

Section A – Methodology

Question A1. The tenderer must clearly explain their proposed methodology and outline the suitability, robustness and limitations of the proposed methods and how they will answer the research questions.

Introduction

Our proposed study method has been designed based on: our understanding of the scope of the Invitation to Tender (ITT); our contextual and technical knowledge, skills and experience from undertaking the previous Scottish Snowsports Strategic Review studies (in [2011](#)¹ and 2016²) for Highlands and Islands Enterprise (HIE) and Scottish Enterprise (SE); and from undertaking similar studies elsewhere.

Prior to setting out the detail of our proposed study method, it is important to consider the context in which the research is to be undertaken:

- the previous Scottish Snowsports Strategic Reviews, among other things, had a focus on estimating the economic value of the sector. This was in recognition of the continued importance of the sector to Scotland's rural economy, not least in terms of the significant contribution it makes in local job creation and visitor expenditure;
- this latest research is both wider and deeper than the previous Strategic Reviews. In more recent years there has been a growing body of evidence that recognises that the impacts of sport go well beyond traditional economic measures e.g. employment and Gross Value Added (GVA). The research needs to better understand and capture the many different ways that Scotland's Snowsports sector benefits individuals and families, businesses, and communities/places. More specifically, the research needs to highlight the impact and value of Scotland's Snowsports sector within society, economically, socially and culturally;
- the impact of the coronavirus pandemic (COVID-19) has been widespread, and the sports sector (indoors and outdoors) has been severely affected (e.g. loss of income, loss of markets, postponement/cancellation of events and infrastructure developments), as has its wider supply chain.

¹ The 2011 research was undertaken in partnership with TRC.

² EKOS Report for HIE, Snowsports in Scotland – Progress Update, November 2016. Not publically available.

Snowsports facilities had to shut down entirely for a period of time, and parts of the sector (e.g. mountain resorts and other outdoor facilities) will likely have returned sooner than others (e.g. indoor facilities) albeit under specific guidelines. It will take time for the Scotland's Snowsports sector to reach pre-COVID levels, and there will likely be a range of short to longer-term challenges and issues. COVID-19 will also inevitably have had a negative impact on levels of participation (e.g. clubs);

- physical activity and sport will have a central role to play in Scotland's recovery from the pandemic (e.g. improving physical and mental health, social cohesion). During the pandemic there were increases in people taking part in outdoor pursuits (e.g. walking, cycling, running). Indeed, the Scottish Government (SG) has recently made a commitment, in its [COVID Recovery Strategy](#) (October 2021) to doubling investment in sport and active living to £100 million a year by the end of the current Parliament. Being able to evidence the wider impact that the Scottish Snowsports sector creates helps to build the case for continued investment;
- while the sector had already started to adapt (e.g. through diversification successfully into non-skiing activities, including sightseeing and mountain biking), it is clear that being agile and responsive to changes in both consumer behaviour/ expectations and in the marketplace will continue to be a key driver of change. Sustainability in its widest sense (e.g. financial and environmental), increased digitisation/technological advancement, and increased collaboration will be important considerations as the sector looks to innovate and adapt in today's ever-changing world;
- the pandemic has resulted in some positive benefits and opportunities that could be further capitalised on by the sector. For many, the pandemic has changed our relationship and interaction with the outdoor environment and with nature (e.g. increased appreciation of local parks, open and greenspaces). While outdoor and adventure activities have helped to drive growth in the tourism sector for many years, this has been strengthened by the pandemic (e.g. more people looking to become more active in their local area or looking for new/different ways to stay in good physical and mental health). Further, the staycation trend looks set to continue and become even more popular (i.e. further support for the localism trend). This is particularly important given that the international (although limited) and wider UK domestic market for Scottish Snowsports disappeared overnight due to local lockdowns, and it might take time for this to bounce back (e.g. consumer confidence to travel);

- there has continued to be a programme of infrastructure investment within Scotland's Snowsports sector, and this is now guided by the [2030 National Facilities Strategy](#) to help inform sustainable, long-term investment in the sector. The strategy looks to prioritise actions by:
 - building on the sector's strengths/assets (e.g. when the snow is good, the quality of offer at the mountain resorts is good enough to challenge a wide-range of alpine competencies, from beginners to advanced) capitalising on opportunities (e.g. digitalising ticketing and CRM systems, possibility to extend the winter season using snowmaking technology creating access to ski runs at higher altitudes)
 - at the same time as addressing known weaknesses (e.g. lack of diversity of income/revenue streams) and potential threats (e.g. climate change which is decreasing the predictability of weather patterns). Indeed, a recent [BBC news article](#) (4th November 2021) highlighted the impact of climate change on reducing the amount of snow being seen on Scottish mountains;
- it is also important for the research to be mindful that the five mountain resorts operate within a wider ecosystem (e.g. Cairngorm sits within the Cairngorm National Park which means wider issues of land use, environment, communities, wider economic and tourism plans/strategies); and
- the current policy landscape in Scotland continues to evolve. COVID-19 recovery is front and centre, as is addressing inequalities, tackling climate change and the transition to a net zero economy, and becoming a digital nation. The SG is developing a 10-year National Strategy to drive Scotland's economic transformation as the country recovers from the pandemic and transitions to a net zero economy. Tourism is a key growth sector and will have a pivotal role to play in supporting inclusive growth and wellbeing given its contribution to national and regional economies. This is further reflected in Scotland's new tourism strategy [Scotland Outlook 2030](#) which emphasises the importance of supporting and promoting responsible and sustainable tourism.

It is within this evolving context that this latest research is now being commissioned by SG, with a view to:

- taking stock of, and building on, the previous report (2016) and providing an up-to-date understanding of Scotland's Snowsports sector, including a new estimate of the economic value of the sector;

- exploring the wider social and cultural impacts and value of Scotland's Snowsports sector;
- developing a deeper understanding of the impacts (both negative and positive) of COVID-19 on the sector;
- projecting the long-term sustainability of Scotland's Snowsports sector; and
- providing suggestions for how the Snowsports sector might be strengthened.

Further, our study method has been based on the requirement to determine the economic impact of the Snowsports sector as whole – five mountain resorts and 14 artificial slopes/facilities³ – and that the more detailed research questions regarding resilience to climate change, diversification, intervention, etc are of particular relevance for the mountain resorts⁴.

Study Approach and Principles

The nature and duration of the contract calls for an approach which is collaborative and co-designed – and which draws on the combined knowledge and expertise of the EKOS team, SG Contract Manager and Research Advisory Group. During the course of the study there are various opportunities for the SG Contract Manager and Research Advisory Group to feed into and develop the approach. From developing the project plan to finalising the primary research and fieldworks materials, and from formal input as consultees and sense-checking the results to agreeing the report structure and finalising the report.

Our approach is also one that is flexible in terms of:

- how we undertake the research. For example, using a mixed-methods approach. Further, face-to-face research will only be undertaken if government guidance about COVID-19 at that time allows it (see **Appendix 1** also for Market Research Society [COVID Research Guidance](#)). If not, we will discuss and agree an alternative approach with the SG Contact Manager;
- when we undertake the primary research. Our aim will be to undertake face-to-face interviews with visitors to the mountain resorts/artificial slopes during January and February 2022, including different days of the week and times of the day. We also know that the snowsports centres might not be open every day due to adverse weather conditions (or a lack of snow), and therefore an element of agility and flexibility has to be applied in certain circumstances.

