SCOTTISH ASSOCIATION SURVEY

for the period: 2021/22 and 2022/23

Contents

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01 Executive Summary

Executive Summary

Recent Performance & Recovery

Scotland has performed well in attracting and hosting association conferences in the years following the Covid-19 pandemic and associated lockdowns. In 2022/23 Scotland hosted 282 association conferences, which contributed almost £175m in economic benefit for Scotland and supported the equivalent of c.2,100 FTE jobs.

This represents an 85% return to the number of association events hosted in 2019/20, mainly boosted by the strong recovery of international originating events (97% recovery) and the steady return of UK originating events (79% recovery).

Delegate days spent in Scotland are a crucial measure of success and value. Delegate days and corresponding economic impact rebounded to around three quarters of 2019 levels (72% and 70% respectively).

This success and strong recovery in a highly competitive and challenging economic environment is a combination of the work of Scotland's city convention bureaus, our large conference centres, and the understated but hugely important work of Scotland's universities that help attract and host association events on their campuses.

Scotland's Impressive Relative Ranking

International Congress and Convention Association (ICCA) data shows that Scotland performs disproportionately well for a country of our size. Glasgow and Edinburgh are the UK's second and third most popular event destinations, with only London ranking above them in the UK.

Globally, Glasgow ranks 27th in the world for the number of international association meetings held with Edinburgh ranking 30th. This puts the two cities ahead of some of the world's leading destinations including Washington DC, Tokyo, Geneva, Dubai and Sydney.

Drivers of Success

The work of city convention bureaus, conference venues and universities is supported and complemented by VisitScotland Business Events through national marketing and positioning, our international presence and promotion of Scotland at major trade events, and through targeted investment through the National Conference Bid Fund (NCBF).

National Conference Bid Fund

The National Conference Bid Fund was launched in 2013 with a Scottish Government commitment of c.£3m to help secure additional association events for Scotland. The NCBF has played a pivotal role in securing 186 additional events and bringing c.160,000 delegates to Scotland over the past 11 years.

The return on NCBF investment has been impressive with the c.£3m investment yielding a direct economic impact of c.£270m so far. This is c.£78m in GVA productivity benefits.

The NCBF is now fully allocated and the last supported event will take place in 2025.

Future Outlook & Possible Diminishing Returns

The results of the 2022/23 Scottish Association Survey, albeit influenced by the Covid-19 pandemic and the ongoing recovery of the events and travel markets, show another year of reducing event numbers. In 2018/19 Scotland hosted 447 association events which has dropped year-on-year to 282 in 2022/23.

In previous years, notably 2019/20, a reduction in events was mitigated by a high number of delegate days which ensured a consistent overall economic impact. In recent years number of events, delegate days, and economic impact have all declined.

In 2019/20 the NCBF supported 19 events, reducing to only nine in 2022/23. While the correlation is complex, there is a trend of fewer NCBF supported events and fewer events recorded nationally. If Scotland were to host ten additional events, attracting 1,000 delegates each, for a three-day event, this would contribute an additional 30,000 delegate days per year – creating a significant economic impact.

Competitor destinations, including other UK nations, target and significantly invest in high value association events. Scotland performs well despite a highly competitive international environment. There is however a golden opportunity to create a step change in activity by applying additional resource equivalent to our main competitor nations to stimulate long-term confidence in Scotland's association conference market. This investment would facilitate long term sustainable growth in a high value sector that has valuable linkages with academia and significantly furthers national policy objectives.

In relation to public funding however, additional resource allocation is subject to wider budget considerations.

Data gathered in the past two years indicates a strong recovery has been made from the low point brought on by the Covid-19 restrictions. 2023/24 numbers will be especially revealing to see whether events return to previously seen numbers and delegates, or whether Covid-19 has had a more lasting impact.

There is a trend of 'quality over quantity' being discussed in the business events sector, which is part of wider sustainability discussions. It could be Covid-19 has accelerated the drive towards quality, and some events are no longer viable, rather than Scotland performing less well than in previous years. This is something we will monitor closely and look to examine in future.

The Economic Case for Additional Support

Business event visitors to Scotland spend more per head than any other kind of visitor to Scotland. An international association delegate spends £447 per day (including spend on the delegate and spend by the delegate). The value is even higher for UK delegates. By contrast, leisure visitors from Scotland's highest value international market, the USA, spend £182 per day.

The demonstrable economic impact and potential future returns associated with high value association conferences justifies further strategic investment to safeguard Scotland's position as an attractive, viable and commercially competitive location and encourage a targeted pipeline of longer-term high value association conferences.

Strategic Alignment (NSET & NPF)

Association events specifically contribute to Scotland's economic strategy (NSET) and national policy outcomes (NPF) by furthering Scotland's internationalisation objectives. Scotland welcomes tens of thousands of delegates from around the world every year. Delegates are experts and thought leaders in their fields – for Scotland to host these events enhances Scotland's international reputation across a variety of specialisations.

Attracting international (and UK) delegates to events in Scotland provides Scotland with an important platform to showcase domestic talent, innovation and technology. Association events can also be a catalyst to develop new markets and foster innovation. They can help initiate a culture of delivery through industry linkages and academic spinouts and potential enterprise hubs.

A recent example of success is the 2022 World Forum for Foreign Direct Investment. The annual event brings investors and economic strategists to prime investment locations and facilitates direct contact with corporate decision makers that shape the FDI landscape. The event has changed perceptions of Scotland as a destination for inward investment and is an example of a business event being used as a strategic tool to help further national policy. This approach can be replicated for other sectors and policy areas.

Brexit Impact

The full impact of Brexit on the associations sector is not yet fully understood. 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. The Covid-19 pandemic has overshadowed the UK's withdrawal from the EU and distorted perceptible impacts.

Importantly, the UK has recently rejoined the EU Horizon research organisation which will open UK institutions to joint EU funding and should ensure UK and Scottish institutions retain their close links and prominence in European associations.

