

SCOTTISH ASSOCIATION SURVEY

2024/25



Scottish Association Survey 2024/25

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 ⁽¹⁾.

2024/25 followed a record year for association conference activity in Scotland. Nevertheless the sector continues to provide a consistently high level of economic impact, high delegate attendance and invaluable business activity in quieter mid-week days and low season months. Association conferences also continue to provide a strong strategic contribution to Scotland's national economic strategy and policy objectives.

This document provides:

- A high level summary of performance in 2024/25 ⁽²⁾.
- A headline key performance indicator (KPI) infographic.
- A summary of the sectors contribution to Scotland's national strategy for economic transformation (NSET).
- Detailed charts are also provided in a separate [technical appendix](#)



2024/25 Performance Summary

- **Significant economic impact:** £296.7million net additional impact to Scotland's economy (a 15% reduction compared to 2023/24).
- **High level of delegate attendance:** attracting almost 118,000 delegates resulting in over 400,000 high value delegate days spent in Scotland.
- **Over 300 Association Conference events held:** 305 events held, representing a marginal decline of 4%.
- **Increasing UK events:** 192 UK events hosted, which was an increase of 5% from 2023/24 levels. International events declined by 16%.
- **Significant average value per event:** Over £800,000 additional net additional spend per event.
- **Relatively stable event duration:** On average an event lasted 2.6 days which was relatively consistent with previous years.
- **Substantial activity in low season months:** 42% of events took place between October and March, in typical 'shoulder' or 'low' months.
- **Valuable links with academia:** Over half (53%) of association conferences were held in academic venues. This demonstrates the deep-rooted alignment between association conferences and Scotland's academic venues, research credentials and ambitions.
- **A well-balanced portfolio of domestic and international events:** 63% of events were UK based. This stable UK market performance, attracting regular and repeat business from Scotland's core UK market is desirable and indicates a relatively well-balanced reliable 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 64% of all delegates in 2024/25 while only accounting for 37% of events. This emphasises the importance of attracting ongoing sustainable levels of large-scale highly valuable international conferences to Scotland.
- **Delegate attendance from a wide range of strategically valuable and important sectors:** Life Science events account for over half of delegate days (59%) in 2024/25 while Creative Industries accounted for 10%. However there was also notable attendance levels from several other strategically important sectors including Finance (4%), Design (4%), Information, Computer Technology and Data (3%), Electronics (3%), Education (3%), Energy (2%), Mathematics and Physics (2%), Social Sciences (2%), Public Policy (2%), Sports and Leisure (2%) and Travel Tourism and Leisure (1%) and Trade Union (1%).³

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.

³Sectors with less than 1% of delegate days in 2024/25 include: Aerospace and Defence (0.6%), Geology (0.5%), Transport (0.3%), Management and Professional Studies (0.3%), Construction (0.2%), Marine and Water (0.2%), Agriculture and Forestry (0.1%) and Charities (0.1%).

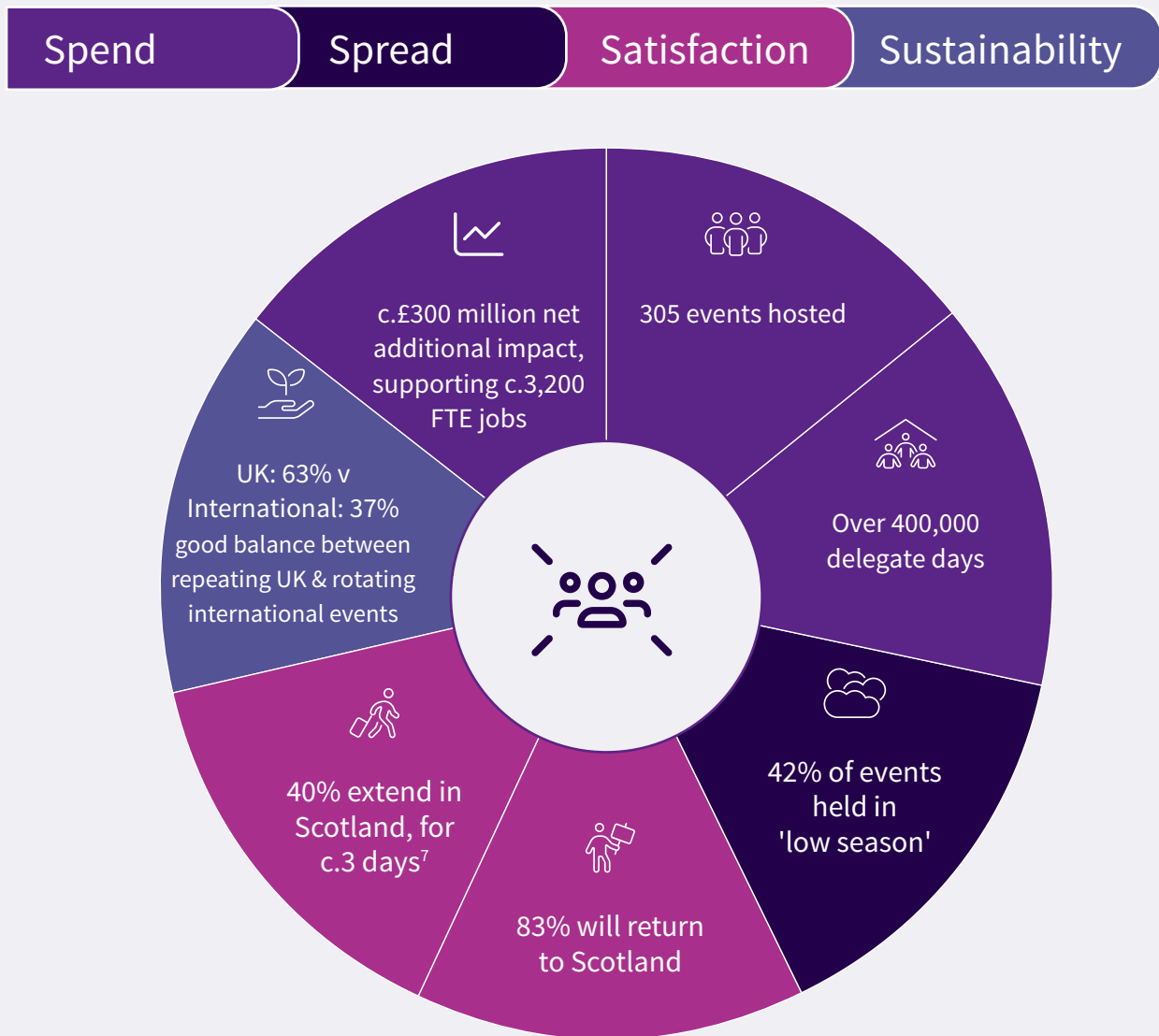
Key Performance Indicators – Spend, Spread, Satisfaction and Sustainability

Figure 1: KPI Infographic highlights the Scottish association conference sectors headline KPIs and shows how the sector contributes to visitor spend, spread satisfaction and sustainability objectives.

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 in the next section and in Table 1: Scottish Association Conference Events Contribution to NSET.

Figure 1: KPI Infographic



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	Association Events: <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 and marketing Scotland’s R&D capacity and infrastructure to harness further rounds of innovation.
2. New Market Opportunities	Association Events: <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. • Delegates directly improve 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 counties with unique opportunities to capitalise on the profile and outcomes of internationally significant events (e.g., major climate and transport declarations⁴ 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>

⁴ <https://cop26transportdeclaration.org>

