there is however a need for an adequate and well-presented system of communication and promotion/marketing if responsible tourists are to be attracted; the travel industry also needs to adapt to meet the (hoped

for) expected increase in responsible tourists.

Current and potential future demand

The information obtained in this study was also used to map current and potential future demand; this is useful to take the inquiry one stage further in order to give operators more specific indications as to what action to take and what marketing tools to adopt.

Three profiles emerged for three main degrees of involvement in responsible tourism issues:

- **RT-aware respondents**, i.e. people who have already heard about responsible tourism and who may be interested in pursuing a responsible tourism holiday, or who may already have had an RT experience (52% of respondents);
- **RT-interested respondents**, i.e. people who are very interested in pursuing an RT holiday, irrespective of whether they are already aware of the phenomenon or not, or who have already had an RT experience (very interested: 23% of respondents);
- **RT travellers**, i.e. people who have already had an RT experience and who may or may not be interested in repeating it (15% of respondents).

RT-aware profile

RT-aware respondents were mainly women (55%) of different age groups (21% aged 25-34), single or in a relationship but no children, and with a higher or further education qualification (54% high school diploma and 41% university degree/academics), who are used to travelling abroad (70% answered that they had travelled abroad at least once in the last 2 years - 14% at least three times, compared with 64% of the non RT-aware respondents).

The main sources of information for this profile is Internet and magazines/newspapers (45%), television (43%), word of mouth from relatives and friends (23%), and to a lesser extent from associations (18.6%), radio (17%) and conferences/seminars/exhibitions (9.5%).

According to RT-aware respondents, "responsible tourism is": minimising environmental impact (yes definitely 72.4%), interacting with the local population (49%), and travelling with an operator that supports local associations (41.5%). They associated it less with: small group holidays, a cheap way to travel, volunteering in a distant country and holidaying in less touristy locations.

30% of the RT-aware group stated they were very interested in going on a responsible tourism holiday (58% fairly interested), compared with 16% of non-RT aware respondents. Of those who were not interested (12%), the reasons provided were the lack of services/comfortable accommodation (21%), lack of information on the nature of the holiday (19.3%), fear that it was overpriced (19.3%), and distrust of the concept of responsible tourism (18%).

Furthermore, 16% declared they had already had a previous experience of this type of tourism. The preferred destinations were Africa, India, South America, Brazil and Australia. In Europe, the selected destinations were primarily Spain and France, then Sicily, Tuscany and Sardinia in Italy.

Key factors in responsible tourism were: knowing how the cost of the trip is spent (70%); being able to interact with the local population (57%); involvement in the implementation of social action projects (41%); financing local development projects (40%).

When asked what would encourage them to go on this type of holiday, RT-aware respondents mentioned: more transparent prices (60%), safety guarantees (56%), detailed information on packages offered (55%) and a quality mark indicating conformity with certain standards (43.5%).

RT-interested profile

The RT-interested group declared a strong interest in going on a responsible tourism holiday in the future.

In this case, the group was mainly composed of women (58%) who tended to be either younger (35% were aged under 34) or older (35% aged over 55), single with no children and with a higher or further education qualification. They appeared to be especially aware of responsible tourism and social responsibility issues although they were still hesitant about pursuing this interest directly due to a lack of clear information.

In most cases, they had more experience of foreign travel than both the AT-aware profile and those who were less interested: 72% had in fact travelled abroad at least once in the last 2 years (13.1% had travelled more than three times), compared with 65% of the fairly/minimally interested and not-interested group and 70% of the RT-aware profile.

67% had already heard of responsible, sustainable tourism compared with 48% of the less or not interested profiles.

Their main sources of information were magazines/newspapers (53%), Internet (50%), television (39%.6%) and radio (19%). Internet, newspapers, radio and associations were more of an influence than for RT-aware respondents, whereas the television made proportionally less of an impact.

Respondents found to be very interested in responsible tourism also endorsed to a greater extent the features said to be the distinguishing characteristics of this kind of tourism: minimize environmental impact 83%, interact with the local population 60.3%, travel with an operator that supports local associations 48%, small group holidays 33%.

The destinations that respondents interested in pursuing a responsible tourism experience would choose were Africa in general, India, South/Latin America, Mexico and Australia. When asked to select European and Italian destinations, Spain, Sicily and Tuscany were rated among the top 20 choices.

Knowing how the money charged for the holiday is spent (75%), interacting with the local population (65%), being involved in a social project (49%) and funding local development actions (46%) were the characteristics of responsible tourism judged to be most important by RT-interested respondents

17% of the "very interested" respondents declared they had already been on a responsible tourism holiday, compared with 16% of the RT-aware profile. Respondents who had still not had a responsible tourism experience explained this with very similar reasons to those used by the RT-aware profile: lack of information on the nature of the holiday (54%), price factor (18%) and to a lesser extent, concerns about safety and the comfort of the accommodation, whilst 10% said they had never had the chance.