Key Headline Impacts

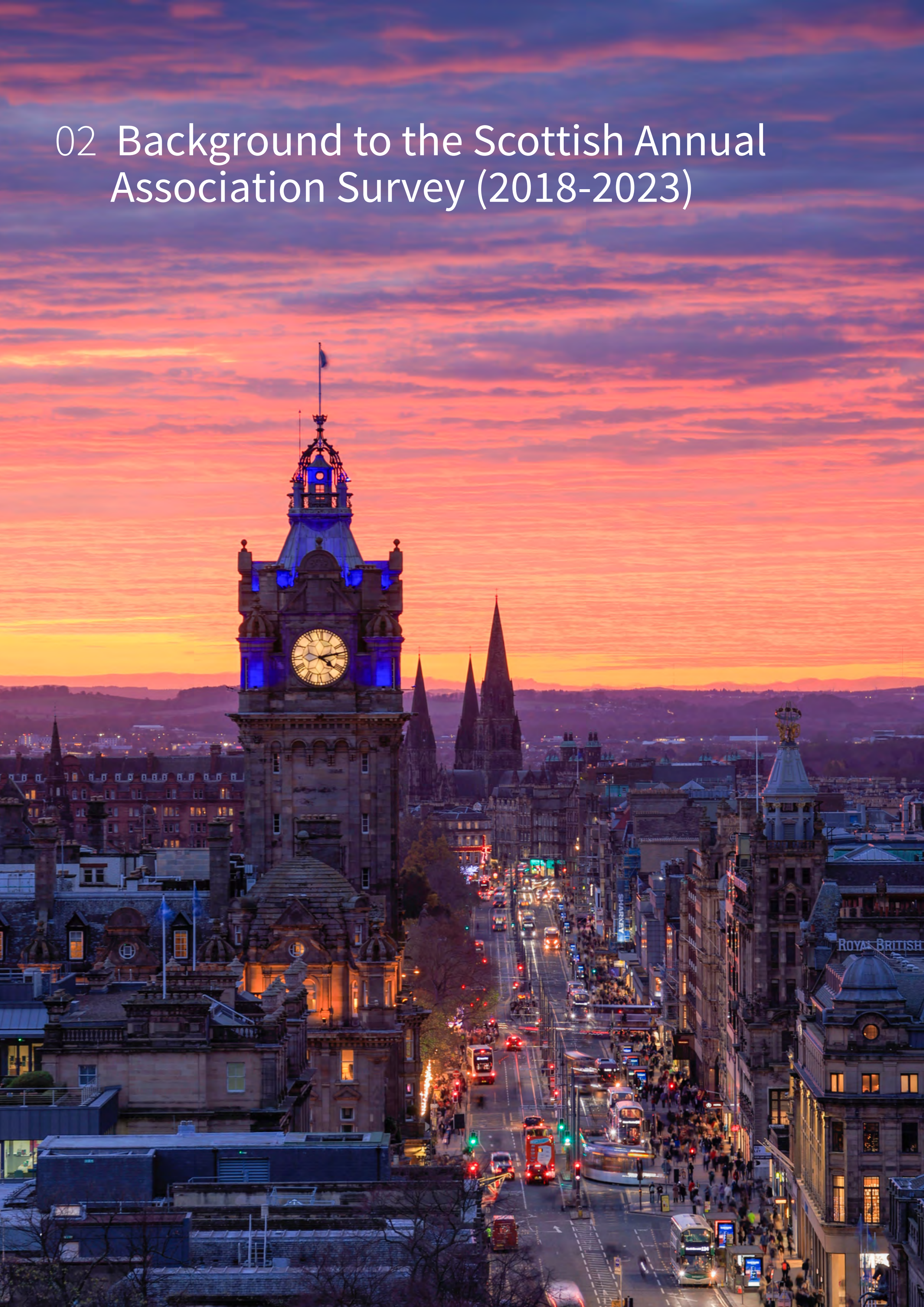
Table EX1 summaries the event profile and economic impact of events held from 2018-19 to 2022-23. A detailed description of the impacts is provided in Section 4 and 5. Detailed event profile and economic impact tables are also provided in Appendix 2: Key Data and Comparisons.

Table EX1: Key Headline Impacts

Key Headline Impacts	Year & Value					Yr on Yr % change	Yr on Yr % change
	18/19	19/20	20/21 (lost due to Covid)	21/22 (Partial Recovery)	22/23 (First Full Year Recovery)	19/20 - 21/22 (Recovery to pre-pandemic)	19/20 - 22/23 (Recovery to pre-pandemic)
Event Profile							
Total events	447	330	271	44	282	13%	85%
UK events	236	213	146	22	169	10%	79%
International events	211	117	125	22	113	19%	97%
Total delegates	130,786	121,440	142,621	17,009	94,353	14%	78%
Total delegate days	425,629	412,273	555,918	97,254	295,590	24%	72%
Net Additional Impact							
Economic value (£m)	£256.40	£250.1	£332.9	£57.2	£174.6	23%	70%
Total FTE jobs	3,461	3,395	4,495	721	2,106	21%	62%
GVA (£m)	£149.60	£146.0	£194.30	£33.0	£100.6	23%	69%

Note: Net Additional Impact (NEI) calculations make use of Scottish Government tourism related multipliers from the 2019 Tourism I-O Table (sourced from SG Economists March 2023). Appropriate assumptions for deadweight; displacement and leakage have also been made which are consistent with HM Treasury Green Book Guidance.

02 Background to the Scottish Annual Association Survey (2018-2023)



Background to the Scottish Annual Association Survey (2018-2023)

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 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 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 repeated in 2019-20. 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.

This report contains the combined results of 2021-2022 and 2022-2023.

03 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 recently 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.

04 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)

