



SUSTAINABLE SPORT

2025 Review of the 2020-2030 National Snowsport Facilities Strategy



[ski-snowboard.scot](https://www.ski-snowboard.scot)



SNOWSPORT
SCOTLAND

Table of Contents

1.0 National Facilities Strategy 2020-2030	3
2.0 Rationale and Remit for the National Facilities Strategy Review	4
3.0 2025 Review of the 2020 Strategic Action Plan	5
4.0 Scotland’s Snowsports Facilities	8
5.0 Mountain Resort Overview	9
6.0 Snowsports Participation in Scotland	10
7.0 Strategic SWOT Analysis	12
8.0 Snowsport Facility Investment Requirements	14
9.0 Social, Economic and Political Landscape	17
10.0 Conclusion and Recommendations	20
11.0 Refinement of the 2030 Vision	22
12.0 Proposed Priority Actions	23

1.0 National Facilities Strategy 2020 – 2030

- 1.1 Snowsport Scotland is the Scottish Governing Body for Snowsports and as such, has responsibility to ensure that the sport is well served by a network of strategically positioned and well-equipped facilities, to allow people of all abilities and ages to safely engage in recreational and competitive snowsports.
- 1.2 In 2019 Snowsport Scotland commissioned the development of a National Facilities Strategy (the '**Strategy**') which was published in 2020 with the intention of providing a ten-year strategic plan for the development of snowsport facilities in Scotland.
- 1.3 Data informing the production of the Strategy was provided by the five mountain resorts and fourteen artificial facilities alongside input from key stakeholders and snowsport clubs to produce a set of recommended objectives and actions in support of a 2030 vision for snowsports.
- 1.4 The Strategy was a significant undertaking, running to 90 pages with an additional 85 pages of appendices, resulting in the production of a vision and mission for snowsports facilities in Scotland.
- 1.5 Vision:
- For the maximum number of people possible to be able to enjoy their chosen snowsport discipline in convenient, appealing and inclusive facilities that are viable and capable of meeting future challenges and sustaining growth in the sport.*
- 1.6 Mission:
- To facilitate the provision of convenient, appealing and inclusive places for communities to enjoy a variety of snowsport facilities.*
- 1.7 To support the delivery of the vision and mission, the Strategy calculated that a total of £85.5 million would be required to bring facilities up to a prescribed standard. However, the Strategy also concluded that this level of investment was unrealistic and a revised figure of £15 million was used to develop a prioritised investment plan for the sector, supported by three principles:
- *Ensure as many people can access facilities as possible and that the existing network stays in place. This means ensuring all facility elements, or as many as possible, are considered to be of adequate quality.*
 - *Ensure that the quality of snowsports facilities are as high as possible; this means making sure the quality of surfaces (artificial and snow) participants practice on are as high as possible and that this is prioritised ahead of ancillary facility elements (such as uplift, lodges etc).*
 - *Ensure that all disciplines of snowsports can be accessed by those living in the three largest cities of the country (Glasgow, Edinburgh and Aberdeen) and that these facilities are sufficient for them to practice to an advanced level.*
- 1.8 Of the £15 million, the Strategy allocated £10 million to mountain resorts and £5 million to artificial facilities in order to produce a prioritised investment plan.
- 1.9 It should be noted that no central budget of £15m existed for the development of snowsports facilities and Snowsport Scotland's influence over any budget identified by individual facilities was, and continues to be, limited.

2.0 Rationale and Remit for the National Facilities Strategy Review

- 2.1 Following the publication of the National Snowsport Facilities Strategy in 2020, the COVID-19 Pandemic, Brexit and war in Ukraine have resulted in a negative economic impact, contributing to increased operating costs for snowsport facilities with the consequence that funds available for investment, expansion and diversification have been significantly reduced.
- 2.2 Due to these unprecedented global events, Snowsport Scotland and stakeholders within the snowsport sector proposed that the Strategy required review and updating.
- 2.3 The Ski Scotland Marketing Group (SSMG) is an industry working group for four of the five mountain resorts in Scotland (excluding Cairngorm Mountain) and provides comprehensive information about skiing, snowboarding and other activities across these facilities. SSMG work in partnership with Snowsport Scotland to increase participation in snowsports in Scotland and signpost opportunities across the mountain resorts.
- 2.4 In April 2024, with the support of SSMG, Snowsport Scotland approached Sustainable Sport to review the Strategy.
- 2.5 The remit of the 2025 National Facilities Strategy Review is as follows:
- *To request updated data from the mountain resorts and artificial facilities across Scotland in relation to facility profile, participation (skier days), SWOT analysis, and investment requirements in support of the previously published 2030 vision.*
 - *To review progress against the 2020 National Facilities Strategy Strategic Action Plan.*
 - *To propose refinements to the 2030 vision and priority actions in respect of the submitted data, considering the wider social, economic and political landscape, and to shape recommendations via a snowsport sector facilities forum for key stakeholders established in partnership with Snowsport Scotland.*
- 2.6 In May 2025 the remit was amended to prioritise the mountain resorts. A subsequent stage of work, focusing on the artificial facilities, will be considered in due course following the completion of this initial stage.