When questioned about actions which could entice someone potentially interested to book a responsible tourism holiday, the responses were not that much different from those given by RT-aware respondents: transparent prices (very important for 69% of the profile), safety (61%), detailed information on the packages offered (57%) and a quality mark indicating conformity with certain standards (48%). An interesting fact that emerged was how RT-interested respondents gave more weight to these aspects compared with RT-aware individuals; this is further proof of how important it is that operators devise targeted communication initiatives.

90% of the very interested respondents declared they would like to receive more information on responsible tourism - compared with 77% of the less interested group and 86% of RT-aware respondents - and for 80% of these, internet was the main source used followed by newspapers/magazines (69%), television (62%), travel agents (60%) and associations (28%). It was interesting to note how in this case, associations and especially travel agents were seen as potentially more useful than they were for RT-aware respondents; this role should be further developed in terms of the specialized consultancy potential travellers could be provided to guide them through the choice and purchase of an RT holiday.

RT travellers

15% of respondents indicated that they had already experienced a "responsible tourism" holiday. Unlike the previous two profiles, this group was composed mainly of men (56%) who were young (47% aged under 34), single or in a relationship without children, with a further or higher education qualification (56% high school diploma and 33% university graduates/academics), and used to travelling abroad (70% had travelled at least once in the past 2 years, 11% at least three times - compared with 66% of non-RT travellers).

This result would suggest that women, albeit the more RT aware and the most interested in responsible tourism, are also the most hesitant about actually going on a responsible tourism experience. Alternatively, it could also mean that, being more informed about responsible tourism, women are in a better position to decide if a particular trip matches the defining criteria of "responsible tourism" allowing it to be classified as such. In effect, only 55% of self-proclaimed "RT travellers" had already heard of responsible and socially responsible tourism.

When asked to name their main sources of information, again the most popular choices were magazines/newspapers (55%), internet (51%) and television (40.5%), although associations received a higher rating (30.6%) than that assigned by the RT-aware profile.

This group associated responsible tourism primarily with minimizing environmental impact (75.5%) followed by interaction with the local population (47.0%), travelling with an operator that supports local associations (43%), and small group holidays (27%). Even though this profile gave more weight to the latter aspects than RT-aware respondents, the greater focus on the "ecological" aspect would obviously seem to suggest that some travellers had interpreted responsible tourism simply as a nature or countryside holiday.

26% of RT travellers stated they were very interested in repeating their experience, and 67% were fairly interested.

The main destinations of choice were India, Africa, South America, Brazil and Australia, with four European locations (Spain, France, UK and Ireland) and three Italian ones featuring amid the top 20.

Knowing how the money charged for the holiday is spent (70%), interacting with the local population (48%), funding local development actions (33%), and being involved in a social project (31%) were judged to be the most important aspects of responsible tourism. It should be pointed out nevertheless that RT-travellers gave these aspects slightly less weight than RT-aware respondents, confirming the possibility that the self-professed "travellers" may have not fully understood what responsible tourism is.

When questioned about what would entice them to repeat the experience, the main answers reflected those of the other two profiles: more transparent prices (60%), safety guarantees (56%), detailed information on packages offered (55%) and a quality mark indicating conformity with certain standards (43.5%). Again, less emphasis was given on the whole to these aspects compared with the RT-interested and RT-aware profiles, shedding doubt yet again as to their effective status as "responsible" travellers.

Based on the information collected, and considering in particular the various interpretations of the concept of responsible tourism, the percentage of travellers using associations (approx. 40%) as a source of information, and those indicating a strong interest in repeating the experience (26%), a reasonable estimate would be that the actual number of **"responsible travellers" is Italy is probably 30% lower than the number of people claiming to be this kind of traveller, which is equal to no more than 4-5% of the total population.** A percentage of this group uses specialist tour operators whilst the remainder organise their own trips.

The 15.3% found in the study was probably due to the respondents not having fully understood what responsible tourism entails, and therefore based their answers on an incomplete picture of the phenomenon and its defining features (not just a nature holiday but also interaction with local peoples, etc.).

Initiatives to promote responsible tourism

To sum up, the results obtained in the study confirmed a general interest in responsible tourism in Italy, and in one way or another, showed an awareness of issues such as minimizing impact on the environment and promoting social justice, especially amid respondents of average to high social and cultural backgrounds.