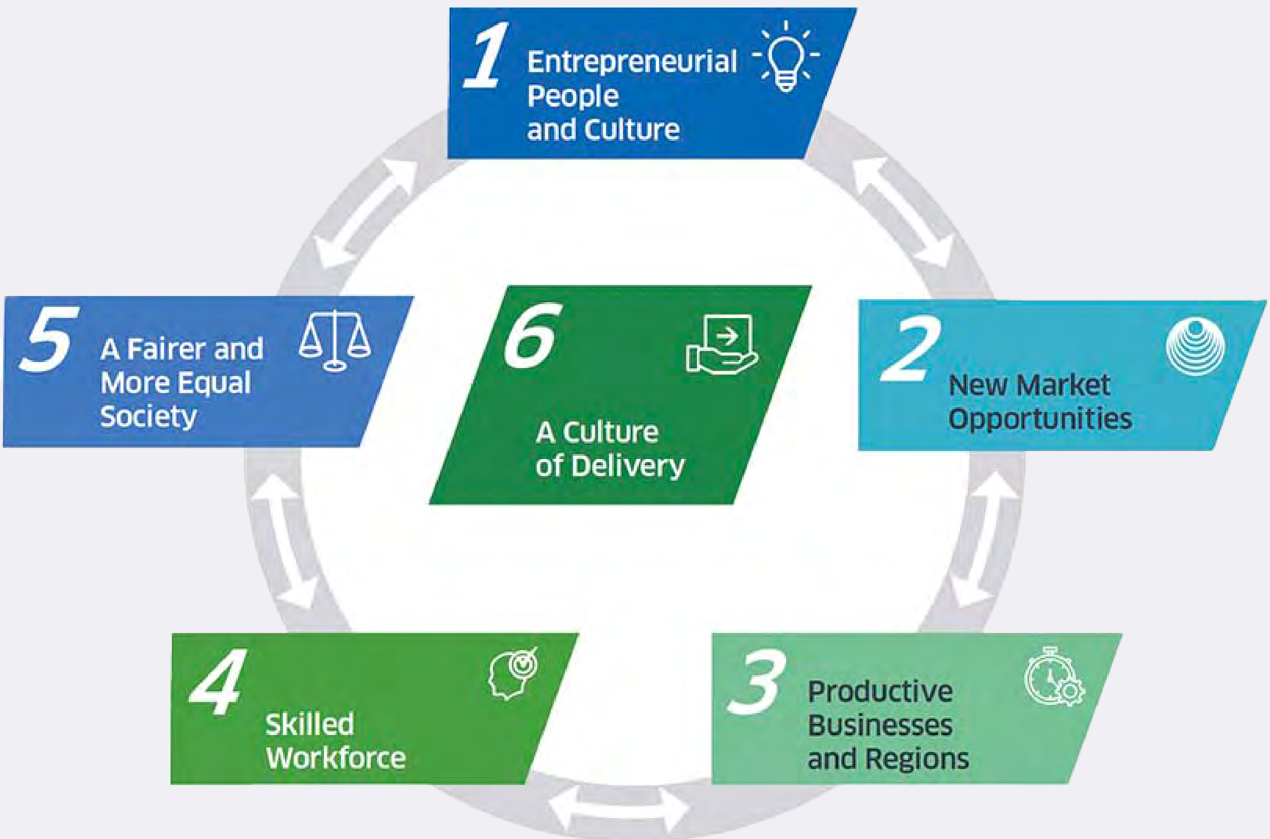
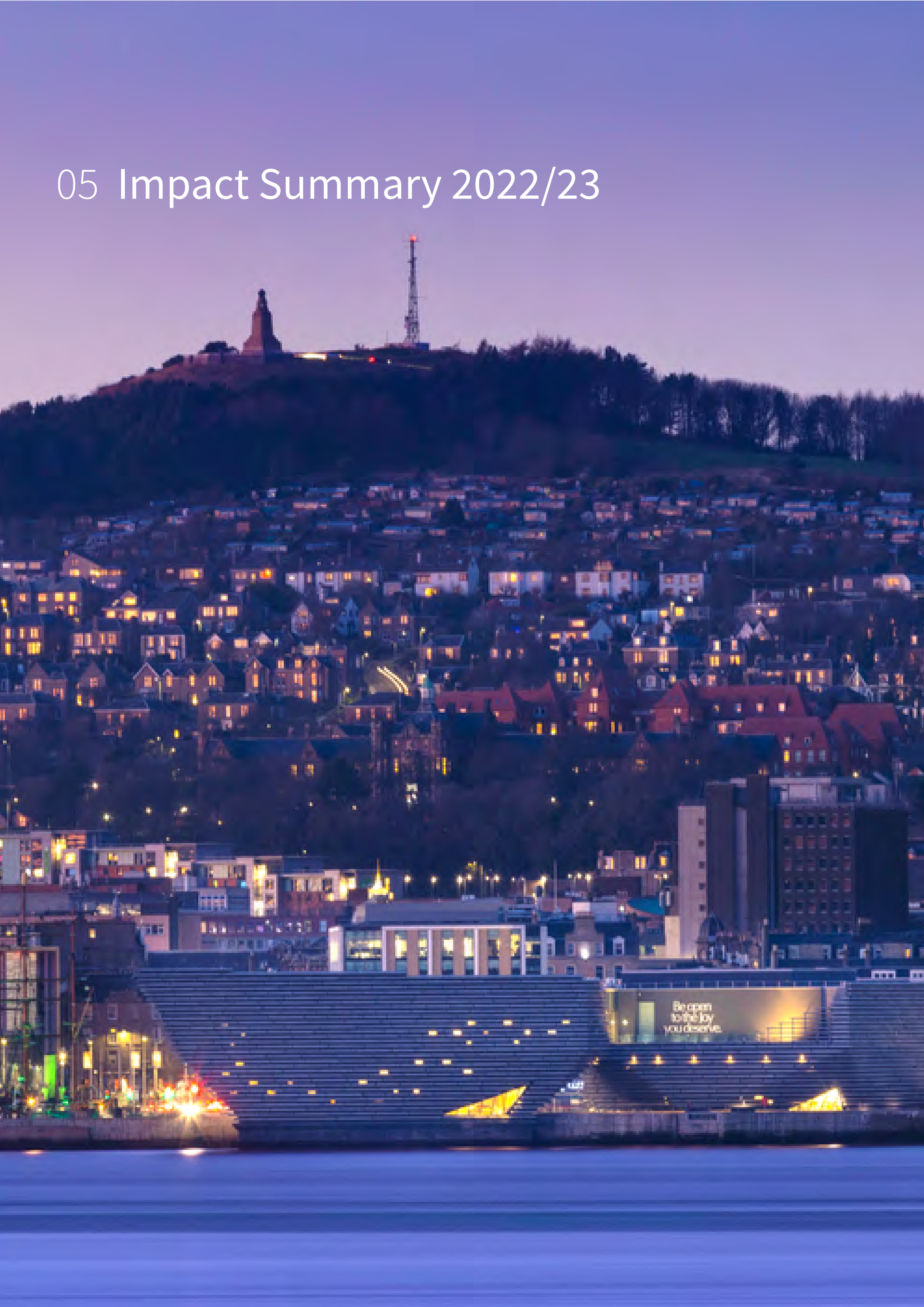


Table 1: Scottish Association Events Contribution to NSET

NSET Objective	NSET Contribution by Association Events
1. Entrepreneurial People and Culture	Association Events: • 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 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: • 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	Association Events: • 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	Association Events: • 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	Association Events: • 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 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	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.

https://nationalperformance.gov.scot/ https://sdgs.un.org/goals

05 Impact Summary 2022/23



2022/23 Impact Summary

The past three years have been unique and extraordinary for the business events sector. In March 2020 Scotland, like most countries around the world, went into a highly restrictive lockdown to curb the spread of Covid-19. Lockdowns and travel restrictions resulted in a total shut down of the business events sector in 2020/21. 2021/22 remained restrictive with business events only permitted for a few months.

2022/23 was the first year since the pandemic in which all restrictions were removed and business events were able to operate in a 'business as usual' environment.

While 2022/23 saw the removal of all legal restrictions to holding events, the effects of the pandemic were still evident. Some organisers continued virtual or hybrid options and delayed a full in person conference to 2023/24.

