

DUNIRA STRATEGY

Sustainable Business Solutions in Tourism

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FOR IMMEDIATE RELEASE

SCOTTISH INDEPENDENCE WILL NOT HARM SCOTTISH TOURISM

Dunira Strategy publishes Referendum Survey during Scottish Tourism Week

Dunira Strategy has today published the important results of their new survey, showing that fears of a drop in Scottish tourism in the event of Scottish Independence are unfounded.

Conducted across the British Isles, respondents were asked a single question:

“Thinking about Scotland as a tourism destination, if it became an independent country, would this affect your decision to go there?”

The vast majority (85%) said that “it would make no difference”.

Of those that thought it would make a difference (15%), a significant proportion (43%) said that Independence would make them “want to visit even more”. Only 8% of respondents said that Independence would make them “avoid going there”, showing that – at worst – tourists are ambivalent about the impact of Scottish Independence on tourism in Scotland.

England is Scotland’s most important market. In 2012, it generated 6 million visits and £1.7bn in direct expenditure, spending an average of £281 per person per trip. Visitors from England are 40% of Scotland’s tourism market by volume and 39% by value. It is therefore vitally important to understand whether Independence represents a threat to Scottish tourism.

There were some significant variations in results.

The greatest affinity for Scotland (“it would make no difference, it’s a great destination”) is found on the island of Ireland (59.1%), Northern England (57.0%) and Central England (54.8%), whilst the South West (48.1%) and South East (50.8%) of England show the least affinity. Independence would have the most negative impact on visitors from Central (11.5%), South West (10.1%) and South East (8.9%) England, where the highest proportion of respondents would consequently “avoid going there”. The most positive impact would be in the Republic of Ireland, where 11.3% of respondents said that Independence would make them “want to visit even more”.

Age is also an important factor. The majority (59.3%) of respondents from each of the four higher age groups (35-44, 45-54, 55-64, 65+) all said that Independence “would make no difference, it’s a great destination”. A statistically significant proportion (11.1%) of the middle age groups (25-34, 35-44) said that Independence would affect them and that they “would want to visit even more”, whilst a significant proportion (14.5%) of the highest age group (65+) also said Independence would affect them and that they “would avoid going there”. One third (34.1%) of the youngest age group (18-24) said that Independence “would make no difference, it’s never interested me”.

Men are more likely to be affected by the prospect of Independence with 18.1% saying that it would have an impact, whilst only 11.4% of women thought it would make a difference.

In terms of geography, there is a clear divide. Amongst key cities, the greatest affinity for a Scotland (“it would make no difference, it’s a great destination”) is found in Liverpool (62.7%), Dublin (60.0%) and Newcastle (59.8%), whilst the greatest aversion (“it would make no difference, it’s never interested me”) is found in Bristol (28.5%), Cardiff (26.8%) and Belfast (26.5%).

Commented Dunira Strategy’s Managing Director Benjamin Carey FTS:

“A number of commentators have argued that Independence could jeopardise growth in the UK staycation market, which is a key component in the recovery of Scottish tourism following the economic crisis. This survey shows that these fears are unfounded. Certainly VisitScotland would need to work hard to engage the South of England, but there are also opportunities to reward the loyalty of the North of England and the Celtic affinity of the island of Ireland. With Scotland already punching above its weight internationally, a renewed focus on tourism from the British Isles will ensure that Scotland is building on its outstanding credentials as one of the world’s strongest tourism brands.”

Edinburgh
12 March 2014

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Notes:

- (1) The survey was conducted by TLF Research on behalf of Dunira Strategy. 1834 adults across the British Isles were interviewed between 18 February and 7 March. To the question “Thinking about Scotland as a tourism destination, if it became an independent country, would this affect your decision to go there?”, respondents could reply “Yes”, “No, it would make no difference” or “Don’t know”; “Yes” was then divided between “I would avoid going there” and “I would want to visit even more”, whilst “No” was divided between “it’s a great destination” and “it’s never interested me”.
- (2) In the Referendum on Thursday 18 September 2014, Scottish residents over the age of 16 will be asked the yes/no question: “Should Scotland be an independent country?”
- (3) The tourism sector is of vital importance to the Scottish economy, worth £4.33bn in direct expenditure from overnight visitors (2012) and providing employment to 185,900 within the tourism growth sector (2011). In 2012, visitors from the British Isles amounted to 13.2m trips (86%), which delivered £3.03bn (41%) of tourism expenditure in Scotland.
- (4) Dunira Strategy is a leading independent consultancy with a focus on the sustainable development and environmental management of tourism. Current activities in Scotland include projects in Falkirk, Perthshire, Strathclyde and the Western Isles. Dunira has recently developed a *Green Destination Index*, which benchmarks Scotland’s sustainability as a tourism destination against the 28 members of the European Union and the other three territories of the United Kingdom. Internationally, Dunira works with community groups, national governments and international agencies, including UNDP, UNEP, UNESCO, UNWTO and the World Bank; current assignments, involving feasibility studies, market development and investment promotion, include assignments in Cyprus, India, Iran, Lebanon, Russia, Somalia and Yemen.
- (5) Dunira’s managing director Benjamin Carey is a director of The Tourism Society, former chair of Tourism Society Scotland and an appointed member of the Scottish Enterprise Advisory Board of Co-operative Development Scotland, the Committee of UNESCO Scotland and the UN World Tourism Organization’s Panel of Experts.