3.0 2025 Review of the 2020 Strategic Action Plan

3.1 The 2020 National Facilities Strategy identified a number of objectives in relation to the delivery of the national vision for snowsports and that, by the end of 2030, *Snowsport Scotland would...*

Facilities Retention and Investment		
Objective F1	<i>...ensure that all areas are subject to either a net increase, or at the very least, no change to the current supply and access to snowsport facilities across all disciplines.</i>	Strategic Action Plan Actions 1 and 2
Objective F2a	<i>...undertake a feasibility study to ascertain the cost and deliverability of developing Strategic Snowsport Centres in Scotland...</i>	Strategic Action Plan Action 3, 13 and 14
Objective F2b	<i>...undertake a feasibility study to ascertain the cost and deliverability of developing (a) national snowsport centre in Scotland...</i>	Strategic Action Plan Action 4
Objective F2c	<i>...undertake a funding projection assessment to determine the likely level of funding available to invest into snowsport facilities over the next 10 years.</i>	Strategic Action Plan Action 5
Objective F3	<i>...should the outcome of F2 show that delivering the strategic snowsport centres vision is given the projected funding environment, then prioritise 80% of investment into Scottish Facilities on enhancing the surface quality of snowsport.</i>	Strategic Action Plan Action 6
Objective F4	<i>...establish a network of park-based roller ski clubs in the central urban belt. These should include hire facilities and opportunities for coaching to introduce a new market to Nordic skiing.</i>	Strategic Action Plan Action 8 and 9
Objective F5	<i>...engage snowsport surface experts to develop detailed recommended practice standards for the maintenance of artificial snowsport centres.</i>	Strategic Action Plan Action 7
Objective F6	<i>...carry out an audit of all snowsport facilities regarding their accessibility for people living with additional needs and compliance with the Equalities Act 2010.</i>	Strategic Action Plan Action 10
Data Strategy and Insight		
Objective D1	<i>...produce a data strategy that provides Snowsport Scotland with the capability and insight of centralised participation and utilisation data from snowsport facilities and associated programmes.</i>	Strategic Action Plan Action 11
Objective D2	<i>...commission an industry leading expert to carry out an assessment of the core market segmentation profile for each discipline of snowsport.</i>	Strategic Action Plan Action 12
Collaborative Working		
Objective C1	<i>...work with centres and key stakeholders to establish a joint procurement framework with a view to maximise efficiencies around capital expenditure for such items as; uplift infrastructure, snowmaking infrastructure; rental equipment purchasing and regular maintenance works.</i>	Strategic Action Plan Action 16
Objective C2	<i>...work with Ski Scotland, Highlands and Islands Enterprise, Visit Scotland and with clubs and centres, in particular mountain resorts, to identify opportunities to create a network of events aimed at boosting tourism to the Highlands and attracting visitors to the mountain resorts.</i>	Strategic Action Plan Action 17
Environmental Sustainability		
Objective E1	<i>...have lobbied local and national government to have improved public transport links to both artificial and mountain resorts.</i>	Strategic Action Plan Action 13
Objective E2	<i>...have lobbied local and national government to gain special permissions/exemptions allowing centres to install green energy solutions, such as small wind turbines at their sites.</i>	N/A

3.2 Not all the actions in the 2020 Strategic Action Plan, developed following the identification of objectives in Section 2.1 above, are directly correlated. Some objectives have multiple actions whereas some objectives did not translate into any proposed action e.g. Objective E2.

3.3 To assess progress against the Strategic Action Plan, an assessment was initiated by Snowsport Scotland in November 2024 to determine the progress with the activities identified to deliver the vision for snowsports in Scotland.

3.4 Five categories, with associated colour coding, were identified to enable assessment of progress for each action in the Strategic Action Plan. These being:

- **Blue** **Action Completed**
- **Green** **Action Ongoing, within timescale identified within the Strategy**
- **Amber** **Action Ongoing, outside the timescale identified within the Strategy**
- **Red** **Action Not Started**
- **Black** **Action Not Progressing**

