STATE OF PLAY: THE IMPACT OF GEOPOLITICAL EVENTS ON INTERNATIONAL TOURISM IN 2017

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EXECUTIVE SUMMARY

RICHARD SINGER
PRESIDENT, EUROPE OF TRAVELZOO

Travelzoo commissioned research into global consumers’ perception of safety and security on holiday for ITB Berlin 2017, using independent research company Norstat to facilitate the research worldwide. This paper outlines the findings from 6,032 holidaymakers from nine major tourist-generating countries: the UK, the USA, China, Japan, South Africa, Germany, France, Russia and India.

Safety and security are imperative, basic requirements, and tourism, as a discretionary activity, is incredibly vulnerable to their absence. Terrorism is not novel and dates back to the 11th century and earlier; however, this paper is focusing on the climate of worry induced by attacks taking place following the Arab Spring in 2010.

This period has seen an increase in attacks on Western Europeans, with events in the past 36 months causing tourists both within and outside of Europe to change their holiday choices due to concerns over safety.

The recent inquest into the Sousse attacks in 2015 continues to feature in press headlines across Europe. Debates about who is responsible for tourists’ safety abroad show the industry developing the role it plays in ensuring consumers feel everything is being done to ensure they are safe.

Our ITB survey finds that 97% of all respondents have personal safety at the forefront of their minds when choosing a holiday destination, and that the majority feel significantly more concerned now than they did in 2014.

The study looked at risk in general and found that concern over the risk of a terrorist attack at a destination far outweighs concern over other risks, including natural disasters, disease and local crime rates. This paper therefore focuses on the findings related to the risk of terror.

In working with Bournemouth University’s academics from the Tourism Faculty, we have assessed the key drivers for behavioural change regarding leisure travel. We conclude that the current climate of concern demands the tourism industry and governments unite to provide two things:

1) Better clarity of information regarding the safety and security of tourism destinations. This role is best performed by official government bodies; however, Travelzoo believes current information is too complex and open to interpretation for the general consumer. We also believe travel companies should be more proactive in sharing official information about safety and security with their customers before they book, especially in areas with a high risk of terror.

2) A system of standardisation or certification of safety and security for major tourism areas, such as hotels, resorts, restaurants, theatres and other venues. We believe that such a system should be driven by an international tourism body working with the travel industry to ensure travel companies honour their duty of care, so far as they are able, in order to build consumer trust and confidence in where they holiday.

Travelzoo believes that the current climate of fear can be addressed by better communication to the public about destinations and their potential risk. Armed with more insight and information, consumers can feel empowered to make informed decisions, and, whilst the world remains volatile and unpredictable, responsibility for the personal safety of holidaymakers can be distributed fairly across governments, the travel industry and consumers themselves.

Prof. Dr. Roland Conrady
Scientific Director of the ITB Berlin Convention

Safety and security is now a key factor in the majority of consumers’ travel decisions and so ITB Berlin has decided to make this a core topic at this year’s ITB Berlin convention.

We are happy to have worked in close partnership with Travelzoo on this unique, in-depth and valuable worldwide study on safety and security in the global tourism market.
CLIMATE OF WORRY

Consumer travel confidence is affected by independent and collective influences. The travel industry relies upon push factors that stimulate travel and pull factors that attract tourists to particular destinations.

Tourism is an industry with a high income elasticity of demand, which means that as income grows, the demand for tourism products grows more than proportionately. The rapid growth of the BRIC (Brazil, Russia, India and China) economies has acted as a supply pipe in this respect, adding to the steady growth generated by the industrialised economies. The push factors of growing economic prosperity and declining real costs associated with travel mean that more people enter the tourism market each year. However, the past few years have been particularly challenging, with factors such as the global financial crisis, which started in 2008 and still reverberates around the world, affecting national economies and hindering the continued growth of tourism activity.

