

# The economic, social and cultural impact of Scotland's snowsports sector - Technical report



**AGRICULTURE, ENVIRONMENT AND MARINE**

# The economic, social and cultural impact of Scotland's snowsports sector 2022

## Technical Report



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# 1. Introduction

This technical report accompanies the main report that presents the findings of research into the Economic, Cultural and Social Impact of the Scottish Snowsports Sector. It provides further information and detail which has been used to inform the design of the research and its findings.

The research was commissioned in January 2022, and over the course of this year the funding, policy and operating environments have continued to evolve. The research findings and actions to strengthen the snowsports sector in Scotland should therefore be reviewed in the following context:

- **The cost of living crisis:** This will affect us all, but the impact will be disproportionately felt by those who are already struggling to make ends meet. For many individuals and families, it will mean struggling to meet basic needs, such as rent, food, clothing, and heating. With less, or no, disposable income, tough decisions will need to be made and household budgets cut accordingly. Many will focus on necessities rather than luxuries. Sports and activities which are free or cheap to access are likely to be more appealing. Snowsports activities can be expensive, and participation is likely to be impacted negatively by the current crisis.
- **Climate change:** Scotland is getting ever warmer and wetter and this trend looks set to continue. Decreasing predictability of weather patterns continues to threaten the sustainability and viability of the mountain centres. The levels of snowfall are declining and becoming less predictable which may result in declining demand, and this increases the snowsports sector's vulnerability.

The pressures placed on Scottish public finances have been significant for several years, and continue to be under significant pressure, not least because of external factors such as the coronavirus (COVID-19) pandemic and cost of living crisis. The Scottish Government and enterprise agencies (and others) will face significant challenges when setting budgets in the short- and medium-term. This will mean difficult decisions will require to be made that will limit the scope and flexibility to fund interventions that are not considered a top or high priority.

## 1.1 Structure of the report

This report contains the following information:

Section 2 - Research methodology

Section 3 to Section 7 - Fieldwork materials

Section 8 - Consent forms/privacy notices

Section 9 to Section 11 - Summary data tables

Section 12 – Business group discussion notes

## **2. Research Methodology**

The study method comprised secondary and primary research as described below.

### **2.1 Secondary research**

The study method involved the following secondary research.

First, a wide range of strategy and policy documents were accessed and reviewed to set the scene, and more specifically to help the study team consider how snowsports fits with, and contributes to, policy priorities. This included those with a focus on the economy, tourism, health and wellbeing, sport and physical activity, and those directly relating to snowsports. The study team's knowledge of the policy landscape was supplemented with an online search to identify any wider documents of relevance.

Second, we undertook a literature and evidence review to help illustrate the wider impact that sport and physical activity, including snowsports, has on people and places (i.e. economic, social and cultural impact). This involved an online search of published research and other reports, and included publications in Scotland, the rest of the UK and further afield. The study team's knowledge of the existing evidence based was supplemented with an online search to identify any additional documents of interest.

### **2.2 Primary research**

The primary research was designed and agreed with the Scottish Government client group.

#### **Stakeholders – consultations**

A list of key stakeholders to be consulted was developed in partnership with the Scottish Government and Snowsport Scotland. This comprised three main stakeholder groups:

- Snowsports operators – all mountain centre and artificial slope operators.
- National Governing Bodies of sport and other snowsports related organisations – for example, sportscotland, Snowsport Scotland, Ski Scotland, Scottish Disability Sport, Mountaineering Scotland.
- Other stakeholders – for example, Enterprise Agencies, Cairngorms National Park Authority, VisitScotland.
- An email introduction was issued to consultees by the Scottish Government to broker introductions with the study team. The study team then sent a follow-up email to consultees to arrange a mutually convenient date/time.

A total of 37 remote consultations were undertaken between January and April 2022. Some consultees were engaged on a number of separate occasions.

Table 2.1: Stakeholders consulted

	Number on consultee list	Interviews completed
Snowsports operators	20	16
National Governing Bodies of sport and other snowsports related organisations	10	10
Other stakeholders	17	11
<b>Total</b>	<b>47</b>	<b>37</b>

A data request was developed and issued by EKOS to the five mountain centres (March 2022) and 14 artificial slope operators (April 2022) to help inform the sector review and economic impact assessment (EIA). A four-week timescale was provided for completion.

The data request sought to capture data:

- On a range of metrics, including: income and expenditure, demand for snowsports activities and non-snowsport activities, skier days, employment, and capital investment.
- Over a period of 12 years from 2010/11 to 2021/22 (where possible).

Few operators provided data, and where it was provided, this was often partially completed. The study team and Scottish Government issued follow-up emails to encourage a greater response rate. We received:

- Five partial responses from the mountain centres
- Four partial responses from the artificial slopes.

A lack of engagement, and therefore data, made comprehensive analysis of aspects such as finance, employment, and demand more difficult. Gaps in data resulted in challenges in providing a robust sector level assessment, including limiting the breadth and depth of analysis that could be undertaken.

### Visitor survey

EKOS designed the visitor survey in partnership with our study partner IBP Strategy and Research (IBP) who undertook the visitor survey on our behalf. All aspects of the survey design and implementation were agreed by the Scottish Government client team.

A phased approach was undertaken to the visitor survey.

The early priority was to complete the target 1,000 interviews on-site across the five mountain centres during the winter season. The on-site interviews commenced in February 2022.



An initial target number of interviews per mountain centre was developed based on the average proportion of snowsports visitors between 2010/11 and 2014/15 at the mountain centres, Table 2.2.

A total of 342 interviews were initially completed at the mountain centres. To supplement the number of on-site interviews completed, hard copy self-completion questionnaires were made available within cafes at the mountain centres. This resulted in an additional 97 responses, bringing the total to 439 interviews. As can be seen in Table 2.2 the proportion of interviews initially completed did not full match the anticipated profile.

Table 2.2: Mountain centre visitor survey – initial survey frame

	Average % snowsports visitor 2010/11 to 2014/15	Target interviews	Actual interviews	% Actual
Cairngorm Mountain	37%	374	203	46%
Glencoe	16%	156	74	17%
Glenshee	13%	134	79	18%
Lecht 2090	5%	53	1	0.2%
Nevis Range	29%	285	82	19%
<b>On-site interviews</b>	-	<b>1,000</b>	<b>439</b>	<b>100%</b>

Source: Snowsports visitors taken from the Scottish Snowsports Sector Review (2016).

The following points are worthy of note:

- Scottish Government guidance prevented research from being undertaken indoors where the number of interviews was more than 50. This meant that on-site interviews had to be undertaken outdoors.
- The poor weather conditions (such as high winds, snow) presented challenges for both interviewers and interviewees. There were also times when the mountain centres were closed due to the weather conditions (for example, because of no sustainable snow).
- These issues resulted in fewer in-person interviews on-site than envisaged at the outset.
- To supplement the number of on-site interviews completed (in-person and self-completion hard-copy) we asked the mountain centres to distribute an online survey (a further 1,045 responses received).

The visitor survey at the artificial slopes took place between June and July 2022. A target of 400 interviews was set (i.e. circa 30 interviews at each facility). Not all artificial slope operators responded to communications from IBP regarding the visitor survey (three of the 14 artificial facilities responded or 21%). In-person

interviews were undertaken at three of the facilities and two online survey responses related to another two artificial slopes. This resulted in 46 responses (well below target).

Table 2.3 shows a detailed breakdown of survey responses across each mountain centre and artificial slope facility.

Table 2.3: Visitor survey responses by mountain centre/artificial slope

Mountain centre/artificial slope	Number	Percentage
Glenshee	441	29%
Cairngorm Mountain	425	28%
Glencoe Mountain Resort	360	24%
Nevis Range	131	9%
Lecht 2090	127	8%
Firpark Ski Centre	21	0%
Newmilns Snow and Sports Complex	15	0%
Glasgow Ski & Snowboard Centre	8	0%
Polmonthill Snowsports Centre	1	0%
Snow Factor, Glasgow	1	0%

Source: IBP Visitor Survey.  
N=1,530.

Note: artificial slope facilities with no interviews/responses have not been included in the table.

A total of 1,530 responses were received against the target of 1,400.

Table 2.4: Visitor survey summary

	Target interviews	Actual responses	% Achieved
Mountain Centres	1,000	1,484	148%
Artificial slopes	400	46	12%
<b>Total</b>	<b>1,400</b>	<b>1,530</b>	<b>102%</b>

### Club survey

An introduction and online survey aimed at snowsports clubs was issued by Snowsport Scotland on our behalf. It was issued to 36 clubs and 10 responses were received. This represents a response rate of 28%.

## **Business survey**

We engaged with several business facing organisations (e.g. Chamber of Commerce) who operate in the localities in and around the five mountain centres with a view to asking these organisations to promote and/or distribute an introduction and online survey link (provided by EKOS) to key business contacts/members.

We were interested to understand how the snowsports sector, and in particular the mountain centres, create wider benefit for other local businesses (e.g. tourism and hospitality) where the mountain centres are based. For example, bed and breakfasts and hotels might benefit from overnight stays from those taking part in snowsports and non-snowsport activities at the mountain centres nearby.

Due to an initial poor response to the business survey (12 responses), we adopted a targeted approach and asked business-facing organisations to help coordinate small group discussions with local businesses. One such remote discussion took place on 8 July 2022. This was arranged through the Cairngorms Business Partnership and involved 10 participants.

The issues outlined above meant that responses to the visitor and business surveys were collected using a mix of approaches, and the timescales for the primary research were extended accordingly. The data collated provides a snapshot of views and may not be representative of all snowsports visitors and businesses in Scotland.

## 3. Stakeholder discussion guide

### 3.1 Introduction

A number of topic guides were developed to help guide study team member conversations with stakeholders. These were used flexibly and adapted depending on the consultee's role and/or interest in snowsports (i.e. some but not all questions may have been appropriate or relevant to all stakeholders).

Introductions were made and the study team explained the purpose of the research, how stakeholder feedback would be used (i.e. thematic reporting to protect confidentiality and anonymity), the timescales for reporting, and how the report would be used by the Scottish Government.

### 3.2 Snowsport operators

#### **Governance:**

What is the company/ownership structure?

Who owns the land and assets. If leased, who owns and what are the lease terms?

Are there any alternative governance structures that you have considered?

#### **Finance:**

How would you describe the historical financial position?

How would you describe your current financial position for the current year?

How would you describe the financial impact of COVID-19 on your business?

What financial support did you receive during COVID-19 and what difference did this make?

How would you describe your short-term financial prospects (1-3 years)?

How would you describe your long-term financial prospects (3-5 years)?

What are the most significant cost pressures and income pressures that you are facing?

How do you plan to address current and future financial challenges?

What do you see as the most significant challenges/barriers to sustainability in the short and longer term?

What could be done to enhance future sustainability and what needs to be in place to enable this?

**Demand:**

What impact has COVID-19 had on levels of demand?

What was the trend in demand prior to COVID-19?

How do you see levels of demand in the short-term and long-term and what are key influencers?

Do you see opportunities to grow and diversify demand? If so, what do you need in order to take advantages of these opportunities?

**Investment:**

Since 2016 what investments have been made in the centre/facility?

Are there any investments planned for future where there is investment already in place? (if so where is investment coming from i.e. grant funding, commercial loans, other?)

What investments priorities are required in the future but no investment in place?

What are the consequences if priorities are not addressed?

**Supply chain:**

Who are your key supply chain companies, local, national and international?

What do they provide?

Where are they based?

Indicative annual spend?

Have you experienced any problems with your supply chain and how has COVID-19 affected this?

**Local businesses and community groups:**

How do your activities impact on local businesses and community groups?

Which are impacted the greatest?

What engagement do you have with these businesses/organisations?

**Collaboration:**

To what extent do snowsport centres, artificial facilities, non-governmental bodies and clubs collaborate to build a sustainable snowsport sector?

Is there more that could be done to enhance collaboration?

## **Marketing and promotion**

What are the main marketing and promotional channels used to market the Snowsport centre?

Are there improvements that could be made? If so, what?

## **Additional points**

Any wider points you want to feed into the research or feel we have not covered?

## **3.3 Snowsport Scotland and sportscotland**

What is your role and interest in snowsports?

What is the current membership of Snowsport Scotland? How has this changed over recent years?

How important are the snowsport centres and artificial slope facilities to Snowsport Scotland sports and to sporting pathways?

To what extent does Snowsport Scotland and the snowsport sector collaborate to build a sustainable snowsport sector?

What do you consider to be the most important ingredients to ensure a sustainable snowsport sector in Scotland?

What impact has COVID-19 had on the sector? What support was provided to aid its recovery? Is further support needed?

How could sector be further strengthened?

How would you assess the economic impact of the snowsport sector in Scotland?

How would you assess the social and cultural impact of the snowsport sector in Scotland?

What is likely to impact on the scale of economic impact in future years?

What are the main barriers to, and enablers of long-term sustainability of the snowsport sector?

Where do you see opportunities to increase participation and improve/diversify offer?

What are your thoughts on how the sector should be funded to ensure its sustainability?

Are there any countries that we could look at as comparators to Scotland? Are you aware of any lessons that Scotland could learn from other countries? Do you have any contacts and/or research reports that may be useful to review?

Any wider points you want to feed into the research or feel we have not covered?

### **3.4 Enterprise agencies**

#### **Governance:**

Which snowsport centre(s) does the enterprise agency account manage?

What are the governance arrangements in place with each centre?

Has there been any challenges or difficulties experienced?

What works well in terms of the governance arrangements?