³ Figures taken from [2030 National Facilities Strategy](#).

⁴ This is based on clarification SG provided to a question posed on the ITT (i.e. Circular Advice Note 1).

The visitor survey will need to be actively managed, with additional interviewing times being added in where interviewing is not possible for the original planned times. With this in mind, we would suggest that the initial schedule seeks to achieve the target number of interviews over the January and February period, but with the potential to extend this into March where required; and

- how we work alongside the relevant SG team and Research Advisory Group in the delivery of our contracts. For example, as noted above, our preferred approach is to undertake a collaborative approach to ensure that our clients are fully informed and involved from start to end of a contract.

Adopting a flexible approach helps ensure an effective working relationship and ensures that we meet your aspirations and expectations from the research.

Our approach and study method is underpinned by the following principles:

- sufficient time will be devoted at the outset of the study to discuss and agree the scope of the research. Key stakeholders with a direct interest in the research will be informed and involved throughout;
- the development of a Theory of Change (Logic Model) as a framework to show the relationships between inputs, activities, outputs and outcomes related to the Snowsports sector, and which will be tested and refined through the research. It will be key to identify the economic, social and cultural outcomes that matter most;
- using an approach that is open, transparent, robust and objective – our experience is that it is important to consider the quality of evidence for inclusion in impact modelling work. In particular, for impacts which are more intangible or qualitative in nature (e.g. social and cultural impacts). Here, it will be vitally important that we set out clearly the methodologies used to determine metrics, data collection, analysis, any assumptions made, and any limitations of the impact model; and
- including opportunities for the client (and others as appropriate) to sense check and verify our results, findings and conclusions – this will help to increase the understanding and credibility of the impact modelling, and might also identify areas for further refinement or improvement.

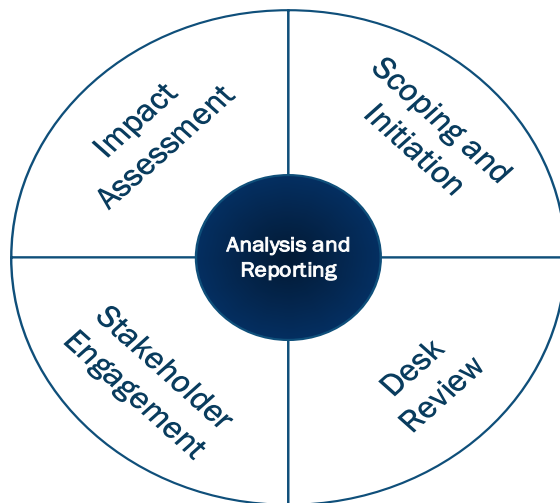
Proposed Methodology to Answer the Research Questions

The research will be undertaken in five distinct but inter-connected stages which are largely linear but also contribute to the final analysis and reporting work, **Figure 1**. Each stage is outlined in more detail below, with **Table 1** providing a high-level overview of which stages will contribute towards answering the six research questions.

Table 1: Research Questions and How Addressed by Study Method

Research Questions	Project Stage(s)
What do we already know about the economic, social and cultural impact of the snowsports sector in Scotland?	Stage 2 – Desk Review. Stage 3 – Stakeholder Engagement.
What is the economic contribution of the snowsports sector to the Scottish economy, both directly and indirectly?	Stage 3 – Stakeholder Engagement. Stage 4 – Impact Assessment.
What broader social and cultural value does the snowsports sector and its supply chain contribute to Scotland as a nation?	Stage 2 – Desk Review. Stage 3 – Stakeholder Engagement. Stage 4 – Impact Assessment.
What impact has COVID-19 had on the snowsports sector and its supply chain in Scotland and what support is needed to aid its recovery?	Stage 2 – Desk Review. Stage 3 – Stakeholder Engagement. Stage 4 – Impact Assessment
How sustainable is the future of the snowsports sector in Scotland? This should take into account potential for diversification and resilience to climate change	Stage 2 – Desk review Stage 3 – Stakeholder Engagement
What interventions—if any - may be required to strengthen the snowsports sector in Scotland?	Stage 2 – Desk Review Stage 3 – Stakeholder Engagement

Figure 1: Project Methodology



Stage 1 – Project Scoping and Initiation

The purpose of the Project Scoping and Inception stage is to establish a shared understanding between the EKOS and client team as to the research rationale and objectives, and to agree a detailed work programme.

Task 1: Inception Meeting

The project will start with an **inception meeting** with the SG Contract Manager and Research Advisory Group where we will:

- discuss client expectations for the study and agree details of the study scope, approach and method;
- identify any specific issues that will inform, or affect progress of the study;
- arrange access to relevant information and data to inform the study – for example, the previous Strategic Reviews (we already have access to these), relevant research and strategy documents;
- identify the people/organisations for consultation, including contact details. We also see value in having a named key contact for each snowsports operator;
- COVID-19 research guidance;

- project management arrangements and proposed schedule of meetings with the Research Advisory Group; and
- consider the format and content of the final reporting outputs.

Task 2: Inception Report

Following the inception meeting we will prepare a concise **inception report** (a minute of the meeting), along with a project plan that will provide details of the research objectives, methodology, timetable, research team, risk management arrangements and contingencies.

Stage 2 – Desk Review

The main purpose of the Desk Review stage will be to gather, review and synthesise all of the available data, documents and evidence to help inform the research. This stage will be important to help set the research within a wider context and will also inform and guide **Stage 3 (Stakeholder Engagement)**. A key focus of the Desk Review will be to take stock of, and reflect on, changes since the Scottish Snowsports Strategic Review (2016) was undertaken (i.e. providing an up-to-date picture of the sector).

Task 3: Literature and Existing Research Review

We will carry out a detailed review of existing literature and research. The review will help to establish what we already know about the wider economic, social and cultural impact of sport and physical activity, including snowsports (e.g. health, education, personal and social development, culture and national identity, environment). Crucially, it will help inform our logic modelling work, including identifying where there are any gaps in our knowledge and understanding. This insight will then be used to enrich and inform our fieldwork design and stakeholder engagement. It will also help us to better understand what impact COVID-19 has had on the sport and physical activity sector in Scotland and its supply chain, and what support is needed to aid its recovery.

Task 4: Strategic Context

We will carry out a detailed review of the strategic context within which the snowsports sector operates, including relevant policies and strategies (local and national), previous reports and research, governing body strategies and plans, ski resort operator plans and strategies and visitor/tourism research.

This will include for example: The National Performance Framework, Active Scotland Delivery Plan, Scotland's Diet and Healthy Weight Delivery Plan; Covid Recovery Strategy, **sportscotland** Sport for Life, Local Authority Development Plans and Local Outcome Improvement Plans, 2018/22 Snowsport Scotland Strategic Plan, Snowsport Scotland National Facilities Strategy 2020/30, Tourism 2030, and Cairngorms National Park Local Development Plan 2021.

