



## Opinion poll on "responsible tourism"

**34% of the people polled are familiar with the notion of responsible tourism and 17% say that they have ever practised this type of tourism.**

**61% confirms always or often using the Internet to book their holidays.**

**47% of respondents think that travelling in a responsible way implies a strong reduction of comfort.**

**Except for luxury and well-being, most respondents believe that responsible tourism could fulfil (or even exceed) their expectations (discovery and change of scene...) to the same degree as conventional tourism.**

**Only 15% of respondents would be willing to pay 2% more for their holidays to compensate for CO<sub>2</sub> emissions.**

These are the results of an opinion poll, which was conducted by Dedicated and commissioned by [the Trade for Development Centre](#) (TDC) of BTC (Belgian development agency) to promote fair and sustainable trade.

3 focus groups<sup>1</sup> were organised during the quantitative phase and 1,003 people living in Belgium were surveyed through the Internet about their travel habits as well as their attitudes, opinions and behaviours vis-à-vis responsible tourism.<sup>2</sup>

Since the TDC is chiefly interested in travel in the South, only people having travelled in Africa, Latin America, and Asia or Oceania were interviewed.

The study also aimed to detect what key means there are to raise awareness about responsible tourism among people living in Belgium and to better develop more responsible tourism.

### The main findings of the study

#### Destinations

Most participants (63%) report travelling abroad once or twice per year. From the 4 destinations tested (Africa, Asia, Oceania and Latin America),

- Northern Africa (Maghreb + Egypt) is by far the destination most visited
  - 68% of respondents travelled there over the last 5 years
  - Slightly more French-speaking (56%) than Dutch-speaking (42%)
- Asia is second with 42% of travel (26% of last destination)
  - Slightly more Dutch-speaking (30%) than French-speaking (21%)
  - Visited slightly more by older respondents (35%)



<sup>1</sup> In Brussels, Namur and Antwerp, respectively on 17, 18 and 19 July 2013.

<sup>2</sup> The survey was conducted through the Internet from 6 to 20 November 2013. Maximum margin of error (frequencies near 50%) is 3.1%.

## **Goals of travelling and activities**

Mostly, respondents look for **"relaxing" holidays before anything else:**

- Rest and leisure (48%)
- Discovery and change of scene
  - Slightly more French-speaking (52%)
  - Slightly more women (45%)
- Nature and landscape (39%)

People having travelled in North Africa recently proportionally looked more for rest and leisure. 58% of them preferred rest and leisure during their holidays, against 36% for people travelling in Asia and 41% for those travelling to sub-Saharan Africa.

**Culture and history** obtain 36% of appreciation and especially seem to attract:

- More Dutch-speaking (38%) than French-speaking (31%)
- More of the older respondents (47%)

**Good food and gastronomy** follow next with 27% of appreciation:

- More markedly with men (31%)
- And with Dutch-speaking respondents (30%)

**Women are more interested by history, local culture and crafts products.**

- 41% of the women interviewed confirm regularly participating to excursions to learn about history and local life, against 27% of men.
- 35% of women interviewed confirm regularly purchasing locally manufactured crafts products, against 19% of men.
- Also, more women (23%) regularly participate to local folklore than men (16%).

**Dutch-speaking people seem more keen to hiking and trekking** than French-speaking people. 51% of Dutch-speaking people do so regularly compared to 43% of French-speaking people.

**29% of people of 54 and above regularly rely on a local guide** for visits, against 15% for people under 35.

## **As a couple, as a singly or with family**

Men and women travel most often as a couple, respectively in 40 and 34% of cases. Women travel more often with family<sup>3</sup> (30%) than on their own (14%). Men travel as much on their own (19%) as with their family (18%).

## **Length and frequency of holidays**

Most commonly, holidays last **two weeks**.

People **older than 54, with a high income or living in Brussels** prefer somewhat to travel more often, rather than for a longer time (by leaving more often but for less long). People under 35 on the other hand prefer length (leaving less often but for a longer time).

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<sup>3</sup> At least 3 people.

### Travel plans and the Internet

**93%** of the respondents have at least occasionally consulted **travel agencies**: especially for travel and accommodation but less for journeys and activities in the country of destination.

**61%** of the people interviewed said they (almost) always or often used the **Internet** to book their holidays abroad. The Internet is the main source of information followed by travel documentaries (audio-visual and written media).