#### **Finance:**

How does the enterprise agency support the different snowsport centres financially?

How have levels of support changed over the years? What processes are involved in determining the level of support?

How has the enterprise agency supported the centres during the COVID-19 crisis?

How would you describe the short-term financial prospects (1-3 years)?

How would you describe the long-term financial prospects (3-5 years)?

What do you see as the most significant challenges/barriers to sustainability in the short and longer term?

What could be done to enhance future sustainability and what needs to be in place to enable this?

What is the role of the enterprise agency in helping to enhance the future sustainability of the sector? What enablers are required to achieve this?

#### **Supply chain and local communities**

How important are the snowsport centres to the wider economic, social, and cultural ecosystems in which they operate?

#### **Collaboration**

In what ways does the enterprise agency and the snowsport centres collaborate?

Is there more that could be done to enhance collaboration?

#### **Additional points**

Any wider points you want to feed into the research or feel we have not covered?

### **3.5 Other business-facing organisations and agencies**

What is the role and remit of your organisation?

How and in what ways does your organisation link with, or connect to, the snowsports sector in Scotland? Are there any interdependencies?

How important a part do the snowsport centres play in terms of supporting the local economy?

How reliant or otherwise are other local businesses on the snowsport centres?

In what ways does your organisation and the snowsport centres collaborate?

What do you consider to be the most important ingredients to ensure a sustainable snowsport sector in Scotland?

Are there things that could be done to strengthen the governance arrangements within the sector?

What are the main barriers to long term sustainability of the snowsport sector

Where do you see opportunities to increase participation and improve/diversify offer

What impact has COVID-19 had on the sector and what support do you think is required to aid its recovery?

How could sector be further strengthened?

How would you assess the economic impact of the snowsport sector in Scotland?

What is likely to impact on the scale of economic impact in future years

How would you assess the social and cultural impact of the snowsport sector in Scotland?

What is likely to impact on the scale of economic impact in future years?

Any wider points you want to feed into the research or feel we have not covered?

### **3.6 Other organisations**

What is the role and remit of your organisation?

How and in what ways does your organisation link with, or connect to, the snowsports sector in Scotland? Are there any interdependencies?

How important are the snowsport centres to your organisation and to sporting pathways?

What are the main sports development pathways/programmes and activities used to develop and increase participation in snowsports?



Where are the strengths in terms of the existing pathway? Where are any weaknesses in terms of the existing pathway?

To what extent, and in what ways, does your organisation collaborate with the snowsports sector?

What do you consider to be the most important ingredients to ensure a sustainable snowsport sector in Scotland?

What are the main barriers to long term sustainability of the snowsport sector?

Where do you see opportunities to increase participation and improve/diversify offer?

What impact has COVID-19 had on the sector? What support was provided to aid its recovery? Is further support needed?

How could sector be further strengthened?

How would you assess the economic impact of the snowsport sector in Scotland?

What is likely to impact on the scale of economic impact in future years?

How would you assess the social and cultural impact of the snowsport sector in Scotland?

What is likely to impact on the scale of economic impact in future years?

## 4. Visitor Survey Questionnaires

### 4.1 Introduction

As outlined in Section 2 responses to the visitor survey were collected using a mix of approaches. The original questionnaire for on-site in-person interviews was therefore amended for different forms of completion. The four questionnaires used are presented below.

### 4.2 Visitor survey – hard copy

#### Introduction

IBP Strategy and Research and EKOS have been commissioned by the Scottish Government to conduct a survey of visitors at all mountain centre 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 clothing/equipment. If you want to enter the prize draw, you will be asked to provide your contact details at the end of the questionnaire.

The questionnaire should take approximately 6-8 minutes to complete. 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.

Q1 Interviewer to select which mountain centre or artificial slope in Scotland the interview is taking place at.

Cairngorm Mountain

Glenmore Lodge

Glencoe Mountain Resort

Huntly Nordic and Outdoors Centre

Glenshee

Lagganlia Outdoor Centre

Lecht 2090

Loch Insh Outdoor Centre

Nevis Range

Midlothian Snowsports Centre,  
Hillend

Adventure Aberdeen Snowsports

Newmilns Snow and Sports  
Complex

Alford Ski Centre

Polmonthill Snowsports Centre

Firpark Ski Centre

Bearsden Ski and Board Club

Snow Factor, Glasgow

RM-Condor, Arbroath

Glasgow Ski & Snowboard Centre

### **About you**

Q2 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)

In Scotland

Not relevant - live outside of Scotland

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)

Q3 How many people are in your immediate party today? (Please write in the number of females and males in each category, including interviewee)

Females

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

Males

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

Prefer not to say

- Aged 15 or under

- Aged 16-34
- Aged 35-59
- Aged 60+

Q4 Are you a member of a ski club?

Yes

No

Q5 Do you use websites or social media channels to find out about snowsports in Scotland?

Yes

No

If yes, which ones?

Q6 Have you visited a mountain centre and / or artificial slope in Scotland prior to your visit today, including any previous visits to this mountain centre / artificial slope?

I have only visited this mountain centre / artificial slope in Scotland before

Yes, I have visited another mountain centre in Scotland before

Yes, I have visited another artificial slope in Scotland before

No, this is my first visit to a mountain centre / artificial slope in Scotland

Q7 Which other mountain centre have you visited in Scotland? (do not tick the name of the mountain centre the person is at today, if that is where the interview is taking place)

Cairngorm Mountain

Glencoe Mountain Resort

Glenshee

Lecht 2090

Nevis Range

Q8 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)

Adventure Aberdeen Snowsports

Loch Insh Outdoor Centre

Alford Ski Centre

Midlothian Snowsports Centre,

Bearsden Ski and Board Club

Hillend

Firpark Ski Centre

Newmilns Snow and Sports  
Complex

Glasgow Ski & Snowboard Centre

Polmonthill Snowsports Centre

Glenmore Lodge

RM-Condor, Arbroath

Huntly Nordic and Outdoors Centre

Snow Factor, Glasgow

Lagganlia Outdoor Centre

Q9 How often, in a typical year, would you visit mountain centres and/or artificial slopes in Scotland?

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**

Q10 How important was (insert name of mountain centre / artificial slope) in your decision to visit the local area / Scotland?

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

Q11 If you had not visited...(insert name of mountain centre / artificial slope)...what would you likely have done instead)?

I would have stayed at home

I would still have visited the local area and done something else

I would have visited another mountain centre / artificial slope in Scotland

I would have visited somewhere else in Scotland but not for snowsports

I would have visited somewhere outside of Scotland

Q12 Are you spending any nights away from home as part of your trip to the mountain centre or artificial slope?

Yes

No

Q13 What type of accommodation are / were you staying in? (please select all that apply throughout your trip)

Staying with family / friends

Hotel

Guest House / B&B / Hostel

Self-catering accommodation

Second home

Airbnb or similar

Other (please write in below)

Q14 How many nights have / will you stay in each of the following? Enter number in each option, including 0.

The local authority area where this mountain centre or artificial slope is located

Elsewhere in Scotland

Q15 On average, how much have / will you spend on accommodation (per night) for your whole trip to the mountain centre 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).

The local authority area where this mountain centre or artificial slope is located

Elsewhere in Scotland

Q16 What is your personal (just you, not your whole party) estimated expenditure for your whole trip to the mountain centre / artificial slope on the following?

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

Food

Drink

Entertainment

Equipment hire

Transport

Shopping

Other (please specify)

**About your experience today experience today**

Q17 What activity or activities are you personally participating in at the mountain centre / artificial slope today?

Skiing

Skiing lessons

Freestyle

Cross-country skiing

Snowboarding

Sledging

Tubing

Mountain biking

Hill walking

Other (please specify below)

Q18 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	Not applicable
Availability of car parking around / near to the site / centre						
Availability of public transport to get here						
Being made to feel welcome						
Café / catering facilities						
Cost / affordability						
Covid precautions						
Ease of entry to resort / centre						
Help and support						
Quality of equipment (if hired)						
Quality of overall experience						
Quality of the facilities						
Quality of the overall offer						
Quality of the slopes						
Signage and directions on -site						

Q19 What, if anything, would make the biggest difference to improving your overall quality of experience?

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

Q20 A) What are your main reasons for taking part in outdoor activities such as skiing, snowboarding, hillwalking, mountain biking, etc?

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)

Q20 B) What is your 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)

Q21 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?

Cost / affordability

Lack of snow

Poor weather conditions

Lack of free time

Accessibility issues

Quality of the facilities

Covid concerns

Other (please specify below)

Q21 B) What is your main barrier?

Cost / affordability

Lack of snow

Poor weather conditions

Lack of free time

Accessibility issues

Quality of the facilities

Covid concerns

Other (please specify below)

Q22 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 clothing / 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.

Yes

No

Can you please provide your contact details so that we can get in touch if you are selected as one of the prize winners?

Name

E-mail address or

Telephone number

Thank you for taking the time to complete our questionnaire.

### **4.3 Visitor Survey – tablet version**

#### **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 centres 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 clothing/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 that you are willing to take part?

Yes

No

Thank and close

(Questionnaire is replicated from the hard copy version)

## 4.4 Visitor survey – online (mountain centres)

### Introduction

IBP Strategy and Research and EKOS have been commissioned by the Scottish Government to conduct a survey of visitors at all mountain centres 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 clothing/equipment. If you want to enter the prize draw, you will be asked to provide your contact details at the end of the questionnaire.

The questionnaire should take approximately 6-8 minutes to complete. 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.

Please select the option below to confirm your understanding of the above and to proceed with the survey.

Q1 A) Which mountain centre have you attended most recently?

Where relevant, please answer subsequent questions with reference to this mountain centre that you have attended most recently and if you are completing the survey whilst at a specific mountain centre, please answer for that location.

Cairngorm Mountain

Glencoe Mountain Resort

Glenshee

Lecht 2090

Nevis Range

Q1 B) When did you last attend this mountain centre?

2022

2021

2020

2019

Before this

### **About you**

Q2 What is 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

In Scotland

Not relevant - live outside of Scotland

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)

Q3 Thinking about your most recent visit to a mountain centre in Scotland, how many people are in your immediate party today? (Please write in the number of females and males in each category, including interviewee)

#### Females

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

#### Males

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

#### Prefer not to say

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

Q4 Are you a member of a ski club?

Yes

No

Q5 Do you use websites or social media channels to find out about snowsports in Scotland?

Yes

No

If yes, which ones?

Q6 Thinking about your most recent visit to a mountain centre in Scotland, had you previously visited any mountain centre and / or artificial slope in Scotland prior to that visit, including any previous visits to the mountain centre you visited most recently? Please select all that apply.

I have only visited this mountain centre / artificial slope in Scotland before

Yes, I have visited another mountain centre in Scotland before

Yes, I have visited another artificial slope in Scotland before

No, this is my first visit to a mountain centre / artificial slope in Scotland

Q7 Other than the mountain centre you visited most recently, which other mountain centres have you visited in Scotland?

Cairngorm Mountain

Glencoe Mountain Resort

Glenshee

Lecht 2090

Nevis Range

Q8 Which artificial slopes in Scotland have you visited?

Adventure Aberdeen Snowsports

Alford Ski Centre

Bearsden Ski and Board Club

Firpark Ski Centre

Glasgow Ski & Snowboard Centre

Glenmore Lodge

Huntly Nordic and Outdoors Centre

Lagganlia Outdoor Centre

Loch Insh Outdoor Centre

Midlothian Snowsports Centre, Hillend

Newmilns Snow and Sports Complex

Polmonthill Snowsports Centre

RM-Condor, Arbroath

Snow Factor, Glasgow

Q9 How often, in a typical year, would you visit mountain centres and / or artificial slopes in Scotland?

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 most recent visit to a mountain centre**

Q10 Thinking about your most recent visit to a mountain centre in Scotland, how important was this mountain centre in your decision to visit the local area?

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

Q11 If you had not visited this mountain centre, what would you likely have done instead?

I would have stayed at home

I would still have visited the local area and done something else

I would have visited another mountain centre / artificial slope in Scotland

I would have visited somewhere else in Scotland but not for snowsports

I would have visited somewhere outside of Scotland

Q12 Thinking about your most recent visit to a mountain centre in Scotland, did you spend any nights away from home as part of your trip?

Yes

No

Q13 What type of accommodation did you stay in? Please select all that apply throughout your trip.

Staying with family / friends

Hotel

Guest House / B&B / Hostel

Self-catering accommodation

Second home

Airbnb or similar

Other (please write in below)

Q14 How many nights did you stay in each of the following? Enter number in each option, including 0.

The local authority area where this mountain centre or artificial slope is located

Elsewhere in Scotland

Q15 On average, how much have / will you spend on accommodation (per night) for your whole trip to the mountain centre 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).



The local authority area where this mountain centre or artificial slope is located

Elsewhere in Scotland

Q16 What was your personal (just you, not your whole party) estimated expenditure for your whole trip to the mountain centre / artificial slope on the following?

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

Food

Drink

Entertainment

Equipment hire

Transport

Shopping

Other (please specify)

### **About your experience at the mountain centre**

Q17 Thinking about your most recent visit to a mountain centre in Scotland, what activity or activities did you personally participating in at the mountain resort?

Please select all that apply

Skiing

Skiing lessons

Freestyle

Cross-country skiing

Snowboarding

Sledging

Tubing

Mountain biking

Hill walking

Other (please specify below)

Q18 Thinking about your most recent visit to a mountain centre in Scotland, how would you rate your visit 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	Not applicable
Availability of car parking around / near to the site / centre						
Availability of public transport to get here						
Being made to feel welcome						
Café / catering facilities						
Cost / affordability						
Covid precautions						
Ease of entry to resort / centre						
Help and support						
Quality of equipment (if hired)						
Quality of overall experience						
Quality of the facilities						
Quality of the overall offer						
Quality of the slopes						
Signage and directions on -site						

Q19 What, if anything, would have made the biggest difference to improving your overall quality of experience?

