Scottish Association Survey

For the Period: 2019/20 and 2020/21

Calton Hill, Edinburgh

VisitScotland | Alba™
Business Events

Contents

Executive Summary

This report summarises the findings of the 2019/20 and 2020/21 Scottish Association Survey and compares the results with the inaugural 2018/19 report.

In 2019/20 Scotland hosted fewer association events than in 2018/19, but significantly achieved a similar level of overall economic impact. While fewer events took place, overall delegate days remained similar. Events hosted were therefore on average of greater scale and accommodated a greater number of attendees. These high value events with significant attendance are key targets for Scottish cities. As fewer events took place, we can infer there is room for growth as the released capacity can be used to attract additional events.

In 2019/20 we saw a contraction in the number of venues used compared to 2018/19. Fewer academic venues were used in 2019/20, however the number of events in dedicated conference centres remained similar. Protecting these leading venues and conference centres is vitally important for the sectors ongoing viability as they fulfil an essential role in attracting and harnessing the benefits from high value events. Recent results suggest there is available capacity in academic venues to accommodate and grow smaller events and facilitate a return to 2018/19 levels.

Association conferences remain a key driver of Scotland's internationalisation objectives. Scotland welcomes tens of thousands of delegates from around the world every year. We know these delegates are experts and thought leaders in their fields – for Scotland to host these events, and for these delegates to attend, enhances Scotland's international reputation across a variety of specialisations. Attracting international delegates to events in Scotland, along with attendees from the rest of the UK, provides Scotland with a platform to showcase domestic talent and technology, and also helps attract foreign direct investment.

In the current climate securing value from international events is at severe risk. The Covid-19 pandemic and the restrictions on travel to curb the import and spread of infections are at odds with a quick revival of Scottish based international association events. It is likely UK events will recommence much sooner. Given the greater ease of travel around the UK and high domestic vaccination levels we anticipate UK business events being the first to recover. At present significant travel into the UK from the EU or further afield is hampered by quarantine, and this will only abate as worldwide vaccination rates and infection levels improve.

The international profile and extensive range of benefits delivered by association events is of critical importance to Scotland. A strategy backed by Scottish Government support will be important to encourage international events to return to Scotland when possible.

We have seen in both 2019/20 and the events for 2020/21 which have been cancelled, a continuation of the dominance and importance of life science events to Scotland. For the three years for which we now hold data Life Science events accounted for an average of 49% of delegate days spent in Scotland. Life Sciences encompass a vast range of specialisations from aquaculture to surgery. That such a high proportion of delegate days in Scotland are attributed to the life sciences reflects the incredible strength and depth Scotland holds across life science disciplines. We also know that attracting association events to Scotland is often dependent on the excellence of the research conducted here, and/or the prominence of a Scotland based academic within an association. In both scenarios we can appreciate that Scottish based academics are active in these international networks, and Scottish based research is achieving international recognition. This is a strength on which we can build, and we can look to growing sectors like ICT & Data to potentially fill out excess capacity with targeted support.

ICT & Data events have contributed an average of 9% of delegate days across the past three years. This is another key growth sector for Scotland, and it is encouraging to see association events following where the industry is establishing itself as a world leader, again reinforcing the links between a vibrant academic community and the association events sector. The remaining delegate days in the past three years have come from a further 17 sectors.

The full impact of Brexit on the associations sector is not yet fully appreciated. Some associations operate only within the EU for example, and Scottish or UK associations may no longer be eligible for membership to parent EU associations – whether this will be overlooked we do not know. Concurrently we do not know if the rules of travel, VAT eligibility and ease of access for events professionals will have a negative impact for event planners considering Scotland and the UK. The Covid-19 pandemic has overshadowed the UK's withdrawal from the EU and in years to come we might better understand this impact.

In this report we have for the first time looked at the months in which association events occur. Interestingly there is a strong similarity in each of the three years in terms of the proportion of events held in each month. Association events tend to take place most frequently in late spring and early summer, and again in autumn. We see a dip across peak summer months, and a very quiet winter period from December through March, before steadily recovering through spring again. Association events therefore attract visitors, spending and high value events into Scotland during so-called 'shoulder months' where consumer tourism dips compared to peak summer months.

The outlook for the coming years is challenging. Around half (47%) of events planned for 2020/21 have been cancelled completely or moved to a virtual format. The reminder (53%) have been postponed to a later year. We do not yet know whether events postponed to 2021/22 will be viable, or whether organisers will postpone again or cancel the Scottish edition and move on to a new destination. Some events have also postponed into 2022/23 and beyond. It is vitally important these events go ahead, and that others can be won to fill the calendar. Anecdotal evidence suggests people are desperate to travel again and rekindle relationships in person. When events are able to run again, we are optimistic there will be a surge in demand to attend live events, although the requirements for vaccination might have a negative impact on delegates from countries with a lagging vaccination programme. When events can book again with confidence, we believe Scotland will be in a strong position to win business, any Brexit disruption notwithstanding.

KEY HEADLINE IMPACTS

Table EX1 summaries the event profile and economic impact of events held in 2018-19 and 2019-20 and the profile and value forgone in 2020-21. The economic impact assessment was prepared in accordance with the HM Treasury Green Book Evaluation Guidance.

Association events contributed around £250m of net additional impact to the Scottish economy in 2019/20, supported at least 3,300 FTE jobs and delivered around £150m GVA in productivity gains. Detailed event profile and economic impact tables are provided in Appendix 2: Key Data and Comparisons.

