



**tns** research international

# Impact of Rioting/Civil Unrest on Tourism

## To what extent is there any lingering impact?

– TNS Online Omnibus (Ncompass) – 11-15 August and 15-19 September 2011

### Key Overview:

- Five weeks on, recall of the riots is still fairly high for each market – however in all cases (especially USA), awareness is significantly lower than in the immediate aftermath
- Recall of the specific details and geographical extent is more muddled – a greater perception that the riots were confined to London only
- As would have been anticipated, the immediate impact of the riots on planned trips to England over the next few months has lessened considerably – however there is still a latent effect – especially in the German market where 2 in 5 planned trips are still being affected
- Although the impact of the rioting on the appeal of both England and London as places to visit generally has decreased to much lower levels, there remains a latent level of negative impact on the visitor appeal – especially amongst potential German and American visitors, around a quarter of whom still have this negative opinion
- The continued impact on planned trips over the next few months and the relatively large proportions in each market for whom a visit to England generally, or London specifically, now has lesser appeal suggests that there may be a need for communications from the tourist authorities and the tourism industry generally to provide the appropriate levels of reassurance and positive messaging
- London's perceived ability to deliver a trouble-free Olympics after the riots experience would appear to have strengthened in the weeks following the riots in the eyes of consumers in the USA, Germany and France. This is perhaps a reflection of the absence of any recurrence and the way in which the UK authorities dealt with the situation

### Introduction

Over the period from the 6th-10th August, sporadic and then concentrated bouts of rioting and civil unrest, spread from North London to other parts of the capital as well as to other cities across England – including Manchester, Salford, Bristol, West Bromwich and Wolverhampton. This attracted considerable media attention, both domestically and internationally, and led TNS to undertake some immediate survey work in key overseas markets to establish the impact on the country's reputation as a tourism destination.

In the immediate aftermath of the riots, from the 11th-15th August, we placed a series of questions 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 holiday destinations, as well as the impact on opinions of London as upcoming host of the 2012 Olympic Games. Over 1,000 people were interviewed in each country and the results were weighted to be representative of each country's population.

These results now provide us with a measure of the immediate impacts. But how have these effects changed some 5 weeks later? We repeated the exercise in the same 3 markets over the 15th-19th September period to determine the extent to which the rioting was still an issue among potential visitors to Britain. The results below illustrate how the mindsets of French, German and American visitors have changed over the period – and illustrate the relatively short term impact of major news events of this nature.

# Awareness

## Were you aware of any rioting/civil unrest in the UK during August?

	11-15 August			15-19 September		
	USA	France	Germany	USA	France	Germany
<b>Yes – Aware</b>	<b>75%</b>	<b>95%</b>	<b>95%</b>	<b>59%</b>	<b>87%</b>	<b>82%</b>
- in London	39%	33%	34%	25%	44%	40%
- in other areas of England outside London	3%	6%	4%	2%	6%	3%
- in London & other areas of England	24%	52%	53%	16%	27%	32%
- in the UK generally, but not sure where	9%	4%	3%	16%	10%	7%
<b>No – Unaware</b>	<b>25%</b>	<b>5%</b>	<b>5%</b>	<b>41%</b>	<b>13%</b>	<b>18%</b>
BASE:	1,028	1,054	1,053	1,048	1,059	1,068

**AUGUST WAVE:** In the immediate aftermath of mid-August, 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 in London and other parts of England (53% and 52% respectively). A significant proportion in each case (34% and 33%) thought they had been confined to London however. Only 3-4% were aware of the riots but didn't know where they had taken place in the UK. This suggests that in both these two markets, there was a fairly general awareness of the general extent of the rioting – albeit significant proportions did think they were confined to London. In the USA, awareness levels were lower – only three quarters of the adult population had heard about the disturbances; as many as 25% had not heard anything. There was also more of a feeling that they were confined to London (39%) – only 24% knew they had been more widespread. Additionally, one in eleven (9%) knew about the riots but didn't know where they had taken place in the UK.

**SEPTEMBER WAVE:** Five weeks on, and there have been some fairly large shifts. In all three markets, awareness of the riots has now decreased significantly – especially in the USA where it has dropped by some 16 percentage points to 59%. Awareness in Germany has shown a 13 percentage point decrease to 82%. In France, awareness levels have shown the smallest decline – some 87% claimed awareness, only 8 percentage points lower than in the immediate aftermath.