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

Q20 A) What are your main reasons for taking part in outdoor activities such as skiing, snowboarding, hillwalking, mountain biking, etc?

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)

Q20 B) What is your 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)

Q21 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?

Cost / affordability

Lack of snow

Poor weather conditions

Lack of free time

Accessibility issues

Quality of the facilities

Covid concerns

Other (please specify below)

Q21 B) What is your main barrier?

Cost / affordability

Lack of snow

Poor weather conditions

Lack of free time

Accessibility issues

Quality of the facilities

Covid concerns

Other (please specify below)

Q22 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 clothing / 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.

Yes

No

Can you please provide your contact details so that we can get in touch if you are selected as one of the prize winners?

Name

E-mail address or

Telephone number

Thank you for taking the time to complete our questionnaire.

Please select the button below to submit your response.

## 4.5 Visitor survey - online (artificial slopes)

### Introduction

IBP Strategy and Research and EKOS have been commissioned by the Scottish Government to conduct a survey of visitors at all mountain centres 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 clothing/equipment. If you want to enter the prize draw, you will be asked to provide your contact details at the end of the questionnaire.

The questionnaire should take approximately 6-8 minutes to complete. 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.

Please select the option below to confirm your understanding of the above and to proceed with the survey.

Q1a Which mountain centre / artificial have you attended most recently?

Where relevant, please answer subsequent questions with reference to this mountain centre / artificial slope that you have attended most recently.

Cairngorm Mountain

Glencoe Mountain Resort

Glenshee

Lecht 2090

Nevis Range

Adventure Aberdeen Snowsports

Alford Ski Centre

Glenmore Lodge

Huntly Nordic and Outdoors Centre

Lagganlia Outdoor Centre

Loch Insh Outdoor Centre  
Midlothian Snowsports Centre, Hillend  
Newmilns Snow and Sports Complex  
Polmonthill Snowsports Centre  
Bearsden Ski and Board Club  
RM-Condor, Arbroath  
Firpark Ski Centre  
Snow Factor, Glasgow  
Glasgow Ski & Snowboard Centre

Q1b When did you last attend this mountain centre / artificial slope?

2022

2021

2020

2019

Before this

### **About you**

Q2 What is 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

In Scotland

Not relevant - live outside of Scotland

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)

Q3 Thinking about your most recent visit to a mountain centre / artificial slope in Scotland, how many people were in your immediate party?

Females

- Aged 15 or under

- Aged 16-34
- Aged 35-59
- Aged 60+

Males

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

Prefer not to say

- Aged 15 or under
- Aged 16-34
- Aged 35-59
- Aged 60+

Q4 Are you a member of a ski club?

Yes

No

Q5 Do you use websites or social media channels to find out about snowsports in Scotland?

Yes

No

If yes, which ones?

Q6 Thinking about your most recent visit to a mountain centre in Scotland, had you previously visited any mountain centre and / or artificial slope in Scotland prior to that visit, including any previous visits to the mountain centre you visited most recently? Please select all that apply.

I have only visited this mountain centre / artificial slope in Scotland before

Yes, I have visited another mountain centre in Scotland before

Yes, I have visited another artificial slope in Scotland before

No, this is my first visit to a mountain centre / artificial slope in Scotland

Q7 Which mountain centre have you visited in Scotland?

Cairngorm Mountain

Glencoe Mountain Resort

Glenshee

Lecht 2090

Nevis Range

Q8 Which artificial slopes in Scotland have you visited?

Adventure Aberdeen Snowsports

Alford Ski Centre

Bearsden Ski and Board Club

Firpark Ski Centre

Glasgow Ski & Snowboard Centre

Glenmore Lodge

Huntly Nordic and Outdoors Centre

Lagganlia Outdoor Centre

Loch Insh Outdoor Centre

Midlothian Snowsports Centre, Hillend

Newmilns Snow and Sports Complex

Polmonthill Snowsports Centre

RM-Condor, Arbroath

Snow Factor, Glasgow

Q9 How often, in a typical year, would you visit mountain centres and / or artificial slopes in Scotland?

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 most recent visit to a mountain centre**

Q10 Thinking about your most recent visit to a mountain centre / artificial slope in Scotland, how important was this mountain centre / artificial slope in your decision to visit the local area? 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

Q11 If you had not visited this mountain centre / artificial slope, what would you likely have done instead?

I would have stayed at home

I would still have visited the local area and done something else

I would have visited another mountain centre / artificial slope in Scotland

I would have visited somewhere else in Scotland but not for snowsports

I would have visited somewhere outside of Scotland

Q12 Thinking about your most recent visit to a mountain centre / artificial slope in Scotland, did you spend any nights away from home as part of your trip?

Yes

No

Q13 What type of accommodation did you stay in? Please select all that apply throughout your trip.

Staying with family / friends

Hotel

Guest House / B&B / Hostel

Self-catering accommodation

Second home

Airbnb or similar

Other (please write in below)

Q14 How many nights did you stay in each of the following? Enter number in each option, including 0.

The local authority area where this mountain centre or artificial slope is located

Elsewhere in Scotland

Q15 On average, how much have / will you spend on accommodation (per night) for your whole trip to the mountain centre 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).

The local authority area where this mountain centre or artificial slope is located

Elsewhere in Scotland

Q16 What was your personal (just you, not your whole party) estimated expenditure for your whole trip to the mountain centre / artificial slope on the following?

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

Food

Drink

Entertainment

Equipment hire

Transport

Shopping

Other (please specify)

### **About your experience at the mountain centre /artificial slope**

Q17 Thinking about your most recent visit to a mountain centre / artificial slope in Scotland, what activity or activities did you personally participating in at the mountain centre / artificial slope? Please select all that apply

Skiing

Skiing lessons

Freestyle

Cross-country skiing

Snowboarding

Sledging

Tubing

Mountain biking

Hill walking

Other (please specify below)

Q18 Thinking about your most recent visit to a mountain centre / artificial slope in Scotland, how would you rate your visit in terms of the following aspects, using a scale of 1 (very satisfied) to 5 (very dissatisfied)?

	<b>1 - Very Satisfied</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5 - Very Dissatisfied</b>	<b>Not applicable</b>
Availability of car parking around / near to the site / centre						
Availability of public transport to get here						
Being made to feel welcome						
Café / catering facilities						
Cost / affordability						
Covid precautions						
Ease of entry to resort / centre						
Help and support						
Quality of equipment (if hired)						
Quality of overall experience						
Quality of the facilities						
Quality of the overall offer						
Quality of the slopes						
Signage and directions on -site						

Q19 What, if anything, would have made the biggest difference to improving your overall quality of experience?

**Reason for, and barriers to, taking part in outdoor activities**

Q20 A) What are your main reasons for you taking part in outdoor activities such as skiing, snowboarding, hillwalking, mountain biking, etc? Please select all that apply.

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)

Q20 B) What is your 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)

Q21 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?

Cost / affordability

Lack of snow

Poor weather conditions

Lack of free time

Accessibility issues

Quality of the facilities

Covid concerns

Other (please specify below)

Q21 B) What is your main barrier?

Cost / affordability

Lack of snow

Poor weather conditions

Lack of free time

Accessibility issues

Quality of the facilities

Covid concerns

Other (please specify below)

Q22 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 clothing / 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.

Yes

No

Can you please provide your contact details so that we can get in touch if you are selected as one of the prize winners?

Name

E-mail address or

Telephone number

Thank you for taking the time to complete our questionnaire.

Please select the button below to submit your response.

# 5. Club Survey Questionnaire

## Club Survey

The Scottish Government has commissioned EKOS to undertake research to establish the wider impact and contribution that the snowsports sector makes in Scotland. The research covers the five mountain centres (Cairngorms Mountain Resort, Glencoe Mountain Resort, Glenshee Ski Centre, Nevis Range and The Lecht 2090) as well as the range of artificial slopes across the country.

The research includes various aspects, including visitor surveys at the mountain centres and artificial slopes, and we are now keen to hear from clubs.

A short online survey can be accessed here [Snowsports Clubs - Online Survey](#)

The deadline for responses is the end of May 2022.

All responses will be treated in confidence. Reporting to the Scottish Government will be in aggregate form to protect the anonymity of respondents.

### About your club and its membership

1. What is the name of your club?
2. Where is your club based (i.e. main address)?  
(Drop down list of Local Authority areas)
3. What is your club's current total membership?
4. How many members does your club currently have by gender? Please leave blank if you do not know.

Female:

Male:

Prefer not to say:

5. How many members does your club currently have by age group? Please leave blank if you do not know.

15 or under

16-34

35-59

60+

6. How many members does your club currently have by ethnic group? Please leave blank if you do not know.

White (Scottish, Other British, Irish, Polish, Gypsy/Traveller, Roma, Showman/Showwoman, Other white ethnic group)

Mixed or multiple ethnic groups (Any mixed or multiple ethnic groups)

Asian, Scottish Asian or British Asian (Pakistani, Scottish Pakistani or British Pakistani Indian, Scottish Indian or British Indian Bangladeshi, Scottish Bangladeshi or British Bangladeshi Chinese, Scottish Chinese or British Chinese Other)

African, Scottish African or British African (For example, Nigerian, Somali)

Caribbean or Black (For example, Scottish Caribbean, Black Scottish)

Other ethnic group (Arab, Scottish Arab or British Arab, Other e.g. Sikh, Jewish)

7. How many members does your club currently have by disability? Please enter a total (including 0), provide a breakdown if you can, or leave blank if you do not know.

Total

Deafness or partial hearing loss

Blindness or partial sight loss

Learning disability or difficulty

Physical disability

Mental health condition

Other condition

### **How membership has changed**

8. How has membership changed, if at all, over the five-year period 2015 to 2019 (i.e. the time period before COVID-19)? Please tick one.

It increased a lot

It increased a little

It remained relatively stable

(Route to Q11)



It decreased a little

It decreased a lot

9. A. Where has the increase or decrease in club membership occurred over this period? Tick all that apply.

More females involved

Less females involved

More males involved

Less males involved

More people aged 15 or under involved

Less people aged 15 or under involved

More people aged 16-34 involved

Less people aged 16-34 involved

More people aged 35-59 involved

Less people aged 35-59 involved

More people aged 60+ involved

Less people aged 60+ involved

- B. What has been the main factor?

10. A. Are there any wider factors that have driven the increase or decrease in club membership between 2015 and 2019? B. Please specify.

Yes

(Route to Q10B)

No

11. A. What, if anything, has been the impact of COVID-19 on club membership – so thinking about membership levels between 2020 and now? Please tick one.

It increased a lot

It increased a little

It remained relatively stable

It decreased a little

It decreased a lot

B. Can you provide more detail on the impact of the pandemic on club membership?

12. What, if anything, are the main barriers to increasing club membership? Tick all that apply.

Lack of facilities to accommodate more people

Lack of coaches

Lack of volunteers

Limited links to schools

Lack of public awareness

Other barrier(s) (please specify)

No barriers

13. What activities and programmes does your club offer/provide? Tick all that apply.

Learn to ski/snowboard programmes

Coaching for skills development

Coaching for competition

Nordic

Freestyle

Coaching

Snowsports activities aimed at disadvantaged or under-represented groups (e.g. deprived areas, disabled people, etc)

School programmes

Active School programmes

Snowsports trips – in Scotland

Snowsports trips - elsewhere in the UK

Snowsports trips – outwith the UK (e.g. Europe)

Non-snowsports related activities e.g. mountain biking (please specify)

Social activities/events

Other (please specify)

14. A. What, if anything, has been the impact of COVID-19 on the range of activities and programmed offered by the club – so thinking about provision between 2020 and now? Tick one.

Increased

Stayed the same

Decreased

B. Can you provide more detail on the impact of the pandemic on activities and programmes offered?

### Use of Snowsports Facilities in Scotland

15. A. Which of the following mountain centres in Scotland does the club use? B. How often in a typical year does the club use each one?

<b>Note: B is routed for those selected at A.</b>				
	A	B		
	Tick all that apply	More than 5 times in a winter season if weather permits	2-5 times per season if weather permits	Less than twice per season
Glenshee				
Cairngorm Mountain				
Glencoe				
Lecht 2090				
Nevis Range				
None (Route Q17)				

16. What happened to your club's use of mountain centres in Scotland during the pandemic (i.e. compared to a typical year)? Tick one.

Increased

Stayed the same

Decreased

B. Can you provide more detail?

17. A. Which of the following artificial slope facilities in Scotland does the club use? B. How often in a typical year does the club use each one?

<b>Note: B is routed for those selected at A.</b>					
	A	B			
	Tick all that apply	At least weekly	Monthly	Every few months	Less often than every few months
Aberdeen Snowsports Centre					
Alford Ski Centre					
Bearsden Ski and Board Club					
Firpark Ski Centre					
Glasgow Ski & Snowboard Centre					
Glenmore Lodge					
Huntly Nordic and Outdoors Centre					
Loch Insh Outdoor Centre					

Lagganlia Outdoor Centre					
Midlothian Snowsports Centre, Hillend					
Newmilns Snow and Sports Complex					
Polmonthill Snowsports Centre					
RM-Condor, Arbroath					
Snow Factor, Glasgow					
None					

18. What happened to your club's use of artificial slope facilities in Scotland during the pandemic (i.e. compared to a typical year)?

