

Annual Scottish Association Survey

for the year ended 31 March 2019

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Annual Scottish Association Survey 18/19

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.

This primary research has never been undertaken before and will create a baseline for future evaluations.

The Scottish Association Survey has specifically set out to report 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 not to include corporate conferences and meetings or incentive trips which are harder to monitor and identify. Value estimation has been achieved using industry recognised “Delegate Expenditure Benefit” multipliers, inflated for 2018 prices. The original DEB figures are those recognised by the Scottish Government and have been inflated using Scottish Government price indexes.

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 this report.

The evaluation 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 Scottish Association Survey aims to shine a positive light on the incredible work and success of this sector across Scotland”



Associations and Scotland's Appeal

An association is a group of persons 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, 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. Larger events attracting hundreds, or thousands of delegates attract a significant spend; venue costs, AV, catering, and hotel rooms for delegates being among the most visible. Delegates will spend when at conference on meals, drinks and gifts, and some choose to extend their stay.

Beyond the immediate 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 recognition that Scotland is a world leader in their field. When a conference comes to Scotland it is an opportunity to show those delegates who and what we are, and to project an incredibly 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 immigration. A conversation had at conference can lead to new collaborations that in years to come can produce world changing research.

Impact Summary

How did Scotland Perform in 2018/19 - here are the key results

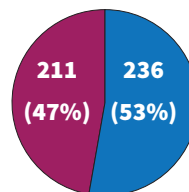
EVENTS & DELEGATES

447 association events hosted in Scotland in 2018/19.
130,786 delegates welcomed to Scotland in 2018/19.

There is a relatively even balance between the number of UK association events and International association events held in Scotland.

Of the 447 association events that took place in 2018/19:

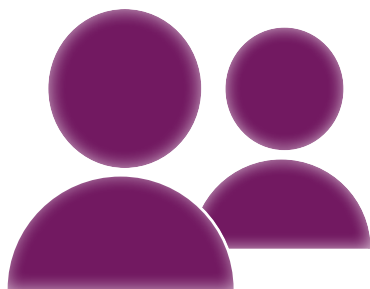
236 (53%) were UK events
and **211 (47%)** were international.



Combined around one in
FIVE (19%)
events last for only one day



The longest association
event lasted for
8 DAYS



Events lasting 2 or 3 days are
the most common with **58%**

2-day events **28%**

3-day events **30%**

Multi-day UK association events accounted for **92%** of all UK delegate* days highlighting the importance and value of UK events that take place over multiple days compared to single day events.

*Delegate days explained in 'Data Gathering' page 9.

International events were responsible for generating the most delegate days in Scotland. This shows that while more UK association events took place in 18/19, international events attract larger numbers and last longer.

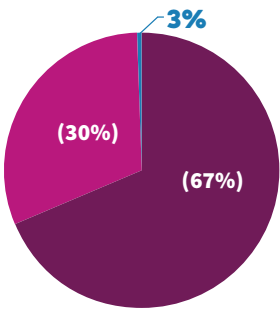
There were **425,600** delegate days spent in Scotland in 2018/19



International association events accounted for two thirds **(67%)** of all delegate days

While UK multi-day events accounted for **30%**

UK single day events accounted for the remaining **3%**

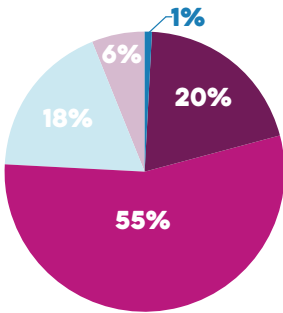


80 different venues across Scotland hosted association events.

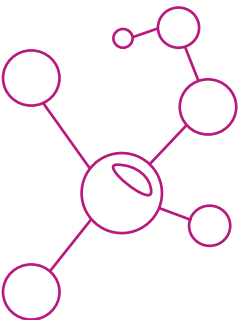


Main venue type used for associations events

Main Venue Type	
Hotel	90
Academic	244
Conference Centre	83
Unique Venue	27
Unknown	3



Life Sciences dominate UK and International events held in Scotland – 172 of 447 events were in the Life Sciences (38%).



Life Science Association events are responsible for **235,800** delegate days which is 55% of all delegate days. Human Health & Disease and Surgery & Medicine events were responsible for the majority of Life Science events.

ICT & Data and Social Sciences events were also well represented.

Information Computer Technology (ICT) for **8%**

Social Sciences accounted for **7%** of overall delegate days.

A further 18 sectors each accounted for below **4%** of delegate days spent in Scotland – see table on page 8 for full details.

EXTENDERS AND REPEAT VISITORS

Around four in ten delegates extend their stay in Scotland for 3 days.

A VisitScotland Survey found **42% of UK delegates** extended their stay for 2.9 days
37% of International visitors stayed for 3.0 days.

Nine out of ten delegates say they will return to Scotland as leisure visitors.

95% of UK delegates state they will return to Scotland while **87% international visitors** say they will re-visit Scotland.

ECONOMIC IMPACT

Association Events & Conferences deliver at least £250million to Scotland's economy.

