

SCOTTISH ASSOCIATION SURVEY

2023/24



Scottish Association Survey 2023/24

Scotland's annual association conference survey



VisitScotland in partnership with key conference venues and convention bureaus monitor the performance of highly valuable inbound association conference events.

The 2023/24 results highlight a significant return of association conferences to Scotland, with more delegates than ever before attending association conference events. This volume of activity has created the largest economic impact recorded to date. In 2023/24 the sector delivered record levels of visitor spend and supported a record number of jobs.

This document provides:

- A high level 2023/24 performance summary.
- A headline key performance indicator (KPI) infographic.
- A summary of the sectors contribution to Scotland's national economic strategy (NSET).
- Detailed charts are also provided in a separate [technical appendix](#).



2023/24 Performance Summary

- **Record economic impact:** £349.1m net additional impact to Scotland's economy representing a 100% increase from 2022/23 (96% when adjusted for inflation).³
- **Significant rise in delegate attendance:** 146,000 delegates representing an increase of 55% compared to 2022/23.
- **Increasing events:** 317 events hosted, which was an increase of 12% from 2022/23 levels and close to pre-covid levels (330 events hosted in 2019/20).
- **Increasing value per event:** Over £900,000 additional spend per event 2023/24. The average value of events held in Scotland exceeded the recent historical average,⁴ as did average delegates and delegate days generated per event.
- **Relatively stable event duration:** Average event lasted 2.7 days which was relatively consistent with 2022/23 levels.
- **Substantial activity in low season months:** 40% of events took place between October and March, in typical 'shoulder' or 'low' months.
- **Valuable links with academia:** Academic venues as main host of association conferences increased by 2% to 59% of all events. This demonstrates the deep-rooted alignment between association conferences and Scotland's academic venues and research credentials and ambitions.
- **A well-balanced portfolio of domestic and international events:** 58% of events were UK based, which is in line with recent historical averages (57%).⁵ This stable UK market performance, attracting regular and repeat business from Scotland's core domestic market is desirable and indicates a relatively well-balanced portfolio of domestic and international events.
- **International events continue to generate the most delegates and events of scale to Scotland:** despite being fewer in number, international events provided 62% of all delegates in 2023/24 while only accounting for 42% of events. This emphasises the importance of attracting ongoing sustainable levels of large-scale international conferences to Scotland.
- **Delegates are now attending from a more even distribution of sectors:** Life Sciences events now account for 30% of delegate days compared to 53% in 2022/23. Other sectors, notably Education and Energy have started to provide an increasing share of delegates (from 6% to 11% and from 7% to 24% respectively).
- **Strong performance from key markets that are also linked to record Foreign Direct Investment (FDI) levels:** Energy related delegate days increased from 21,000 to 117,000 and now account for 24% of delegate days. This coincided with a record level of energy related FDI projects in Scotland in 2023/24.⁶

The association conference sectors recent performance is impressive and encouraging. However, it is possible that some of the events may have come from events displaced into 2023/24 from the Covid-19 pandemic. 2024/25 results are therefore eagerly anticipated to establish if longer term growth trends can be sustained.

¹An "association conference" is a large gathering organised by a professional association. Members gather to network, learn industry trends, participate in educational sessions, and discuss relevant topics related to their field. Association conferences often including keynote speeches, workshops, and panel discussions, all focused on professional development and advancing the goals of the association itself.

²This high-level format differs from previous reports to help emphasis key impacts aid interpretation and ensure the results reach a wider audience.