Increased

Stayed the same

Decreased

B. Can you provide more detail?

**Reasons for participation**

19. A) In general terms, what do you think are the main reasons people have for taking part in snowsports activities? Tick all that apply. B) What do you consider is the main reason? Tick one main reason.

For enjoyment (e.g. something like to do, 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, improve skills and technique, learn new skills)

To discover new places (e.g. sightseeing and/or getting to know a new area, cultural interests)

20. What, if any, are the main barriers to participation in snowsports? Tick all that apply.

Cost of participation

Lack of facilities

Time commitments

Family commitments

Transport

Choice in how to spend leisure/free time

Poor/cold weather puts some people off

Other barrier(s) (please specify)

No barriers

### **Areas for improvement**

21. Do you have any ideas of ways in which the mountain centres in Scotland could improve and diversify their offer to increase the quality of the offer/experience and improve their financial sustainability?

22. Do you have any ideas of ways in which the artificial slope facilities in Scotland could improve and diversify their offer to increase the quality of the offer/experience and improve their financial sustainability?

## **Final comments**

23. Do you have any final comments you would like to feed into the research?

## 6. Business Survey Questionnaire

### Business Online Survey – email introduction

The Scottish Government has commissioned EKOS to undertake research to establish the wider impact and contribution that the snowsports sector makes in Scotland. The research covers the five mountain centres (Cairngorms Mountain Resort, Glencoe Mountain Resort, Glenshee Ski Centre, Nevis Range and The Lecht 2090) as well as the range of artificial slopes across the country.

The research includes various aspects, including visitor surveys at the mountain centres and artificial slopes. We are also interested to understand how the snowsports sector, and in particular the mountain centres, create wider benefit for other local businesses (e.g. tourism and hospitality) where the mountain centres are based. For example, bed and breakfasts and hotels might benefit from overnight stays from those taking part in snowsports and non-snowsport activities at the mountain centres nearby.

As such, we have put together a short online survey to capture feedback from local businesses on the impact (both positive and negative) that the mountain centres have on other businesses. The survey can be found here: [Snowsports - Business Online Survey](#)

The deadline for responses is Friday 17 June 2022.

All responses will be treated in confidence. Reporting to the Scottish Government will be in aggregate form to protect the anonymity of respondents. A privacy notice can be viewed when you start the SNAP survey.

1. Is any of your business' turnover generated by the mountain centres in Scotland? For example, bed and breakfasts and hotels might benefit from overnight stays from those taking part in snowsports (e.g. skiing) and/or non-snowsports (e.g. mountain biking) activities at the mountain centres nearby. Please tick one.

Yes (Route to Q2.)

No (Route to end)

If “No” – This survey is aimed at businesses that generate any turnover linked to the mountain centre(s) in Scotland. Thank you for your time and interest in this survey.

### About your business

2. What is the name of your business?
3. What is the nature of your business (e.g. hotel)?
4. In which local authority is your business based?



5. How many employees does your business have? Tick one.
- Micro (less than 10)
  - Small (10–49)
  - Medium (50-249)
  - Large (250+)
6. How many of the following members of staff does your business have?
- Part-time
  - Full-time
  - Seasonal or temporary
  - Total
7. What proportion of your staff are from the local authority in which the business is based? An estimate will do. Tick one.
- 0%
  - Between 1 and 9%
  - Between 10% and 25%
  - Between 26% and 50%
  - Between 51% and 75%
  - Between 76% and 99%
  - 100%

**Extent of business reliance on the snowsports sector**

8. Which of the following mountain centres in Scotland does your business rely on for some of its turnover? Please tick all that apply
- Cairngorms Mountain Resort
  - Glencoe Mountain Resort
  - Glenshee Ski Centre
  - Nevis Range
  - The Lecht 2090

9. In a typical year, what proportion of your business' turnover is generated by the mountain centres in Scotland – through snowsports and/or non-snowsports activities?

	Snowsports activities	Non-snowsports activities
	Please tick one	Please tick one
0%		
Between 1% and 5%		
Between 5% and 9%		
Between 10% and 20%		
Between 21% and 30%		
Between 31% and 40%		
Between 41% and 50%		
Between 51% and 60%		
Between 61% and 70%		
Between 71% and 80%		
Between 81% and 90%		
Between 91% and 100%		

10. In a typical year, what is your business's annual turnover?

11. Before COVID-19, was the importance of the mountain centres in Scotland to your business changing? Please tick one.

It had become more important

No change in importance

It had become less important

Why do you say this?

12. How important or not important would you say the mountain centres in Scotland is currently to your business as a source of income generation? Please tick one.

Very important

Important

Neither important nor not important

Not that important

Not at all important

Why do you say this?

13. When does your business generate income from the mountain centre(s) you selected above at Question 8? Please tick one.

All year round

Winter season only

14. What impact (both positive and negative), if any, do the mountain centres have on the local communities in which they are based? Think about the mountain centre(s) which your business relies on for some of its turnover.

Positive (e.g. brings more people to the area):

Negative (e.g. environmental costs/impacts, disturbance to wildlife):

15. Do you agree or disagree that the snowsports sector in Scotland generates each of the following benefits/impacts? Again, think about the mountain centre(s) which your business relies on for some of its turnover.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Creates and supports employment in the local area					
Increases footfall for local businesses/area					
Encourages snowsports participants to visit/experience nearby places/attractions (e.g. discover new places or things to do nearby)					
Attracts non-snowsports visitors to the area in the summer months					
Supports the local tourism and visitor economy					
Helps to improve and maintain physical health and fitness of snowsports participants					
Helps to maintain and improve mental health and wellbeing of snowsports participants (e.g. to relax, to unwind, to ease any worry, stress, tension or anxiety)					
Provides opportunities for snowsports participants to be closer to nature (e.g. to enjoy scenery and wildlife, to have access to nature)					

Other (please specify)					
------------------------	--	--	--	--	--

16. How important would you say the mountain centres in Scotland will be to your business as a source of income generation over the medium-term (i.e. next five years)? Please tick one.

Very important

Important

Neither important nor not important

Not that important

Not at all important

Why do you say this?

17. Which of the following options do you think are the most viable opportunities for mountain centres to improve and/or diversify their offer? Tick all that apply

Replace ageing uplift

Greater snowmaking capacity

Diversify income streams

Improve resort food and beverage offering

Improve car parking

Offer year-round passes for accessing the grounds

Allow gondola rides in summer for hiking

Provide educational tours

Build new infrastructure for year-round activities (e.g. mountain-biking, high wire)

An increased focus on biodiversity

A shift towards to low carbon/renewable energy sources

Other (please specify)

### Final comments

18. Do you have any final comments you would like to feed into the research?

# 7. Business Group Discussion Guide

## 7.1 Introduction

The Scottish Government has commissioned EKOS to undertake research to establish the wider impact and contribution that the snowsports sector makes in Scotland. The main aims of the research are to:

- Assess the economic, cultural, and social value of the Scottish snowsports sector.
- Understand the impact of COVID-19 on the snowsports sector.
- Project the long-term sustainability of the snowsports sector.
- Recommend how the sector may be strengthened.

The research covers the five mountain centres (Cairngorms Mountain Resort, Glencoe Mountain Resort, Glenshee Ski Centre, Nevis Range and The Lecht 2090) as well as the range of artificial slopes across the country.

The research includes various aspects, including visitor surveys at the mountain centres and artificial slopes. We are also interested to understand how the snowsports sector, and in particular the mountain centres, affect and/or create wider benefit for other local businesses.

This piece of research will help to shape how the Scottish Government supports the sector and its related supply chains in future years. The research is due to be completed by the end of August 2022, and the outputs will help to inform a new strategy for the Snowsports Sector in Scotland, alongside the stakeholder consultation that has been led by Snowsport Scotland.

## 7.2 Topic areas

The topic areas were used to help guide the conversation and was used flexibly.

1. Introductions. Introductions were made and the study team explained the purpose of the research, how business feedback would be used (i.e. thematic reporting to protect confidentiality and anonymity), the timescales for reporting, and how the report would be used by the Scottish Government.
2. Establish an overview of each business, sector, number of employees, how long it has been operating, etc.
3. To what extent is your business (and local community) currently affected by or reliant on activity that takes place at (insert name of mountain centre)? Why do you say this? Does this depend on wider factors such as seasonality, type of business, etc?
4. Do you think the affect the mountain centre has on your business/local community has changed over the last five years or so? Has it become more or

less important? Think also about pre-COVID and what it is now. Why do you say this?

5. What impact did COVID-19 have on your business? Did the impact of COVID-19 on (insert mountain centre) have a wider affect for your business/local community? In what ways?
6. In what ways does (insert name) mountain centre make a difference or have a positive impact on the local community? Explore whether it:
  - Creates and supports employment in the local area.
  - Increases footfall for local businesses/area.
  - Encourages snowsports participants to visit/experience nearby places/attractions (e.g. discover new places or things to do nearby).
  - Attracts non-snowsports visitors to the area in the summer months.
  - Supports the local tourism and visitor economy.
  - Other impacts.
7. Does it create any negative impacts?
8. How important do you think the (insert name) mountain centre will be to your business (and local community more broadly) over the medium-term (i.e. next five years)? Why do you say this? What implications may this have for your business and the local economy?
9. What actions, if any are you taking/do you plan to take as a business to mitigate against any negative impacts of declining snow levels and the knock-on effect this will have on your business?
10. What do you think mountain centres need to do to improve and/or diversify their offer (i.e. improve their chances of sustainability? What are the barriers to achieving this? What support might they need (and from whom) to achieve this?

## 8. Consent Forms/Privacy Notices

### 8.1 Business Online Survey Privacy Notice

This privacy notice relates to businesses who fill in this business survey.

This privacy notice explains why the contracted independent team (EKOS Ltd) are asking for personal information from you, how this information will be used and how it will be protected. It also sets out your rights.

#### **Why is this information being collected and what will it be used for?**

Your information is being collected in relation to research into the Economic, Cultural and Social impact of Snowsports in Scotland that has been commissioned by the Scottish Government.

You are being asked personal details by EKOS to ensure that a cross-section of businesses within Scotland are included in survey responses, and to better understand levels of dependency and reliance on the mountain resorts for income.

Personal data can be collected and used in this way under the terms of data protection legislation in the UK, those of Articles 6(1)(e) and 9(2)(g) of the General Data Protection Regulation (GDPR) and the Data Protection Act (2018).

#### **What information is being collected?**

This survey is administered through the online platform SNAP. Through completing this survey, we are provided with:

- Your IP address - which will be deleted as soon as we download the data from the software.

The information you are being asked to provide in this survey is:

- Name of your business.
- Local authority area in which the business is based.
- Number/breakdown of employees.
- Annual turnover.
- Proportion of income generated through snowsports and non-snowsports activities at the mountain resorts.

This may not always be direct personal information but may refer to an individual.

#### **Who will have access to my personal information?**

Only named individuals within EKOS who are directly involved in the project will have access to this information. Your information will not be given to Scottish Government and will be reported in aggregate form only.

#### **How will your information be kept secure?**

Your information will be stored securely by EKOS. Full details of our Privacy Policy can be found on our website: <https://www.ekos-consultants.co.uk/privacy-policy/>



## **How long will it be kept for?**

All digital files containing personal information will be deleted by EKOS once the research project has been concluded and the final report has been signed off by the Scottish Government. The contract end date is 31 August 2022.

## **What are your rights?**

As set out in data protection legislation, you have the following rights:

1. The right to be informed of the collection, use, sharing and retention of your personal data.
2. The right of access to your personal information.
3. The right to have inaccurate personal information rectified or completed if it is incomplete.
4. The right to have your personal information erased in certain circumstances.
5. The right to restrict processing or the use of your personal information in certain circumstances.
6. The right to data portability i.e. to obtain and re-use your personal data for your own purposes.
7. The right to object to the processing or use of your personal information in certain circumstances.
8. Rights in relation to automated decision making and profiling.

## **How to contact us**

If you want to know what information EKOS holds about you or to exercise any of the rights set out above, you can contact EKOS via email at [nicola.graham@ekos.co.uk](mailto:nicola.graham@ekos.co.uk)

## **What if I have concerns?**

If you have concerns about how your personal data has been used, you can contact the Scottish Government's Data Protection Officer:

Stuart Gardener  
Victoria Quay  
Edinburgh  
EH6 6QQ  
Email: [DataProtectionOfficer@gov.scot](mailto:DataProtectionOfficer@gov.scot)

If you feel Scottish Government has not resolved your information rights concern, you have the right to lodge a complaint with the Information Commissioner's Office (ICO), The ICO is the supervisory authority responsible for data protection in the UK. For further information, including independent data protection advice and

information in relation to your rights, you can contact the information Commissioner at:

The Information Commissioner, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Tel: 08456 30 60 60. Website: [www.ico.org.uk](http://www.ico.org.uk)

You can also report any concerns here: <https://ico.org.uk/make-a-complaint/>

## 9. Summary Data – Visitor Survey

### About you

Table 9.1: Can I please confirm your full postcode?

	Number	Percentage
Scotland	1,269	83%
Rest of the UK	248	16%
Rest of the World	13	1%

Source: IBP Visitor Survey.

N=1,530

Note: EKOS analysis and coding based on postcode data for UK, and tick box for those who lived outwith the UK. Elsewhere in the UK (town or region was also specified) and elsewhere outside of the UK (country was specified).

Table 9.2: How many people are in your immediate party today, including yourself (by gender and age)?

