

SCOTTISH ASSOCIATION SURVEY



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01

BACKGROUND TO THE SCOTTISH ASSOCIATION SURVEY



Background to the Scottish Association Survey

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, events created for a local Scottish audience are excluded.

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 current 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 and has been repeated annually since. Event data was collected in 2020-21 and value estimates were projected for events that were cancelled or postponed due to the Covid-19 pandemic.



02

ASSOCIATIONS AND SCOTLAND'S APPEAL



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, societies, and 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 excellence was confirmed again 6 years ago in the Times Higher Education World University Rankings 2019. Three universities in Scotland are in the global top 200 for research volume, income and reputation, and four in the global top 200 for research influence (based on citations).

This research success is in addition to the even more impressive ranking of Scottish universities for international outlook covering staff, students and research. Here Scotland really excels, with nine universities in the global top 200. 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.

03

CONTRIBUTION TO SCOTTISH GOVERNMENT ECONOMIC STRATEGY (NSET)



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 1 shows the six broad NSET priority areas where actions and investment should be targeted.

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

Figure 1: Scotland's Economic Strategy (NSET)

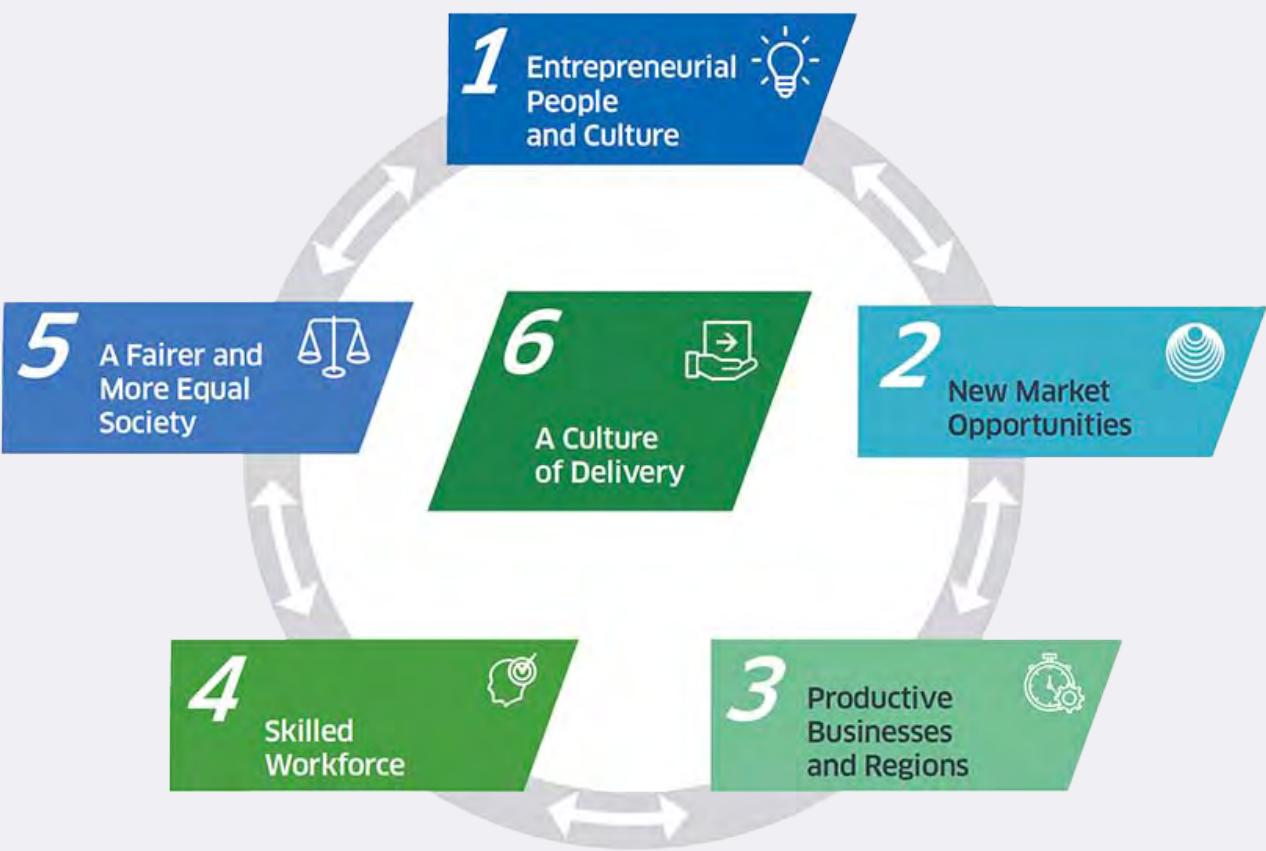


Table 1: Scottish Association Events Contribution to NSET

NSET Objective	NSET Contribution by Association 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 and 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.
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 declarations now synonymous with COP26 held in Glasgow in 2022). • Cover numerous topics and opportunities for linkages with new knowledge and processes. • 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>

04

APPENDIX: DATA GATHERING



Appendix: 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.

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.

In a survey year VisitScotland asks partners to submit details of association conferences or conventions which have taken place in their venues or cities

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.
- 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 bureaux, international conference centres, Scotland’s leading universities and royal colleges, and conferencing hotels. While every effort was made to collect data from as many sources as possible, not all those contacted replied to the survey.

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

The annual report is 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.