³Using <https://www.bankofengland.co.uk/monetary-policy/inflation/inflation-calculator>

⁴2018/19 to 2023/24 (excluding 2020/21 which was adversely affected by Covid-19 pandemic)

⁵2018/19 to 2023/24 (excluding 2020/21 which was adversely affected by Covid-19 pandemic)

⁶Utility supply is the leading sector for Scotland's FDI, with 40 projects secured in 2023, a rise of 81.8% on the 22 projects secured in 2022, and the highest recorded by any sector in any year of the past decade in Scotland.' Source: **FDI in Scotland attracts a record number of projects | EY - UK**

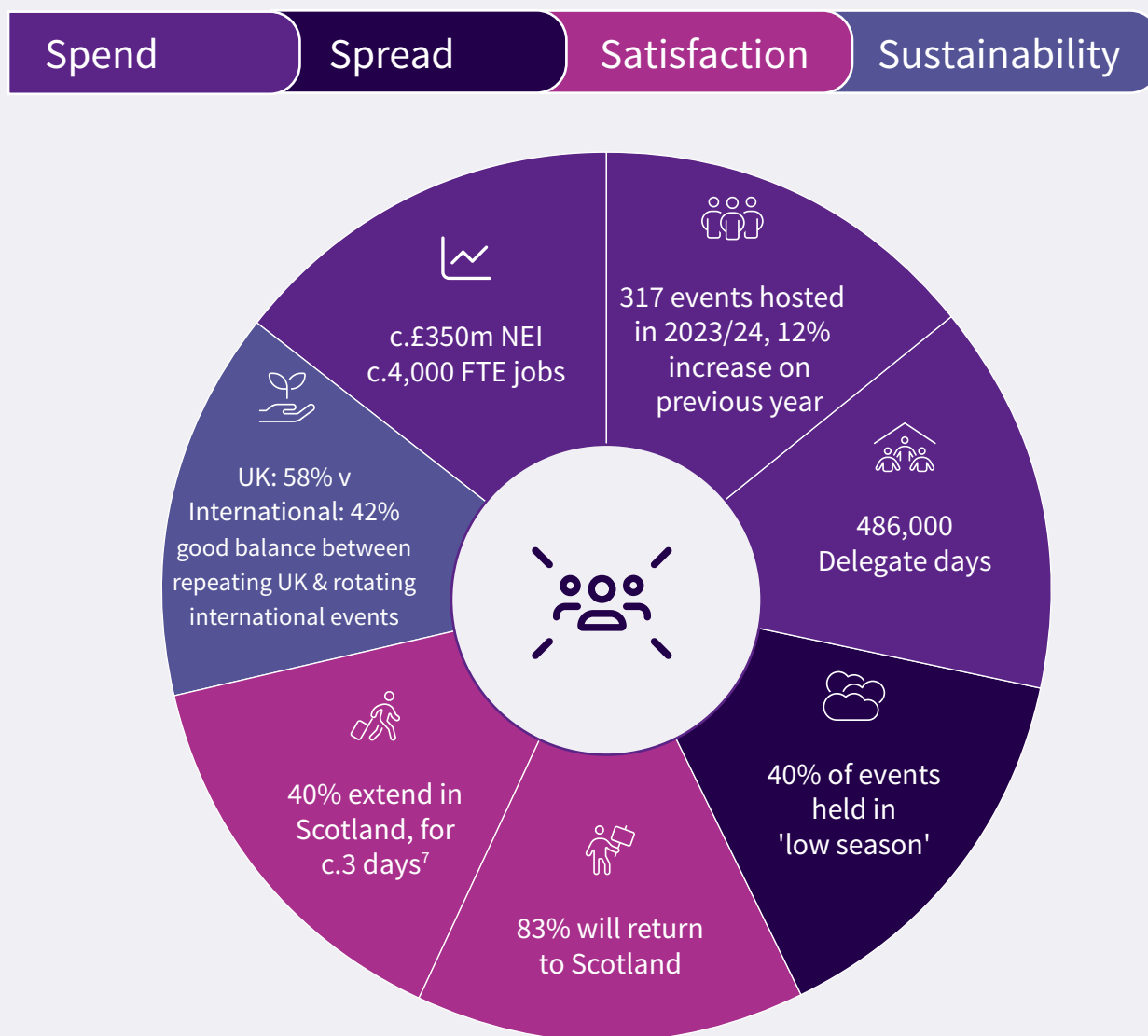
Key Performance Indicators

Figure 1: KPI Infographic highlights the Scottish Association Conference sectors headline KPIs.