An IMF report (April 2016) described the world economy as having been "too slow for too long" and referred to 2016 as a "lacklustre" year. In spite of attempts to project (i.e. FT 2009, IMF 2012) the image that the world is out of the global financial crisis, growth of the USA economy has been described as being steady but tepid. Worldwide there has been either no or very little economic growth, and the search continues for a new economic breakthrough. This has reduced consumer confidence and, although globally the number of travellers has grown, tourist spending has come under pressure. Affecting the strength of the pull factors, issues of safety and security have become particularly problematic. The world continues to feel political tensions, from the South Pacific to the North Atlantic, and there continues to be a cycle of violence, civil and sectarian, stretching from Afghanistan to Somalia, and across to Libya and Tunisia; the sub-Sahara and Eastern Africa regions have done little to stabilise this vast stretch of troubled land. Terrorism and mass migration, both within and outside the MENA (Middle East and North Africa), European and American regions, have poured fuel on the fires of nationalism and protectionism, resulting in such political swings as the Brexit decision in the UK, the election of President Trump in the USA and the rise of the far right in many parts of the world.

Travel confidence levels have also been hit by the emergence of specific issues such as the Zika virus and growing uncertainty in the market in terms of US foreign policy and volatile exchange rates. Tourism is discretionary activity, and slow economic growth, protectionism, terrorism, migration and perceived health risks all work counter to the strong growth in travel that was the hallmark of the twentieth century.

When examined on a global scale, the tourism industry has been incredibly resilient and the demand for international travel, in terms of the number of international visitors, has remained robust (see Figure 1), growing by 4.6% in 2015 to reach 1.2 billion travellers. This growth came in spite of challenges such as the global financial crisis and the Arab Spring.

Early figures for 2016 (UNWTO, 11.16) suggest moderate growth for the year, with negative growth for the second quarter of 2016 in Western Europe, and a large decline in the MENA region. There are suggestions (Rifai 2016, Peltier 2016, Alderman 2016, France 24 2017) that this moderate growth and lower spending is largely the result of subsiding safety and security concerns.

To determine how safety is being perceived by potential holidaymakers, a survey instrument was commissioned by Travelzoo and implemented independently by Norstat for the period December 2016 to January 2017 using the net trap sampling method. The survey was distributed to online users across nine major generating markets and 6,032 useable responses were collected (see Table 1). The survey was terminated for those who never booked a holiday and/or never booked a holiday in a foreign country. The data were adjusted to take account of the different online populations of each country.

![Figure 1: International tourist arrivals, million (World, 2005-2015)](source: United Nations World Tourism Organization (UNWTO))
The results reveal one overarching theme: safety is on the minds of 96.5% of respondents, with 58% suggesting it is on their mind to a great extent. 93% have the threat of terrorism on their minds, and 48.8% are concerned about safety when travelling to a foreign country (see Figure 2). Hence, the data suggests, and not surprisingly, that the majority (70.8%) feel that safety and security is on their minds more than it was just a few years ago. Following this question, a number of questions were asked to find out why the majority of respondents say that safety and security is on their minds more than it was just a few years ago. The reasoning here should be treated with caution because respondents have already made their decision, and then it was decided to attempt to reverse that decision by giving them some extra discount.

Table 1: Profile of respondents

<table>
<thead>
<tr>
<th>Country</th>
<th>Response Rate %</th>
<th>Sample Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>6.4</td>
<td>500</td>
</tr>
<tr>
<td>United States</td>
<td>16.5</td>
<td>999</td>
</tr>
<tr>
<td>Germany</td>
<td>10.5</td>
<td>1000</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>6.7</td>
<td>1000</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>13.4</td>
<td>529</td>
</tr>
<tr>
<td>France</td>
<td>15.2</td>
<td>500</td>
</tr>
<tr>
<td>Japan</td>
<td>5.5</td>
<td>500</td>
</tr>
<tr>
<td>India</td>
<td>15.0</td>
<td>500</td>
</tr>
<tr>
<td>South Africa</td>
<td>2.9</td>
<td>500</td>
</tr>
</tbody>
</table>

The results show that there is an equal divide between those who agreed this may be the case and those who did not. Additionally, the majority (84.8%) discounted the view that the change towards more adventurous travel, or having the responsibility for others (63.3%) was the reason for their increased concern for safety and security. Of the 23.65% of the survey sample who stated that their concerns over safety and security have not changed over the past few years, 70.4% of them suggest that this is down to them having become more adventurous.