The strategic context will be fundamental to understanding and identifying key strategic drivers and issues which already have or will have an effect on the development and sustainability of Scottish snowsports sector. It will also provide evidence of how the sector fits with, and contributes towards, a wide range of outcomes.

Task 5: Market Review

We will undertake a review of worldwide and UK ski market trends to understand how demand is changing, who is participating, what activities are growing/in decline, and what factors are driving the market. The 2016 report provides details of useful sources of information and research, many of which have been updated since that time. For example, [Ski Club of Great Britain Consumer Research 2020](#), the [2021 International Report on Snow & Mountain Tourism](#), to name a couple, will be useful sources of intelligence. The study will also explore other related markets, including general tourism trends, adventure sports, mountain biking and other outdoor activities that may be relevant and present opportunities for future diversification and creation of an “an all year round” offer at the snowsports centres. Climate change is also a key driver within the market and it is important to understand how this is shaping the future of the sector and how this impacts on Scotland specifically.

Task 6 – Scottish Snowsports Sector

This task will involve a detailed review of the Scottish snowsports sector and its key elements including governance, finance, investment, demand and operations for the six-year period 2016/17⁵ to 2021/22. This will allow us to establish a rounded view of the sector as a whole and its constituent parts. Our analysis will be presented by:

- sector as a whole;
- mountain resorts and artificial slopes;
- snowsports and non-snowsports activities; and

⁵ Data in the Scottish Snowsports Review (2016) uses data to 2015/16.

- by year.

The snowsports market can fluctuate considerably from year to year as it is heavily dependent on the vagaries of the weather. Previously studies have looked at performance over a longer period than a year to try to iron out these fluctuations and identify an underlying trend. We plan to adopt the same approach again.

The success of this task will depend on the availability and quality of data that can be obtained from key stakeholders including the five snowsports centres and 14 artificial slopes/venues. We will prepare a Data Request which can be reviewed by the client prior to issue.

The review will consider the different governance structures across the sector, identify and understand what is working well (or less well) and why. It will also seek to identify where there may be opportunities to make changes to improve sector resilience and sustainability. It will also involve a review of the financial performance of each snowsports centre and other indoor/outdoor artificial venues in terms of income, expenditure and capex. This will establish the historical and current trading conditions, including the impact of COVID-19 on the last two years.

We will enquire whether we can access income and expenditure forecasts which take account of known and potential pressures and risks (e.g. rise in the living wage, rise in national insurance contributions, upwards pressures on salaries, increasing utility costs and other critical supplies and services). Combined with future demand forecasts, this could allow an assessment to be made of future financial sustainability of the sector. An assessment of previous capital expenditure will allow us to assess what impact this has had on performance and what plans are in place for future investment. This assessment will also help to identify areas or opportunities to help further strengthen the sector.

We will assess historical levels of demand for each snowsports centre and other indoor/outdoor artificial venues along with wider market trends to better understand underlying changes in activities, numbers, accessibility, demographics, etc, and use this as a basis to identify gaps and opportunities for the future, as well as preparing a future forecast of demand. Combined with future financial forecasts, this will allow an assessment to be made of future viability. This task will also focus on bringing insight and understanding of those who are under-represented in the snowsports sector e.g. those from deprived communities, disabled people and minority ethnic communities.

The review of the Scottish snowsports sector will also consider key operational aspects including pricing, activities/programmes, staffing, maintenance and operations. This will allow us to understand how things are changing as the sector emerges and rebuilds from COVID-19, and what implications this might have for the individual centres/sector. Operations can have a profound effect on visitor experiences, financial performance and longer-term sustainability.

The review will identify where there are differences and synergies between centres and where there are opportunities to strengthen co-operation and collaboration to help enhance sector resilience.

Stage 3: Stakeholder Engagement

We will design and undertake an inclusive and participative programme of stakeholder engagement and consultation to ensure that as many people/organisations with a direct role and/or interest in the research, as possible are able to contribute their views, ideas and experiences, and in a way that is appropriate to them.

We have designed a mixed-methods approach to ensure both breadth and depth of coverage with a diverse range of stakeholders. Much of the primary research will be undertaken remotely via telephone or video conferencing facilities (e.g. Microsoft Teams, Zoom), with consultees offered a choice. The exception will be the visitor survey. We have costed for this to be undertaken on a face-to-face basis at the various site locations (unless COVID-19 restrictions change e.g. local lockdowns).

Task 7: Fieldwork Material Design

The design of fieldwork materials will include topic guides and questionnaires. Each will be bespoke to the stakeholder group, albeit there will likely be areas of commonality. All fieldwork materials will be presented in draft format to the client Contract Manager for review and comment prior to use. We will also prepare some introductory text which can be emailed by the client (or others as appropriate) to the agreed stakeholder list. Our experience is that an introduction that is issued by an agency/someone the contact knows helps secure greater buy-in (“warm introduction”), as opposed to EKOS making “cold calls”.

The visitor survey questionnaire will be co-designed with our study partner – IBP Strategy and Research. We will also design a short information leaflet that can be read/shown to visitors to support recruitment and informed consent.

We will also pilot the fieldwork materials across a small sample of research participants to assess whether the ‘right’ data is being gathered, and to ensure that the questions are easily understood.

Task 8: Scottish Snowsports Operators

We will engage closely with the five mountain resorts and 14 artificial slopes/ facilities⁶ who are responsible for the management and operation of the facilities, **Table 2**. The purpose of this engagement will be three-fold, namely to:

- request and collate the necessary information and data to inform Task 6 (Scottish Snowsports Sector).
- arrange a suitable time for a formal consultation as part of the programme of stakeholder engagement, and to tease out views and opinions against the various research questions, including around economic, social and cultural impact, impact of COVID-19, resilience to climate change, diversification, and future interventions; and
- develop a better understanding of key supply chain and local businesses to help progress Tasks 11 and 12.

Table 2: Snowsports Facilities

Cairngorm Mountain (Scotland) Ltd	Glenmore Lodge - Sportscotland
Glencoe Mountain Resort Ltd	Huntly Nordic and Outdoors Centre - Aberdeenshire Council
Glenshee Ltd	Lagganlia Outdoor Centre - The City of Edinburgh Council's Sport and Outdoor Learning Unit
Lecht Ski Company Limited	Loch Insh Outdoor Centre
Nevis Range Mountain Resort	Midlothian Snowsports Centre, Hillend – Midlothian Council
Aberdeen Snowsports Centre – Sport Aberdeen	Newmilns Snow and Sports Complex
Alford Ski Centre – Aberdeenshire Council	Polmonthill Snowsports Centre – Falkirk Community Trust
Bearsden Ski and Board Club	RM-Condor, Arbroath – Arbroath Ski Club
Firpark Ski Centre – Clackmannanshire Council	Snow Factor, Glasgow
Glasgow Ski & Snowboard Centre	

We have costed for **19 consultations**, although we recognise that there might be multiple contacts within the same organisation. We will arrange group discussions where possible.

⁶ Details taken from [2030 National Facilities Strategy](#).