Table of Progress against Outcomes					
No.	Actions	Priority	Start Date	Finish Date	RAG
1	Establish a COVID-19 fund to help mitigate the impact of anti-COVID-19 measures on the Snowsports sector and distribute this on a needs and priority basis.	High	Q2 2020	Q4 2022	Completed
2	Develop and maintain a prioritised risk register of facilities under threat of closure	High	Q2 2022	Q3 2020	Ongoing
3	Tender for a study into the feasibility of developing the Strategic Snowsport Centres in three phases, the cost of this and sources of investment.	High	Q2 2020	Q3 2021	Not Progressing
4	Tender for a study into the feasibility of developing the national snowsport (centre) including the cost of this and sources of investment.	Medium	Q2 2020	Q3 2021	Not Progressing
5	Undertake a consultation exercise to discern a robust projection of the likely levels of investment into snowsport facilities available over the next 10 years	High	Q1 2020	Q4 2020	Not Progressing
6	Should the outcomes of the work detailed in F2 show that there is likely to be insufficient funding to realise the 2030 vision for Snowsport, seek to prioritise 80% of funding to snowsport surfaces. This investment should fall in line with a regularly updated 'tactical' action (an initial iteration of which is provided below).	High	Q1 2020	Q4 2030	Not Progressing
7	Consult with key stakeholders within the artificial snowsport surfaces community to establish a recommended best practice for the maintenance of the various types of matting. This should be with clear reference to the financial and staffing resources available.	High	Q2 2020	Q3 2021	Not Progressing
8	Devise a strategic plan to establish and sustain Nordic roller ski clubs in the central urban belt.	High	Q2 2020	Q4 2020	Completed
9	Implement the plan (e.g. to add a minimum of two clubs with physical infrastructure present, one club in each major settlement; Glasgow and Edinburgh).	High	Q2 2021	Q4 2025	Not Progressing
10	Undertake an audit of all facilities to ascertain their compliance with the Equalities Act 2010 and the cost of upgrading facilities, where relevant.	High	Q2 2020	Q3 2021	Not Progressing
11	Tender for a full data strategy out to market and appoint a qualified industry professional to produce this strategy	High	Q2 2020	Q4 2020	Not Progressing
12	Depending on the outcome and findings of the strategy, implement a nation-wide data capture tool that will provide Snowsport Scotland with robust, accurate insight into how often facilities are being used and by whom	High	Q4 2020	Q1 2020	Ongoing
13	Convene a panel of key stakeholders to determine a joint strategy for advocating for improved public transport links to both mountain resorts (on weekends) and to artificial centres in or near towns. Where possible leverage to have public transport routes established to maximise accessibility to snowsport facilities across Scotland.	High	Q2 2020	Q4 2020	Not Progressing
14	Design and put out to tender a brief for a feasibility study to undertake a detailed investigation regarding the need for artificial snowsport facilities in Dundee and Inverness. This should include market testing to understand the appetite for constructing and operating such a facility.	High	Q2 2020	Q1 2021	Not Progressing

15	Complete the feasibility study for Dundee and Inverness project and implement the conclusion.	High	Q2 2020	Q4 2025	Not Progressing
16	Utilise the site-specific investment matrix, as well as the numerous group meetings organised by Snowsport Scotland to determine what capital purchases could benefit from joint procurement and pursue this as an option and establish a joint procurement framework	Medium	Q2 2020	Q1 2021	Completed
17	Establish a specific action group to research the possibility of a series of events utilising the mountain resorts being established and if successful, support the action group as required	Medium	Q2 2020	Q1 2021	Completed

3.5 The table above reveals limited progress against the 2020 Strategic Action Plan. The majority of actions (11 of 17) fall into the ‘Not Progressing’ category. Four actions were assessed as ‘Completed’ and two actions were categorised as ‘Ongoing’.

3.6 To understand the rationale behind this position, Snowsport Scotland provided the following assessment:

- The National Facilities Strategy was published in draft in 2020 but was never formally concluded nor submitted to the Snowsport Scotland Board for endorsement. This forms part of the rationale for the commissioning of the 2025 review.
- The collective actions allocated to Snowsport Scotland within the Strategic Action Plan, such as the tendering and commissioning of feasibility studies, were reliant upon additional budget being secured from Scottish Government, which was not achieved.
- The majority of the actions with the 2020 plan fall beyond the remit of Snowsport Scotland, as it neither owns nor operates any snowsport facilities and has no jurisdiction or authority to direct or control their operations, budget allocation or investment proposals.

3.7 The lack of formal endorsement by the Snowsport Scotland Board, and the lack of formation of key stakeholder actions groups to drive forward the identified actions, offers some rationale as to why the majority of the 2020 strategic actions were never progressed.

3.8 The absence of Board endorsement may also explain why the Snowsport Scotland Executive team did not include the strategic action recommendations within any operational planning from 2020 onwards.

3.9 The actions that have been assessed as ‘Completed’ or ‘Ongoing (outside timescale)’ were undertaken as part of other ongoing strategic or operational activities. As these actions do not form part of a coherent plan in relation to the progression or delivery of the strategic actions, their completion or progression could therefore be considered coincidental rather than planned.

3.10 It is therefore imperative that the Snowsport Scotland Board consider the revised recommendations emerging from the 2025 review to ensure that:

- They are formally adopted;
- Those recommendations within the remit of Snowsport Scotland are embedded within future operational planning; and
- That any recommendations beyond the remit of Snowsport Scotland as a single entity are endorsed to be taken forward for action with key stakeholders.