KEY HEADLINE IMPACTS	YEAR AND VALUE			YEAR ON YEAR % CHANGE	
	18/19	19/20	20/21	18/19 to 19/20	19/20 to 20/21
Event Profile					
Total events	447	330	271	-26%	-18%
UK events	236	213	146	-10%	-31%
International events	211	117	125	-45%	7%
Total delegates	130,786	121,440	142,621	-7%	17%
Total delegate days	425,629	412,273	555,918	-3%	35%
Net Additional Impact					
Economic Value (£M)	£256.4	£250.1	£332.9	-2%	33%
Total FTE jobs	3,461	3,376	4,495	-2%	33%
GVA (£m)	£149.6	£146.0	£194.3	-2%	33%

Note: Net Additional Impact calculations make use of Scottish Government tourism related multipliers from the 2018 Tourism I-O Table (sourced 2020). Appropriate assumptions for deadweight; displacement and leakage have also been made which are consistent with HM Treasury Green Book Guidance.

Background to the Scottish Association Survey (2018-2021)

The Scottish Association Survey is a national survey carried out by VisitScotland in partnership with key venues and convention bureaus across Scotland to develop a better understanding of the size and value of the association conference sector to Scotland.

The Scottish Association Survey reports on the size and value of association conference business that takes place in Scotland. To qualify events must not ordinarily take place in Scotland, and the organiser has chosen Scotland ahead of another country, including the rest of the UK. Events must attract at least 50 delegates, and delegates ought to be internationally targeted – the event cannot be one created for a local Scottish audience.

Due to a variety of factors, including the involvement of convention bureaus, and the smaller number of venues typically able to host association conferences, the scope of the survey has been limited to association conferences only, and does not include other business events like corporate conferences and meetings or incentive trips which are harder to monitor and identify.

Value calculations incorporate Scottish Government and industry recognised “Delegate Expenditure Benefit” multipliers which have been adjusted to 2018 prices using the HM Treasury Price Deflator.

This report shows the value and economic impact of Scotland’s association conference sector. It is important to emphasise the figures and analysis relate to association events that predominately attract attendees and spending from outside Scotland. The full criteria for events included and excluded is detailed in Appendix 1: Data Gathering. The assessment also uses survey information to estimate the value from event attendees extending their stay in Scotland and those that have been encouraged to return as a leisure visitor.

The inaugural assessment was carried out in 2018-19. This report contains the results of the 2019-2020 Scottish Association Survey and the 2020-2021 survey. It should be noted that due to the Covid-19 pandemic and national lockdown no events took place in 2020-21. The 2020-21 results should be interpreted as value forgone due to Covid-19.

Kelvingrove Park, Glasgow

Associations and Scotland’s Appeal

An association is a group of individuals banded together for a specific purpose. When we refer to associations in the context of business events, we are normally talking about academic or trade associations, groups of like-minded professionals and academics.

Associations are membership organisations. Almost all associations organise periodic conferences which are available for all members to attend. These can be biannual, annual, biennial, triennial, etc. International associations are peripatetic, and each iteration of their annual conference can take place in a new destination. Depending on the size of the association membership, the conference can be a meeting place for one hundred, or ten thousand delegates.

Associations as decision makers remain influenced by their membership. An association for kidney surgery specialists will often look to hold its annual conference in a destination where there is a strong local specialism in kidney surgery and where there is an active local member to assist in organising the conference.

Scotland is a world leader in many advanced sectors, including a wide range of Life Science disciplines, data science, engineering, education, social sciences, ICT, photonics, satellites, and many more. When adjusted for population, Scotland has more universities in the Times Top 200 world universities per head of population than any other country, and Scotland's universities excel when it comes to citations. Scotland's research is cited by other researchers around the world more often than any other country in comparison to its GDP and Scotland ranks third in the world (after Switzerland and the Netherlands), ahead of all the G8 countries in terms of citations per researcher. In addition, Scotland attracts a significant amount of research funding into its research and innovation centres.

These collective factors, and the fact that many of the academics and professionals working in Scotland are members of international associations, mean Scotland is a key destination for conferences. For many years’ individual academics, and academics working together with convention bureaus have worked to bring conferences to Scotland.

Association conferences have become a highly valuable industry. Association events typically attract hundreds, or thousands of delegates and involve significant spending on venue costs, audio visual (AV) services, catering and hotel rooms. Delegates spend money on meals, drinks and gifts. Some delegates also choose to extend their stay and/or return as leisure tourists.

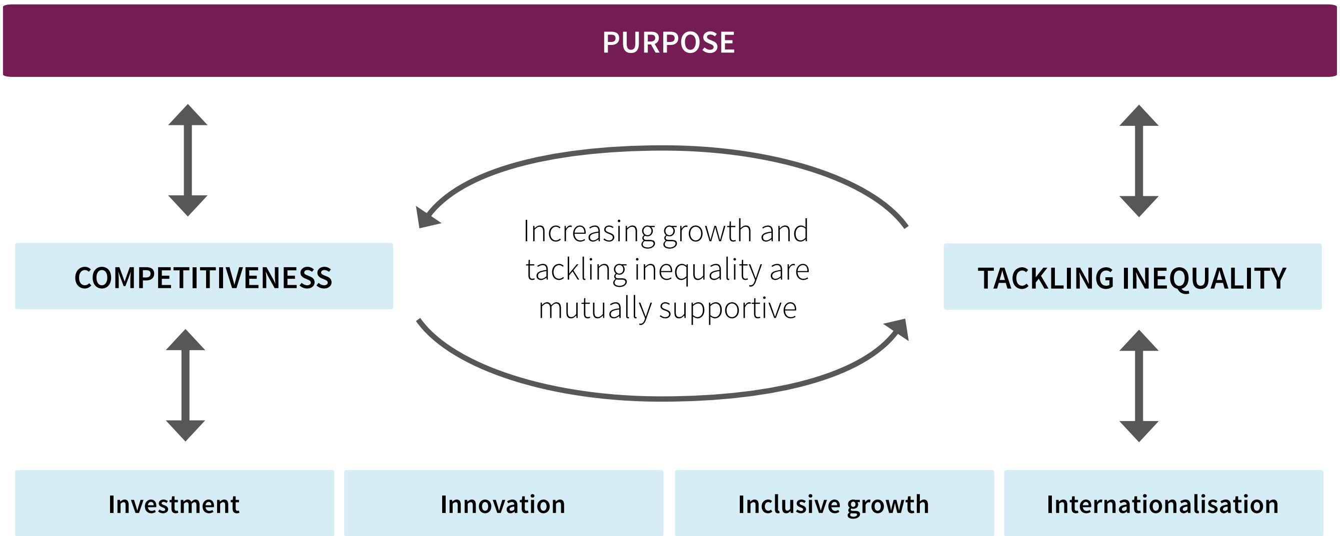
Beyond the immediate direct spend, which is vital for local economies, the legacy associations can have on a destination is now gaining greater attention. An association selecting Scotland is confirmation that Scotland is a world leader in their specialist field. When a conference comes to Scotland it is an opportunity to show those delegates who and what we are, and to project a positive image of Scotland back around the world.