Task 9: Resort Visitors and Local Communities

Visitor Surveys

A key element will be visitor surveys across all 19 sites which will capture direct evidence from snowsports participants pertaining to the overall study objectives and research questions. The design of the survey questionnaires will be led by EKOS, working alongside the client, but with input from IBP, with respect to the structuring and formatting of questionnaires. The surveys will likely require to capture a mix of:

- profile information (e.g. demographics, party type);
- behavioural information (e.g. nature of engagement with the sector, frequency of engagement, means of accessing facilities);
- financial information (e.g. direct spend on facilities, spend on equipment and other elements); and
- attitudinal information (e.g. impact on health and wellbeing, wider social impact, overall perceptions of the sector in Scotland and its contribution, likely use of other facilities, things that might improve their overall experience).

The requirement will be for a questionnaire that can be administered over a reasonable timescale, to secure participation without impacting negatively on participants' experiences. We believe it would be appropriate to design a questionnaire that can be delivered over a period of no more than 10 minutes. This is an appropriate timescale given the context for interviews, where individuals will be targeted for interview in their "down time" periods, allowing for robust information on all of the above issues to be captured.

A face-to-face survey is the only practical method of quickly gathering robust information on the issues set out above and is a tried and tested method. Alternatives such as postal or online surveys would be difficult to administer and have the potential for a low response rate and a response profile that is atypical of snowsport participants as a whole. It is unlikely that participants could easily be identified for telephone interview and the costs of this would be greater than for the face-to-face approach.

Interviewing of this sort is permissible under current SG Covid-19 regulations as well as the guidance of IBP's professional body, the Market Research Society (**Appendix 1**). IBP has continued to deliver projects of this nature over the period of the pandemic. They undertake a risk assessment as a matter of course for such projects and will consider issues such as face coverings, social distancing and hygiene requirements as part of this.

The intention would be to put in place a programme of interviews that reflects participation within the different parts of the sector.

For the five snowsports centres, our proposal is to conduct a programme of 1,000 interviews. Indicatively, this sample size provides an overall margin of error of +/- 3.1% whilst also being sufficiently large to allow for comparisons between respondent criteria (including demographics, facilities used and so on). This sample size reflects the particular importance of these facilities to the sector.

We would expect to agree a target programme of interviews across the five centres – this would likely reflect the typical scale of participation at each centre with the number of interviews being targeted being broadly proportionate to historic levels of activity. An initial programme of interviews will be scheduled setting out dates and times for IBP interviewers to attend each location. However, we recognise the need for a flexible approach given the uncertainties with respect to the availability of snow. This programme will therefore need to be actively managed, with additional interviewing times being added in where interviewing is not possible for the original planned times. With this in mind, we would suggest that the initial schedule seek to achieve the target number of interviews over the January and February 2022 period, but with the potential to extend this into March where required.

Indicatively, we would envisage a total of 50 interviewer “shifts” of up to six hours, each of which would target 20 interviews (leading to a total sample of 1,000 interviews). We have assumed an interview duration of 10 minutes, and so around 20 interviews over a typical six-hour interviewing shift, allowing for down time between interviews for the sourcing of interviewees. This will provide more certainty of hitting the target numbers according to the fieldwork schedule, whilst ensuring that all the necessary issues are addressed.

For the artificial slopes, we propose a smaller, but still substantial, sample size of 400 interviews. Indicatively, this sample size provides an overall margin of error of +/- 4.9%, which will provide robust information on this part of the sector as a whole. Our intention would be that this programme of interviews would cover all of the 14 artificial slopes. Again, the specific profile of planned interviews would reflect levels of activity at the different locations. For this survey, we would envisage a total of 20 interviewer “shifts” of up to six hours, each of which would target 20 interviews (leading to a total sample of 400 interviews).

In each case, specific interviewing arrangements would be agreed with local staff. Interviews would be conducted on a random basis in order to provide the most accurate profile of participants.

We propose to conduct interviews using Computer Aided Personal Interviewing (CAPI) as this minimises the transfer of materials between people involved in the research process. The CAPI approach also means that results are uploaded automatically (as soon as a Wi-Fi network becomes available) and shortens the process between completion of fieldwork and provision of results.

The survey would be set up on the SNAP data processing platform and completed results would be provided to EKOS in the form of the completed SNAP data set, which would then be used by EKOS as the basis of its analysis and reporting for this part of the research.

Club Survey

We will also design and host a SNAP online survey of snowsports clubs to collect more detailed information on their activities – membership/ participant numbers and change over time; charitable activities; role in the local community etc. This will also help to build our understanding of social and cultural impact. We propose to work with and through Snowsport Scotland to issue a short survey on our behalf.

Task 10: Governing Bodies and Snowsports Sector Agencies

The purpose of this engagement will be to identify the main sporting issues associated with the snowsports sector and to better understand what part the mountain resorts and artificial slopes play in the snowsports participation and event pathway. It also will facilitate a better understanding of sector specific challenges and opportunities. We see value in consulting with Governing Bodies of Sport beyond Snowsports to reflect the wider non-sports activities now taking place at the mountain resorts. We have costed for up to **10 consultations** – the list will be discussed/agreed with the client, but we would expect it to include the following.

Table 3: Governing Bodies and Snowsports Sector Agencies

sportscotland	Snowsports Sector Working Group
Snowsport Scotland	Scottish Snowsports Marketing Group
Ski Scotland	British Association of Snowsport Instructors*
Scottish Disability Sport	Mountaineering Scotland
Disability Snowsport UK	Scottish Cycling

Task 11: Supply Chain Businesses

The purpose of this task is to better understand the location, scale, and levels of dependence and resilience in the direct and indirect supply chains for the snowsports sector, and the impact of COVID-19. These organisations will be identified through discussion with snowsports centre operators, and will likely include suppliers of key equipment and services which the centres are heavily dependent upon for ensuring business continuity.

At this stage we have allocated **four days of input** – we can be flexible in terms of how these days are used to best effect for engagement with supply chain businesses. For example, it would be useful to discuss this further at the inception meeting, as well as with snowsports operators. For example, an online survey could be undertaken supplemented with some telephone interviews.

Task 12: Local Businesses

Similarly, the purpose of this task will be to better understand the scale and levels of dependence that local businesses have on the five snowsports centres and how resilient they are. This will help to build up a picture of how dependent (or otherwise) they are on snowsports and other non-snowsports visitors, and the impact of, and longer-term implications of COVID-19.

For example, as demand varies, how does this impact on their business, employment opportunities and the people who work for them along with the wider communities that they serve? At this stage we have allocated **four days of input** – we can be flexible in terms of how these days are used to best effect for engagement with local businesses. For example, it would be useful to discuss this further at the inception meeting, as well as with snowsports operators. For example, an online survey could be undertaken supplemented with some telephone interviews.

Task 13: Other Agencies

There are wider agencies that have a significant stake in the Scottish snowsports sector and will likely have ideas and opinions that might help to shape the outcomes of this study, including on the social and cultural impacts. This might include Outdoor Activity Centres, various Scottish Government departments (e.g. health, education, welfare, business), VisitScotland, Events for Scotland, Cairngorms National Park Authority, Highland and Islands Enterprise, Scottish Enterprise, Local Authorities, Regional DMOs and also landowners e.g. Invercauld Estate.