4.0 Scotland's Snowsport Facilities

- 4.1 The snowsport sector in Scotland is comprised of facilities, both natural and artificial, that offer opportunities to take part in the various skiing and snowboarding disciplines ('**snowsports**').
- 4.2 Snowsports have a long history in Scotland with permanent uplift facilities installed at five mountain areas, the oldest of these resorts being Glencoe with its original uplift facilities installed almost seventy years ago in 1956.
- 4.3 Snowsports hold a celebrated position in Scottish outdoor culture, with towns such as Aviemore expanding rapidly in the 1960's to accommodate the post-war appetite for snowsports, attracting those with a passion for the natural environment and outdoor pursuits.
- 4.4 The development of artificial facilities followed the growth of snowsports across the mountain areas and substantial investment was made in facilities that could provide opportunities for participation outside the winter season. The largest of these within Scotland is Midlothian Snowsports Centre, which was a world-leading artificial facility following its opening in 1965 and remains one of the top ten artificial facilities in the world five decades on.
- 4.5 There are five mountain areas and sixteen artificial facilities recognised by Snowsport Scotland.
- 4.6 The mountain areas offer the best outdoor skiing and snowboarding in the UK and are referred to collectively as the 'mountain resorts' in this review. The mountain resorts are:
- Cairngorm Mountain
 - Glencoe Mountain Resort
 - Glenshee Snowsports Centre
 - Nevis Range Mountain Resort, and
 - The Lecht 2090
- 4.7 The sixteen artificial facilities are:
- Aberdeen Snowsports Centre
 - Abernethy Trust, Nethybridge
 - Alford Ski Centre
 - Ancrum Outdoor Centre
 - Bearsden Snowsport Club
 - Craigclowan School and Nursery
 - Firpark Ski Centre
 - Glasgow Ski and Snowboard Centre
 - Glenmore Lodge
 - Huntly Nordic and Outdoor Centre
 - Lagganlia Outdoor Centre
 - Loch Insh Outdoor Centre
 - Midlothian Snowsports Centre
 - Newmilns Snow and Sports Complex
 - Polmonthill Snowsports Centre, and
 - RM-Condor, Arbroath

5.0 Mountain Resort Overview

- 5.1 Sustainable Sport and Snowsport Scotland met with representatives from each of the mountain resorts to outline the objectives of the Strategy review and to discuss the current position at each centre. These meetings took place between June and July 2024.
- 5.2 To gather the required data for the Strategy review, Sustainable Sport worked in partnership with Snowsport Scotland to develop separate tailored questionnaires for the mountain resorts. These were provided to the mountain resorts between September and November 2024.
- 5.3 It should be noted that the scope of this review does not include an update to the detailed mountain resort profiles as included as Appendix 1 of the 2020 National Facility Strategy. Instead, a summary across the mountain resorts has been provided in Section 5.4, for reference.
- 5.4 Mountain resort facility overview:

Mountain Resort	Elevation	Snowsport Capacity (per day)	Total Runs (Number)	Total Runs (Km)	Green (Number)	Blue (Number)	Red (Number)	Black (Number)
Cairngorm Mountain	1,097m	2,500	33	30km	14	10	7	2
Glencoe Mountain Resort	1,108m	1,200	19	20km	4	6	7	2
Glenshee Snowsports Centre	1,070m	3,500	59	40km	20	19	18	2
Nevis Range Mountain Resort	1,190m	1,500	35	20km	7	12	11	5
The Lecht 2090	645m	2,000	17	18km	4	7	5	1

Mountain Resort	Number of Lifts (inc. Magic Carpet)	Funicular	Gondola	Chair Lift	Drag Tow	Magic Carpet
Cairngorm Mountain	11 (13)	1	0	0	10	2
Glencoe Mountain Resort	8 (10)	0	0	3	5	2
Glenshee Snowsports Centre	22	0	0	3	19	0
Nevis Range Mountain Resort	7 (1)	0	1	1	5	1
The Lecht 2090	10 (12)	0	0	1	9	2

6.0 Snowsports Participation in Scotland

- 6.1 As part of the data collection for this review, SSMG provided snowsport participant data for all mountain resorts for the period 1979 to 2023. Due to the incomplete data set for all resorts from 1979 (only Glenshee Snowsports Centre and The Lecht could provide data for participation pre-1985), 1990 was identified as the baseline year as it was the first year that snowsports participation data across all five mountain facilities was recorded.
- 6.2 Between 1990 and 2023, almost eight million snowsport participant sessions ('skier days') were recorded at the Scottish mountain resorts (n = 7,944,885), an average of just under a quarter of a million snowsport skier days per annum over the period (n = 240,754).
- 6.3 Figure 1 indicates market share for snowsport participation across the five mountain resorts between 1990 and 2023 (excluding 2021 due to pandemic closure).