A large proportion (65.7%) of this group (4,270 out of 6,032) responded by saying that it was because the world has become a more dangerous place. When they were asked if this is because they have become older and more risk averse, the results show that there is an equal divide between those who agreed this may be the case and those who did not. Additionally, the majority (84.8%) discounted the view that the change towards more adventurous travel, or having the responsibility for others (63.3%) was the reason for their increased concern for safety and security. Of the 23.65% of the survey sample who stated that their concerns over safety and security have not changed over the past few years, 70.4% of them suggest that this is down to them having become more adventurous.

The decision to travel is the product of the equation between the costs and benefits of travel. Travel-related risk is on the cost side of that equation and so reducing monetary costs of travel may offset that risk. To assess the likely effectiveness of price discounting, respondents were presented with two similarly appealing countries, one with a small risk of terrorism and one considered to be absolutely safe. Respondents were asked whether they would go on holiday to a destination that had a small risk of terrorism if the holiday price was reduced by £100 per person. Only 15.8% of respondents reacted positively to the lower price, and 49.6% of respondents rejected the offer. Offering larger discounts of £200, £400 and £600 per person did not affect the decision of those who had rejected the £100 reduction originally. It is plausible to argue that those who accept the small risk of terrorism believe that there is a small risk of terrorism wherever they go, and so common sense suggests that they should accept the discounted offer. For the remainder of the sample (the vast majority), these data suggest that people are not willing to be exposed even to a small amount of risk of terrorism in return for a cheaper holiday, and people’s decisions tend to be rational when they are presented with hypothetical facts.

1 It should be noted while data overall was collected from December 2016 to January 2017, there are some variations between countries that could affect the perception of risk of some countries (i.e. given the trail of events and news, media framing and people’s memory).

2 Two summary variables have been extracted: frequency % of Very Fearful and Not Fearful at All.

3 The reasoning here should be treated with caution because respondents have already made their decision, and then it was decided to attempt to reverse that decision by giving them some extra discount.

Figure 2: When safety is on your mind when choosing where to holiday, to what extent were you thinking about each of the following?

- Terrorism
- Safety when travelling to the country
- Safety when travelling inside the country
- Crime
- Sickness and disease
- Natural disaster

Mean response on scale of 1-3

0.0  0.5  1.0  1.5  2.0  2.5  3.0

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Figure 3: To what extent would you be fearful of visiting the following cities, countries or regions?

- Iran
- Israel
- Dubai
- Abu Dhabi
- Turkey
- Australia
- India
- Spain
- Germany
- China
- Japan
- Russia
- France
- USA
- Brazil
- UK
- New Delhi
- Istanbul
- Riyadh
- Sydney
- Joburg
- Madrid
- Munich
- Berlin
- Beijing
- Hong Kong
- Tokyo
- Moscow
- Paris
- NYC
- Rio
- London

Figure 4: Safety is on my mind to a great extent when choosing where to holiday

WHO FEELS MOST AT RISK?

To examine the relationship between fear level and nationality, respondents’ nationalities were compared regarding responses to the question, “To what extent is safety and security on your mind when choosing where to holiday?”

Three measures were used here. Firstly, descriptive statistics to display the overall results (Figure 4). Secondly, it was plausible to see if the difference between countries on the left-hand side and those on the right-hand side of Figure 4 sum to a substantial effect size (Field 2005, Cohen 1994). The very large sample size, if analysed using conventional statistical reasoning, would lead to results using the probabilities of test statistic, which were significant, though non-substantive simply because of the size of the data set⁴, therefore effect sizes are reported rather than probabilities (Field 2005, Cohen 1994). Finally, the data were analysed to see if the three clusters of countries were found to be in distinctly separate groups.