### Responsible tourism: concerns and perceptions

A little more than half of the respondents (54%) have already heard about the concept "**responsibility vis-à-vis local people**". I.e., responsibility:

- First and foremost, towards **the environment** (it is actually the aspect that most attention is paid to: 63% of the respondents often or always pay attention to it, even though this score is clearly lower for the unyielding)
- Second, towards **culture**
- Third, towards **social issues**
- And finally, towards **economic issues**

Most respondents (78%) agree **on the rather positive impact** of tourists at the **economic level**. For the other aspects the scores vary more widely.

**Flemish respondents say they better know** the concept of responsibility vis-à-vis local people, but they are proportionally **less inclined to contribute to it**: 49% of Walloon, 52% of Brussels respondents and 57% of Flemish respondents have heard about responsibility vis-à-vis local people; but, conversely, 68% of Brussels respondents, 64% of Walloon respondents and 57% of Flemish respondents are inclined to personally contribute to responsible tourism.

Flemish respondents seem less convinced that their **behaviour can make a difference in responsible tourism**. 56% of them think so, compared to 73% of Brussels respondents and 77% of Walloon respondents.

**Compensation of CO<sub>2</sub> emissions is received with much reservation** by the respondents (including the Believers). Only 15% of respondents would (probably or certainly) be willing to put aside 2% of the price of their holidays for a recognised association to fight climate change.

### Constraints and incentives of responsible tourism

Except for luxury and well-being, most respondents believe that responsible tourism could fulfil (or even exceed) their expectations (discovery and change of scene...) to the same degree as conventional tourism.

Principal incentives:

- Duty towards future generations (74%)
- Impression (desire) to do the right thing (69%)
- Feeling of making a genuine difference (64%)

Main constraints:

- Perception of having to limit one's level of comfort (47%)
- Feeling that this type of tourism is more expensive (40%)
- Scepticism about this approach (impossible of being a tourist without affecting the local people) (39%)

## Profile of travellers who are interested in meeting local people

The study investigated the profile of travellers having indicated "meeting with inhabitants" among the 3 statements that best characterised, according to them, their holidays.

They make up **23% of the total sample** and are likely interesting for smaller travel agencies and the specialised "responsible" travel organisations.

- Tourists who choose **Asia** (33%) and **sub-Saharan Africa** (30%) are significantly more interested in meeting local people than those visiting North Africa (18%) and Latin America (19%).
- There is no difference between Dutch-speaking and French-speaking respondents,
- But **women** are slightly more interested than men (25% / 21%) in meeting with inhabitants.
- Also **older people** are **more interested** than young people (29% > 54 yrs; 23% between 35 and 54 yrs; 18% < 35 yrs).
- And **Brussels respondents** (30%) more than Flemish (23%) or Walloon respondents (22%).
- Also **couples without children**; and clearly more **people travelling on their own**.
- **But there are no differences between social classes.**
- They especially travel to **discover and change of scene** (40%) or for **culture and history** (37%) rather than rest and leisure (33%).
- 50% travel **3 weeks and more**.
- Are clearly more **involved/committed** and, in decreasing order, participate much more to **folklore**, traditions and **local** celebrations and attractions (more than 15 points of difference); eat more at **local restaurants**; purchase **local crafts** and gather more information about **behaviours** to adopt when travelling.
- It is by far the category that has **heard most about responsibility vis-à-vis local people (65%)** and they feel significantly more responsible at all levels (like those travelling to sub-Saharan Africa): 81% for the environment; 75% for culture and 65% for social issues; but still much less for economic issues (only 59%).

Even though they pay more attention to all these aspects than other travellers, they are **paradoxically more sceptical** than average **as to the positive impact on economic issues**.

- Even though the concept of ecotourism is known best, it is **responsible tourism** that is practised most (1 out of 4), followed by **fair tourism** (17%).
- It is the group **that understands responsible tourism best, or that grants it an active dimension**. For them, responsible tourism first and foremost stands for "respecting the heritage and culture", followed by "preserving fauna and flora".
- The perception of and the meaning given to the **concept of 'responsible tourism'** especially matches their expectations and incentives. Responsible rather than conventional tourism can **better fulfil their desire** to "meet local people", to "discover and change scene" and for "culture & history". It is, however, not at all associated with "luxury & well-being" and "sports & leisure".
- Responsible tourism seems fully compatible with today's way of travelling, creates **personal added value** and is **not considered limiting**.
- More than anything else, the **Internet** is the **number one source of information**.
- Among the actions to take to promote responsible tourism, they mention in the 1<sup>st</sup> place: "Help the destinations to develop responsible tourism infrastructure" and then inform, show the impact & raise awareness - through **documentaries, travel guides** and **websites about responsible tourism**.