Conferences start conversations and create opportunities for engagement. These can lead to new projects, funding, businesses, or inward migration. A conversation had at conference can lead to new collaborations that in years to come can produce world changing research.

Contribution to Scottish Government Economic Strategy

Scotland's Economic Strategy sets out a framework for a competitive and fairer Scotland. The strategy provides a broad approach to boosting competitiveness and addressing inequality. Figure 1 shows the four broad priority areas where actions and investment should be targeted.

FIGURE 1: SCOTLAND'S ECONOMIC STRATEGY



Touch Bionics © Scottish Enterprise & Scottish Development International

Contribution to Scottish Government Economic Strategy

Table 1 demonstrates the significant contribution association events make to the Investment; Innovation; Inclusive Growth and Internationalisation objectives outlined in the Scottish Government Economic Strategy.

TABLE 1: SCOTTISH ASSOCIATION EVENTS CONTRIBUTION TO SCOTLAND'S ECONOMIC STRATEGY

OBJECTIVE	CONTRIBUTION
Internationalisation	• Majority of events are attended by international delegates, exposing Scotland to global influence and networks. • This supports Scotland's offer to promote its international brand and showcase Scotland and Scottish goods and services internationally.
Inclusive Growth	• Events and conferences interact with many sectors, businesses, academic and professional communities. • They form an important role in disseminating knowledge and professional practices which are important factors in developing understanding and relations between different regions and cultures. • Business events also take place during quieter times of the year (and week). This supports greater levels of employment and helps address challenges around productivity.
Innovation	• Business events and conferences create forums for new product development; exchanging new methodologies and showcasing successful advancements. • Host nations can capitalise by linking attending businesses and sectors to Scottish academia and marketing Scotland's R&D capacity and infrastructure to provide further rounds of innovation.
Investment	• Investment in attracting footloose business events and conferences act as a catalyst for investment in Scotland's growth sectors. • Sector specific events can act as an anchor for subsequent investment in R&D facilities. This helps Scottish businesses innovate, grow and create high value quality employment opportunities. • Sector events can also act as a catalyst for investment in Scotland's other Growth Sectors (energy; life sciences; creative industries; food & drink and financial & business services).

2019/20 Impact Summary

This section analyses the results of the 2019/20 Scottish Association Survey and compares key volume and value indicators with the inaugural 2018/19 survey results.

Detailed event profile and economic impact tables are provided in Appendix 2: Key Data and Comparisons.

Headline Figures

- The number of association events that took place fell from 447 to 330 – a decrease of 26%
- The total number of delegate days fell marginally from 425,600 to 412,273 – a decrease of 3%
- Economic impact also declined from £256.4m to £250.1m – a decrease of 3%
- There was a decrease in the number of delegate days from international events, but this was somewhat offset by an increase in delegate days from multi-day UK events.

Events and Delegates

2019/20 witnessed a sizable reduction in the number of association events hosted in Scotland, however this reduction did not translate into a meaningful reduction in overall delegate days or economic impact.

These results reflect the comparatively higher average value of the 2019/20 events compared to the previous year. Average attendance at events in 2019/20 was 25% higher than in 2018/19 (368 delegates compared to 294 delegates). There was also a 17% increase in the number of large-scale events with more than 1,000 delegates (28 compared to 24). The two largest events held in 2019/20 were also of a greater scale than the two largest events in 2018/19.

Economic Impact

In 2019/20 the net additional economic impact of association events, including direct, indirect, and induced spending, was £250.1m, a modest reduction of 3% on 2018/19. FTE jobs supported fell by a similar proportion.

Given the reduction in the number of events hosted was 26%, it is encouraging to see the economic impact remain relatively unaffected. This reflects the greater average value of each event and contributes to responsible and sustainable tourism objectives which seek to maximise the value of visitors while minimising any perceived negative impacts (e.g. carbon emissions and congestion).

Extenders and Repeat Visitors

VisitScotland research into the propensity for delegates to extend their stay in Scotland pre or post conference has shown little change since 2018/19. The sample size and confidence level of the original figures was high. Under normal circumstances we would expect additional responses to further confirm these figures.

At present we remain confident that c.40% of delegates typically extend their stay in Scotland, for an average of three days. UK delegates are marginally more likely to extend compared to international delegates but will extend for a slightly shorter period.

Events by Month

The 2018/19 and 2019/20 results provide a pattern of when events take place in Scotland. Following a typically very quiet winter, there is a notable uptick in Spring through to June which was the busiest month for events and delegates attendance. A dip follows across summer before an end of year revival in Autumn as September and November witness a notable increase in activity where events and delegates return to levels comparable to June.

Looking at the proportion of events taking place in each month across the year we can see the same pattern developing, with a remarkable closeness between 2018/19 and 2019/20. The slight difference seen between March 2019 and 2020 can in part be explained by a loss of events in March 2020 due to Covid-19, and had they not been cancelled we would have seen a greater synchronicity.