	Female	Male	Gender not Specified
Aged 15 or under	274	276	50
Aged 16-34	432	480	31
Aged 35-59	651	784	44
Aged 60+	152	250	40
<b>Total</b>	<b>1,509</b>	<b>1,790</b>	<b>165</b>

Source: IBP Visitor Survey.

Table 9.3: Are you a member of a ski club?

	Number	Percentage
Yes	263	17%
No	1,261	83%

Source: IBP Visitor Survey.

N=1,524

Table 9.4: Do you use websites or social media channels to find out about snowsports in Scotland?

	Number	Percentage
Yes	1,178	77%
No	350	23%

The main sources of information used includes mountain centre websites, Facebook, Instagram, Twitter, and Google.

Source: IBP Visitor Survey.  
N=1,528

Table 9.5: Have you visited a mountain centre and / or artificial slope in Scotland prior to your visit today/your most recent visit, including any previous visits to this mountain centre / artificial slope?

	Number	Percentage
Visited another mountain centre in Scotland previously	1,166	77%
Visited another artificial slope in Scotland previously	480	32%
Only visited this centre/ artificial slope before	266	18%
First visit to a mountain centre /artificial slope in Scotland	64	4%

Source: IBP Visitor Survey.  
N=1,514.

Multiple response question where respondents could select more than one option and all that applied. Percentages may total more than 100% as a result.

Table 9.6: Which other mountain centre have you visited in Scotland?

	Number	Percentage
Cairngorm Mountain Resort	765	65%
Glenshee	716	61%
Nevis Range	658	56%
Lecht 2090	627	54%
Glencoe Mountain Resort	617	53%

Source: IBP Visitor Survey.

N=1,166.

Multiple response question where respondents could select more than one option and all that applied. Percentages may total more than 100% as a result.

Table 9.7: Which other artificial slopes in Scotland have you visited?

	Number	Percentage
Snow Factor, Glasgow	280	58%
Midlothian Snowsports Centre, Hillend	247	51%
Adventure Aberdeen Snowsports	138	29%
Glasgow Ski & Snowboard Centre	109	23%
Bearsden Ski and Board Club	97	20%
Alford Ski Centre	79	16%
Glenmore Lodge	79	16%
Firpark Ski Centre	65	14%
Polmonthill Snowsports Centre	42	9%
Loch Insh Outdoor Centre	41	9%
Huntly Nordic and Outdoors Centre	32	7%
Newmilns Snow and Sport Complex	30	6%
Lagganlia Outdoor Centre	21	4%
RM-Condor Arbroath	19	4%

Source: IBP Visitor Survey. N=480.

Multiple response question where respondents could select more than one option and all that applied. Percentages may total more than 100% as a result.

Table 9.8: How often, in a typical year, would you visit mountain centres and/or artificial slopes in Scotland?

	Number	Percentage
Often (e.g., every couple of months or more)	680	45%
Occasionally (e.g., a few times a year)	539	35%
Rarely (e.g., once a year)	303	20%

Source: IBP Visitor Survey.  
N=1,522

## About your trip

Note: Respondents who were interviewed in person by IBP at a mountain centre or artificial slope or who self-completed the survey on the day of their visit at a mountain centre were then asked a range of questions about their visit that day. Respondents who completed the online survey were asked to think about and provide further details about their most recent visit to a mountain centre or artificial slope facility in Scotland (where applicable).

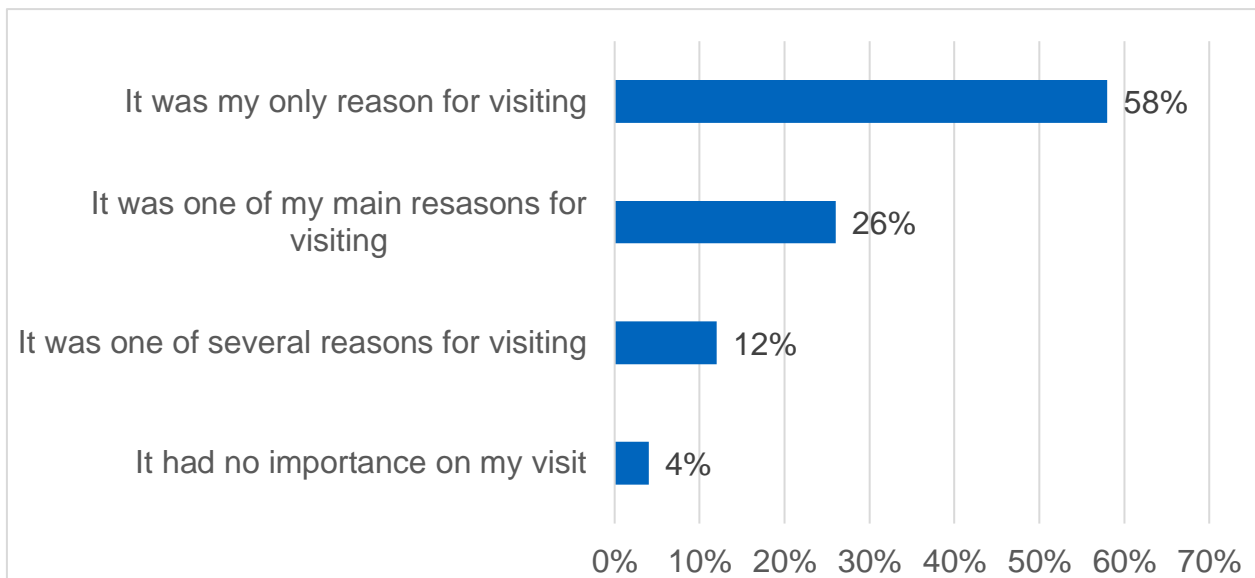
Table 9.9: Interviewer to select which mountain centre or artificial slope in Scotland the interview is taking place (or individual to select if self-completing the survey on-site or individual completing the survey online to select their most recent visit)

	Number	Percentage
Glenshee	441	29%
Cairngorm Mountain	425	28%
Glencoe Mountain Resort	360	24%
Nevis Range	131	9%
Lecht 2090	127	8%
Firpark Ski Centre	21	0%
Newmilns Snow and Sports Complex	15	0%
Glasgow Ski & Snowboard Centre	8	0%
Polmonthill Snowsports Centre	1	0%
Snow Factor, Glasgow	1	0%

Source: IBP Visitor Survey.  
N=1,530.

Note: artificial slope facilities with no interviews/responses have not been included in the table.

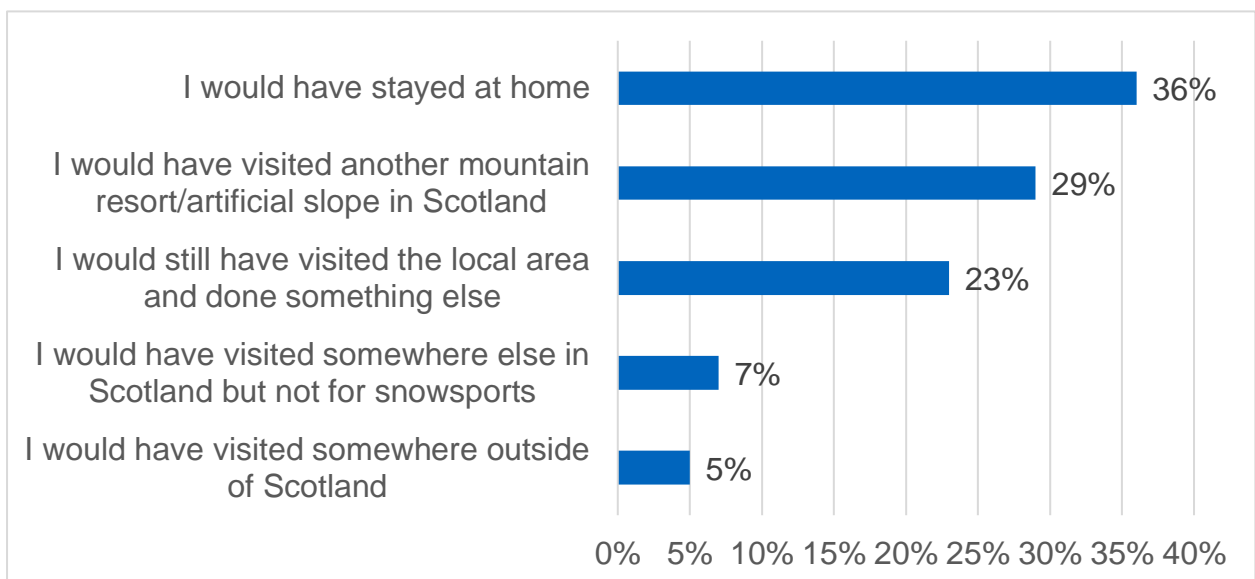
Figure 9.1: How important was (insert name of mountain centre / artificial slope) in your decision to visit the local area / Scotland?



Source: IBP Visitor Survey.

N=1,228.

Figure 9.2: If you had not visited (insert name of mountain centre/ artificial slope) what would you likely have done instead?



Source: IBP Visitor Survey.

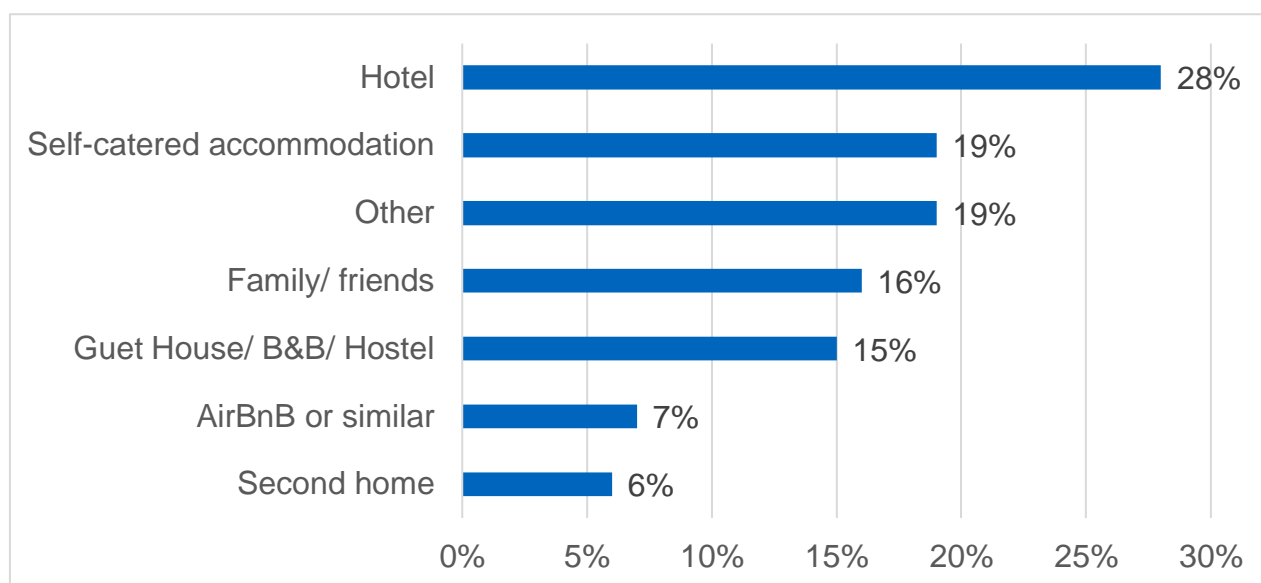
N=1,469.

Table 9.10: Are you spending any nights away from home as part of your trip to the mountain resort or artificial slope?

	Number	Percentage
Yes	538	36%
No	946	64%

Source: IBP Visitor Survey.  
N=1,484.

Figure 9.3: What type of accommodation are / were you staying in?



Source: IBP Visitor Survey.  
N=538.

Multiple response question where respondents could select more than one option and all that applied. Percentages may total more than 100% as a result.

Table 9.11: How many nights have / will you stay in each of the following? Enter number in each option, including 0.

	Number (Total)
The local authority area where this mountain centre or artificial slope is located	2,946
Elsewhere in Scotland	939

Source: IBP Visitor Survey.  
N=492



Table 9.12: On average, how much have / will you spend on accommodation (per night) for your whole trip to the mountain centre 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.

	£ (Average)	£ (Total)
The local authority area where this mountain centre or artificial slope is located	£96	£427,484
Elsewhere in Scotland	£50	£143,837

Source: IBP Visitor Survey.  
N=472

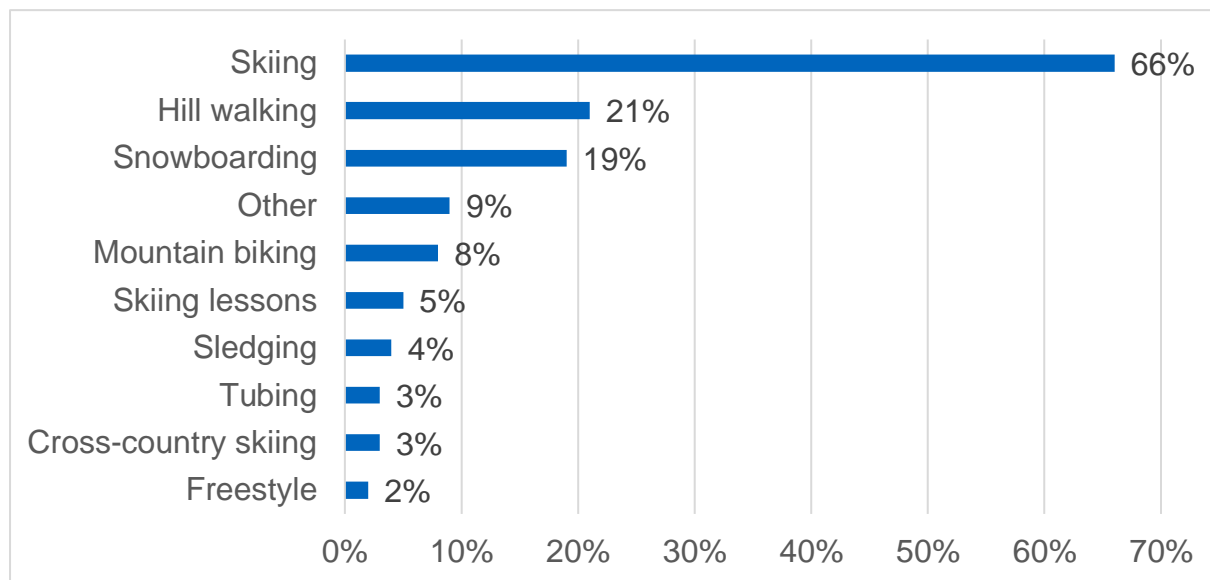
Table 9.13: What is your personal (just you, not your whole party) estimated expenditure for your whole trip to the mountain resort/artificial slope on the following?