Despite significant challenges and uncertainty, the 2022/23 data shows a rebound close to what was recorded in 2019/20. This is hugely positive for the business events sector in Scotland and builds on the initial recovery seen in 2021/22.

There were concerns in 2022/23 regarding event staffing levels, with many furloughed or redundant staff having moved to new employment. While this impacted some operations, it is encouraging that demand for event staff is growing. No events were declined or cancelled due to staffing in 2022/23.

2022/23 Headline figures

- 282 association conferences – 15% less than in 2019/20.
- 295,590 delegate days – 28% less than 2019/20.
- c.£175m – 30% less than 2019/20.

While the values are all down compared to 2019/20, they should be viewed in the context of no events having taken place in 2020/21 and very few being possible in 2021/22. The results for 2022/23 therefore shows a strong recovery to pre-pandemic levels.

An 85% return of event numbers, a 72% return of delegate days, and to achieve 70% of the pre-pandemic economic benefit, in the first year of normal operation, is remarkable and testament to the value placed on in-person meetings and Scotland's ability to meet that demand.

Events and Delegates

The total number of events is 15% down on the total number hosted in 2019/20, and even lower again than the record high recorded in 2018/19. However, it is challenging to draw strong conclusions from this downward trend. 2018/19 appears to have been an exceptionally good year, while 2019/20 may have been a cyclically quieter year. 2020/21 was projected to have less events than 2019/20, but it is unknown how many short lead time bookings would have occurred.

The drop in the number of events in 2022/23 resulted in fewer delegates and delegate days. Total delegates are down 22% on 2019/20, with delegate days down by 28%. Scotland hosted c.50,000 less delegates which resulted in over 100,000 fewer delegate days. This is not an insignificant decline. Fewer delegate days, especially those with an overnight component, result in fewer hotel and restaurant bookings and reduces wider impacts for other local businesses.

There is no one segment size (e.g., 1000+, 500-999, and 499 or lower) that is noticeably impacted disproportionately. All event sizes show a decline in both number and attendance.

It is hoped this is related to post Covid-19 factors and nothing more systemic. Unmeasurable contributors could include tighter operating budgets affecting conference attendance, following a year of highly restrictive lockdowns.

Economic Impact

Association conferences held in 2022/23 contributed c.£175m to the Scottish economy. This is 30% lower than 2019/20, and as in previous years the correlation between delegate days and economic impact is very clear.

The greatest value to Scotland is in multiday events where delegates spend three days or more. For example, 100 delegates staying in Scotland for five days (500 delegate days) would deliver more additional value than 200 delegates staying for two days (400 delegate days).

The value from extended stays and repeat visitors were all down compared to 2019/20.

Sector and Venues

2022/23 saw association events held in 32 different venues across Scotland compared to 45 different venues in 2019/20.

Events held in academic and dedicated conference centres remained relatively stable, falling only marginally by 3% and 6% respectively. Hotels by contrast saw a near 50% decline in use. Unique venues declined by 38%.

This demonstrates the enduring importance of conference centres to host events above a certain size, and the huge importance of our universities and their strong academic networks. The results for hotels are less clear, it may be that general demand was lower which pushed fewer events to hotels when university and conference centre space was not available, or, that hotels were not focused on the business events market as much as they have been in previous years and were focusing on a return of leisure markets as a priority after Covid-19.

Life Science events continue to be the largest in number and generate the most delegate days. The overall proportion of delegate days from Life Science events in 2022/23 rose from 42% to 53%.

Other notable sectors for 2022/23 included: Education; Energy; Engineering Manufacturing and Design; Finance, Business and accounting; ICT and Data; and the Social Sciences, which all accounted for between 10,000 – 20,000 delegate days.

As a percentage of delegate days, these sectors accounted for the following:

- Energy 7%
- Education 6%
- Finance, business & accounting 6%
- Engineering 5%
- ICT 4%
- Social Sciences 3%

Compared with previous years sectors like ICT and Social Sciences are not as valuable while others such as Energy and Education have increased in value. This may simply be cyclical, and sectors like ICT may be more comfortable with a virtual meeting format, at least in 2022/23.

The link between the business events sector and national economic development is clear. Business events can be one of the tools that helps Scotland achieve its economic objectives.

Events by Month Trends

The event sequence in 2022/23 converged with the trends observed between 2018/19 and 2019/20, namely a quiet winter period, growth in late spring to June, a summer lull and an autumn revival.

The busiest months for association events are in May, June and September with event planners avoiding winter and focusing on spring, early summer and early autumn. Peak summer months during school breaks and holiday season are routinely avoided.

Concluding Notes

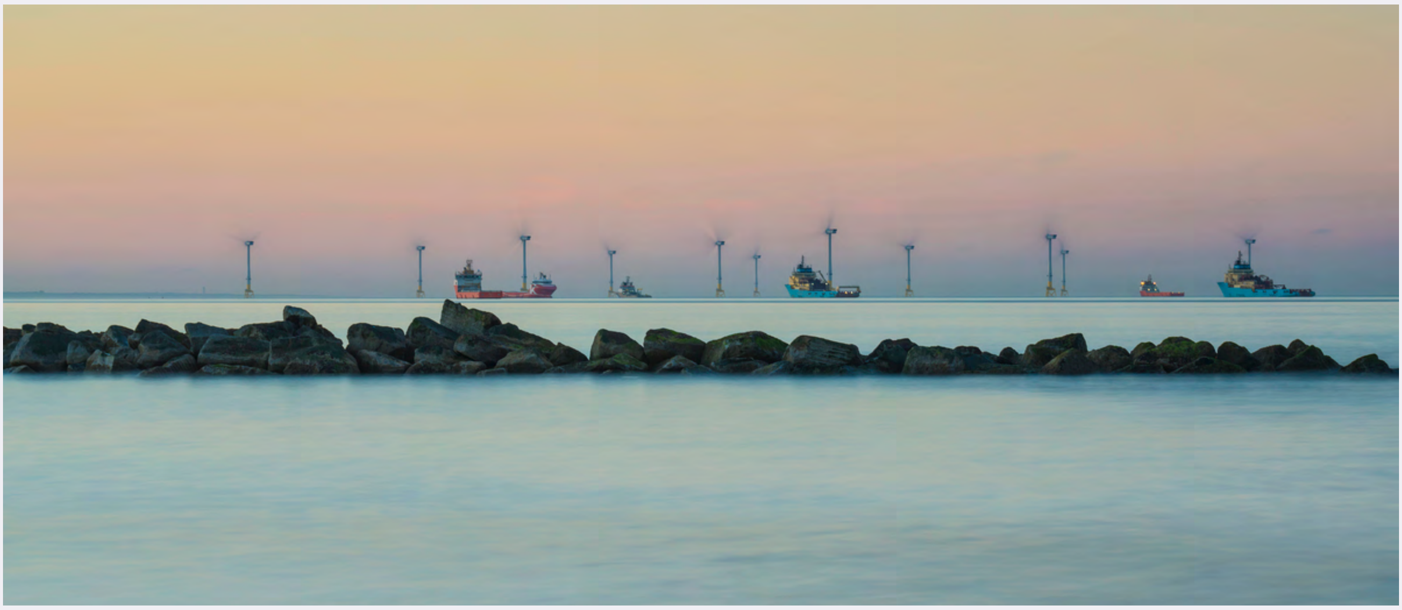
2022/23 has been a positive year for the association conference sector in Scotland. While the volume and value were below previous years it must be considered a success in the context of recovery from the Covid-19 pandemic. Interpreting this year's data is very much a choice between viewing the results as a drop from 2019/20, or a huge resurgence from 2020/21 when no events took place at all.