We have costed for **up to 15 consultations** to identify and understand any relevant strategic, operational, financial and legal dependencies that might exist and how they might influence the economic/social/cultural impact of the sector and its longer-term sustainability.

Summary

Table 4 provides a summary of our primary research stage.

Table 4: Summary of Proposed Primary Research

Stakeholder Group	Interview Numbers
Scottish Snowsports Operators	19 in-depth consultations (remote).
Resort Visitors And Local Communities	1,000 Interviews across five Snowsports Centres (face-to-face). 400 Interviews across 14 artificial slopes (face-to-face). Online survey of snowsports clubs.
Governing Bodies and Snow Sector Agencies	10 in-depth consultations (remote).
Supply Chain Businesses	TBC (four days allocated).
Local Businesses	TBC (four days allocated).
Other Agencies	15 in-depth consultations (remote).

Stage 4: Impact Assessment

The purpose of this stage is to provide an up-to-date economic impact assessment (EIA) of the sector (since 2016). As noted earlier, this research is broader and deeper than the earlier reports, with cultural and social impacts also a key consideration. The wealth of information and data collated through the previous stages, and in particular **Stage 2 (Desk Review)** and **Stage 3 (Stakeholder Engagement)** will feed directly into this process.

Task 14: Economic Impact Assessment

We will develop the bespoke EIA model in spreadsheet format using data derived from the primary research programme, information from companies operating ski resorts and dry slopes, as well as suitable economic coefficient from secondary sources.

Routes to Impact

It is firstly important to determine the mechanism through which the snowsports sector generates impacts, known as the Routes to Impact.

In this case, the Routes to Impact are derived from two main sources:

- expenditure by visitors at snowsports resorts with data gathered from the visitor survey, regarding expenditure in shops, restaurants, hotels, etc; and
- operational impact from snowsports companies with employment and turnover data gathered from direct engagement with these businesses.

Gross Impacts

Once the Routes to Impact have been identified, the gross quantifiable impacts can be estimated. These are the total impacts which are attributable before any adjustment is made to capture wider effects.

For visitor expenditure, survey returns on visitor spend are grossed up to reflect the total number of visitors at snowsports facilities. This spend is then converted to GVA and employment using coefficients from secondary data.

Operational spend will use returns on employment and turnover, as well as a number of other data points from snowsports operators, which will be converted to GVA using coefficients from secondary data.

The focus will be on the following indicators:

- output – the economic output generated by the sector;
- employment – generally defined in terms of Full Time Equivalents, that is permanent, year-round, full time (over 30 hours per week) jobs; and
- GVA – a measure of the value generated by economic activity.

Geographic Study Area

Impacts will be presented at the Scotland level in-line with the ITT.

Gross to Net

It is normal, and best practice, to assess both gross and net impacts. Here, gross impacts capture all of the benefits which are attributable to an activity (i.e. all of the direct spend in the economy attributable to the event) and effectively define the “upper limit” of the value of benefits that have accrued.

Net impacts are derived by adjusting gross direct impacts for:

- displacement – displacement refers to the negative impacts of one event’s activities on others within the same study area. In this case, this would mainly involve the displacement of visitor spend from one location to the other;
- leakage – leakage measures the level of impacts/benefit that accrues to people or organisations based outside of the ‘target’ region; and
- multipliers - relate to the impact of additional economic impact that occurs as a result of spending through additional income, supplier purchases, and longer-term effects. Multipliers are applied to GVA and Employment factors.

As with gross impacts, net impacts will be presented in terms of output, employment and GVA.

Comparability with 2016

Compared to the 2016 report, we believe that this is a more robust methodology of determining economic impact, as it uses direct primary research with visitors as opposed to proxy average spend figures from VisitScotland. However, due to using different methodologies to determine economic impact, this will not be directly comparable to the 2016 report. We therefore propose that we also conduct an economic impact assessment using the 2016 methodology in order to judge change over time.

Task 15: Social and Cultural Impact Assessment

Our social and cultural impact assessment will focus on evidencing the value and impact the sector has for individuals, families, local communities and businesses, by:

- understanding the nature and magnitude of these impacts, direct and indirect;
- understanding the interdependencies between inputs and outcomes and the influencing and facilitating role of key stakeholders and organisations;
- identifying how key stakeholders can best direct their resources and influence to maximise the positive social/cultural impacts of the snowsports sector; and
- establishing an initial framework for monitoring (high level KPIs) of the ongoing social/cultural impacts of snowsports sector, including the use of appropriate proxy indicators.

Indeed, the ITT mentions a range of impacts for the research to further explore through the desk and primary research, namely: development of opportunities and jobs for local businesses; impact on public services and facilities; opportunities for recreation; pride in local/regional/national area; change to local environment or area's character/way of life; impact on prices for goods and services; cultural exchange between locals and visitors; volume of visitors; and relationships between local communities and business owners, etc.

The benefits of this type of assessment will be to:

- enrich our understanding of the wider social and cultural benefits of the snowsports sector locally and nationally;
- knowing how best to direct resources beyond the direct delivery and promotion of snowsports activities in Scotland;
- which partnerships should be explored or developed further;
- ability to justify (and possibly obtain) further resources from cross-sector organisations, whereby wider benefits of engagement in snowsports can be proven;
- understand strategically how financial investment and time allocation can generate the greatest impacts and identify what works and what does not; and
- the ability to monitor these targeted outcomes.

Stage 5 – Analysis & Reporting

This final stage will involve detailed analysis and reporting of the information, data and insights gathered during the previous stages.

Task 16: Analysis

Information, data and evidence gathered through the earlier stages will be analysed to distil conclusions and key findings for the study. We will ensure that we provide comprehensive, robust and rigorous answers to each of the research questions posed by the ITT and clear actions that are designed to strengthen the snowsports sector in Scotland. This will include a mix of:

- quantitative analysis – using advanced analytics, infographics, charts and tables with associated narrative; and

- qualitative analysis – manual coding of more qualitative feedback captured to: identify common and cross-cutting themes and issues; identify patterns, trends and the balance of opinion; consider the frequency of patterns/themes that emerge; consider links to the research questions; and help make informed, logical, and verifiable conclusions.

Task 17: Draft Report

Reporting will be an iterative process until the final report is signed off. In the first instance, we will submit a draft report to the Research Advisory Group for consideration and discussion. The draft report will be presented in an agreed format, but we expect that it will include:

- Executive Summary.
- Introduction and Context.
- Study Method.
- Strategic Context.
- Market Overview.
- Scottish Snowsports Sector.
- Economic, Social and Cultural Impact of the Sector.
- Impact of COVID-19 on the Snowsports Sector.
- Conclusions.
- Recommendations for how the Sector may be strengthened.
- Technical Appendices.

Task 18: Research Advisory Group Meeting

We will facilitate a meeting with the Research Advisory Group to discuss the draft report. We will prepare an agenda for the meeting as well as a presentation slide pack. We will ensure that there is sufficient opportunity for the Group to ask questions as well as to have a wider conversation around the emerging conclusions and recommendations.