Descriptive analysis suggests that respondents from Russia hold safety in mind more than any other country, followed closely by respondents from India and South Africa (see Figure 4). Western Europeans seems fairly equal in their assessment of safety.

⁴ Effect size (r=Z/√N) is a simple way of quantifying the difference between two groups that has many advantages over the use of tests of statistical significance alone. There are small limitations with this measurement as the sample size is not equal across the countries. r=0.10 small effect, r=0.30 medium, r=0.50 large effect.
In order to see whether, for example, the Russian and the British, German or French are significantly different in the way they feel about safety, Kruskal-Wallis and post hoc tests were conducted. The UK was selected to represent Germany, France and China because the scores of all countries’ respondents were similar. The results suggest that there are significant differences between nationalities.

Comparing Russia with European countries in this survey, the findings suggest that there is a medium ($r^2 = 0.40$) effect and that the effect of Russian nationality in increasing the extent of personal concerns over safety and security is fairly substantive. The result is similar when respondents from Russia are replaced by respondents from India, although the size of the effect falls slightly ($r = 0.35$). Comparisons between the UK and South Africa suggest that there is a small to medium effect ($r = 0.29$) between the respondents. However, comparison between the respondents from the UK and USA ($r = 0.13$) or Japan ($r = 0.10$) reveal relatively small effects.

These results suggest that while respondents from all countries have safety and security on their minds, there are some distinct groups. There is a small difference of effect size ($r = 0.13$) between respondents from the UK, Germany, France and China, who suggest that safety and security concerns occupy a lower level in their minds, when compared to those from the USA and Japan, but a fairly substantively different effect size ($r = 0.362$) to those from Russia, India and South Africa, who have the highest levels of concern over safety when choosing where to holiday. There is also a small to medium ($r = 0.26$) effect size when respondents from the USA and Japan are compared to those from Russia, India and South Africa.

Following on from the above question, respondents were asked about risk-specific concerns (see Figure 5). Given that terrorism was perceived highest when awareness of specific concerns was measured (Figure 2), it was decided to see if there are differences between nationalities and if these differences are statistically significant. A similar procedure was undertaken to the above (i.e. Kruskal-Wallis, post hoc and effect size tests). Examining the levels of concern over terrorism (see Figure 4), the data suggests that there are mainly two clusters of countries. Russia, India, Japan and South Africa were all in close proximity with respect to their concerns about terrorism, whereas the remaining European countries together with the USA and China formed the lower category group. The effect size between these groups is relatively small ($r = 0.16$), which suggests that the effect of these clusters in increasing the extent of concern about terrorism is not substantive. Germany was selected to represent the UK, France, the USA and China because the scores of all were similar. Having tested for differences, the findings suggest that there are significant differences: for example, between Russia and Germany there is a small effect size ($r = 0.26$); a small effect size between Germany and India ($r = 0.11$) and Germany and Japan ($r = 0.12$); and a negligible effect size between Germany and South Africa ($r = 0.03$). Overall, when comparing the effect size between general safety and terrorism concerns, the results suggest that these nations are more homogenous in terms of their terrorism concerns than general safety concerns.

Finally, responses from respondents of different nationalities were tested to examine levels of fearfulness in relation to visiting countries (see Figure 3) that had been subjected to recent terrorist attacks. The results suggest three European countries show more fear toward destinations that had recent terrorist attacks compared with Russia or Japan (See figure 6). It is probable that when respondents consider actual destinations, it demonstrates the gap between a hypothetical assessment and reality. In simple terms, these findings suggest that, in order to get a better picture, a combination of hypothetical postulation and tangible events might be a better way of assessing the perceptions, because people can articulate their thoughts more clearly this way.
ARE TOURISTS STILL BOOKING?