	£ (Average)	£ (Total)
Food	£31	£47,871
Drink	£12	£19,015
Entertainment	£5	£7,155
Equipment hire	£9	£13,948
Transport	£21	£32,849
Shopping	£10	£14,826
Other	£8	£11,628

Source: IBP Visitor Survey.  
N=1,530

## About your experience today/ your most recent visit

Figure 9.4: What activity or activities are you personally participating in / did you participate in?



Source: IBP Visitor Survey.

N=1,530.

Multiple response question where respondents could select more than one option and all that applied. Percentages may total more than 100% as a result.

“Other” responses included sightseeing, bird watching, winter climbing, and ski touring.

Table 9.14: How would you rate your visit today in terms of the following aspects, using a scale of 1 (very satisfied) to 5 (very dissatisfied)?

	<b>Satisfied /very satisfied</b>	<b>Neither satisfied nor dissatisfied</b>	<b>Dissatisfied/ very dissatisfied</b>	<b>Not applicable</b>	<b>Base</b>
Ease of entry to centre/ facility	86%	8%	6%	0%	1,514
Signage and direction on-site	85%	9%	4%	2%	1,516
Being made to feel welcome	84%	9%	6%	2%	1,521
Availability of car parking	81%	12%	6%	1%	1,523
Quality of overall experience	78%	15%	6%	0%	1,522
Help and support	77%	11%	5%	7%	1,503
Covid precautions	69%	10%	2%	19%	1,493
Quality of overall offer	68%	19%	10%	3%	1,502
Quality of facilities	63%	23%	13%	1%	1,494
Cost/ affordability	62%	24%	12%	2%	1,514
Quality of the slopes	60%	20%	12%	7%	1,509
Café/ catering facilities	59%	21%	10%	10%	1,497
Quality of equipment (if hired)	29%	6%	3%	62%	1,295
Availability of public transport	19%	6%	19%	57%	1,441

Source: IBP Visitor Survey.

Table 9.15: What, if anything, would make the biggest difference to improving your overall quality of experience?

In an open-ended question that asked respondents “What, if anything, would have made the biggest difference to improving your overall quality of experience”, some common themes emerged.

Reflecting the make up of the respondents who took part in the survey, much of the feedback related to mountain centres.

- Better weather conditions.
- More snow.

The afore-mentioned factors are of course outwith the control of the operators.

Other comments included: ensuring facilities like the funicular and chairlifts are open/functioning (e.g. improving maintenance, improved communication with visitors); and having full access to the mountain centre (i.e. the top of the mountain was closed).

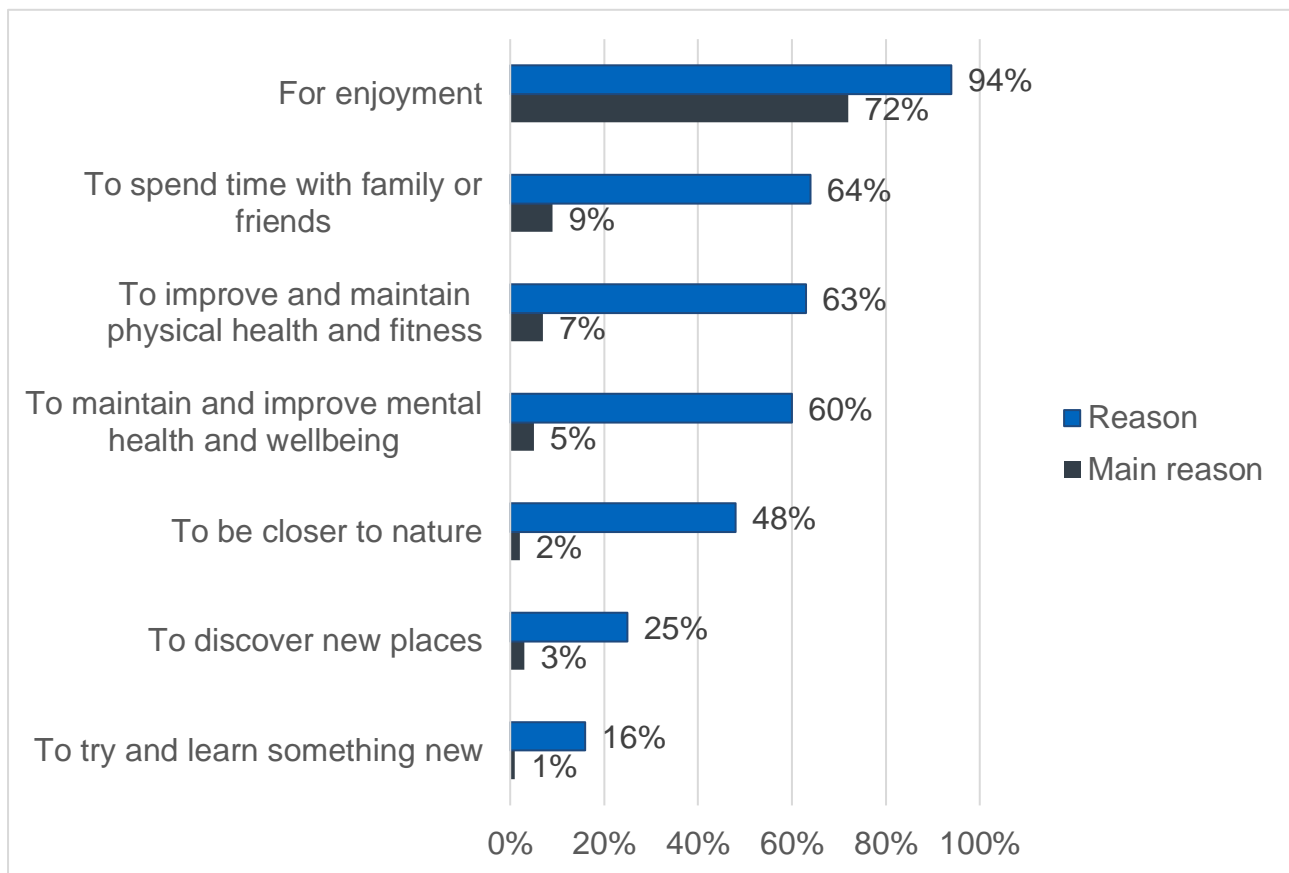
Some respondents drew attention to the need to develop the infrastructure servicing mountain centres and artificial slopes, including more public transport options, more public toilets, bigger car parks, and electric vehicle (EV) charging points.

Finally, some respondents felt the visitor experience could be improved by reducing the cost of certain things. Car parking, lifts, and food were all mentioned.

Others said there needs to be more staff in order to reduce the amount of queuing that visitors need to do (e.g. at ticket offices).

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

Figure 9.5: What are your main reasons for you taking part in outdoor activities such as skiing, snowboarding, hillwalking, mountain biking?

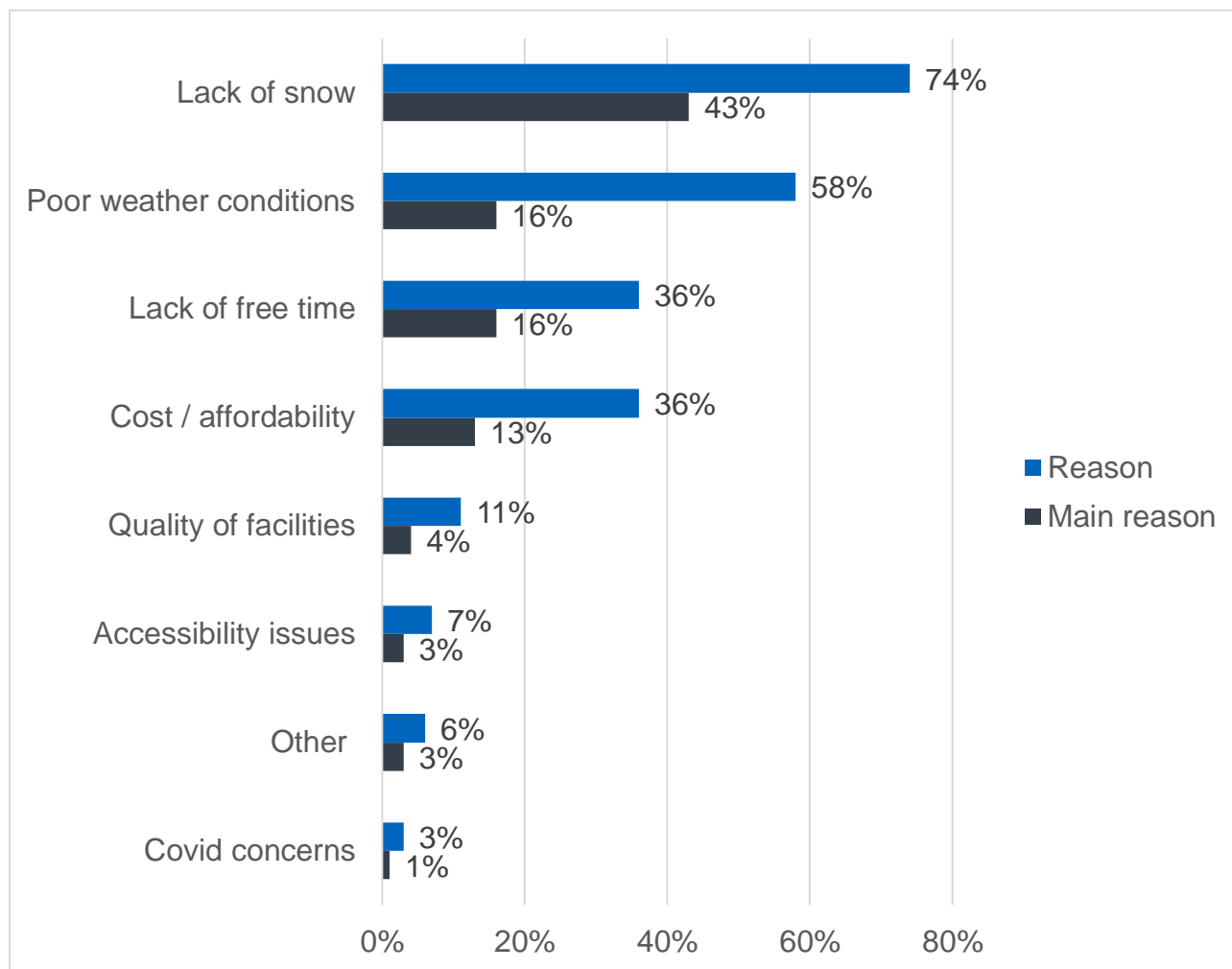


Source: IBP Visitor Survey.

N=1,510.

Multiple response question where respondents could select more than one option and all that applied.

Figure 9.6: 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?



Source: IBP Visitor Survey.  
N=1,518.

Multiple response question where respondents could select more than one option and all that applied.

Other responses included the distance to resorts, old age/ injuries, and a lack of public transport. Please note several respondents commented on the poor management of the Cairngorm Resort as a factor.

Table 9.16: What, if anything, would make the biggest difference to reducing your barriers to taking part in these types of outdoor activities more often?

In an open-ended question that asked respondents “What, if anything, would make the biggest difference to reducing your barriers to taking part in these types of outdoor activities more often?” some common themes emerged, which were broadly similar to those in Table 9.15.

Reflecting the make-up of the respondents who took part in the survey, much of the feedback related to mountain centres.

- Better weather conditions.
- More snow.
- Cheaper Prices

The weather factors are outwith the control of the operators, but a substantial portion of respondents identified the need for more artificial snow making.

Other comments included: ensuring the funicular is reopened and repairing/improving chairlifts.

A few respondents identified the need to develop the infrastructure servicing mountain centres and artificial slopes, including better public transport, bigger car parks and better snow clearing on roads.

## 10. Summary Data – Club Survey

Ten clubs responded to the online survey aimed at snowsports clubs who are members of Snowsport Scotland. The data tables below present absolute values as it is good practice not to use percentages when total responses are less than one hundred.

Table 10.1: Where is your club based (i.e. main address)?

Local authority	Number
Highland	5
Aberdeenshire	3
City of Edinburgh	1
Glasgow City	1

Source: EKOS Club Survey and analysis.  
N=10

Table 10.2: What is your club's current total membership?