Task 19: Final Report and Presentations

A final report will be presented to the client, taking account of any amendments identified at the draft report stage and from discussions with the Research Advisory Group. In addition to the final report, we will provide the following to aid wider dissemination of research findings (including at the presentations):

- a one page summary of the main findings;
- a written visual summary of the main findings (i.e. infographics); and
- a short animation video (using whiteboard animation) will be produced. We have assumed an estimated running time of between 2-3 minutes to communicate the story of the economic, social and cultural value of the Snowsports Sector in Scotland.

In addition, we propose to provide the client with an **online insights dashboard** that will communicate and tell the story of the economic social and cultural value of the Snowsports Sector in Scotland, including the impact of COVID-19.

We will also facilitate **two remote presentations** to the client and stakeholders and also to those in the communities with vested interests in the future of snowsports and those who have taken part in the research.

Suitability, Robustness and Limitations of Proposed Methods

The ITT clearly sets out the scope of the work, research questions to be answered and study deliverables, and we have designed our study method and approach to fully address these. We bring 30+ years of designing and undertaking socio-economic impact assessments for a range of clients, including local government, City Region Deal partners, enterprise agencies, Further and Higher Education sector (FE/HE), and private and third sector organisations.

Impact assessment is a core service for EKOS, and ranges from sports to culture, from physical regeneration to enterprise, and from tourism and heritage to sector reviews. EKOS also led the development of the updated economic impact assessment guidance (and prepared training materials) for the appraisal and evaluation teams in SE and HIE.

Further, sport and leisure is a sector we specialise in as a company. Our areas of expertise include: strategic and operational reviews, research into markets and trends in participation to inform service design and delivery; feasibility studies into the development of new facilities and services, making a robust case for investment; evaluation to assess performance and inform service development and improvement; and strategy development to define clear priorities for investment.

Our approach is tried and tested. We have put together a study partnership and team with the right mix of contextual and technical knowledge and understanding to deliver robust, high quality outputs.

The issues or limitations we might expect to encounter include:

- the study commences close to the Christmas and New Year holiday period, and there is an expectation that the primary research will commence early January. This is relatively tight, and would require very prompt access to all necessary background information and data to help inform fieldwork design;
- we also know that the snowsports centres might not be open every day due to adverse weather conditions (or a lack of snow), and therefore an element of agility and flexibility has to be applied in certain circumstances;
- we also recognise that if weather conditions are good and prolonged then access to staff time, particularly within the five snowsports centres may be limited;
- the quality, depth, consistency and format of available data is often a limiting factor, however, we are confident that our approach will manage and mitigate any risks in this area;
- some operators might not be open to sharing forecast income and expenditure data (e.g. private limited companies), as there might be some sensitivities and confidentiality about the figures; and
- forecasting of future performance e.g. demand, income, expenditure can present challenges as it relies on robust historical data and detailed understanding of issues that affect future performance e.g. we know that weather conditions play a significant part in levels of demand and financial performance, and COVID-19 will present a disrupted picture. In developing forecasts we will use recognised techniques for forecasting e.g. ARIMA and ETS modelling.

Question A2. The tenderer must outline all the ethical issues they can foresee and how these will be addressed. This must include consideration of: recruitment and informed consent; the rights of data subjects; burden on research participants; and confidentiality and anonymity.

We recognise that the onus is on the company to ensure that ethical considerations are considered at the outset in our project plan and regularly reviewed. We have policies that ensures our approach and methodology will mitigate any particular challenges or sensitivities (e.g. Ethics Policy, Data Handling and Confidentiality).

EKOS follows the code of conduct set by the Market Research Society with respect to conducting research, and our research activity is founded upon the principle of willing co-operation and informed consent of participants.

Since its inception, IBP has successfully maintained certification of its Quality Assurance systems to BS EN ISO9001: 2015 standards for Market Research and Management Consultancy Services, with re-certification being achieved most recently in March 2021. IBP is accredited as a Market Research Society Company Partner, reflecting its commitment to the highest professional and ethical standards. This provides confidence in the work that the company carries out and internal systems and procedures ensure that this is validated and checked at every stage in the process.

We have reviewed the [Ethics Guidance for Scottish Government Social Researchers](#), and this aligns strongly with the ethical principles we follow as an organisation:

Sound application and conduct of social research methods and appropriate dissemination and utilisation of the findings

The quality of evidence for inclusion in impact modelling work will be of paramount importance, and to this end our proposed study method is robust and based on our considerable knowledge and experience of undertaking related commissions (including the previous Scottish Snowsports Strategic Reviews).

We are regularly required to produce reports of a publishable standard, and will work with the SG Contract Manager to develop research deliverables that are accessible and easily understood by the intelligent lay-person. We will also produce a standalone executive summary that could be used to support the wider dissemination of findings. Further, infographics and a short animated video will be produced to aid effective information sharing, information/data visualisation, and understanding.

Participation based on valid informed consent

All of our research activity is founded upon the principle of willing co-operation of individuals, groups and organisations. All social research undertaken is consistent with relevant national guidance, including the 'Mainstreaming Equality Toolkit' and 'Good Practice Guidance - Consultation with Equality Groups'.

Where required, we will get consent from participants before they become involved in the research. In this regard, we make sure that people are properly informed of their right to decline to take part or to withdraw at any time. The decision of participants will be respected at all times. No one will be pressured or coerced into taking part in the research.

We can produce a short information leaflet which can be shown/read to the participant. This will provide people with the information they might need to make an informed decision on whether or not to participate, how their feedback will be used, and if and when the final report will be published (and how they will be able to access this). Participant Information Sheets would set out what potential participants should expect if they decide to take part in the research.

We will use electronic methods for seeking, confirming and documenting informed consent in the research study.

The study partners bring considerable experience of engaging with a wide range of stakeholder groups –senior and operational staff within organisations and businesses, with communities of interest and of place, and with individuals and families that have participated in activities, or benefited directly from support (including those with protected characteristics). We will work closely with the client, and others as appropriate (e.g. mountain resorts), to check and ensure that everyone has the information and support they need to make an informed decision.

Enabling participation

EKOS brings considerable experience of designing and undertaking research studies, and recognise that this commission calls for a:

- variety of different approaches and methodologies to ensure that various stakeholder groups can feed in their views and experiences in a way that suits them, and at a time that suits them;
- tailored approach to the design of fieldwork materials that reflects the different ways various types of stakeholder have been involved; and

- tailored approach to the specific needs of particular target groups (e.g. those without access a computer or who lack confidence/skills in using IT).

Our approach and methodology recognises, and will remove, the main barriers to full and equal stakeholder participation in the study (physical, attitudinal, financial and cultural). This includes:

- participant information sheets will contain the information potential participants need to make an informed decision regarding whether or not to take part, and who to contact if they want to find out more information;
- information sheets and fieldwork materials will use plain English – they will be jargon-free, straightforward and easy to read and understand. We can share the relevant topic guide with stakeholders in advance of the interview so that they can see the question areas of interest;
- all printed materials will be accessible and easy to read (e.g. leaflets) – large font size, easy to read fonts, no overlapping text/images, etc;
- for telephone interviews, EKOS will call the participant at an agreed time, so that the participant is not charged for making the phone call;
- we will ensure that no one has to travel any great distance to take part (i.e. visitor surveys at the snowsports facilities);
- participatory and inclusive consultation methods will be used to allow the different stakeholders, and especially those whose voice may be marginalised, to articulate and present their views; and
- prize draw vouchers for the visitor survey (e.g. we will offer two x £200 ski-equipment vouchers). Prize draws can help boost participation, and it is a good way to thank participants for taking part in the research.