Contribution to NSET

The nature of association conferences and related high value delegate spending also significantly contribute to Scotland's economic policy and strategic objectives which is demonstrated overleaf in **Table 1: Scottish Association Conference Events Contribution to NSET.**

Figure 1: KPI Infographic



⁷ source: VS delegate survey (20,700 responses)

Contribution to Scottish Government Economic Strategy (NSET)

Scotland's National Strategy for Economic Transformation (NSET) sets out a framework for a competitive and fairer Scotland. The strategy provides a broad approach to boosting competitiveness and addressing inequality. NSET objectives are directly related to achieving the outcomes set out in Scotland's National Performance Framework (NPF) and the United Nations Sustainable Development Goals.

Figure 2 shows the six broad NSET priority objectives where actions and investment should be targeted.

Table 1 demonstrates the significant contribution association events make to the objectives outlined in NSET.

Figure 2: NSET priority areas



Table 1: Scottish Association Conference Events Contribution to NSET

NSET Objective	NSET Contribution by Association Conference Events
1. Entrepreneurial People and Culture	<p>Association Events:</p> <ul style="list-style-type: none"> Showcase Scottish business and Scottish university expertise to international audiences. Create valuable, and in some cases irreplaceable international networking opportunities. Stimulate innovation, entrepreneurship, and growth through exposure to the most advanced thinking on new processes and technologies. Provide societal, health and wellbeing impacts (e.g., through leading life science events, which are particularly prevalent in Scotland). Scotland can capitalise by linking attending businesses and sectors to Scottish academia marketing Scotland's R&D capacity and infrastructure to harness further rounds of innovation.
2. New Market Opportunities	<p>Association Events:</p> <ul style="list-style-type: none"> Expose Scotland to global influence and networks. Can anchor a countries reputation in a new sector and become the global thought leading location (e.g., Offshore Europe, which cemented Scotland and Aberdeen as the energy capital of Europe). This approach can be repeated in data, technology, precision medicine and aquaculture. Support and advance opportunities in Scotland's key growth sectors, especially life sciences; financial and business services; energy and creative services (e.g., the 2022 World Forum for Foreign Direct Investment brought global finance and major foreign investors to Scotland). Delegate and event host spending provides further stimulus to other Scottish growth sectors namely sustainable tourism and food and drink.

NSET Objective	NSET Contribution by Association Conference Events
3. Productive Businesses and Regions	<p>Association Events:</p> <ul style="list-style-type: none"> • Take place throughout Scotland and benefit regions and productivity by supporting direct jobs and businesses and also through multiplier effects (e.g., supply chain effects and household spending). • Happen during quieter times of the year (and week) which is important for a balanced visitor economy
4. Skilled Workforce	<p>Association Events:</p> <ul style="list-style-type: none"> • Provide a learning platform to upskill, network and learn from highly knowledgeable influential international groups. • Offer events, membership, and pathways for continuous professional development, and in many cases serve as the accreditation body for specialisms and charterships. • Directly improve delegate skills and knowledge through exposure to the latest innovations and technologies.
5. A Fairer and More Equal Society	<p>Association Events:</p> <ul style="list-style-type: none"> • Can be agents of change and provide countries with unique opportunities to capitalise on the profile and outcomes of internationally significant events (e.g., major climate and transport declarations⁸ now synonymous with COP26 held in Glasgow in 2022). • Cover numerous topics and opportunity for linkages with new economic, societal, and knowledge and importantly provide the basis for enduring international alliances.
6. A Culture of Delivery	<p>The NSET Culture of Delivery objective aims to ensure that the five objectives and related policy programmes of action set out above are joined up. Association events held in Scotland strongly contribute to each objective and deliver important benefits to Scotland's economy. However, additional support would deliver a step change in the scale and value of these contributions. Further support to help win additional association events for Scotland can unlock huge returns. VisitScotland is eager to realise the full wide-ranging potential of association events to Scotland's wellbeing economy.</p>

⁸ <https://cop26transportdeclaration.org>