## Behavioural typology vis-à-vis responsible tourism

Behavioural typology of travellers shows there are 4 categories of travellers, with their specifics.

### The Believers

Are **very involved** in the "responsible" tourism approach:

- **High scores** for **incentives** for responsible tourism
- **Average to weak scores** for perceived **constraints or impediments** for responsible tourism

This is the **smallest group**. It represents 20% of the sample interviewed.

This group consists of

- Women mainly
- Significantly more French-speaking respondents
- Especially higher (high and medium-high) socio-professional profiles

Compared to others, this group especially pays attention to "responsibility vis-à-vis local people". It is also, compared to others, more attracted by the following types of travel:

- Discovery and change of scene
- Nature and landscapes
- Culture and history
- Meeting with local people

### The Reserved ones

Are aware of the responsibility of travellers

Do not actually see any "barriers" to adopting a more "responsible" approach (**very weak scores** for perception of **constraints**)

**BUT** nevertheless remain **rather inactive** in "responsible" tourism

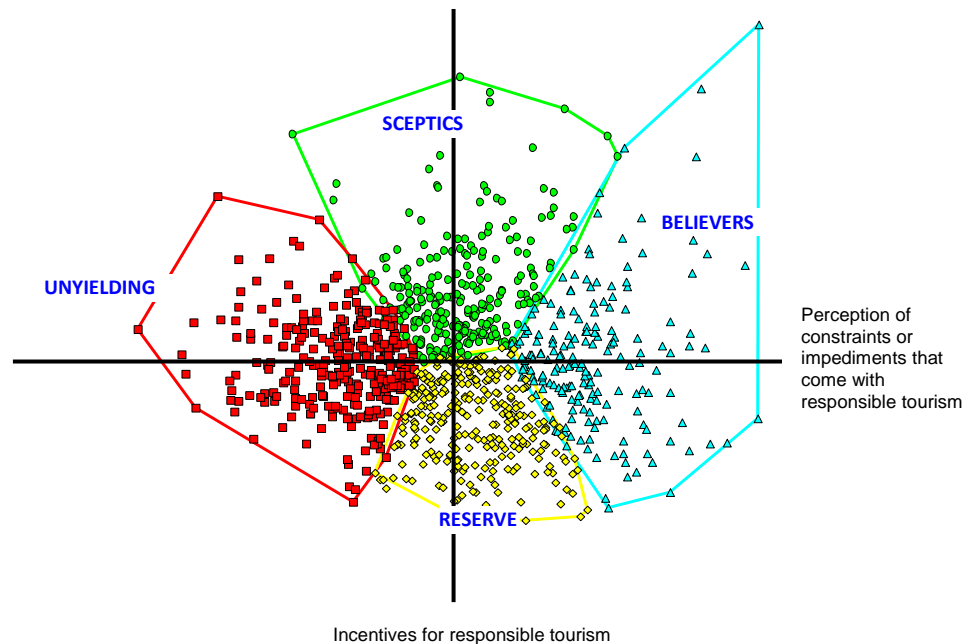
- **Average scores** for **incentives**

This group represents 28% of the sample interviewed

This group consists of

- Slightly more women than men
- Both French-speaking and Dutch-speaking respondents
- Especially higher (high and medium-high) socio-professional profiles

No specific preferential characteristics for the types of holidays.



### **The Sceptics**

Do see "benefits" for choosing a "responsible approach (**relatively high scores** for **incentives** for responsible tourism)

**BUT** see major barriers (**very high scores** for perception of **constraints and impediments**)

Are therefore **more critical** about the "responsible" tourism approach

This group represents 24% of the sample interviewed

The composition of this group is very **heterogeneous**:

- Both French-speaking and Dutch-speaking respondents
- Both women and men
- Practically transversal for socio-professional profiles

No specific preferential characteristics for the types of holidays.

### **The Unyielding**

Seem "indifferent" towards "responsible" tourism:

Do not see any particular "barriers" to adopting a "responsible" approach (**average to weak scores** for the perception of **constraints**)

**BUT** do not see the "benefits" either for such an approach (**very weak scores** for **incentives**)

Like the reserved group, this group represents 28% of the sample interviewed.