What can be understood from the data is that there are clear busy periods and down periods across the year. The relative quiet in July and August can be explained by global summer holiday times, as delegates as well as organisers use annual leave. Similarly, in December we see a big reduction as thoughts will turn to holidays and the new year. Clearly very few people are planning big events and we see not just a reduction in the number of events, but much smaller delegate numbers indicating the events that are planned are smaller in scale. The slow start in January and February can perhaps be seen as a slow start to a new year, and conference 'season' really begins in earnest in March.

The busy spring and autumn periods are encouraging to observe and indicate that many association events do take place in so called 'shoulder months' where traditionally tourism activity in Scotland is a little quieter. This helps Scottish businesses with seasonality as delegates will occupy hotels and use other services when in Scotland.

Sector and Venues

2019/20 would have witnessed a reduction in the number of discrete venues used to host association events. This reduction is to be expected given the number of events fell by 26% - fewer venues were needed. Academic venues as a category saw the greatest reduction, however overall they remain the most used type by volume of events. Conference centres also saw a reduction in events, however proportionally their use grew, and the decrease in the number of events at conference centres was not as marked as at academic venues. This fits with our picture of fewer events taking place in Scotland, but those events being of greater scale and requiring large dedicated conference space.

Life Science events were again the leading sector, contributing 42% of total delegate days. ICT and Data events increased their contribution of delegate days from 8% in 2018/19 to 10% in 2019/20. Social Science events were again a large contributor of delegate days and saw a big leap from 7% of delegate days to 11% in 2019/20. These three sectors combined accounted for 63% of delegate days spent in Scotland, the remaining 37% of delegate days coming from a further 17 sectors. We can again see how important life sciences are to Scotland. Although a reduction from 55% of delegate days in 2018/19 to 42% has happened, this is still a huge proportion and underlines the importance of both excellent academia in Scotland, and the strong relationships the business events industry has with academia and the ability to work together to bring events to Scotland.


Marischal College, Aberdeen

Concluding Notes

2019/20 saw a reduced number of events. However, this reduction in events did not translate into a meaningfully reduced economic impact. The data shows that a greater proportion of events attracted 1,000 delegates or more, which helped maintain a high level of delegate days, which in turn helped to minimise the impact of hosting fewer events. No great loss of economic impact was measured, highlighting the importance of securing events of scale for Scotland. Life Science events continue to dominate, with some small adjustments to the next most significant sectors, but with no sudden swings to new sectors.

A pattern is emerging of a lull in events across winter and a slight dip in summer, but with most activity taking place in late spring, early summer, and autumn.

Finally, it must be noted that March 2020 which is included in 2019/20 figures was the first month where the impact of Covid-19 was being felt in Scotland. While the Covid-19 pandemic has had the biggest impact across 2020/21 we are aware of 10 events which have had to be cancelled from March 2020 which in normal circumstances would have been included in the 2019/20 data and analysis. In brief, the data includes:

- 10 events
- 4,990 delegates
- 12,190 delegate days
- One event with projected 3000 delegates
- An estimated direct spend of £6.6m

This report looks only at events that have taken place, and the value of those events, so we have not included these cancelled events in the 2019/20 figures. But we can note that while the 10 additional events would not greatly alter the reduction in events seen in 2019/20, the additional delegates and spend would have made 2019/20 almost equal to 2018/19 for delegate days spent in Scotland, and crucially would have resulted in a greater economic impact compared to 2018/19.

Had it not been for the Covid-19 pandemic 2019/20 would have seen a greater economic impact from fewer events. This ties in with the insights we have already discussed of fewer events with a high attendance contributing as much value as a greater volume of events with slightly low attendances.

2020/21 Impact Summary

The 2020/21 figures are distinct from those obtained in 2018/19 and 2019/20. In March 2020 Scotland was placed into a highly restrictive lockdown to prevent the spread of Covid-19. The restrictions placed on events lasted throughout 2020/21. As a result, no Scottish association events took place in this financial year.

Communication with partners and colleagues across the Business Events sector has highlighted the devastating effect of Covid-19 and emphasised the ongoing challenges for the industry.

The 2020/21 survey was carried out to continue demonstrating the value and contribution of the association conference sector to Scottish Government by quantifying the value lost in 2020/21 due to Covid-19. VisitScotland acknowledges the significant contribution made by our partners during a sensitive period in which redundancies were being made and operations were being down sized.

No events or value was realised in 2020/21. This assessment makes the assumption that the events for which data was received would have taken place were it not for the Covid-19 pandemic, and that expected delegate numbers are reflective of the attendance that would have occurred. The basis for this is that professional event organisers book venue and hotel space with great precision and would not knowingly overestimate the size of space they would need. Event organisers have a comprehensive understanding of how many delegates attend their events from year to year.

Furlough and the availability of key staff at our data partners meant the 2020/21 assessment was more challenging than before. There are several caveats to note:

- Data was requested from all previous partners, however not all were in a position to respond
- The data received was partial and includes events that were booked for 2020/21. Additional events may have been added within the year under normal circumstances. The data received and reported for 2020/21 is therefore likely to be an underestimate
- Some of the events planned for 2020/21 cancelled entirely, others have moved to future years. If an event were planning to return in future, the loss has still been felt in 2020/21 and is recorded here.
- All event data is a projected estimate based on bookings. Previous assessments were based on confirmed final events & delegate information.
- Included in the total are 10 events that were cancelled in March 2020. These 10 events were not included in 2019/20 figures as they did not go ahead due to Covid-19. They have been included into the 2020/21 figures to capture the loss that has been felt in Scotland due to events cancelling for no other reason than the impact of Covid-19. These 10 events were worth c.£6.6m.

Headline Figures

- The number of association events would have fallen from 330 to 271 – a decrease of 18%.
- The total number of delegate days would have increased significantly from 412,273 to 555,918 – an increase of 35%.
- Economic impact would have grown from £250.1m to £332.9m - an increase of 33%.