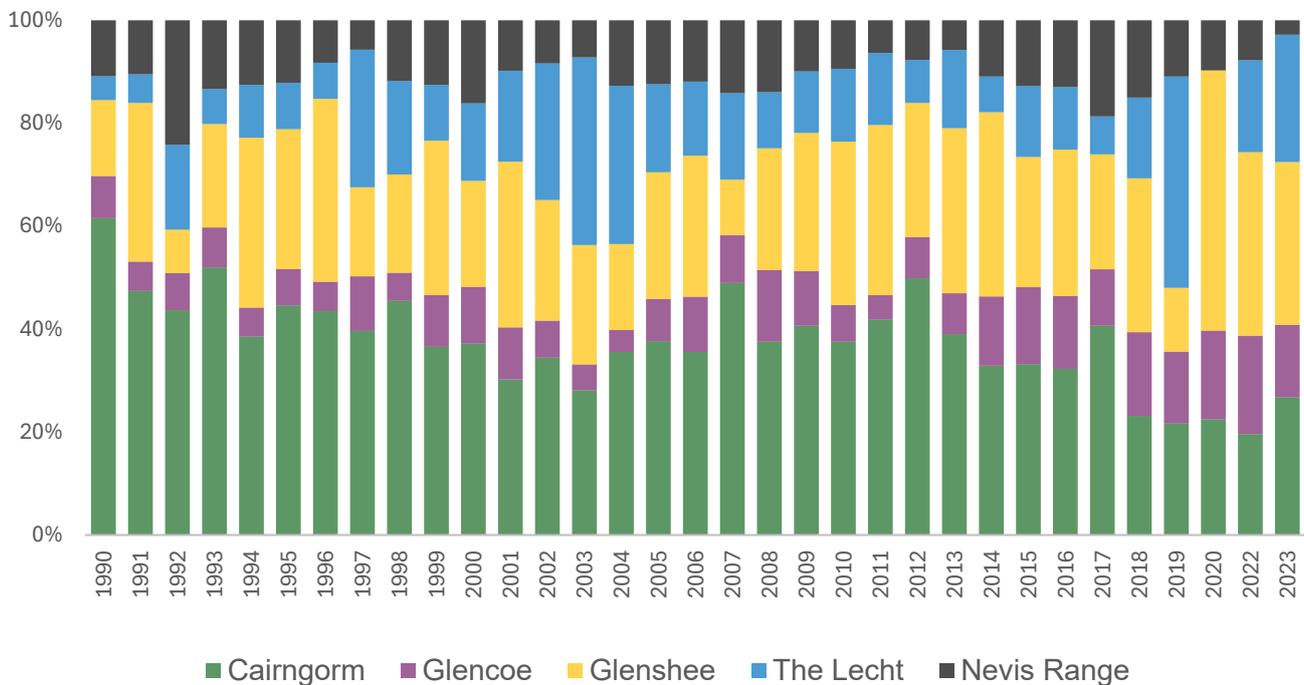


Figure 1 – Snowsport participation (skier days) market segmentation mountain resorts 1990 - 2023

- 6.4 Figure 2 provides an overview of cumulative snowsports participation in Scotland at the mountain resorts between 1990 and 2023 (excluding 2021 due to pandemic closure).

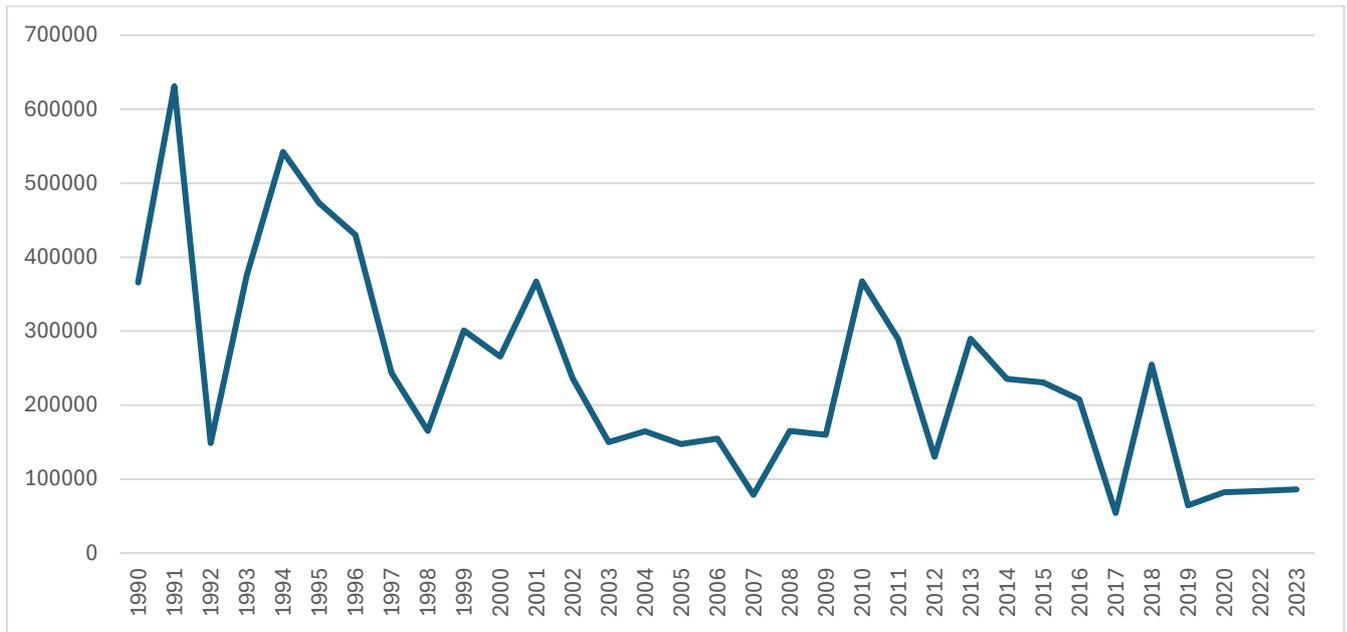


Figure 2 – Cumulative snowsport participation (skier days) across mountain resorts 1990 – 2023

