

The Economic, Cultural and Social Impact of the Scottish Snowsports Sector

Snowsports Facilities in Scotland



There are five mountain centres in Scotland: Cairngorm Mountain; Glencoe; Glenshee; Lecht 2090; and Nevis Range. The five mountain centres are important assets to Scotland's rural economy. They also contribute to a strong sense of place, and to the unique culture and heritage of the local communities within which they are firmly rooted.

There are 14 artificial slope facilities located across urban and rural communities in Scotland. The artificial slopes continue to play a crucial role in helping people, in particular children and young people, to grow in confidence, skill, and ability. They are an important gateway into snowsports.

Research Aims and Methodology

1. To analyse the economic, cultural, and social value of the Scottish snowsports sector.
2. To understand the impact of the COVID-19 pandemic on the snowsports sector.
3. To consider the long-term sustainability of the snowsports sector in Scotland.
4. To recommend how the snowsports sector may be strengthened.

The research involved: 38 stakeholder consultations, visitor surveys (1,530 responses), an online club survey (10 responses), and engagement with businesses located near the mountain resorts (12 online survey responses and 10 businesses involved in a group discussion).

Strengths of the Snowsports Sector in Scotland



Scotland has a network of facilities that make access possible for most of its population. Around 3.5 million people are within a two-hour drive and over five million are within a three-hour drive of a mountain centre. Almost 2.8 million are within a 30-minute drive of at least one artificial slope facility, rising to almost 4.5 million within a 60-minute drive.



The snowsports facilities are managed by, and involve, passionate and knowledgeable people.



When the snow is good, the quality of offer at the mountain centres is good and caters for a wide-range of interests and competencies – from beginners to advanced.



The mountain centres continue to explore ways to diversify the offer, and to increase their appeal to a wider audience year-round. Each centre is at a different stage, and some will be better placed to diversify than others. The Nevis Range is a good example of this in practice – it offers snowsports, gondola, mountain-biking, walking, paragliding, etc.



Scotland's snowsports facilities have benefited greatly from significant capital investment over the years, including from the Scottish Government and Enterprise Agencies. Investment has been used to diversify and strengthen the centres' offerings.

Challenges for the Snowsports Sector in Scotland



There is a heavy reliance on the domestic market for the mountain centres. Ski Club of Great Britain survey data (2020) also shows that Scotland is not viewed as a destination for a skiing holiday.



The COVID-19 pandemic had a massive impact on the world-wide snowsports market. This included immediate shutdown in business across the sector. In Scotland the numbers visiting the mountain centres have not yet recovered. Demand at the artificial slopes has, however, recovered better.



The number of people in Scotland participating in snowsports is declining. Non-snowsports activities at the mountain centres, however, tend to be more resilient and not subject to the same level of variation.



Decreasing predictability of weather patterns (e.g. less snowfall, greater infrequency of snow) threatens viability of mountain centres, in particular those who are less able to diversify.



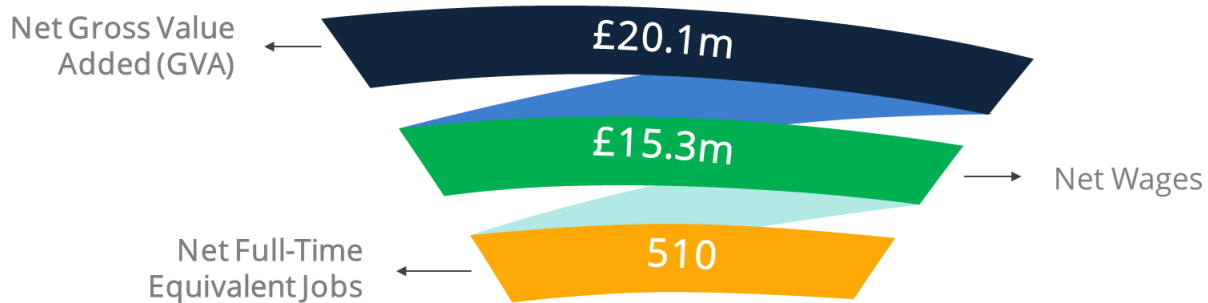
Reliance on grant funding and a lack of diversity of income/revenue streams is a continuing challenge for snowsports sectors.



The sector also faces challenges in staff recruitment and retention; cost pressures; and ageing infrastructure.








Economic Impact

The Economic Impact Assessment (EIA) estimates that the snowsports sector in Scotland generates (2022):



Social and Cultural Impact

Visitor survey reasons for snowsports participation

	For enjoyment	94%
	Spend time with family and friends	64%
	Improve and maintain physical health and fitness	63%
	Improve and maintain mental health and wellbeing	60%
	Be close to nature	48%
	Discover new places	25%
	Try/learn something new	16%

Source: IBP Visitor Survey.

N=1,510. Multiple response question where respondents could select more than one option and all that applied.

Actions to Strengthen the Scottish Snowsports Sector

The Scottish snowsports sector will need to prioritise actions to strengthen the sector, harness a partnership and collaborative approach where appropriate, and explore ways to diversify income streams to become less reliant on public funding and to ultimately become more self-sustaining.

The following actions could be considered to help achieve this:

Diversification

- Invest in infrastructure which will make all-year round access possible
- Introduce new and varied activities during the year that require access to the mountains

Access and participation

- Encourage the next generation of snowsports participants through programmes of snowsports activities
- Consider the options to improve and integrate public transport connections to each ski centre from main population areas where demand is highest

Collaboration

- Develop a shared vision for the future of the snowsports sector that has strong community involvement and buy-in

Staffing

- Consider how the sector can collectively support smaller, privately-owned, organisations with succession planning and longer-term sustainability

Improvement

- Support the shift towards low carbon/ renewable energy sources
- Improve centres and existing infrastructure to help the sector to adapt to climate change, allowing more environmentally friendly and sustainable ways to operate, and ensure they match and exceed customer expectations