Events and Delegates

The number of potential events reported for 2020/21 has dropped compared to the previous two years. 18% fewer events are reported for 2020/21 compared to 2019/20, and 39% lower than 2018/19.

Despite this reduction both projected delegates days, and the potential value of those events increased significantly. Had events gone ahead to this scale, there would have been a 31% increase in economic value and a 35% increase in delegate days compared to 2019/20.

These results show that a lower volume of events with significant attendance were becoming more evident and would have continued the trend for fewer events delivering a similar or increased economic impact observed in 2019/20.

This is the second year in a row where fewer events were planned to take place in Scotland. This may suggest that 2018/19 was a benchmark year for event volume.

The 2020/21 data also highlights the importance of international events to Scotland. Had these events gone ahead then international delegate days would have accounted for 76% of all delegate days, up from 64% in 2019/20. UK multi-day events by contrast contributed 23% of delegate days, down from 33%. UK Single day events, low already in 2019/20 at 3% of total delegate dates, would have fell to only 1%.

Additional single day UK events may have been added to the 2020/21 calendar before Covid-19 stopped all events, however the real significance of the 2020/21 figures would have been the continued growth of international events, sizable increase in delegate days correspondingly significant (31%) increase in economic impact.

Economic Impact

2020/21 was set to deliver a record increase in the economic impact of association events in Scotland. Data on planned events show 2020/21 would have provided £332.9m in economic value to the Scottish economy. This sizable increase would have been driven by a considerable increase in delegate days which increased by 34%. Delegate days as opposed to the number of delegates are the major driver of economic value. The greater the number of delegate days the greater the spend to accommodate them. For example, 100 delegates staying in Scotland for five days (500 delegate days) would deliver more additional value than 200 delegates staying for 2 days (400 delegate days). The number of delegates visiting Scotland in 2020/21 was anticipated to be around 142,621, an increase of 17% from the previous year. Overall had 2020/21 events proceeded as planned there would have been a 32% increase in FTE jobs, representing more than additional 1,000 FTE jobs.

Sector and Venues

2020/21 would have witnessed a reduction in venue types for a second year in a row, with the exception of dedicated conference centres which would have increased. The increase in use of dedicated conference centres reflects the trend of Scotland hosting larger scale events, and a drop in all other venue types. In 2020/21 we see an increase in conference centre use. This again links to fewer events with higher attendance, these events are ultimately reliant on large venue space such as conference centres. Academic venues despite another year of decline remained the most popular venue type. This highlights the enduring importance of academic bodies and venues in hosting association events, and the vital role academia plays in attracting association conferences to Scotland.

Life Science events would have contributed the most delegate days and increased their overall proportion of total delegate days from 42% to 50%. It was also anticipated that ICT and Data events would have continued to provide 10% of delegate days. The contribution of Social Science events, a previously high contributor of 11% of delegate days in 2019/20 was due to fall to a three-year low of 3%. The contribution of Public Policy events was expected to increase to an impressive 10% of delegate days. This increase was due to be driven by one very large conference.

Events by Month Trends

2020/21 would have continued the trends observed between 2018/19 and 2019/20 with a quiet winter period, growth in late spring to June, a summer lull and an autumn revival. April was however, for the first time, due to be the busiest month for the number of events and delegates visiting Scotland. This was followed by June and September as in previous years. November was due to be particularly quiet however which was a notable move away from the normal trend.

Concluding Notes

The value of Scottish Association events in 2020/21 was lost to the Covid-19 pandemic. The data gathered is however considered to be a relatively accurate reflection of the value and impact that would have occurred. Trends identified between 2018/19 and 2019/20 were due to reoccur, including the prevalence of spring and autumn peak booking times, the dominance of Life Science events followed by ICT & Data events, and the continued importance of international events and delegates.

Data from the past two years shows a decrease in the number of events held in Scotland. In 2019/20 this corresponded with a drop in delegates. However, in 2020/21 delegates days would have reached a three-year high despite the number of events scheduled being at a three-year low. Therefore, while fewer events are taking place, they are attracting higher numbers of delegates and are lasting longer.

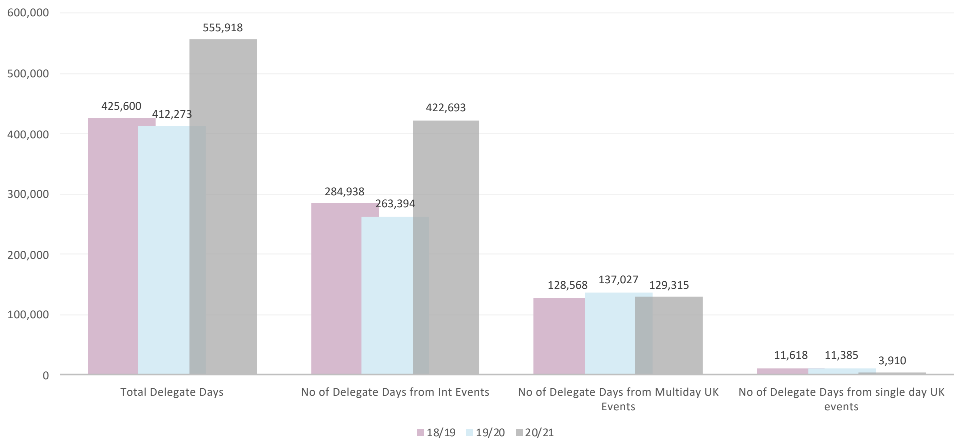
2020/21 was set to be a record year for the Business Events sector. These values provide encouragement and benchmark targets for future years. Recent impacts have been largely driven by international events. This also provides some focus as we look to recover from the pandemic. As Scotland reopens and begins to rebuild business events can continue to help drive economic value and support recovery across the nation.