- 6.5 Figure 1 highlights that there are clear variations, both across the individual mountain resorts in any given year which can be related to snow accumulation (or the lack thereof) at individual facilities, and in snowsports participation at a single mountain resort across consecutive years.
- 6.6 For example, Glencoe Mountain Resort recorded a record number of snowsport participant sessions in 2018, an increase of 12% on the previous record set in 2001. This is in no small part due to the significant investment in Glencoe Mountain Resort over this period in physical infrastructure to engage and attract snowsport participants to the facility.
- 6.7 Figure 3 shows snowsport participation at Glencoe Mountain Resort over the same period 1990 – 2023 (excluding 2021 due to pandemic closure).

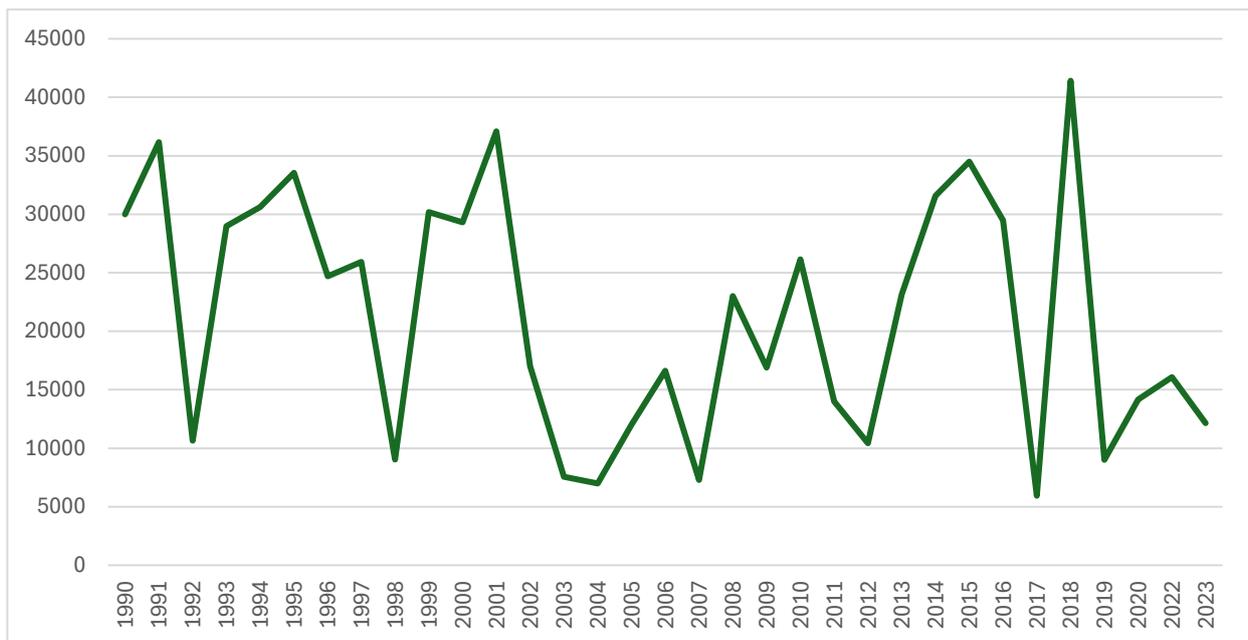


Figure 3 – Snowsport participation (skier days) at Glencoe Mountain Resort 1990 - 2023

- 6.8 Snowsport participant data for recent years should also be considered within the context of the COVID-19 pandemic and resulting lockdown. The lockdown, imposed by the UK Government, as agreed with the devolved governance of the home nations, was announced on 23 March 2020 and had a significant impact on the snowsport sector in Scotland as a stay-at-home order was mandated to address the rapid spread of the COVID-19 influenza virus.
- 6.9 Although restrictions were incrementally lifted, Scottish Government guidance limited free movement between local authority areas. On 4 January 2021, a national lockdown was again introduced in Scotland, impacting participation in snowsports. All COVID-19 restrictions were lifted by the Scottish Government on 21 March 2021. As such, data for 2021 has not been included in Figures 1, 2 and 3 above.
- 6.10 As observed above, snowsports participation at mountain centres can vary between seasons and centres, depending on the availability of snow. To provide an indication of the related stability, or variability, in membership of clubs, Snowsport Scotland provided membership information for the previous 10-year period. This information is provided in Figure 4, below.