Number of members	Number of clubs
10 or less	2
Between 11 and 50	3
Between 51 and 100	1
101+	4

Source: EKOS Club Survey.  
Clubs provided a number, and this has been coded.  
N=10

Table 10.3: How many members does your club currently have by gender? Please leave blank if you do not know.

Gender	Number of members	Average number of members by gender
Female	238	34
Male	340	49
Prefer not to say	-	-

Source: EKOS Club Survey.  
N= 7 clubs.



Table 10.4: How many members does your club currently have by age group?  
Please leave blank if you do not know.

Age group	Number of members	Average number of members by age group
15 or under	116	23
16-34	108	22
35-59	253	42
60+	104	21

Source: EKOS Club Survey.  
N= 6 clubs, total membership = 581.  
Clubs provided a number and this has been coded.

Table 10.5: How many members does your club currently have by ethnic group?  
Please leave blank if you do not know.

Ethnic group	Number of members
White Scottish, Other British, Irish, Polish, Gypsy/Traveller, Roma, Showman/Showwoman, Other white ethnic group	308
Mixed or multiple ethnic groups	2
Asian, Scottish Asian or British Asian	Pakistani, Scottish Pakistani or British Pakistani Indian, Scottish Indian or British Indian Bangladeshi, Scottish Bangladeshi or British Bangladeshi Chinese, Scottish Chinese or British Chinese Other 10
African, Scottish African or British African	for example, Nigerian, Somali -
Caribbean or Black	For example, Scottish Caribbean, Black Scottish -
Other ethnic group	Arab, Scottish Arab or British Arab, Other e.g. Sikh, Jewish. -

Source: EKOS Club Survey.

N= 5 clubs.

Table 10.6: How many members does your club currently have by disability?  
Please enter a total (including 0), provide a breakdown if you can, or leave blank if you do not know.

	Number of clubs
Total	3
Deafness or partial hearing loss	-
Blindness or partial sight loss	1
Learning disability or difficulty	2
Physical disability	2
Mental health condition	-
Other condition	-

Source: EKOS Club Survey.

Note: some individuals have more than one disability.

N=5

Table 10.7: How has membership changed, if at all, over the five-year period 2015 to 2019 (i.e. the time period before COVID-19).

Membership	Number of clubs
It increased a lot	1
It increased a little	5
It remained relatively stable	3
It decreased a little	1
It decreased a lot	-

Source: EKOS Club Survey.

N=10

Table 10.8: A. Where has the increase in club membership occurred over this period? B. What has been the main factor?

	A – Number of clubs	B – Number of clubs
More females involved	2	
More males involved	1	
More children aged 15 or under involved	2	2
More people aged 16-34 involved		
More people aged 35-59 involved	3	2
More people aged 60+ involved	1	
Not sure/don't know		2

Source: EKOS Club Survey.  
N=6

A. Multiple response question where respondents could select more than one option and all that applied

Table 10.9: A. Where has the decrease in club membership occurred over this period? B. What has been the main factor?

	A – Number of clubs	B – Number of clubs
Less females involved		
Less males involved		
Less children aged 15 or under involved		
Less people aged 16-34 involved		
Less people 35-59 involved	1	
Less people aged 60+ involved	1	
Not sure/don't know		1

Source: EKOS Club Survey.  
N= 1

A. Multiple response question where respondents could select more than one option and all that applied

Table 10.10: Are there any wider factors that have driven the increase or decrease in club membership between 2015 and 2019?

Membership	Number of clubs
Yes	2
No	2
Not sure/don't know	6

Qualitative feedback highlighted the following: One club was recently newly established, and the increase was driven by this. The other club noted that social media presence has attracted new members.

Source: EKOS Club Survey.  
N=10

Table 10.11: What, if anything, has been the impact of COVID-19 on club membership – so thinking about membership levels between 2020 and now?

Membership	Number of clubs
It increased a lot	-
It increased a little	-
It remained relatively stable	6
It decreased a little	2
It decreased a lot	2

**Can you provide more detail on the impact of the pandemic on club membership?**

Wider feedback confirmed that the pandemic had a negative impact on club income. Clubs were unable to operate as usual, activities were suspended, some members “drifted away”, and there was less incentive for new members to join. Lockdown restrictions on travel and social distancing also had an impact. Even where membership had been relatively stable, clubs noted that activity was significantly reduced.

Table 10.12: What, if anything, are the main barriers to increasing club membership?

<b>Barriers</b>	<b>Number of clubs</b>
Lack of volunteers	6
Lack of coaches	5
Lack of public awareness	4
Lack of facilities to accommodate more people	3
Other barrier(s)	3
Limited links to schools	1
No barriers	-

Source: EKOS Club Survey.

N=9.

Multiple response question where respondents could select more than one option and all that applied. Numbers may total more than 9 as a result.

“Other” includes lack of enthusiasm, access to equipment, and the closure of the funicular railway at Cairngorm Mountain Resort.

Table 10.13: What activities and programmes does your club offer/provide?

Activities	Number of clubs
Coaching for skills development	6
Coaching for competition	6
Nordic	6
Snowsports trips – in Scotland	5
Snowsports trips – outwith the UK	5
Coaching	4
Social activities/events	4
Snowsports activities aimed at disadvantaged or under-represented groups	3
Snowsports trips - elsewhere in the UK	2
Non-snowsports related activities	2
Freestyle	1
Active School programmes	1
Learn to ski/snowboard programmes	-
School programmes	-
Other	-

Source: EKOS Club Survey.

N=10.

Multiple response question where respondents could select more than one option and all that applied. Numbers may total more than 9 as a result.

Note: Learn to ski may be covered in coaching for skills development.

Table 10.14: Has the range of activities and programmes offered by your club increased, stayed the same or decreased? Think about A) in the five years pre COVID 19 pandemic, and b) since the start of the pandemic?

Activities	A. Period pre-COVID-19	B. Since start of the pandemic
Increased	4	2
Stayed the same	5	3
Decreased	-	4

While the negative impact of the pandemic was reiterated by clubs (e.g. trips cancelled/postponed, knock-on impact of travel restrictions and social distancing guidance, in-person activities such as coaching and schools programmes restricted or stopped for a time), there was some feedback that suggests that some clubs: successfully pivoted some activities online (e.g. group meetings, online coaching tutorials); increased their online presence and engagement (e.g. encouraging members to post videos of their personal training); and explored how they could diversify the offer to be more appealing to new members.

Source: EKOS Club Survey.  
N=9 (Pre-COVID-19 and Since the start of the pandemic).

Table 10.15: A. Which of the following mountain centres in Scotland does the club use? B. How often in a typical year does the club use each one?

	A. Number of Clubs	B. More than 5 times in a winter season if weather permits	B. 2-5 times per season if weather permits	B. Less than twice per season
Glenshee	1	-	-	1
Cairngorm Mountain	3	1	1	1
Glencoe Mountain Resort	3	1	-	2
Lecht 2090	1	-	1	-
Nevis Range	1	-	-	1
None	5	-	-	-

Source: EKOS Club Survey.  
N=10

Table 10.16: A. Which of the following artificial slope facilities in Scotland does the club use? B. How often in a typical year does the club use each one?

	A. Number of Clubs that use the facility	B. At least weekly	B. Monthly	B. Every few months	B. Less often than every few months
Aberdeen Snowsports Centre	-				
Alford Ski Centre	-				
Bearsden Ski and Board Club	-				
Firpark Ski Centre	-				
Glasgow Ski & Snowboard Centre	1		Not answered		
Glenmore Lodge	3	2			1
Huntly Nordic and Outdoors Centre	3	2	1		
Loch Insh Outdoor Centre	1				1
Lagganlia Outdoor Centre	-				
Midlothian Snowsports Centre, Hillend	1			1	
Newmilns Snow and Sports Complex	-				
Polmonthill Snowsports Centre	1				1
RM-Condor, Arbroath	1				1
Snow Factor, Glasgow	4				4
None	2				

Source: EKOS Club Survey.



N=8

Table 10-17: What happened to your club’s use of mountain centres and/or artificial slope facilities in Scotland during the pandemic? (i.e. compared to a typical year)

Activities	Club use of mountain centres	Club use of artificial slopes
Increased	-	1
Stayed the same	1	2
Decreased	4	5

Qualitative feedback was that facilities were closed for a long period of time and then some only opened part of the time. Travel restrictions were also in place.

Source: EKOS Club Survey.

N=5 (clubs who use mountain centres) and N=8(clubs who use artificial slopes)

Table 10.18: A) In general terms, what do you think are the main reasons people have for taking part in snowsports activities? B) What do you consider is the main reason?

	A. All reasons	B. Main reason
For enjoyment (e.g. something like to do, enjoy it)	10	6
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)	7	3
To maintain and improve mental health and wellbeing (e.g. to relax, to unwind, to ease any worry, stress, tension or anxiety)	7	-
To be closer to nature (e.g. to enjoy scenery and wildlife, to have access to nature)	6	-
To spend time with family or friends (e.g. to socialise, to connect with others, to have shared experiences)	5	-
To try or learn something new (e.g. a new recreational activity, improve skills and technique, learn new skills)	3	1
To discover new places (e.g. sightseeing and/or getting to know a new area, cultural interests)	3	-

Source: EKOS Club Survey.

N=10

All reasons: Multiple response question where respondents could select more than one option and all that applied. Number may total more than 10 as a result.

Table 10.19: What, if any, are the main barriers to participation in snowsports?

	Number of clubs
Cost of participation	7
Lack of facilities	5
Transport	4
Choice in how to spend leisure/free time	3
Other	3
Time commitments	2
Family commitments	1
Poor/cold weather puts some people off	-
No barriers	-

Source: EKOS Club Survey.

N=10

Multiple response question where respondents could select more than one option and all that applied. Number may total more than 10 as a result.

Table 10.20: Do you have any ideas of ways in which the mountain centres in Scotland could improve and diversify their offer to increase the quality of the offer/experience and improve their financial sustainability?

The main suggestions put forward by clubs for how mountain centres in Scotland could improve and diversify their offer to increase the quality of the offer/experience and improve their financial sustainability are summarised below.

It should be noted that a wide range of points were mentioned, none to any great extent:

- Improve uplift/ lift facilities.
- Expand the offer e.g. mountain biking, Nordic facilities, rollerski.
- Improve roads, transport, and parking.
- Make access to centres more affordable.
- Improve attractiveness of areas surrounding the centres e.g. remove discarded tow machinery, fix broken snow fences, reduce litter, etc.
- Increase promotion and marketing.
- Better management of mountain centres.

Source: EKOS Club Survey.

Table 10.21: Do you have any ideas of ways in which the artificial slope facilities in Scotland could improve and diversify their offer to increase the quality of the offer/experience and improve their financial sustainability?

For artificial slopes, suggested improvements put forward by clubs were as follows:

- Improve maintenance and facilities.
- Offer other activities to increase income e.g. rollerski, cross country.
- Ensure facilities are affordable for people to access.

As above, absolute numbers were small.

Wider feedback from clubs highlighted that many Nordic skiers, ski-tourers, backcountry skiers and ski-mountaineers do not require a commercial snowsports centre to participate in their sport. Further, these clubs said that such provision makes an important contribution to local economies (e.g. food and drink, accommodation) – but there is a perception that this was not always acknowledged or recognised.

# 11. Summary Data – Business Survey

Twelve businesses responded to the online survey aimed at businesses located near the mountain centres.

The data tables below present absolute values as it is good practice not to use percentages when total responses are less than 100.

The number of responses to the survey was low and its findings should be treated with caution. Further, not every respondent answered all survey questions.

Table 11.1: Is any of your business' turnover generated by the mountain centres in Scotland? For example, bed and breakfasts and hotels might benefit from overnight stays from those taking part in snowsports (e.g. skiing) and/or non-snowsports (e.g. mountain biking) activities at the mountain centres nearby.

	Number of businesses
Yes	12
No	-

Source: EKOS Business Survey.  
N=12

Table 11.2: In which local authority is your business based?

From a drop-down list	Number of businesses
Highland	12

Source: EKOS Business Survey.  
N=12

Table 11.3: What is the nature of your business (e.g. hotel)?

	Number of businesses
Accommodation	4
Food and drink	1
Leisure and recreation, including outdoor adventure	6
Other	1

Source: EKOS Business Survey.  
Open-ended question coded by EKOS  
N=12

Table 11.4: How many employees does your business have?

	Number of businesses
Micro (less than 10)	7
Small (10–49)	4
Medium (50-249)	1
Large (250+)	-

Source: EKOS Business Survey.  
N=12

Table 11.5: How many of the following members of staff does your business have?

	Number of businesses	Total number of employees	Range - employees
Part-time	7	29	1-15
Full-time	9	151	1-100
Seasonal/temporary	6	37	2-20

Source: EKOS Business Survey and analysis.  
N=10.

Table 11.6: What proportion of your staff are from the local authority in which the business is based? An estimate will do.

	Number of businesses
0%	1
Between 1 and 9%	-
Between 10% and 25%	-
Between 26% and 50%	1
Between 51% and 75%	2
Between 76% and 99%	2
100%	5

Source: EKOS Business Survey.  
N=11

Table 11.7: Which of the following mountain centres in Scotland does your business rely on for some of its turnover?

	Number of businesses
Nevis Range	8
Glencoe Mountain Resort	6
Cairngorms Mountain Resort	3
The Lecht 2090	3
Glenshee Ski Centre	-

Source: EKOS Business Survey.  
N=12.

Multiple response question where respondents could select more than one option and all that applied. Numbers may total more than 12 as a result.

Table 11.8: In a typical year, what proportion of your business' turnover is generated by the mountain centres in Scotland – through snowsports and/or non-snowsports activities?