Figures and Charts

Number of association events v. Gross Economic Value

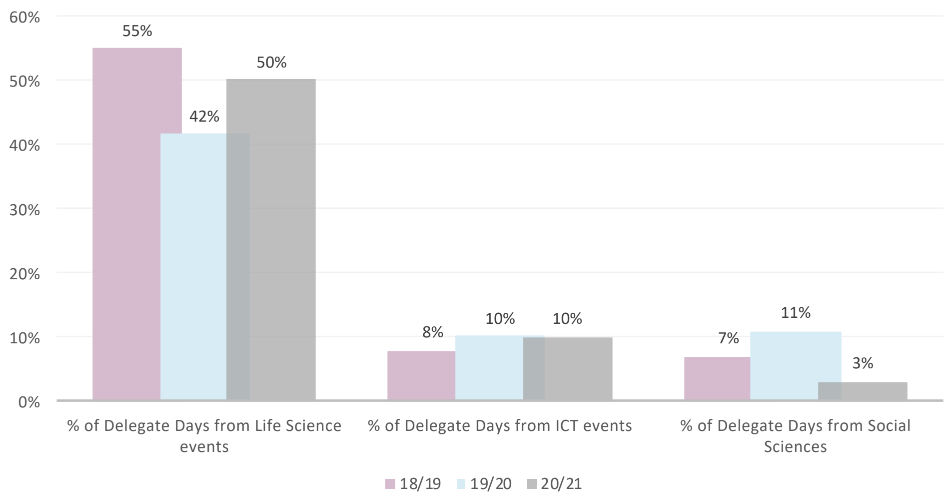
- Number of events held in Scotland can be seen to fall year on year.
- However economic value of those events was similar in 2019/20 and grew in 2020/21.
- The reduced number of events are on average larger and last longer, generating an equal or greater number of delegate days.

Delegate Days by event origin and Total



- In all years delegate days generated from international events are highest.
- UK multi day and single day events contribute a fairly consistent number of delegate days.
- Biggest growth seen in international delegate days, highlighting importance of hosting these events.

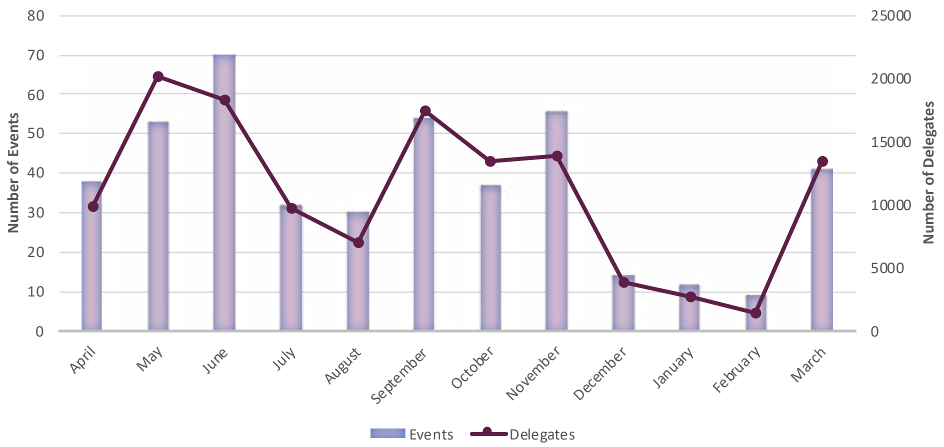
% of delegate days from leading sectors



- For all year's Life Science events generate the highest percentage of delegate days by some margin.
- ICT & Data events contribute a significant proportion of delegate days and has seen growth.
- Social Sciences, a big driver of delegate days, saw a big drop in 2020/21.

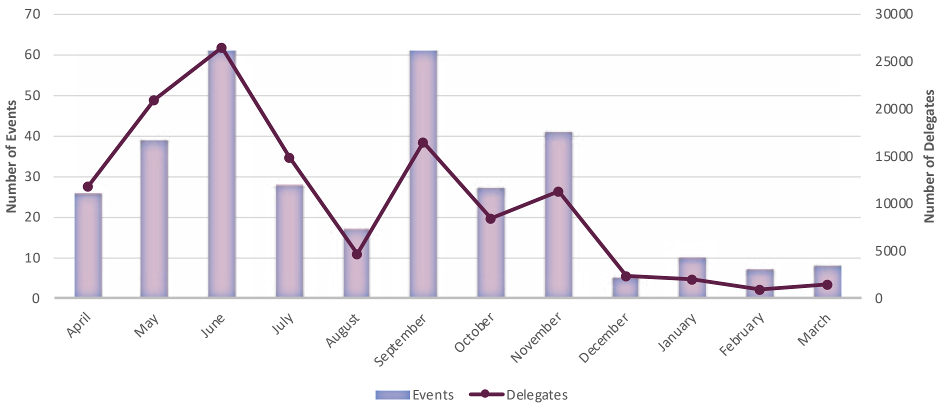
Figures and Charts

18/19 Events per month / Delegate count



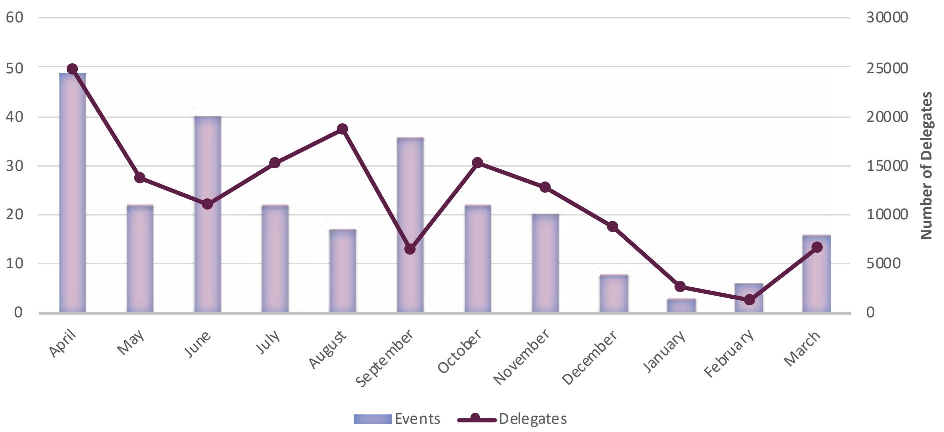
- The first year for which we have data reveals a rise in events in spring and early summer.
- This is followed by a summer dip during traditional school holiday months.
- Followed by an autumn rise from September to November.