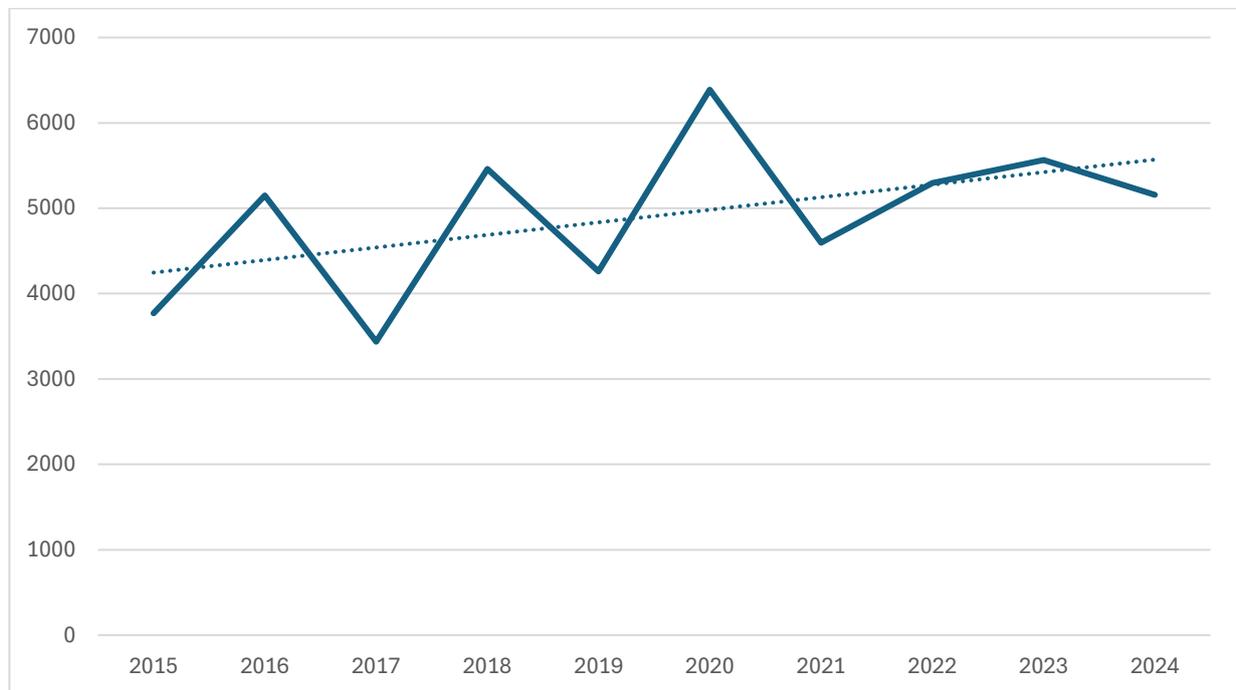


Figure 4 – Snowsport Scotland Club Memberships 2014/15 – 2023/24

- 6.11 The membership data provided by Snowsport Scotland demonstrates that membership of the club community remains strong with an upward trend (dotted line). The current membership of 5,158 members is ahead of the 10-year average of 4,908.

7.0 Strategic SWOT Analysis

- 7.1 An updated strategic analysis of the Strengths, Weaknesses, Opportunities and Threats across the mountain resorts and the Snowsport Scotland Board was undertaken to determine key themes and as a comparison against the SWOT analysis undertaken as part of the original Strategy. The result of the strategic SWOT analysis is provided below.