As time passes, it becomes challenging to recall the sentiment and conditions that prevailed in 2020 and 2021. Association events are often planned in multi-year cycles, contracted years in advance, and can take a whole year of dedicated planning and marketing to bring to life. It is important to recognise the extent to which these rhythms were disrupted by the Covid-19 pandemic. For some event organisers (and delegates) 2022/23 would have simply been too soon.

Other important factors include events contract schedules being pushed out. Where another destination was planned for 2021, they kept that destination for 2022 (to avoid breaking contract) and pushed Scotland to a later date. Industry feedback confirms a lot of reorganising took place from events that were delayed or cancelled in 2020 and 2021.

Across other metrics we saw the continuation of some established patterns, not least the continued importance of life science events as a generator of delegate days, and the vital role played by universities and conference centres in providing spaces and services that allow association meetings to take place.

The economic impact, while lowered, remains significant. Events generated zero for the economy in 2020/21. To return to 70% of pre-pandemic levels in the first full operational year is remarkable.



06 Impact Summary 2021/22

2021/22 Impact Summary

This section analyses the results of the 2021/22 Scottish Association Survey relative to the 2019/20 survey results. As stated elsewhere, no events took place in 2020/21 due to the global coronavirus pandemic and the national lockdown.

2021/22 Headline figures

- The number of events that took place fell from 330 to 44 – a decrease of 87%
- The total number of delegate days fell from 412,273 to 97,254 – a decrease of 76%
- Economic impact was naturally correspondingly lower than before, falling from c.£250m to c.£57m – a decrease of 77%

2021/22 Operating Conditions

The results need to be considered in the context of the ongoing Covid-19 lockdown restrictions.

As no events took place in 2020/21, we can view these figures as a positive recovery from a truly unprecedented year where no events took place at all. In addition to this, business events were only permitted from August to December, and, following a pause to late January, were permitted again from February to March.

It is important to not understate the severity of the lockdowns and the difficulty and uncertainty that surrounded whether live, face-to-face events would ever return as we knew them pre-pandemic.

2021 was characterised in Scotland by a tiered lockdown system, where even level 0, the lowest available, did not permit indoor events of more than 200 people, and mandated individuals were always kept one metre apart. In addition, there was major global travel disruption and a traffic light system for inbound arrivals, with arrivals from red countries required to hotel quarantine for 10 days. These are clearly not conditions to plan for a conference of 1,000 people with confidence.

In 2020 many events were cancelled causing enormous financial ramifications for both associations and venues, reducing the risk appetite of both parties. This too added to an anxious environment, in which new Covid-19 strains were emerging. There was no guarantee that should events be allowed, that they wouldn't be subsequently prohibited if a new lockdown was required.

In this light, we should view a 13% bounce back in event numbers and 24% return in delegate days, as a considerable success, especially when events were only permitted in six months of the year.

Events and Delegates

2021/22 witnessed a sizable reduction in the number of association events hosted in Scotland. However, the fall in delegate days relative to events was not as pronounced. Events numbers fell by 87%, where delegate days spent in Scotland fell by only 76%.

Unusually, average attendance at events in 2021/22 was marginally higher than in 2019/20, 387 delegates compared to 368 delegates.

This was in part driven by one global mega event (COP26) which Scotland hosted, which lasted nearly two weeks. This was both the largest and longest event of the year, and the largest business event Scotland has ever hosted.

Only two events exceeded 1,000 delegates in 2021/22, and the remaining 42 ranged between 50 and 700 delegates.

Economic Impact

In 2021/22 the net additional economic impact of association events, including direct, indirect, and induced spending, was £57.2m, a reduction of 77% on 2019/20. FTE jobs supported fell by a similar proportion.

Given the reduction in number of total events hosted was 87%, it is encouraging to see the economic impact was less impacted. This was due to a higher-than-average number of delegate days per event.

Following the preceding year, in which no events took place, reasonably positive economic impacts will have encouraged suppliers that business events would return in greater numbers once a more permissive operating environment emerged.

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

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 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. In the past, following a typically very quiet winter, there has been a notable uptick in Spring through to June which historically was the busiest month for events and delegates attendance. A dip follows over summer before an end of year upturn in autumn as September and November witness a notable increase in activity where events and delegates return to levels comparable to June.

Analysing the spread of events by month in 2021/22 is of limited value given the disruption to the normal events calendar, the fact that business events were only allowed to take place for six months (with a break) in the year, and that normal planning cycles, not to mention in year bookings, were completely disrupted.

23 of 42 events took place in October and November, representing 52% of all events. This perhaps speaks to some expectations that events would be permitted at that time of year which allowed planning to take place. While permissible from August onward, planners were reluctant to arrange so close to a potential easing of restrictions for fear of the event being cancelled. This highly active period also covered Scotland hosting a mega conference, which included numerous satellite events.

Events numbers decline from the end of November to February, and then surge in March, with 13 events (30%) hosted. This aligns with market confidence in restrictions being eased (and then dropped altogether) from March onwards.

The data suggests a strong urge to return to live events, as soon as planners had confidence that lockdowns would not return and force events to cancel, an understandable risk minimising strategy.