19/20 Events per month / Delegate count



- The same patterns occur in 2019/20 with June being the most prominent month for events and delegates.
- March 2020 decline in part attributable to Covid-19 with all events cancelled from mid-March onwards.
- Data suggests, were it not for lockdown, March would have shown an increase in events as in previous years.

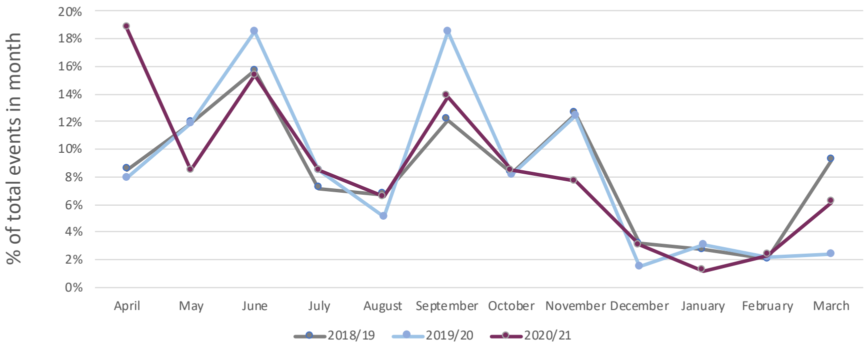
20/21 Events per month / Delegate count



- Data for 2020/21 (although incomplete) would have produced broadly similar pattens.
- April 2020 would have been the busiest month for events and delegates.
- Autumn rise in events less pronounced than in previous years.

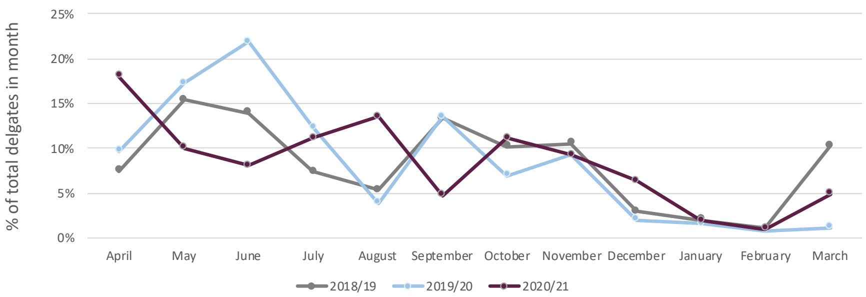
Figures and Charts

% Events by month 18/19 to 20/21 comparison



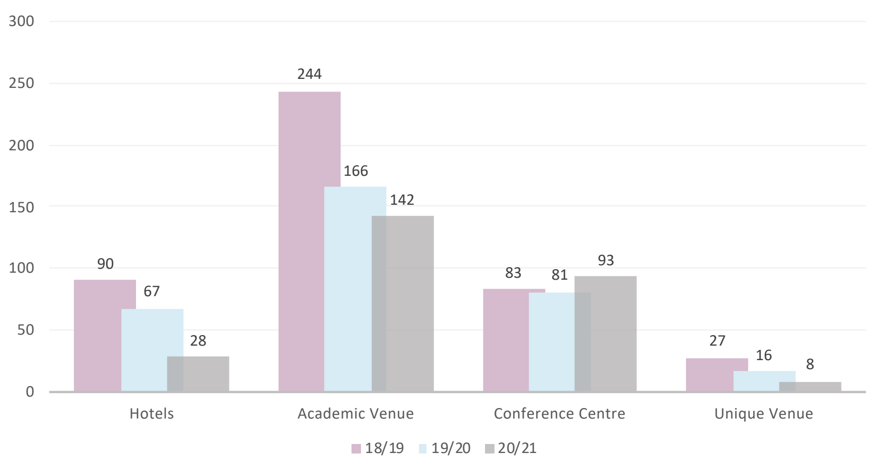
- Chart demonstrates the proportion of annual event hosted by month from 2018/19 to 2020/21.
- Booking patterns are consistent between years focusing on spring and early summer followed by autumn.
- Winter months consistently quiet.
- Data suggests that association conferences have 'experiential' aspect, and delegates prefer to travel in warmer months, outside traditional holidays, and can enjoy visit to destination (i.e. not a purely transactional trip).

% of Delegates by month 18/19 to 20/21 comparison



- Proportion of delegates by month for three years shows some convergence, but less pronounced than events by month.
- Some spikes in quieter months suggest that while not many events take place in summer months, they can still be events of scale and deliver disproportionally high impacts.

Main conference venue type



- Number of discrete event venues has fallen from 80 in 2018/19, to 35 in 2020/21.
- Fewer venues in use to be expected as fewer events have taken place year on year, results in greater concentration of venues in use.
- Academic venues, while falling, remain the most used venue.
- Conference centre events have shown greatest stability and are the only venue choice to increase in popularity.
- As economic value of events has increased, we can infer the importance of conference centres to hosting large scale events that drive high numbers of delegate days.

Appendix 1: Data Gathering

The Scottish Association Survey is a national survey carried out by VisitScotland in partnership with key venues and convention bureaus across Scotland to develop a better understanding of the size and value of the association conference sector to Scotland.

Prior to 2018/19 this research has not been done before. The size and value of the association conference and conventions market to Scotland had not previously been known and estimates have been used.

Research conducted by VisitBritain over 10 years ago estimated that Business Events, or MICE, spend was approximately 1/5th of the overall visitor economy. The size of the visitor economy in Scotland is in turn based on IPS data, and it is impossible to try and estimate what proportion of the MICE spend can be attributable to conferences, corporate events, incentive trips or product launches.