	Snowsports activities	Non-Snowsports activities
0%	2	1
Between 1% and 9%	7	6
Between 10% and 20%	3	-
Between 21% and 30%	-	1
Between 31% and 40%	-	-
Between 41% and 50%	-	-
Between 51% and 60%	-	-
Between 61% and 70%	-	-
Between 71% and 80%	-	1
Between 81% and 90%	-	1
Between 91% and 100%	-	1

Source: EKOS Business Survey.  
N=12

Table 11.9: In a typical year, what is your business’s annual turnover?

Eight businesses provided details on their business’ annual turnover – this ranged from £45,000 to £4,000,000, with an average of £1.04 million.

Table 11.9: COVID-19, was the importance of the mountain centres in Scotland to your business changing?

	Number of businesses
It had become more important	2
No change in importance	4
It had become less important	3

Source: EKOS Business Survey.  
N=10. One business started during the pandemic.

Table 11.10: How important or not important would you say the mountain centres in Scotland is currently to your business as a source of income generation?

	Number of businesses
Very important	1
Important	6
Neither important nor not important	-
Not that important	2
Not at all important	3

Source: EKOS Business Survey.  
N=12

Table 11.11: When does your business generate income from the mountain centre(s) you selected?

	Number of businesses
All year round	9
Winter season only	3

Source: EKOS Business Survey.  
N=12

Table 11.12: What impact (both positive and negative), if any, do the mountain centres have on the local communities in which they are based? Think about the mountain centre(s) which your business relies on for some of its turnover.

### **Positive**

- Helps to bring people to the area, and to more remote/rural parts of the country.
- Repeat visitors.
- Tourist attraction/destination – snowsports and non-snowsports activities.
- Creates employment for local people.
- Spin-off benefits for local businesses (e.g. visitors that stay in the local area and spend money in the towns and local shops, cafes, and restaurants).
- Helps to generate professional athletes, including those who take part in major sporting events (e.g. Winter Olympics).

### **Negative**

- Environmental impact and environmental degradation of paths, etc.
- Snow cover conditions are increasingly unreliable because of climate change.
- Ski lifts at the centre, including the funicular railway (Cairngorm) – limited flexibility to open in a diverse range of conditions.
- There is scope for more collaborative and joint working between mountain centres and other local businesses for the benefit of everyone.

Source: EKOS Business Survey.  
Open-ended question coded by EKOS.



Table 11.13: Do you agree or disagree that the snowsports sector in Scotland generates each of the following benefits/impacts? Again, think about the mountain centre(s) which your business relies on for some of its turnover.

	<b>Strongly agree</b>	<b>Agree</b>	<b>Neither agree nor disagree</b>	<b>Disagree</b>	<b>Strongly disagree</b>
Creates and supports employment in the local area	6	5	-	1	-
Increases footfall for local businesses/area	5	5	1	-	1
Encourages snowsports participants to visit/ experience nearby places/attractions (e.g. discover new places or things to do nearby)	5	2	3	1	1
Attracts non-snowsports visitors to the area in the summer months	7	3	1	-	1
Supports the local tourism and visitor economy	8	3	-	1	-
Helps to improve and maintain physical health and fitness of snowsports participants	7	4	1	-	-
Helps to maintain and improve mental health and wellbeing of snowsports participants (e.g. to relax, to unwind, to ease any worry, stress, tension or anxiety)	6	3	3	-	-
Provides opportunities for snowsports participants to be closer to nature (e.g. to enjoy scenery and wildlife, to have access to nature)	5	5	1	-	-
Other	-	-	-	-	-

Source: EKOS Business Survey.

Table 11.14: How important would you say the mountain centres in Scotland will be to your business as a source of income generation over the medium-term (i.e. next five years)?

	<b>Number of businesses</b>
Very important	1
Important	6
Neither important nor not important	1
Not that important	1
Not at all important	3

Source: EKOS Business Survey.  
N=12

Table 11.15: Which of the following options do you think are the most viable opportunities for mountain centres to improve and/or diversify their offer?

	<b>Number of businesses</b>
Replace ageing uplift	7
Other	7
Greater snowmaking capacity	6
A shift towards to low carbon/renewable energy sources	6
Build new infrastructure for year-round activities (e.g. mountain-biking, high wire)	6
An increased focus on biodiversity	5
Allow gondola rides in summer for hiking	5
Offer year-round passes for accessing the grounds	5
Improve food and beverage offering	5
Diversify income streams	4
Improve car parking	4
Provide educational tours	2

Source: EKOS Business Survey.

N=12.

Multiple response question where respondents could select more than one option and all that applied. Numbers may total more than 12 as a result.

## **12. Business Group Discussion Notes**

The Cairngorms Business Partnership helped to arrange a group discussion with some of its members. Members located in and around three mountain centres were invited to attend (Cairngorms Mountain Resort, The Lecht, Glenshee Ski Centre). The video conference session took place on 8 July 2022 and involved 10 participants.

### **A mix of businesses affected by winter sports**

Those involved in the group discussion ranged from accommodation providers to hospitality, and from retail to outdoor activity providers. The discussion with local businesses confirmed that the snowsports sector in Scotland had a direct and indirect affect on a wide range of businesses.

### **Knowledge, expertise, and passion**

Those businesses that participated in the group discussion had considerable knowledge and expertise of snowsports. It was clear that all had a passion for the area in which they lived and worked, for winter sports, and for Scotland's mountain centres.

Some wore different "hats". In addition to providing valuable feedback from a business perspective, many if not all were existing "customers" of the mountain centres – they learned to ski or do ski in Scotland. Many were actively involved in their local community, including members of community development trusts and "ambassadorial" roles with Ski Scotland.

### **Businesses are dependent to varying degrees on the mountain centres**

The reliance or dependency of the businesses that took part on the mountain centres varied. While for some this reliance was felt to be easy to measure (e.g. ski schools, retail), for others it was considered much more difficult to quantify.

The weather was the main factor said to influence the level of dependency businesses had on the mountain centres. Participation in snowsports was said by businesses to be massively dependent on weather conditions and was also snow dependent. They reported that more extreme weather conditions had resulted in mountain centres "not getting the level of snow they used to" and often remained closed due to wind/storm conditions.

The general trend reported was that that the level of dependency had been reducing.

### **Many businesses have already diversified**

It would be safe to say that all businesses had adapted their business model to be sustainable and to be more resilient to fluctuations in visitor numbers for skiing and snowsports.

Some businesses (e.g. ski schools, adventure tourism) talked about the importance of having “back-up plans” – “Plans A, B and C” for customers when weather conditions or a lack of sustainable snow prevents access to mountain centres.

The main feedback from businesses was that customers would be “more forgiving” if you had alternatives planned.

## **Snowsports is one activity customers may wish to do**

For businesses located in areas with “good” visitor infrastructure that helped to attract people to the area (e.g. Cairngorms Mountain Resort, Nevis Range), it was reported that people have different reasons for visiting the area:

- Many want to take part in snowsports activities.
- Some want to do other things (e.g. walking, mountain-biking, ice-skating, etc).

Having a mix of different “things for people to do” was considered important given the extent to which the mountain centres in Scotland were subject to “vagaries of the weather”.

High quality visitor infrastructure was seen as essential by businesses, as was continuing to invest in improving visitor infrastructure in areas surrounding the mountain centres.

The mountain centres were considered by businesses to be important natural assets and “world-class” – however, the infrastructure at the centres was also felt to be in need of significant investment (e.g. lifts).

Businesses reported that additional investment would help to meet changing customer expectations, improve the visitor experience, and encourage return visits.

## **Mountain centres in Scotland have a USP**

The consensus among business participants was that Scotland’s mountain centres help to differentiate Scotland as an outdoor destination/adventure sport destination from other areas across the UK, whether there is snow or not.

They provide the area with a USP.

Having a USP was felt to be beneficial as people have much more choice nowadays regarding how to spend their leisure time. There was reported to be increasing competition for leisure time.

In terms of USP, Aviemore was felt to be “the only true ski centre/area in the UK”:

- Glencoe, Glenshee and The Lecht are remote and attract day visitors. Businesses reported that they do not have a wider visitor economy ecosystem.
- Snowsports was felt to be a small part of the Nevis Range business model.

- Cairngorms Mountain Resort (like the Nevis Range) was said to attract overnight visitors.

The rest of the mountain centres in Scotland were, however, felt to benefit from the unique profile and brand associated with Aviemore and the Cairngorms Mountain Resort.

As noted above, elements of the product were considered by business participants to be world-class, however, it was felt more could be done to “package the wider offer up” and to promote it more.

## **Winter destination / adventure tourism destination**

Mountain centres, such as Cairngorms Mountain Resort, were viewed by businesses as critical to the vision of firmly establishing the area as a winter destination and tourism destination in its own right.

The mountain centre gave “credibility” to the winter/tourism destination vision, and other businesses were also considered an important part of the mix. Mountain centres were said to be part of the “social fabric” of the area and central to the whole piece – “Aviemore is the starting point”, the Cairngorms Mountain Resort is “an important and integral part of the jigsaw”.

Positioning the area and its businesses to support this vision was considered a priority. Businesses felt there was a strong synergy between the mountain centres and wider business base, which provided opportunities to promote the visitor offer as a whole package.

Businesses reported that the years when there is good snow will be “the icing on the cake” (i.e. knock-on impacts for other businesses in the area), while the winter destination concept included snowsports as well as a much broader range of attractions and activities which would provide alternatives for local residents and visitors when weather/snow conditions were poor. There have been many “lean winters” and a year-round offer, including a diversified winter destination offer, could help to “bolster” the local economy to come out stronger the other side.

Further diversification and creating year round employment opportunities were said to be key to delivering on this ambition. It would also create thriving local communities – creating a “buzz” and good atmosphere about the place.

## **Improved marketing**

There was felt to be a need to improve marketing to promote the mountain centre areas as year-round destinations. This would help to drive more people to visit – for snowsports and for non-snowsports activities. There was considered to be further opportunities to tap into the large domestic market.

Businesses reported that videos and social media content were popular ways people liked to receive information. They provide opportunities to not only promote the mountain centres, but the range of other attractions, facilities and activities available (i.e. increased promotion of the local area as a whole).

There were also felt to be more opportunities to promote it as an “integrated tourism destination”.

## **Attracting and retaining people can be a challenge**

Employment patterns were said to be different in rural areas. There were considered to be higher levels of self-employment, part-time employment, seasonal employment, and portfolio working (i.e. multiple jobs in similar or unrelated areas) compared to urban Scotland.

Access to good quality employment was viewed by businesses as critical to:

- Reducing the prevalence of young people moving away from home to work or due to the (perceived) limited local employment opportunities.
- Attracting working age people to return or move to the local area.

While the businesses had some permanent employees, many also used freelance staff. A common feature was that freelance or part-time staff had multiple jobs. For example, being a ranger in the summer and a ski instructor in the winter. Providing more year round employment opportunities was considered vital to talent attraction and retention.

## **Interdependences**

There were considered to be a range of factors that impact on rural areas’ ability to attract and retain people. Among other things, businesses reported that this included a lack of:

- Good quality employment opportunities.
- Appropriate and affordable housing.
- Social, leisure and recreational opportunities – “things to do”.

While these are not skills issues, if they are not addressed, it was felt that mountain centres and local businesses would be less likely to be successful.

## **Community engagement and involvement**

Regular and meaningful community engagement and involvement at a grassroots level was seen as essential by businesses. In relation to Cairngorms Mountain Resort this was considered to have been lacking. Although, a member of the Aviemore and Glenmore Community Trust mentioned this was beginning to move in the right direction.

The closure of the funicular railway was said to have had a significant impact on the number of visitors to the area, a knock-on effect to local businesses, and had damaged the Aviemore/Cairngorms brand. The businesses who participated felt that the Cairngorms Mountain Resort had been poorly managed, operated and marketed.

It was reported that a lack of community consultation had not helped. There was a strong feeling among businesses that it should be transferred into community ownership.

It was considered vital that the mountain centre operator and public sector agencies (e.g. Highlands and Islands Enterprise) aimed to rebuild strong relationships with the local community, with local businesses, and with customers of the Cairngorms Mountain Resort.

Thinking can not be “insular” – there was felt to be too much “focus on the hill”. It was suggested that the Cairngorms Mountain Resort could not be looked at in isolation from the wider offer in the surrounding area.

Stakeholders need put more focus on “investing in the future”.

There was said to be a role for all key stakeholders to play in helping ensure a sustainable Cairngorms Mountain Resort, and thereby a thriving local economy and community – “it is important that we get it right”.

Businesses felt that there was scope for stakeholders to collaborate and work together to deliver on the vision of creating an integrated and complementary winter/summer destination and visitor economy.

## **Suggestions to improve and/or diversify the offer**

Feedback in relation to Cairngorms Mountain Resort, centred on the following:

- There is a need to reconnect and rebuild relationships with the local community and businesses, and with customers.
- It is important to develop a shared vision for the future that has strong community involvement and buy-in. Previous masterplans have lacked this input. There is an opportunity for “blue-sky thinking” to help get all ideas on the table.
- Further diversification of the offer e.g. mountain-biking.
- The snow factory could be re-sited further up the mountain.
- The capacity of the funicular is limited and can be prone to fail during heavy snow. Existing uplift needs to be improved and increased in scale and would be capable of getting more people up the mountain more quickly.
- Uplift options could be improved by laying artificial surface for uplifts so not reliant on snow.
- Explore wider options to increase funding and income generation (e.g. crowdfunding, establish a hydro power plan to support snow-making and improve environmental credentials).





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