Respondents were asked about their travel plans for the next 12 months. The pull factors of weather, heritage and exotica were found to be strong, and only 12.7% of total respondents suggested that they will not be visiting a foreign country in the next 12 months. Some 44% of respondents were undecided about which country they are going to visit, and the remaining 43.2% already had travel plans, suggesting a strong appetite for travel in spite of threats to security. A quarter of the respondents who had said they already knew which foreign country they planned to visit stated that safety had been a factor in choosing their destination. However, they also accepted that “destination appeal” is still an important matter for them. This raises a question: if people are still travelling, why should the industry be concerned about improving safety? There are a number of challenges from the market point of view, the world economic perspective and in terms of ethical and social responsibility.

From the market point of view, the data suggests that travellers evaluate a number of factors before they make their final decision about where to go. The results from the current survey suggest (see Figure 6) that crime rate, word of mouth (WoM) and e-WoM are taken into consideration by consumers, particularly when they are searching for information.

When respondents were presented with similar options to consider (see Table 2) and were asked about the importance of each of these search items, the top three were found to be the terrorism rating, the crime rate and the safety record of the airline involved. Therefore, it is clear from the data in this survey that consumers are significantly concerned about safety, with terrorism particularly in mind.

These findings suggest that consumers might avoid some destinations and instead favour other destinations on the basis of such assessments, which means one destination’s loss becomes another destination’s gain. To counter this view, the recent waves of terrorist attacks on mainland Europe suggest that the probability of terrorist attacks is no longer so place dependent and, therefore, the risks associated with such attacks are no longer confined to specific geographic locations. If the industry had considered Europe, being free of such risks, to be a safety net for its business, the recent negative growth rates of travel in Western Europe during the second quarter of 2016 may signal otherwise.

Figure 3 shows that the fear factor is not confined to countries in the MENA region and that, in addition to countries such as Brazil and Russia, even some of the top European destinations have suffered in terms of the perception of their safety. So the fact that some destinations may be considered to be safe might simply be a fluke or an echo from the past.

Irrespective of the how fearful people may be to travel to specific destinations, there are other matters that need to be taken into consideration, such as corporate social responsibility, ethics, the duty of care and the dependency on tourism of some countries.

Insecurity has taken a heavy toll on many countries where tourism is the main source of foreign exchange earnings. Under such circumstances, a decline in demand for travel means a reduction in tourism jobs, which adds to unemployment among the young, adding fuel to the fires of political unrest and creating an environment that is a breeding ground for terrorism and migration. Nor is it just the tourism industry that suffers when travel confidence is damaged. Within destinations, declining demand for tourism products reduces employment opportunities in the accommodation, catering, finance and communication sectors directly. However, it also reduces income and employment in other supporting sectors, such as agriculture, energy, manufacturing and business services, compounding the issues of high unemployment and low income.

The effects of declining tourism demand will also eventually be felt within the tourism-generating countries as profits are squeezed to keep prices low to persuade travellers to buy the products, and this in turn puts pressure on the ability of companies to support employment opportunities. The tourism industry should not ignore the problems facing these destinations or the people who have to pay the price for insecurity.
Table 2: Importance of each search item before travel