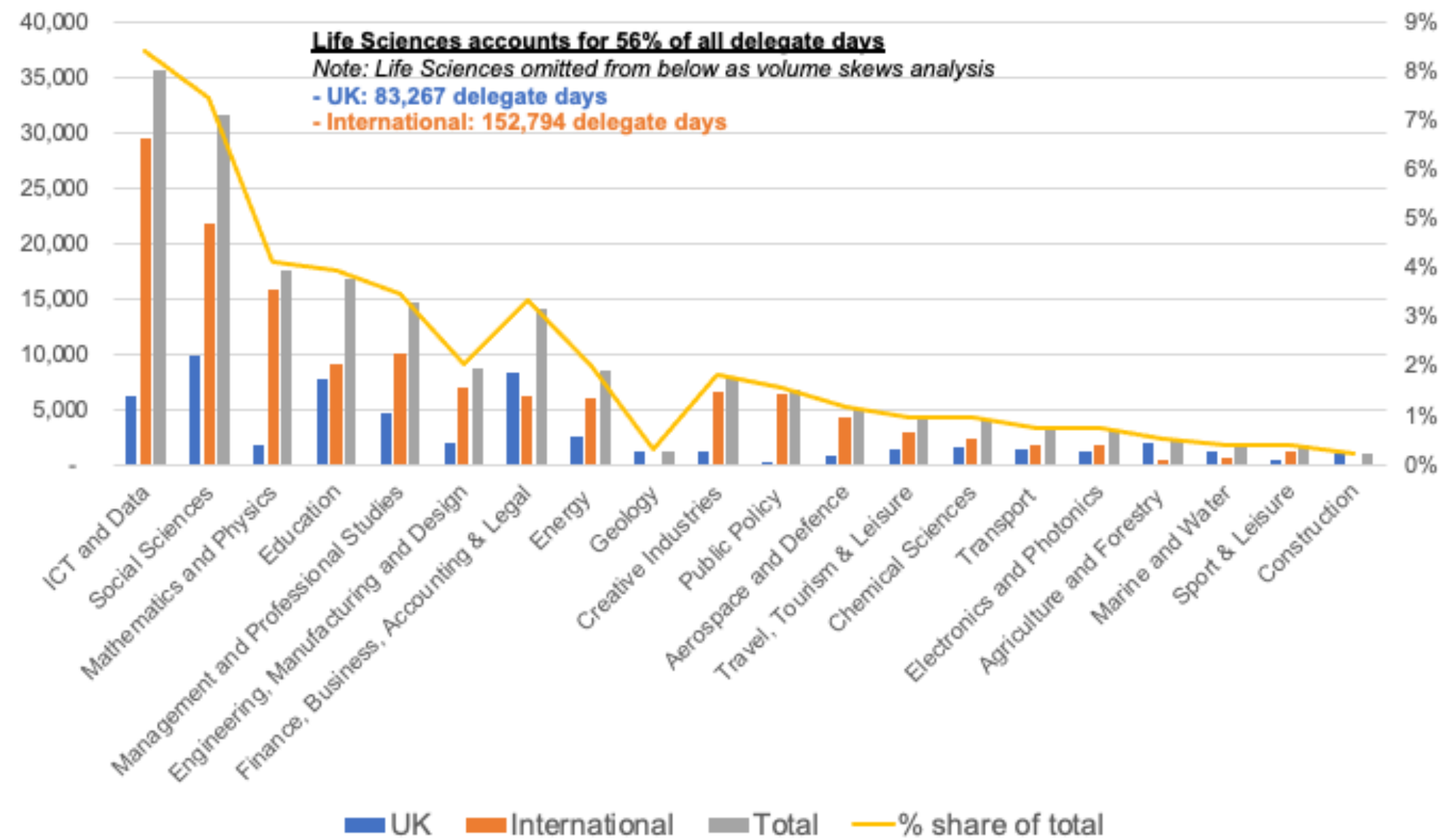
Association Events & Conferences contributed c.**£206million** to Scotland's economy in 2018/19. Extended stays and repeat visits were worth a further c.**£11million**. The combined direct impact of association events in Scotland in 2018/19 was c.**£217million**.

The sector supports c.3,500 FTE jobs.

Gross Impacts: Association Events & Conference 2018/19

Origin of Value	Gross Impact	FTE Jobs	As % of total
Association Events & Conferences	£206.3	3,285	94.9%
Extenders Additional Value	£5.6	90	2.6%
Repeat Visits	£5.5	87	2.5%
Total	£217.4	3,461	100%

Number of Delegate Days at UK and International Association Events by Sector and % Share of total



Data Gathering

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

This research has not been done before. The size and value of the association conference and conventions market to Scotland has 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 18/19.

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 out with 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. 130,786 delegates travelled to Scotland in 18/19, factoring in the number of days each was in Scotland for, the total number of delegate days is 425,600.

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 bureaux, international conference centres, Scotland’s leading universities and royal colleges, and conferencing hotels. In total event information from over 80 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. It is hoped 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.