VisitScotland has asked partners to submit details of association conferences or conventions which have taken place in their venues or cities, in financial year 19/20, and events that were planned and cancelled in 20/21.

Criteria – What is Included and What is Excluded

All data that has been submitted to VisitScotland has been audited and any events found not to be suitable have been removed. Criteria included:

- The event would not normally take place in Scotland; the organisers have chosen to come to Scotland through a competitive bid or through other decision-making processes.
- Any events organised for a Scottish audience, e.g. a regional Scottish conference of a UK national body, have been omitted. Such an event would not attract a significant number of people from outwith Scotland, and so the economic value of new spend in Scotland is negligible.
- The event must be for an association – be that an annual conference, a working group meeting or a specialist cross sector conference where there might not be an association body, but the event could not be classified as a corporate event, for example international governmental congresses
- Events that have been excluded include roadshows; lectures; exams, training days; corporate meetings; evening receptions and product launches.
- One day symposiums, organised by university faculties, have been evaluated on an individual basis to ascertain to what extent delegates will have travelled from abroad to attend. There was a base assumption that in most cases a faculty symposium would have a Scottish audience unless this could be proven otherwise.
- Events must attract 50 or more delegates, in line with similar criteria used by ICCA (International Congress and Convention Association).

In this survey we have in places used “delegate days” to describe the impact association events have in Scotland. Delegate days is a measure that looks at the total number of delegates who have attended each event, and the number of days the event they have attended has lasted and assumes full attendance.

The Scottish Association Survey aims to shine a positive light on the incredible work and success of this sector across Scotland. Results were obtained from Scotland’s convention bureaus, international conference centres, Scotland’s leading universities and royal colleges, and conferencing hotels. In total event information from over 47 venues across Scotland was received. While every effort was made to collect data from as many sources as possible, not all venues replied to the survey.

We hope in future years that greater awareness of the survey will instigate greater participation.

This report has been produced by VisitScotland Business Events in collaboration with the VisitScotland Insights Department. All statistical analysis and modelling has been undertaken by the VisitScotland Insights team.

Appendix 2: Key Data and Comparisons

PROFILE OF EVENTS	YEAR AND VALUE			YEAR ON YEAR % CHANGE	
	18/19	19/20	20/21	18/19 to 19/20	19/20 to 20/21
Events (UK v International)					
Total events	447	330	271	-26%	-18%
UK events	236	213	146	-10%	-31%
International events	211	117	125	-45%	7%
Duration					
Percentage of events that lasted one day	19%	22%	9%	3%	-13%
Percentage of events that lasted two days	28%	26%	29%	-2%-	2%
Percentage of events that lasted three days	30%	24%	32%	-6%	8%
Longest event (days)	8	9	12	13%	33%
Percentage of UK delegate days from multi-day UK events	92%	92%	84%	0%	-8%
Delegate Days					
Total delegate days	425,629	412,273	555,918	-3%	35%
International delegate days	285,443	263,861	422,693	-8%	60%
UK delegate days (multi-day)	128,568	137,027	133,225	7%	-3%
UK delegate days (single)	11,618	11,385	3,910	-2%	-66%
Percentage of delegate days from international events	67%	64%	76%	-3%	12%
Percentage of delegate days from multi-day UK events	30%	33%	24%	3%	-9%
Percentage of delegate days from single day UK events	3%	3%	1%	0%	-2%
Venue					
Number of venues who hosted an association event	80	46	35	-43%	-24%
Number of events at Hotels	90	67	28	-26%	-58%
Number of events at Academic Venue	244	166	142	-32%	-14%
Number of events at Conference Centre	83	81	93	-2%	15%
Number of events at Unique Venue	27	16	8	-41%	-50%

PROFILE OF EVENTS	YEAR AND VALUE			YEAR ON YEAR % CHANGE	
Key Sectors					
Percentage of Delegate Days from Life Science events	55%	42%	50%	-13%	9%
Percentage of Delegate Days from ICT & Data events	8%	10%	10%	2%	0%
Percentage of Delegate Days from Social Sciences	7%	11%	3%	4%	-8%
Additional Value					
Average UK delegate extension (days)	2.9	2.8	2.8	-10%	0%
Average international delegate extension (days)	3	3.2	3.2	20%	0%
Percentage of UK delegates that extend	42%	42%	42%	0%	0%
Percentage of International delegates that extend	37%	36%	36%	-1%	0%
Percentage of UK delegates that intend to return to Scotland	95%	94%	94%	-1%	0%
Percentage of International delegates that intend to return to Scotland	87%	87%	87%	0%	0%
Spending					
Economic value from association events (£m)	206.3	201.3	267.4	-2%	33%
Economic Value from extenders (£m)	5.6	5.1	6.6	-8%	29%
Economic Value from potential repeat visitors (£m)	5.5	6.8	8.3	24%	22%
Total Economic Value (£m)	217.4	213.3	282.3	-2%	3%
FTE Jobs (Full Time Equivalents)					
FTE jobs from events	3,285	3,205	4,258	-2%	33%
FTE jobs from extenders	90	82	105	-9%	29%
FTE jobs from repeat visits	87	108	132	25%	22%
Total FTE jobs	3,461	3,395	4,495	-2%	32%
Net Additional Impact					
Economic Value (£m)	256.4	250.1	332.9	-2%	33%
Total FTE jobs	3,461	3,376	4,495	-2%	33%
GVA (£m)	149.6	146.0	194.3	-2%	33%

Note: Net Additional Impact calculations make use of Scottish Government tourism related multipliers from the 2018 Tourism I-O Table (sourced 2020). Appropriate assumptions for dead weight; displacement and leakage have also been made which are consistent with HM Treasury Green Book Guidance.

P&J Live, Aberdeen

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