<table>
<thead>
<tr>
<th>Search Items</th>
<th>Importance of Item*</th>
</tr>
</thead>
<tbody>
<tr>
<td>International ratings like the Global Terrorism Index</td>
<td>83.2</td>
</tr>
<tr>
<td>Crime rates in the country</td>
<td>81.3</td>
</tr>
<tr>
<td>The safety track record of the airline involved</td>
<td>81.3</td>
</tr>
<tr>
<td>The safety track record of the tour operator involved</td>
<td>79.4</td>
</tr>
<tr>
<td>Levels of disease in the country</td>
<td>76.6</td>
</tr>
<tr>
<td>Advice on the website of your own government</td>
<td>76.5</td>
</tr>
<tr>
<td>The human rights record of the country</td>
<td>75.0</td>
</tr>
<tr>
<td>Advice of family and friend</td>
<td>74.0</td>
</tr>
<tr>
<td>The safety track record of other suppliers involved</td>
<td>72.9</td>
</tr>
<tr>
<td>Whether the country is prone to natural disasters</td>
<td>71.5</td>
</tr>
<tr>
<td>An Internet search of news items about the country</td>
<td>70.9</td>
</tr>
<tr>
<td>Advice on another governments’ website</td>
<td>70.3</td>
</tr>
<tr>
<td>Advice on social media and online chat forums</td>
<td>70.2</td>
</tr>
<tr>
<td>The harshness of punishments for minor offences in the country</td>
<td>68.4</td>
</tr>
<tr>
<td>The rates of corruption in the country</td>
<td>68.2</td>
</tr>
<tr>
<td>A general Internet search</td>
<td>67.1</td>
</tr>
<tr>
<td>TV reports</td>
<td>66.2</td>
</tr>
<tr>
<td>The predominant religion in the country</td>
<td>65.0</td>
</tr>
<tr>
<td>Which country/ies the country borders</td>
<td>63.5</td>
</tr>
<tr>
<td>Newspaper articles</td>
<td>63.0</td>
</tr>
<tr>
<td>Whether the country is a member of an international trade or defence body</td>
<td>62.5</td>
</tr>
<tr>
<td>that your country also belongs to</td>
<td></td>
</tr>
<tr>
<td>The wealth of the country</td>
<td>60.3</td>
</tr>
<tr>
<td>Whether people in that country can generally speak your language</td>
<td>58.7</td>
</tr>
<tr>
<td>Whether you can speak the language of the country</td>
<td>52.3</td>
</tr>
<tr>
<td>Poverty levels in the country</td>
<td>52.1</td>
</tr>
</tbody>
</table>

10-point scale: To a great extent = 10 and Not at all = 0, scores sum (percentage of 7, 8, 9 and 10)

WHAT SAFETY MEASURES ARE NEEDED?

Respondents were asked what precautions they have taken to maximise their safety when travelling abroad. They were given two sets of options. The first set of options related to the organisations they needed to rely on for their safety, such as hotels, tour operators and transport companies. The top five actions identified by respondents included booking with a large hotel chain and a tour operator rather than booking a self-managed independent holiday. The other set of options were related to activities that they chose to undertake whilst on holiday.

Respondents stated that they avoided remote and crowded areas, and that they chose to travel regionally, a trend that became evident following 9/11. Importantly, these top-five responses shared one element across both sets of options, and that is the need for familiarity.

The challenge presented by recent terrorist attacks is that the attacks and their perpetrators are themselves unfamiliar in the sense that they are a very different form of terrorism to previous attacks by separatist groups (for example, ETA and the IRA).

Respondents were then presented with the same options and were asked which, if any, are they more likely to do now compared to what they would have chosen a few years ago. Four out of five (see Figure 7) provided responses similar to the previous category, with the majority of respondents placing a strong emphasis on avoiding crowded areas, highlighting the importance of security at large events.

Figure 7: Which of the following, if any, are you more likely to do now compared to a few years ago?
This was followed by the familiarity aspects of staying with a large hotel chain and booking with a tour operator. Recently there have been occasions where, in spite of a terrorist attack or another event, the travel warnings issued only advised travellers to be more cautious but did not issue a travel ban on the affected destination. This meant that, in spite of the likelihood of an attack, the traveller was not able to cancel their holiday. The majority of respondents (59.1%) mentioned that they will look for insurance policies that allow for cancellation because of terrorism.

Moving on, respondents were told to imagine there was a terrorist attack while they were on holiday and they later become aware that their government had classed the destination as “high risk” and advised against all but essential travel due to the risk of potential terror attacks. Then they were asked, “Would you blame any of the following (Figure 8) for allowing the holiday to go ahead despite there being a risk of attack?”