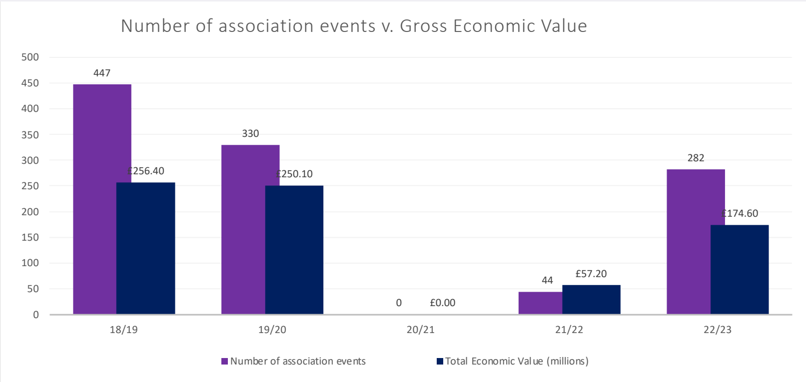
Concluding Notes

2021/22 can be characterised as a year of partial recovery that was constrained by lockdown restrictions and apprehension associated with a new Covid-19 variant which would further delay a return to a normal operating environment.

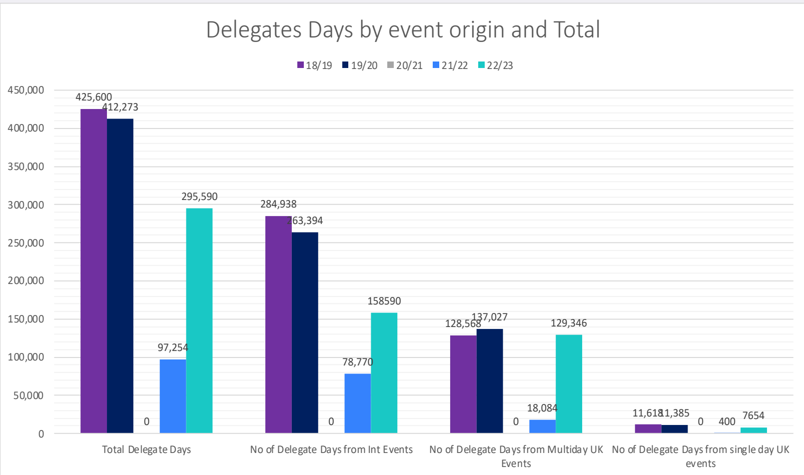
Despite unprecedented challenges, when events were possible, they returned swiftly contrary to some predictions that online meetings would be the new normal. This demonstrates remarkable resilience and adaptability from the sector. It also revalidates the need, value and desire for meeting face to face, live interactions, human connection, and the irreplaceable spark of live events. Something online platforms tried and failed to replicate.

The encouraging results for 2021/22 provide confidence in the longer-term need for business events and for Scotland as an exemplar host nation of major business and association conference events.

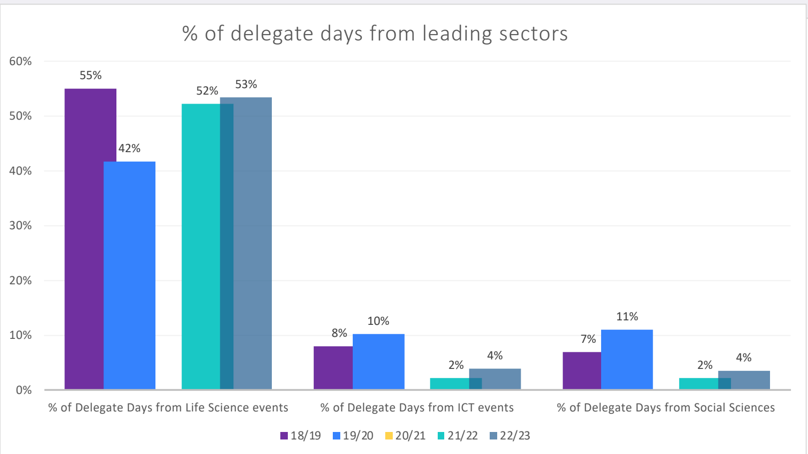
07 Figures and Charts



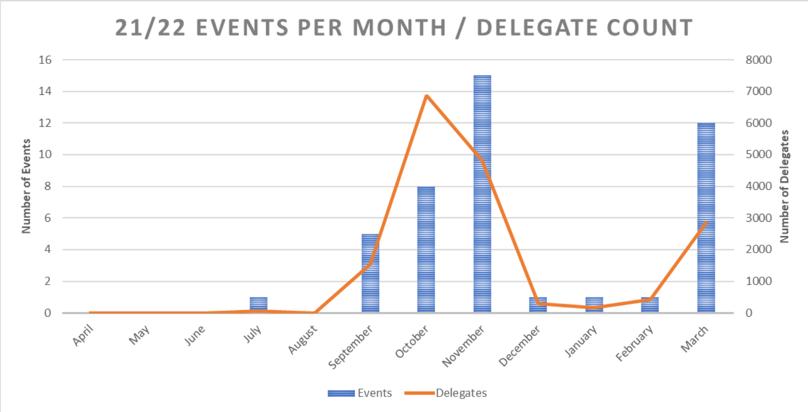
- Number of events held in Scotland can be seen to bounce back from covid wipeout.
- Number of events has increased to 85% of 19/20 numbers.
- Economic impact down relative to number of events, indicating fewer delegates have attended events.



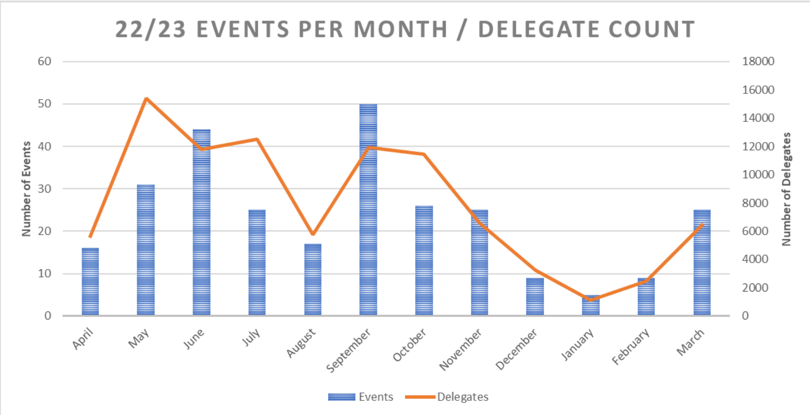
- In all year's delegate days generated from international events are highest.
- UK multi-day events came back to near parity with 19/20 numbers.
- Total delegate days in 22/23 on par with international delegate days in 18/19 – recovery has been strong, still more to do.