One of the most interesting findings relates to the perceived geographical extent of the rioting. In all three markets, amongst those who claim recall, there is a much greater belief than previously that the riots were confined to London only. Previously, a third of both the French and German populations believed they had been confined to London – this has increased to 40%+ in each market five weeks on. Additionally, around double the initial proportions in each market recall the rioting but cannot remember in which parts of the UK they took place.

*Five weeks on, and it appears that awareness levels have reduced across all three markets – especially the USA and Germany, though awareness levels have been sustained at higher levels in France. Despite this, in all three markets, the majority of the adult population did recall the rioting – in the case of both France and Germany, over four in five of the population were still aware from the extremely high levels of awareness previously (95%). There is more of a blurring of the detail however – in all three markets, amongst those aware, larger proportions believed they were exclusively 'London events', or were simply unsure in which parts of the UK they had taken place.*



# Short term impact - intention to visit England

**(AMONG THOSE AWARE): Impact of the riots on their intention to visit England in next few months?**

	11-15 August			15-19 September		
	USA	France	Germany	USA	France	Germany
<b>No Impact</b>	<b>33%</b>	<b>52%</b>	<b>43%</b>	<b>61%</b>	<b>73%</b>	<b>59%</b>
<b>Some Impact</b>	<b>67%</b>	<b>48%</b>	<b>57%</b>	<b>39%</b>	<b>27%</b>	<b>41%</b>
- Will definitely not now visit	26%	5%	14%	10%	5%	9%
- Now less likely to visit	14%	13%	8%	7%	2%	11%
- Will still visit but will avoid certain areas	15%	17%	12%	10%	9%	10%
- Will postpone the trip until later	11%	13%	23%	12%	10%	11%
BASE (aware & intending to visit England in next few months):	72	157	105	72	128	100

**AUGUST WAVE:** Immediately after the disturbances, respondents were asked to describe what type of impact the riots might have had 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 in any case (ranging from 9% of Americans intending such a visit, 11% of Germans, and 16% of French adults).

The short term impacts were clear. Americans were most likely to be affected, albeit a much smaller proportion had been intending to visit in any case (9%) – with complete cancellation a more common option here 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.

The French were likely to be least affected: 52% who were intending to visit would still do so without any changes post-riots. Some 17% would still visit but would now avoid certain areas, whilst 13% were now less likely to visit and 5% will no longer take a trip at all. 13% would postpone their visit until a later date.

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.

**SEPTEMBER WAVE:** Five weeks on, and it is clear that the impacts of the riots have been very short term for most potential visitors. In each market, among those who recalled the riots, the proportion who claimed this would impact on their proposed travel were much lower than previously stated. That said, significant minorities still claimed they would still have some form of impact on their likely travel to England – 27% of French visitors who had been intending to travel, compared with 39% of Americans and 41% of Germans. In each case, avoiding certain areas or postponing their trips until a later date were now more likely than cancelling the trip altogether. The drop-off in impact was most noticeable among Americans suggesting that the riot effects were most short term in this market. In contrast, the affects would appear to have been slightly longer term in Germany.

**Conclusion - There remains a degree of latent negative impact on visits to England from the rioting in all three markets – however, as would be expected, these impacts are all significantly lower than those recorded in the immediate aftermath. The high immediate impacts on US visitors have declined considerably and are also much lower among potential French visitors. The negative impacts have declined to a lesser extent among German visitors – the riots continue to have a claimed impact on over 2 in five planned trips among Germans to England.**



# Impact on appeal of England and London as destinations

Among those aware, what is the impact of the riots on appeal of England/London as places to visit?

	11-15 August			15-19 September		
	USA	France	Germany	USA	France	Germany
<b>ENGLAND:</b>						
- Recent events make England a less appealing place to visit	37%	36%	42%	23%	15%	25%
- Recent events have no real impact on the appeal of England as a place to visit	63%	64%	58%	77%	85%	75%
<b>LONDON:</b>						
- Recent events make London a less appealing place to visit	39%	35%	45%	24%	16%	26%
- Recent events have no real impact on the appeal of London as a place to visit	61%	65%	55%	76%	84%	74%
BASE (Those aware of the riots):	769	1,001	1,000	623	920	872

**AUGUST WAVE:** In the immediate aftermath of the riots, over four in ten German adults who stated they were, aware of the rioting, felt that England was now a less appealing destination to visit (42%). There was a slightly bigger impact on London – 45% of Germans felt it was a less appealing place to visit.