A third of respondents pointed out they would blame none of the entities in the list, but the majority, 68%, pointed to at least one of entities in the list. Earlier in this report it was shown that respondents had stated that they had in the past and would in the future use tour operators instead of self-packaged holidays to reduce risk exposure. Responding to the question above, given that people were putting more trust in the hands of tour operators, some 40% of respondents suggested that they would blame the tour operators and a further 23.2% would blame the website where they saw the deal, followed by those who would blame the government of the country in which they had holidayed. When things go wrong, there is a tendency to focus on who to blame rather than looking for solutions. This, of course, becomes more pertinent when life has been put in danger.

What makes people feel safer whilst on holiday? Respondents were presented with 11 security measures and asked to rate their effectiveness. Security measures in airports were voted the most important, followed by the presence of police at holiday locations (see Figure 9).

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diagram

Figure 8: Who do you blame?

<table>
<thead>
<tr>
<th>Entity</th>
<th>Frequency %</th>
</tr>
</thead>
<tbody>
<tr>
<td>The tour operator you booked with</td>
<td>0%</td>
</tr>
<tr>
<td>None of these</td>
<td>30%</td>
</tr>
<tr>
<td>The website you saw the deal on and booked via</td>
<td>20%</td>
</tr>
<tr>
<td>The government of the country you holidayed in</td>
<td>15%</td>
</tr>
<tr>
<td>The insurance company that you used for travel insurance</td>
<td>10%</td>
</tr>
<tr>
<td>The media organisation that carried advertising that made you aware of the holiday</td>
<td>5%</td>
</tr>
<tr>
<td>The airline you travelled there with</td>
<td>0%</td>
</tr>
<tr>
<td>The hotel you stayed in</td>
<td>0%</td>
</tr>
</tbody>
</table>

Figure 9: Which of the following initiatives might make you feel safer on holiday?

- The right to carry your own gun at the holiday location
- The travel company checking the details of people booking against a criminal database
- Tighter security at airports than there currently is
- Laws to stop people wearing garments that hide their faces
- Airport style security checks in hotels
- Airport style security checks at popular tourist attractions
- ID checks at the holiday location
- Traffic restrictions at festivities attended by tourists
- CCTV surveillance at the holiday location
- The presence of soldiers at the holiday location
- The presence of police at the holiday location
- The presence of a large hotel chain

Source: [Two summary variables have been extracted: frequency % of A Lot Safer and Not At All Safer](#)
It is important that there are recognisable standards of security at airports, subject to regular independent verification, particularly those in holiday resorts. There are standards of security – such as those developed by the International Civil Aviation Organization (ICAO), the EC regulation No 300/2008 and the standards set in the UK by the Civil Aviation Authority (CAA) – and if such standards were universally adopted and their implementation regularly checked around the world, it may be possible to develop a Kitemark-style system showing which airports have met the criteria (in much the same way as other types of standards are certified, such as the Blue Flag, Hospitality Guild, Campaign for Environmentally Responsible Tourism).

The current situation leaves too much variability from country to country. Similarly, a Kitemark system could be developed for major tourist facilities such as hotels, attractions and theatres. That way, travellers would be aware that the airport or tourist facility had at least met the threshold criteria for security.

But even with such standards in place, it is important that implementation is not simply a tick-box exercise. For instance, government policies should ensure the salaries of security forces (particularly in developing countries) are consistently paid and that the payments occur on time, to take care of the welfare of security staff. This would ensure that staff are well motivated to take care of their guest to their best of their ability.

CONCLUSION

The world in which travel and tourism has taken place in the last few years has been epitomised by instability, insecurity and uncertainty.

Tourism as an industry is a form of consumption based on faith and, as such, is highly susceptible to shocks. However, tourism is not the sole industry to fall victim of violence; violence also affects foreign direct investment. In many countries, particularly in developing countries, tourist spending and foreign direct investment are the major channels for acquiring foreign exchange. Both require confidence from external stakeholders.

If foreign-exchange reserves are compromised, the ability of a country to weather financial storms and economic shocks, such as those caused by terrorist attacks, are also compromised – a country with limited foreign-exchange reserves is a country with limited buoyancy, so it cannot keep the trade afloat for long periods of time while it recovers.