Avoidance of personal harm

Our success has been built upon establishing a reputation whereby participants have the confidence/assurances that our research is conducted honestly, fairly, with care/respect, and without unwelcome intrusion, harm or undue stress.

We only use appropriately trained and briefed staff to conduct primary research (including with seldom heard groups), analysis and reporting.

All of the study team have PVG – previously Disclosure Scotland checks.

Non-disclosure of identity and personal information

Principles of confidentiality, data protection and anonymity will be upheld. All participants will be provided with assurances that:

- their rights of privacy will be respected;
- their views will be listened to without fear of judgement;
- no information which could be used to identify them will be made available without their agreement to anyone other than the researcher responsible for conducting the research;
- we will respect their right to confidentiality, and that all information or data collected, including sensitive personal information, will be stored and destroyed securely and in accordance with data protection law;
- the information they supply will not be used for any purposes other than for this research; and
- they will not be adversely affected or embarrassed as a direct result of their participation in the research project.

Appendix 1: Market Research Society COVID-19 Research Guidance

The current [MRS Guidance](#) (September 2021) notes the following.

Research companies are required to undertake a risk assessment of all projects of this nature and to agree this with the client, taking appropriate mitigation measures as appropriate. The risk assessment addresses the full operational process taking account of issues such as interviewer selection, interviewer travel, interviewing locations, and appropriate mitigations. This risk analysis will detail the risk mitigation steps that we will take.

For similar projects these have included:

- an interviewer COVID health screening questionnaire to be completed before fieldwork starts;
- the taking of Lateral Flow Tests on a regular basis;
- a requirement to avoid sharing vehicles where possible;
- permissible interviewing locations;
- social distancing requirements;
- use of face coverings (the use of these would be mandated when indoors and would be part of risk management discussions when interviewing is undertaken outdoors);
- avoiding the transfer of items between interviewer and interviewee (such as showcards or thank you cards); and
- hygiene requirements, including regular hand sanitisation.

A detailed briefing on COVID-related protocols will be provided as part of an overall interviewer briefing.

From: (Redacted)
To: (Redacted)
Cc: (Redacted)
Subject: Visitor Survey
Date: 03 February 2022 15:38:01
Attachments: [image001.png](#)
[Visitor Survey V3.docx](#)

Hi ^(Redacted)

Further to ^(Redacted) email this morning, please find attached a draft version of the visitor survey. Please let me know if you have any comments? Looking to finalise this quite quickly if possible, as IBP might need to be ready and flexible to start interviews with a couple of days notice.

Thanks,
(Redacted)

(Redacted)



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RESEARCH INTO THE ECONOMIC, SOCIAL AND CULTURAL IMPACT OF SCOTLAND'S SNOWSPORTS SECTOR

Introduction

Good morning/afternoon, my name is from IBP. We have been commissioned by the Scottish Government to conduct a survey of visitors at all mountain resorts and artificial slopes in Scotland as part of research into the impact of Scotland's snowsports sector.

We have a prize draw available to everyone who participates in the survey. There are 2 x £200 vouchers for snowsports equipment. If you want to enter the prize draw, we will capture your contact details at the end of the survey.

The survey takes approximately 6-8 minutes. Would you be willing to take part?

Before we begin, I would like to confirm that any information that you provide will be used by IBP and our research partners EKOS only for the purpose of this research. It will be used only for the purposes of statistical research and no information that allows you as an individual to be identified will be included in any report. Your response will be stored securely and will be destroyed, and electronic copies deleted as soon as it is no longer needed for the study. You may end the interview at any time.

Can I confirm you are willing to take part?	
	▼ one
Yes	
No	Thank and close

1. Interviewer to select which mountain resort or artificial slope in Scotland the interview is taking place at.			
▼ one			
Cairngorm Mountain (Scotland) Ltd		Glenmore Lodge - Sportscotland	
Glencoe Mountain Resort Ltd		Huntly Nordic and Outdoors Centre	
Glenshee Ltd		Lagganlia Outdoor Centre	
Lecht Ski Company Limited		Loch Insh Outdoor Centre	
Nevis Range Mountain Resort		Midlothian Snowsports Centre, Hillend	
Aberdeen Snowsports Centre		Newmilns Snow and Sports Complex	
Alford Ski Centre		Polmonthill Snowsports Centre	
Bearsden Ski and Board Club		RM-Condor	
Firpark Ski Centre		Snow Factor	
Glasgow Ski & Snowboard Centre			

About you

2. Can I please confirm your full postcode? This will be used for analysis purposes only and will not be used to contact you. (Please write in the following format - AB12 3CD)	
Not relevant - live outside of the UK	(please <input type="checkbox"/> and complete below)
Elsewhere in the UK (interviewer, please specify town or region in the space below)	
Elsewhere outside of the UK (interviewer, please specify country in the space below)	

3. How many people are in your immediate party today? (Please write in the number of females and males in each category, including interviewee)		
	Females	Males
Aged 15 or under		
Aged 16 - 34		
Aged 35 - 59		
Aged 60+		

4. Are you a member of a ski club?	
	<input type="checkbox"/> one
Yes	
No	

5. Do you use websites or social media channels to find out about snowsports in Scotland?	
	<input type="checkbox"/> one
Yes	
No	
If yes, which ones?	

6. Have you visited a mountain resort and/or artificial slope in Scotland prior to your visit today, including any previous visits to this mountain resort/artificial slope?		
	<input type="checkbox"/> all that apply	
I have only visited this mountain resort/artificial slope before		Q9
Yes, I have visited another mountain resort in Scotland before		Q7
Yes, I have visited another artificial slope in Scotland before		Q8
No, this is my first visit to a mountain resort/artificial slope in Scotland		Q9

7. Which other mountain resorts have you visited? (do not tick the name of the mountain resort the person is at today, if that is where the interview is taking place)	
	✓ all that apply
Cairngorm Mountain (Scotland) Ltd	
Glencoe Mountain Resort Ltd	
Glenshee Ltd	
Lecht Ski Company Limited	
Nevis Range Mountain Resort	

8. Which other artificial slopes in Scotland have you visited? (do not tick the artificial slope the person is at today if that is where the interview is taking place)			
✓ all that apply			
Aberdeen Snowsports Centre		Lagganlia Outdoor Centre	
Alford Ski Centre		Loch Insh Outdoor Centre	
Bearsden Ski and Board Club		Midlothian Snowsports Centre, Hillend	
Firpark Ski Centre		Newmilns Snow and Sports Complex	
Glasgow Ski & Snowboard Centre		Polmonthill Snowsports Centre	
Glenmore Lodge - Sportscotland		RM-Condor	
Huntly Nordic and Outdoors Centre		Snow Factor	

