

Will the recent UK riots damage foreign tourism?

Introduction

During the evening of Saturday 6 August an initially peaceful protest, about the death of a man shot by police, in Tottenham North London became violent. Over the next three nights and into the morning of 10 August, bouts of rioting and civil unrest spread across the capital and to other cities and towns across England. These included Manchester, Salford, Bristol, Birmingham, West Bromwich and Wolverhampton.

This attracted considerable media attention, both domestically and internationally, and led TNS Travel & Tourism division to undertake immediate survey work in key overseas markets to establish the impact on the country's reputation as a tourism destination.

A series of questions were placed on our online omnibus surveys in France, Germany and the United States of America. These questions sought to determine levels of awareness of the rioting and their geographical extent, the immediate impact on travel plans, the longer term impact on England and London's appeal as a holiday destination, and the public's opinion of London as the host of the 2012 Olympics.

More than 1,000 people were interviewed from each country and the results were weighted to be representative of each country's population.*

Awareness

In both Germany and France, 95% of the adult population were aware of the rioting over the previous few days in the UK. In each case, over half were aware that they had taken place both in London and other parts of England (53% and 52% respectively). However a significant proportion in each country (34% and 33%) wrongly believed the violence to have been confined solely to London.

Only 3-4% showed an overall awareness of the riots but did not know where they had taken place within the UK. This suggests that in both of these two markets, there was general awareness of the extent of the rioting – although a significant number of Germans and French thought the unrest was confined only to London.

In the USA, awareness levels were lower than in Europe, although still significant. Only three-quarters of the adult population had heard about the disturbances, whilst 25% had not. Awareness that the riots had occurred across England (24%) was lower than the belief that the unrest had been confined to London (39%). 9% of Americans knew about the riots, but not where, within the UK they had taken place.

In all three countries, awareness of the unrest tended to increase with age. Males also tended to be slightly more aware than females.



Conclusion: Awareness levels of the riots and their geographical extent were extremely high in France and Germany and only slightly lower in the US. These levels of awareness are very high for a 'news event' – indicating a potentially high level of impact on tourism.

How will the riots impact travel plans to the UK in the short-term?

Respondents were asked to describe what type of impact the riots might have on their intentions to visit England over the next few months. In each case, amongst those aware of the riots, intentions to visit England in the short-term were relatively low. 9% of Americans intended to come to the UK, 11% of Germans and 16% of French adults were planning a trip.

The French were least likely to be affected as 52% who were intending to visit would still do so without any change to their itinerary post the riots. Some 17% would still visit but would now avoid certain areas, whilst 13% were now less likely to visit and 5% would no longer take a trip at all. 13% of the French said they would now postpone their visit until later this year.

The Germans were slightly more likely to be affected, although 43% of those who were intending to visit would still do so. However a larger proportion – 14% were now ruling out a visit, and 8% were less likely to visit than before. Whilst 12% would still visit but avoid certain areas, almost a quarter (23%) claimed they would postpone a visit until later in the year.

Americans were most likely to be affected – with complete cancellation a more common option than postponing the trip to later or avoiding certain areas when visiting. Only 33% of those intending to visit claimed to be unaffected, whilst over a quarter (26%) were no longer considering a visit and 14% were now less likely to visit than before.

In summary, amongst a relatively small proportion who had been actively planning a trip to England in the next few months, the French were most pragmatic and least likely to be affected (albeit around half were considering some changes). Americans were more likely to be affected, with as many as 40% who had been considering a trip to the UK now less likely to visit or changing their plans entirely.

The appeal of England and London as tourism destinations

Respondents were asked to describe the impact of the rioting on the appeal of England and London as travel destinations. The 42% of German adults who were aware of the rioting felt that England was now a less appealing destination to visit. There was a slightly bigger impact on the capital – 45% of Germans felt London was now less appealing as a holiday destination.

Amongst Americans, 37% felt that England was now less appealing whilst a slightly larger proportion (39%) held this view about London, notably a slightly lower proportion than amongst the German population.

Lowest impact again seems to be amongst the French – 35% claimed the appeal of England was now lower and 36% replied in this way about London.

The negative impact on the appeal of the UK tended to increase with age – and the effect was generally more

negative amongst females rather than males (other than in France where males were slightly more likely to be negatively affected).

Whilst only a relatively small number of those who had already been planning to visit England seem to have been discouraged from doing so, the results seem to suggest that there will be some work to do in order for England and London to regain their previous levels of appeal as a travel destination – especially in the German tourism market.

Impact on London as host of the 2012 Summer Olympics

With the 2012 Olympics less than a year away, the impact of the disturbances on London's abilities as host city was of considerable interest.

French respondents were least likely to be impacted: half of the population claimed the events made no difference to their opinions of London as the Olympics host next year. For 29%, the riots gave them less confidence in London's ability to host a trouble-free Olympics, whilst 21% felt that London would be better prepared following the riots.

There was a similar view presented by US respondents. Opinions had not changed for just under half the respondents questioned (48%), but the balance towards having less confidence (33%) over having more confidence (19%) in a trouble-free Olympics was slightly greater in USA than in France.

The German population were most likely to claim to have changed their opinion about their confidence in London as Olympics host – two in three had done so (66%). Interestingly, there was a divided view here on the impact of the riots – a slightly larger proportion (34%) felt that London would now be better prepared to deliver a trouble-free Olympics than those who felt less confident in the city's ability than before (32%).

The riots have clearly had a significant impact on the international community's confidence in London as Olympic host city for 2012. However, this may be offset by the belief that the riots have made London better equipped for the Olympics. In Germany this view outweighed those who felt less confident in the city's ability.

Summary

Clearly, in the immediate aftermath of the riots, there has been a significant impact in these overseas markets in terms of the short-term effects on immediate plans to travel to Britain, the appeal of England and London as destinations, and confidence in London as 2012 Olympics host. The longer term effects however, are yet unknown. TNS intends to repeat this research in the near future to investigate.

* Fieldwork: TNS Online Omnibus (NCompass), 11 – 15 August 2011. Surveys were undertaken online with a representative sample of adults in each country and the results have been weighted to be representative of each country's population. Sample sizes were 1,028 (USA), 1,054 (Germany) and 1,053 (France).

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