Nevertheless, some aspects need to be further explored in order to raise awareness of the phenomenon and encourage the correct practice of this kind of travel.

Responsible tourism needs to be more widely publicized, most importantly as a travel philosophy, in order to clarify what it means and what it doesn't. In addition, the principal features need to be better publicized (organisation, logistics, costs, etc.) along with the services and opportunities offered by travel operators in this field.

More specifically, the results of the study pointed to information-related problems in the following areas:

- Firstly, the availability of information was referred to, which depends on how operators make it available and how easy it is for potential users to access it. This in turn depends on the channels used for the particular market being targeted (e.g. young students, mature adults, families with children, etc.);
- Secondly, the type and quality of targeted information and how it is communicated also emerged as a problem. One of the primary reasons for the lack of interest in responsible travel or for not having tried the experience yet, was the lack of information on exactly what it entails. Likewise, one of the actions which would encourage respondents to go on this type of holiday was more information on the nature of the holiday, the packages offered, the operators, etc.

As regards information to be conveyed, one factor not to be overlooked is a clear explanation on how the cost of the holiday is spent and therefore the transparency of each part of the price: this reassures travellers and more importantly, will dispel some of their doubts over the real objectives of this type of tourism. From this point of view, a quality mark certifying that the holidays and services offered conform to certain standards of "responsibility" and "solidarity" may also be useful.

As regards the way information reaches users, although Internet was evidently the preferred means for the dissemination of information on the concept itself, what it entails and the packages offered by travel operators - not just because the respondents in the study belonged to a web community, but because internet is now widely used by consumers in general - the important role that the more traditional media (newspapers and television) and especially associations and travel agents, already play should be further developed. Associations in particular, could target the web, press and television to get their message and their philosophy across, whilst travel agents should become travel consultants aiming to expand the travel horizons of their customers and help them select the kind of holiday that best fits their needs, supplying all necessary information and guaranteeing the quality of the proposals offered.

Finally, as regards Senegal as a potential destination for a responsible tourism holiday, it has to be noted how the Italian population possesses only a limited understanding of Senegalese culture, despite the existence of a well-populated Senegalese community in this country. This is probably due to the difficulty in distinguishing different peoples from the same continent, which was also evident in the choice of Africa alone, and not individual African countries, as a potential destination.

Despite this, when specifically pressed, one third of the subject group indicated that they had

thought about going on holiday to Senegal, more particularly, for a responsible tourism experience. This inclination was greater in people who were already aware of the phenomenon, or who would in any case have been more attracted to this kind of travel.

This said, when asked spontaneously to name the destinations they would choose for this type of holiday, Senegal was mentioned in very few cases.

This probably suggests that information on projects underway in the country and on the various options available to visit Senegal have not been sufficiently publicized with potential travellers.

Study methodology

In this study, a 25-question questionnaire was administered to a subject group of 1000 Italians, both male and female, of different ages, professions, educational backgrounds and home towns using CAW, the computer assisted web interview technique. The interviewees were members of a web community, and were invited to complete the questionnaire which was presented on a web page. Progression through the interview was managed automatically and results were downloadable in real time to a server. The sample in this case was therefore, a group of internet users whom, by their very nature (age, cultural level, socio-economic position, travel and holiday preferences, etc.) tend to be more aware of responsible tourism and interested in undertaking this type of travel experience.

Organisations involved

This study was coordinated by ONG CISV in Turin and carried out by ISNART, the Italian national institute for tourism research (a joint-stock consortium of the Italian Union of Chambers of Commerce, Handicraft and Agriculture) and Ciset, the international centre for the study of the tourist economy at Ca' Foscari University in Venice, as part of Fondazioni4Africa - Senegal - responsible tourism sector.

Italian partners were: Associazione Senegalesi di Torino, Associazione Trait d'Union, Viaggi Solidali, and Associazione Italiana Turismo Responsabile.

Info: www.aitr.org/senegal

The Fondazioni4Africa project brings together for the first time ever four of Italy's' biggest foundations funded by banks: Compagnia di San Paolo, Fondazione Cariparma, Fondazione Cariplo and Fondazione Monte dei Paschi di Siena. The humanitarian mission and underlying principle of subsidiarity, combined with the foundations' previous project experiences, gave life to an economic partnership and joint project organisation in the realm of international solidarity, working closely with Italian non-governmental organisations and African immigrant associations. The Fondazioni4Africa project has two main areas of intervention, in North Uganda and in Senegal, both of which are funded by resources provided by the foundations. Fondazione Umano Progresso has also decided to join forces, thereby creating an overall budget of 11.1 million euro for the first three years.

Info: www.fondazioni4africa.it.