It is often argued (e.g. Heppke-Falk et al. 2006, Perotti 2005, Blanchard and Perotti 2002) that government intervention, through fiscal and monetary policy instruments, can ease the pressure and invite foreign investors back. Fielding and Shortland (2005) cast doubt on the effectiveness of reform packages that merely focus on financial and economic variables if they do not take control of political instability and, in particular, violence. Their findings show that the relationship between political violence and the flight from domestic to foreign currencies could reduce public holdings as governments try to defend the exchange rate, thus resulting in currency devaluation (e.g. Turkey 2017, Egypt 2016).

Tourism seems to have been left to fend for itself, and is trying hard to survive as an industry that lives on narrow profit margins. Yet it is one of the largest employers in both generating and receiving country economies.

A recent study commissioned by UNWTO highlighted the importance of public–private partnership, emphasising that the safety and security of tourists is not the sole responsibility of the private sector, but a shared responsibility with the public sector. From a governmental point of view, this should not to be seen as supporting a tourism sector that is mainly private-sector driven, but also protecting an image of safety that is needed to lure foreign direct investors.

From an industrialised-world perspective, countries cannot afford to ignore safety and security at home and abroad. Economic frustration and anxiety in the developing world has, in part, manifested in one of the largest waves of mass migration since World War II and has also been partly responsible for sowing the seeds of the terrorist attacks.

The argument that the number of terrorist attacks on the European mainland has declined (GTD 2016) is true, but they have changed in nature, because the recent attacks have been undertaken on the basis of religion. Religious identity creates a binary division, and therefore attacks by one group generate fearfulness in the
other. The pattern of attacks has also led to the notion of place dependency that was evident in the past being discarded. It has been replaced with the notion of “place independency”, which means that the fear factor is fluid across borders.

From the private-sector point of view, the industry has a duty of care to its customers, creating a tension between that care and the investment that has taken place, especially when faced with complex travel warnings. There is a need to focus more on the changes achieved rather than only on the results. If the industry focuses on change, it might achieve better results.

The tourism and hospitality sectors can increase the security that is in place to deal with the symptoms of threats, but investment in security cameras will not stop the attacks, only capture the images of those undertaking them. As many attackers believe that in carrying out their attacks they will become martyrs, this is not going to achieve any form of prevention. The prevention of real threats remains in the hands of central governments.

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SAFETY AND SECURITY more on their minds than in 2014

41%  A little more
39%  A lot more

CHINA

DON'T feel like a nation TARGETED by terrorists

68% willing to buy DISCOUNTED HOLIDAYS in destinations with small risk of NATURAL DISASTER

48% WILLING to stay at a resort hit by TERRORISM 10 years ago

Perceived SAFEST places

Japan South Korea Canada Australia France

Perceived most DANGEROUS places

Japan South Korea Canada Australia France

SAFETY AND SECURITY more on their minds than in 2014

36%  A little more
35%  A lot more

FRANCE

Of all nations polled, French are the MOST LIKELY to feel TARGETED by terrorists when on holiday

Very little preparation before a trip – just a generic INTERNET SEARCH

Recent ATTACKS make other countries cite France as one of the most DANGEROUS places they've visited – and PARIS is more feared than LONDON

Perceived SAFEST places

Portugal Canada Italy Spain Belgium

Perceived most DANGEROUS places

United States France Germany

SAFETY AND SECURITY more on their minds than in 2014

41%  A little more
31%  A lot more

GERMANY

56% willing to holiday at a resort hit by DISEASE 10 years ago

2nd LEAST likely to feel targeted by TERRORISTS

50% would blame the TRAVEL COMPANY they booked with if things go wrong on holiday

37% interested in the CRIME RATES of countries they're about to visit

Perceived SAFEST places

Switzerland Denmark Austria Italy Spain

Perceived most DANGEROUS places

United States Germany France