In contrast to the group of "believers", the "unyielding" group consists of:

- Mainly men
- Significantly more Dutch-speaking respondents
- Especially weaker (low and medium-low) socio-professional profiles

This group, compared to others, is more attracted by the following types of travel:

- Rest and leisure
- Good food and gastronomy
- Luxury and well-being

## Potential levers and means of action

Responsible tourism is just burgeoning and the challenge is quite big.

### Everything still needs to be done!

The participants in the focus groups and in the Internet poll showed they were **aware of the issues** and of the negative impacts of tourism in general and of the **need for improvement** in this respect.

### YET

Certain **barriers** seem to impede (or even block) their (more or less explicit) willingness to get involved in the general improvement effort.

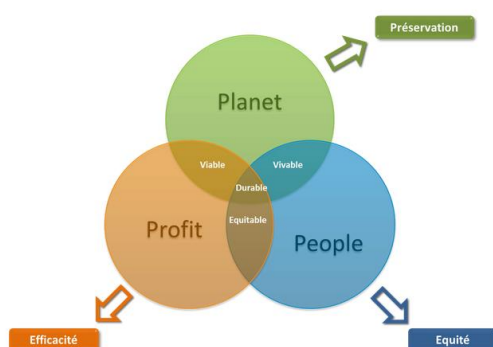
Most of these barriers are not insurmountable and many **axes of progress** were highlighted in the focus groups:

- **Inform travellers**
  - About **the concept itself** (clarify the concept)
  - About **opportunities** (in the agencies). Ensure that the responsible tourism offer is included in tourism and specialised guidebooks (Lonely Planet, Rough Guide...)
  - About the **positive impact** of various actions/approaches (proof of effectiveness)
  - About the **negative impact** of tourism
- **Put travellers at ease**
  - By providing **guarantees** (labels, certification...)
  - By rendering the concept of responsible tourism more "**accessible**"
    - The smallest of acts has an impact
    - Travelling in a more responsible way does not necessarily bring along major limitations
- **Involve travellers**
  - By "**facilitating**" their involvement in the approach as much as possible
    - Simple, clear and repeated information
    - Regular explanations, varied channels of information
  - By making **travellers responsible** (informal traveller's charter...)
- **Guide the travellers (role attributed to the travel agencies)**
  - By offering **alternatives** for classical tourism
  - By informing travellers about **good practices** and proper behaviours to be adopted in the country of destination
  - By **fostering** (promoting) more responsible accommodation, activities and types of business
  - By fostering the reliance on **the local guide**
- **Raise awareness among the youngest of travellers**
- **In the countries of destination, foster the development of partnerships:**
  - For the development of responsible infrastructure
  - For better communication in the accommodation, shops, public venues...
  - For better control

- **Diversify the offer**
  - **Combine responsible tourism and adventure and leisure tourism**
    - There are more specialised providers of adventurous and leisure tourism than of community or responsible tourism. Local responsible tourism organisations could – if feasible (geographically or otherwise) – offer an "adventure circuit" or "seaside activity".
  - **Meet the increased demand for authentic experiences and further service delivery**
    - Demand for authentic experiences – away from mass tourism – is on the rise. A growing number of travellers looks for experiences that differ from their day-to-day life and that suit the setting visited.
    - Apart from accommodation, develop activities that allow involvement of other people in the community. Activities and day trips that showcase the way of life and traditions of the local host population (initiation to local dance, cooking classes, learning to fish with a net...)
- **Automatically include compensation for CO<sub>2</sub> emissions in flight tickets.**  
By explaining to travellers that this is part of a responsible tourism approach. The amounts actually remain quite low (2% of ticket price).
- **Responsible tourism must not forget travelling should be enjoyable**  
In comparison to other sectors, **sustainability in tourism is still lagging behind**. One of the main reasons is that there is a **tone of reprimand** used when talking about sustainability whereas holidays should be synonymous of relaxation and freedom.
  - **Highlight a concept of pleasure.**  
Not in the strict sense of the word, but rather as a **broad range of feelings**: joy, emotion, genuine encounters...
  - Pleasure for the traveller through an enriching experience and pleasure for the local host in the sense of being treated with respect and having decent work.

#### The 8Ps of marketing in sustainable tourism

The 3 Ps of sustainable development



The 4 Ps of the marketing



And let us not forget the 8<sup>th</sup> P: the concept of Pleasure