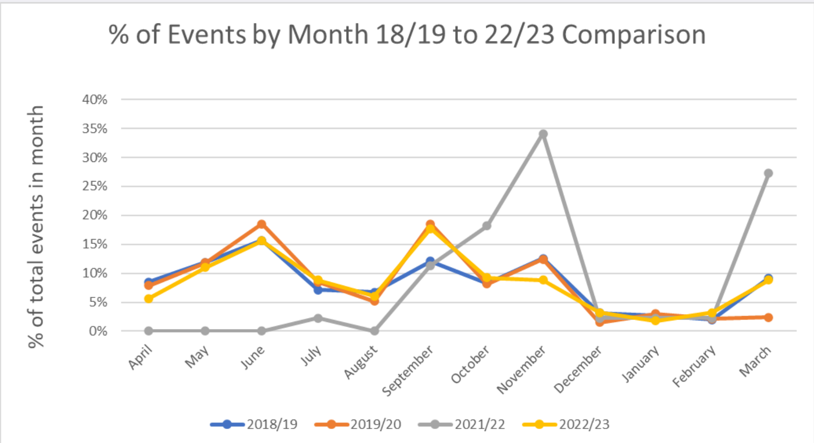
- Life Science events generate the highest percentage of delegate days by some margin.
- ICT & Data events contribute a significant proportion of delegate days but has dropped from 19/20 high.
- Social Sciences still a big driver of delegate days, but saw a similar drop to ICT events. Other sectors have come to have similar impact.



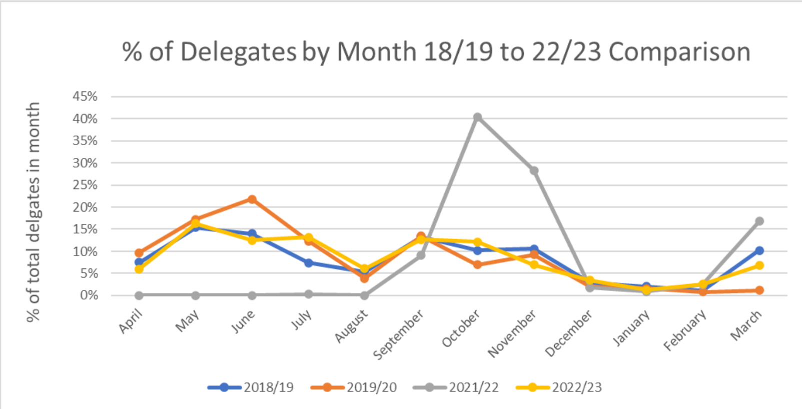
- 21/22 data is skewed by lockdowns from April to July, and again in December and January.
- Difficult planning environment, but as events became possible and confidence increased, we see growth throughout Autumn, then cut short in December.
- Removal of all restrictions in March, which was known in advance, gave confidence and we see a steep return of events when possible.



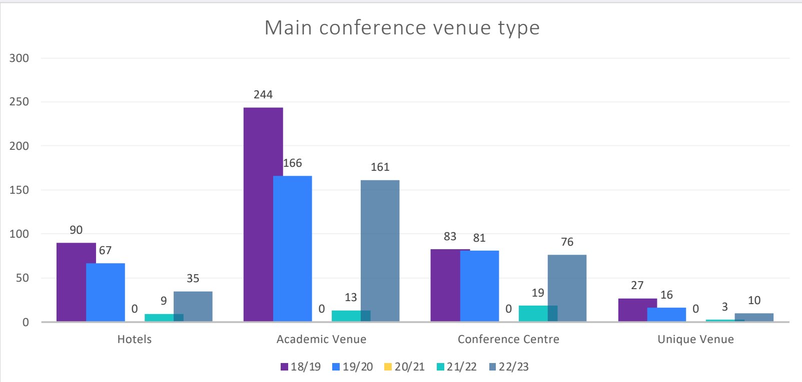
- Data for 2022/23 shows a return to previously established patterns.
- May was busiest for events not delegates – shows events keen to return, perhaps before delegates.
- September & May busiest month for delegates – as has been seen in previous years.
- Return of Winter dip, before a rise in March.



- Chart demonstrates the proportion of annual event hosted by month from 2018/19 to 2022/23.
- Booking patterns are consistent between years focusing on spring and early summer followed by autumn. Correlation in three 'normal' years striking.
- 21/22 data skews from normal patterns, but this is due to lockdowns.
- Winter months consistently quiet before spring resurgence.
- 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).