Amongst Americans, 37% felt that England was now less appealing whilst a slightly larger proportion (39%) held this view about London – slightly lower proportions than amongst the German population. Lowest impact seemed to be amongst the French – 35% claiming the appeal of England was now lower and 36% replying in this way about London.

**SEPTEMBER WAVE:** By mid September, predictably, the impact on the appeal of both London and England as destinations has decreased from the height of early-mid August. That said, significant proportions claim that England remains a less appealing place to visit because of the rioting; this is especially the case for Germany and the USA where around a quarter have this opinion (25% and 23% respectively). The proportion in France was slightly lower (15%). As in the initial wave of research, reflecting the focus of the riots, the impact on London's appeal as a (tourism) destination is marginally higher – one percentage point for each market.

*These results suggest that even although it is now over a month since the riots were global news events, they are still having a degree of negative impact on the appeal of both England as a whole and London specifically as visitor destinations.*



# Impact on London as host of the 2012 Olympics

**Among those aware, what is the perceived impact of the riots on London's ability to host the 2012 Olympic Games?**

	11-15 August			15-19 September		
	USA	France	Germany	USA	France	Germany
• I have less confidence in London's ability to host a trouble-free Olympic Games in 2012	33%	29%	32%	20%	21%	23%
• Riots have not changed my opinion at all	48%	50%	33%	61%	61%	44%
• I think London will be more prepared to host a trouble-free Olympic Games in 2012	19%	22%	34%	19%	18%	32%
• NET IMPACT	-14%	-7%	+1%	-1%	-3%	+9%
BASE (Those aware of the riots):	769	1,001	1,000	623	920	872

**AUGUST WAVE:** With the 2012 Olympics on the immediate horizon, the impact of the disturbances on London's abilities as its host city was of considerable interest. In the initial wave of research immediately after the riots, French respondents were least likely to be impacted: half of the population (50%) claimed the events made no difference to their opinions of London as Olympics host next year. Amongst the other 50% however, on balance it was felt that the riots gave them less confidence of London's ability to host a trouble-free Games (29%) as opposed to 21% feeling that London would be better prepared following the experience of the riots. There was a similar view present in the USA. Opinions had not changed for just under half (48%), however the balance towards having less confidence (33%) vis-a-vis more confidence (19%) in a trouble-free Olympics was slightly greater than in France. The German population were most likely to claim to have changed their opinion about their confidence in London as Olympics host city – 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%).

**SEPTEMBER WAVE:** Five weeks on, and the impacts have lessened: three in five in both the USA and France who recalled the riots claimed that they hadn't changed their confidence levels in London's ability to host a trouble-free Olympics. In each case around one in five had rather less confidence, but only a slightly smaller proportion felt that London would now be better prepared for any civil unrest or disturbances. Among Germans, the latent impacts were slightly greater with only 44% claiming the riots had no impact on their opinion. However, as in the initial wave, the German population felt that the experience in dealing with the riots was more likely to make London better prepared for a trouble-free Olympics than less able to deal with it (32% and 23% respectively).

*Initially, the riots clearly had an impact on the confidence of fairly large proportions of the French, German and US populations in their view of London as Olympic host city 2012. However, five weeks on, this view has lessened considerably in all markets, and if anything, there has been a clear swing towards the viewpoint that London will now be better prepared to deliver a trouble-free Olympics as a result of the riots experience. The relatively short-lived nature of the rioting, with no notable recurrences over subsequent weeks, and perhaps the way in which the UK civil authorities dealt with the situation perhaps provides the travelling public a greater degree of confidence in our ability to host a trouble-free Olympic Games.*



**For more information about our whitepapers, or for further details of the kinds of services offered by TNS Mercury and the Travel and Tourism sector please contact us on:**  
**+44 (0)131 243 3908 or**  
**[jim.eccleston@tns-ri.co.uk](mailto:jim.eccleston@tns-ri.co.uk)**

**Visit us on our web site at [www.tns-ri.co.uk](http://www.tns-ri.co.uk)**