9. How often, in a typical year, would you visit mountain resorts and/or artificial slopes in Scotland?	
	✓ one
Often (e.g. every couple of months or more often)	
Occasionally (e.g. a few times a year)	
Rarely (e.g. once a year)	

About your trip

10. How important was... (insert name of mountain resort/artificial slope)...in your decision to visit the local area/Scotland?	
	✓ one
It was my only reason for visiting	
It was one of my main reasons for visiting	
It was one of several reasons for visiting	
It had no importance in my visit	
I live locally	

11. If you had not visited...(insert name of mountain resort/artificial slope)...what would you likely have done instead?	
	✓ one
I would have stayed at home	
I would still have visited the local area and done something else	
I would have visited another mountain resort/artificial slope in Scotland	
I would have visited somewhere else in Scotland but not for snowsports	
I would have visited somewhere outside of Scotland	

12. Are you spending any nights away from home as part of your trip to the mountain resort or artificial slope?		
	✓ one	
Yes		Q13
No		Q16

ONLY ASK THOSE SPENDING NIGHTS AWAY FROM HOME	
13. What type of accommodation are/were you staying in? (please select all that apply throughout your trip)	
	✓ all that apply
Staying with family/friends	
Hotel	
Guest house/B&B/Hostel	
Self-catering accommodation	
Second home	
Airbnb or similar	
Other (please write in below)	

ONLY ASK THOSE SPENDING NIGHTS AWAY FROM HOME	
14. How many nights have/will you stay in each of the following? Enter number in each option, including 0.	
	Number
The local authority area where this mountain resort or artificial slope is located	
Elsewhere in Scotland	

ONLY ASK THOSE SPENDING NIGHTS AWAY FROM HOME	
15. On average, how much have/will you spend on accommodation (per night) for your whole trip to the mountain resort or artificial slope? (Please write a number for each area, even if it is 0 and if you are unsure)	
Please exclude any expenditure made on behalf of family or friends - so just the cost per person, per night. Please write a number only in each box (no £ sign).	
	Number
The local authority area where this mountain resort or artificial slope is located	
Elsewhere in Scotland	

16. What is your personal (just you, not your whole party) estimated expenditure for your whole trip to the mountain resort/artificial slope on the following?

Please exclude any expenditure made on behalf of family or friends.

(If you are unsure, please estimate a value). Interviewer, please write a number only in each box (no £ sign) including "0" if no expenditure within that category.

	Amount
Food	
Drink	
Entertainment	
Equipment hire	
Transport	
Shopping	
Other (please specify below)	

About your experience today

Note: Capture wider non-snowsports activities, if relevant.

17. What activity or activities are you personally participating in at the mountain resort/artificial slope today?

	✓ all that apply
Skiing	
Skiing lessons	
Freestyle	
Cross-country skiing	
Snowboarding	
Sledging	
Tubing	
Mountain biking	
Walking	
Other (please specify below)	

18. How would you rate your visit today in terms of the following aspects, using a scale of 1 (very satisfied) to 5 (very dissatisfied)?						
	1 - Very Satisfied	2	3	4	5 - Very dissatisfied	N.A.
Ease of entry to resort/centre						
Signage and directions on-site						
Being made to feel welcome						
Help and support						
Cost/affordability						
Quality of the slopes						
Quality of the overall offer						
Quality of the facilities						
Quality of equipment (if hired)						
Café/catering facilities						
Availability of public transport to get here						
Availability of car parking around/near to the site/centre						
Covid precautions						
Quality of overall experience						

19. What, if anything, would make the biggest difference to increasing your overall quality of experience?

Reasons for, and barriers to, taking part in outdoor activities

20. A) What are your main reasons for taking part in outdoor activities such as skiing, snowboarding, hillwalking, mountain biking, etc? B) What is your main reason?		
	A) ✓ all that apply	B) ✓ one main reason
For enjoyment (e.g. something you like to do, you enjoy it)		
To improve and maintain physical health and fitness (e.g. overall fitness and stamina, to lose weight, to be more physically active, to have more energy)		
To maintain and improve mental health and wellbeing (e.g. to relax, to unwind, to ease any worry, stress, tension or anxiety)		
To spend time with family or friends (e.g. to socialise, to connect with others, to have shared experiences)		
To be closer to nature (e.g. to enjoy scenery and wildlife, to have access to nature)		
To try or learn something new (e.g. a new recreational activity)		
To discover new places (e.g. sightseeing and/or getting to know a new area, cultural interests)		

21. A) What are the main barriers you face that make it difficult for you to take part in outdoor activities such as skiing, snowboarding, hillwalking, mountain biking, etc more often? B) What is your main barrier?		
	A) ✓ all that apply	B) ✓ one main reason
Cost/affordability		
Lack of snow		
Poor weather conditions		
Lack of free time		
Accessibility issues		
Quality of the facilities		
Covid concerns		
Other (please specify below)		

22. What, if anything, would make the biggest difference to reducing your barriers to taking part in these types of outdoor activities more often?

Prize draw

We have a prize draw available to everyone who participates in this survey. There are 2 x £200 vouchers for snowsports equipment. Would you like to be entered into the prize draw? The winners will be selected randomly by EKOS once the primary research has been completed (end April), and someone from EKOS will be in touch directly with the winners.		
		✓ one
Yes	Next question	
No	Thank and close	

Can you please provide your contact details so that someone from EKOS can get in touch if you are selected as one of the prize winners?	
Name	
Email address or	
Telephone number	
Thank and close	

From: (Redacted)
To: (Redacted)

Subject: Engagement with Research - Economic, Cultural and Social Impact of Scotland's Snowsport Sector in Scotland - EKOS - 23 May 2022
Date: 23 May 2022 16:56:32
Importance: High

Dear Scottish Snowsport Sector directors

Most of you will have attended past Scottish Government Annual Strategic Snowsport Meetings which were chaired by Fergus Ewing (Previously Cabinet Secretary for the Rural Economy and Tourism).

We continue to hold this meeting, with Mairi Gougeon Cabinet Secretary for Rural Affairs and Islands keen to engage with the sector. We will be in contact with future meetings/plans.

As you will be aware, EKOS are carrying out Research into the *Economic, Cultural and Social Impact of Scotland's Snowsport Sector* in Scotland.

We appreciate efforts that have been made so far to feed in your views as part of the consultation process, facilitate on-site visitor surveys and share surveys with the public via social media and your associates.

We know that you are busy and appreciate the time taken to make sure EKOS have all essential data sets at their disposal. The economic impact elements are of particular importance for this research and will provide a key evidence base to ensure future sustainability of the sector.

Can you please endeavour to ensure all the information requested by EKOS in the data template is provided by 10th June so that the final report is as true a reflection of the sector at present as possible. ^(Redacted) is leading on the project and can be contacted;

(Redacted)

@ekos.co.uk

Thank you

(Redacted)

Policy Officer | Rural Economy | Scottish Government

(Redacted) Saughton House, Broomhouse Drive, Edinburgh, EH11 3XD Email (Redacted)

Currently working from home and contactable

Mobile: 07747450074

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