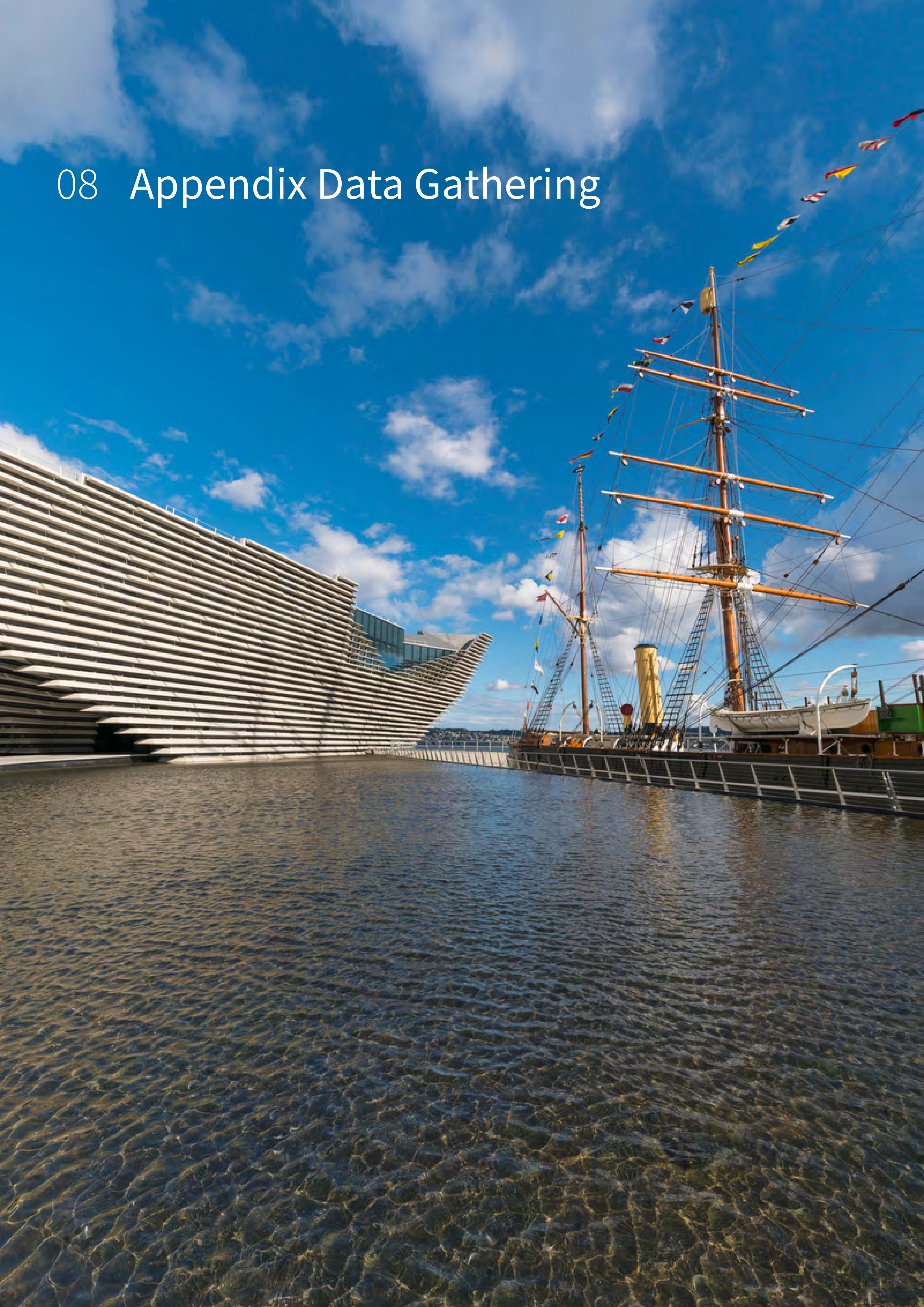


- Proportion of delegates by month shows similar convergence for 'normal' years, with 21/22 again an outlier due to lockdowns.
- 21/22 data has flattened graph in other years due to 68% of all delegates visiting in only 2 months.
- We can see the importance of May, June, September, October and November for delegate numbers.



- Number of discrete event venues has fallen from 46 in 2019/20, to 32 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 type.
- Conference centre events have shown greatest stability reflecting importance for major events.

08 Appendix Data Gathering



Apendix 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 21/22 and 22/23.

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.

Apendix 2: Key Data and Comparisons

Profile of Events	Year & Value					Yr on Yr % change 19/20 - 21/22 (Recovery to pre-pandemic)	Yr on Yr % change 19/20 - 22/23 (Recovery to pre-pandemic)
	18/19	19/20	20/21 (lost due to Covid-19)	21/22 (Partial Recovery)	22/23 (First full Year Recovery)		
Events (UK v International)							
Total events	447	330	271	44	282	13%	85%
UK events	236	213	146	22	169	10%	79%
International events	211	117	125	22	113	19%	97%
Duration							
% of events that lasted one day	19%	22%	9%	11%	18%	52%	81%
% of events that lasted two days	28%	26%	29%	30%	27%	112%	104%
% of events that lasted three days	30%	24%	32%	45%	31%	190%	130%
Longest event (days)	8	9	12	13	7	144%	78%
% of UK delegate days from multi-day UK events	92%	92%	97%	98%	94%	106%	102%
Delegate Days							
Total delegate days	425,629	412,273	555,918	97,254	295,590	24%	72%
International delegate days	285,443	263,861	422,693	78,770	158,590	30%	60%
UK delegate days (multi-day)	128,568	137,027	133,225	18,084	129,346	13%	94%
UK delegate days (single)	11,618	11,385	3,910	400	7,654	4%	67%
% of Delegate Days from Int events	67%	64%	76%	59%	43%	92%	67%
% of Delegate Days from multiday UK events	30%	33%	24%	39%	49%	117%	148%
% of Delegate Days from single day UK events	3%	3%	1%	2%	8%	85%	294%

Profile of Events	Year & Value					Yr on Yr % change 19/20 - 21/22 (Recovery to pre-pandemic)	Yr on Yr % change 19/20 - 22/23 (Recovery to pre-pandemic)
	18/19	19/20	20/21 (lost due to Covid-19)	21/22 (Partial Recovery)	22/23 (First full Year Recovery)		
Venue							
No. of events at Hotels	90	67	28	9	35	13%	52%
No. of events at Academic Venue	244	166	142	13	161	8%	97%
No. of events at Conference Centre	83	81	93	19	76	23%	94%
No. of events at Unique Venue	27	16	8	3	10	19%	63%
No. of events at Unknown venue type	3	0	0	0	0	0%	0%
Key Sectors							
% of Delegate Days from Life Science events	55%	42%	50%	52%	53%	125%	128%
% of Delegate Days from ICT & Data events	8%	10%	10%	2%	4%	22%	39%
% of Delegate Days from Social Sciences	7%	11%	3%	2%	4%	21%	32%
Additional Value							
Average UK delegate extension (days)	2.9	2.8	2.8	2.8	2.8	100%	100%
Average Int delegate extension (days)	3	3.2	3.2	3.2	3.2	100%	100%
% of UK delegates that extend	42%	42%	42%	42%	42%	100%	100%
% of Int delegates that extend	37%	36%	36%	36%	36%	100%	100%
% of UK delegates that intend to return to Scotland	95%	94%	94%	94%	94%	100%	100%
% of Int delegates that intend to Scotland	87%	87%	87%	87%	87%	100%	100%

Economic Impact Breakdown	Year & Value					Yr on Yr % change	Yr on Yr % change
	18/19	19/20	20/21 (lost due to Covid)	21/22 (Recovery)	22/23 (First Full Year Recovery)	19/20 - 21/22 (Recovery to pre-pandemic)	19/20 - 22/23 (Recovery to pre-pandemic)
Gross Spending							
Economic value from association events (£m)	£206.3	£201.3	£267.4	£49.8	£148.3	25%	74%
Economic Value from extenders (£m)	£5.6	£5.1	£6.6	£0.8	£4.0	15%	77%
Economic Value from potential repeat visitors (£m)	£5.5	£6.8	£8.3	£1.0	£5.2	14%	76%
Gross Economic Value (£m)	£217.4	£213.3	£282.3	£51.6	£157.4	24%	74%
Net Economic Value (with Type II Multiplier)	£256.4	£250.1	£332.9	£57.2	£174.6	23%	70%
Net FTE Jobs (Full Time Equivalents)							
FTE jobs from events	3,285	3,205	4,258	696	1,984	22%	62%
FTE jobs from extenders	90	82	105	11	53	13%	65%
FTE jobs from repeat visits	87	108	132	14	69	12%	64%
Total FTE jobs	3,461	3,395	4,495	721	2,106	21%	62%
Net Additional Impact							
Economic Value (£m)	£256.4	£250.1	£332.9	£57.2	£157.4	23%	63%
Total FTE jobs	3,461	3,395	4,495	721	2,106	21%	62%
GVA (£m)	£149.6	£146.0	£194.3	£33.0	£100.6	23%	69%

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.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