STRENGTHS IDENTIFIED	WEAKNESSES IDENTIFIED
<ol style="list-style-type: none"> 1. High Demand for Activities – Strong interest from both new and returning customers ensures continued viability. 2. Economic Impact on Rural Communities – Ski centres provide significant economic benefits through tourism, hospitality, and employment. 3. Cross-Sector Employment Opportunities – A significant workforce supports both the ski industry and broader rural economies. 4. Renewable Energy and Sustainability – A commitment to renewable energy generation towards environmental and financial sustainability. 5. Experienced and Knowledgeable Staff – Highly qualified teams with deep knowledge of ski areas and a passion for snowsports. 6. Strong Community and Club Relationships – Strong ties with local clubs and communities, fostering engagement and support. 7. Government Support – A successful track record of securing government funding. 8. Established Infrastructure – Well-developed lift network across multiple geographic areas. 9. Well-Maintained Facilities and Equipment – Including recent slope replacements (i.e. artificial slopes) and high-quality equipment hire ensure a great visitor experience. 10. Patriotic and Unique Experience – Snowsports in Scotland is seen as a point of pride, within a challenging and rewarding environment. 	<ol style="list-style-type: none"> 1. Aging Infrastructure – Many facilities require upgrades, including lifts, changing areas, and cafés. 2. Funding Limitations – Challenges in accessing funding, which are subject to regional variations and ownership models. 3. Limited Public Transport and Access Roads – Poor transport links and reliance on third party-managed access roads hinder accessibility. 4. Energy and Grid Limitations – Some resorts lack National Grid access and the grid’s capacity to support renewable energy is a concern. 5. High Operating Costs and Financial Uncertainty – Delivering a ski season requires significant sunk costs making long-term planning risky. 6. Staff Housing and Accommodation – Lack of seasonal staff housing and accommodation affects recruitment and retention. 7. Recruitment and Workforce Challenges – Difficulty in hiring and retaining seasonal staff, including ski instructors, snowboard instructors, and maintenance engineers. 8. Unpredictable Weather and Snowfall – Dependence on natural snowfall and changeable weather conditions make planning difficult. 9. Lack of Cohesion and Unified Strategy – Centres operate with individual plans rather than a cohesive national approach. 10. Skill Gaps and Workforce Turnover – Shortages of qualified ski and snowboard instructors, relief technicians and high season staff turnover.
OPPORTUNITIES IDENTIFIED	THREATS IDENTIFIED
<ol style="list-style-type: none"> 1. Diversification into Non-Seasonal Activities – Developing non-skiing activities (e.g., mountain biking) and expanding into the summer tourism market. 2. Capital Investment for Infrastructure – Increased investment in facilities, including lifts, snowmaking, and snow storage systems to boost operational efficiency and visitor experience. 3. Expansion of Snowmaking Capabilities – Improving and expanding snowmaking capacity will help mitigate unpredictable weather and extend the snowsport season. 4. Improved Funding Support – Opportunities for improved collaboration as a sector to identify opportunities for increase funding, which can be used for development and expansion. 5. Growth of Freestyle and Adaptive Options – Introducing freestyle options like airbags and increasing adaptive equipment for those with additional support needs. 6. Enhanced Marketing and Promotion – Collective marketing campaigns, including promotion of Scotland’s snowsport resorts as a destination, can attract a wider audience, especially from other areas of the UK. 7. Schools and Educational Programs – Expanding school programs and providing more lessons, especially adaptive sessions, to cater to a diverse range of customers. 8. Growth of Adventure Tourism – Capitalising on the growth of backcountry, wilderness, and experiential skiing can appeal to new demographics and add value to the offer. 9. Increased Chairlift Capacity – Increasing the capacity of lifts, including potential additions like a tow rope or ski touring lifts, can improve access and reduce congestion. 10. Last-Minute and Spontaneous Ski Trips – Take advantage of on the growth of last-minute bookings and day trips, catering to those seeking spontaneous outdoor experiences. 	<ol style="list-style-type: none"> 1. Reliance on Snowsport Income – Over-reliance on snowsport-related income without diversification into other activities can pose risks. 2. Aging Infrastructure – Many facilities, including lifts and snowmaking equipment, are aging and require costly maintenance and upgrades. 3. Funding and Capital Investment Shortages – Insufficient capital investment and lack of adequate funding support limits growth and upgrades. 4. Rising Operating and Energy Costs – Increased energy costs (e.g., for snowmaking) and rising operational expenses threaten profitability. 5. Competitive International Ski Destinations – Cost of travel abroad for guaranteed snow makes Scotland a less attractive option for some tourists. 6. Unpredictable Weather and Natural Snow Cover – Reliance on natural snowfall, combined with changing weather patterns (more rain and wind), creates uncertainty and closures. 7. Climate Change – Warming climate and inconsistent snow conditions pose longer-term challenges for the snowsports industry. 8. Lack of Qualified and Reliable Employees – Staffing challenges, such as low availability of skilled workers and high turnover rates, could impact service quality. 9. Perception and Reputation – Negative perceptions or difficulty in accessing facilities may drive potential customers away. 10. Competition and Fragmentation Between Resorts – Lack of collaboration between resorts could weaken the overall marketing and promotion of Scotland’s snowsport sector.

- 7.2 The strategic SWOT analysis highlights key strengths in the Scottish snowsport industry, such as experienced staff, strong community relationships, previous economic support and an ongoing commitment to sustainability, all of which ensure continued demand and economic impact. However, challenges like staff recruitment and retention, aging infrastructure and unpredictable weather hinder growth.
- 7.3 Opportunities for improvement lie in capital investment, expanding snowmaking, diversifying activities, and improving engagement. The industry also faces threats from climate change, rising costs, and competition from international destinations. To thrive, the sector must seek to address and mitigate its weaknesses, prioritise and capitalise on investment and foster collaboration across snowsports facilities.
- 7.4 The previous SWOT assessment conducted in 2020 concluded that the strength of snowsport facilities in Scotland lie in their accessibility to large catchment areas, including affluent urban centres. The range of facilities, being suitable for all levels of snowsports enthusiasts, was also highlighted. As with the current assessment, the quality of management was regarded as a strength with facilities maintaining positive relationships with key stakeholders.
- 7.5 Snowmaking technology and diversified income streams were also seen as key opportunities, with increasing investment in these areas expected to enhance the appeal of resorts, extend the winter season and attract more domestic and inbound tourism. Opportunities to expand resort activities and improve infrastructure, such as the restoration of the Cairngorm Mountain funicular railway, were regarded as options to further strengthen the sector's potential.
- 7.6 Previous weaknesses that were identified include reliance on first generation, energy-intensive snow factories, along with the high costs of maintenance and limited capital reserves to weather lean years. Furthermore, the competitive nature of funding opportunities was highlighted as complicating the process to secure financial support.
- 7.7 Overall, the latest SWOT analysis emphasises sustainability, workforce challenges and economic resilience whereas the previous assessment focused on accessibility, infrastructure and financial constraints. Despite these shifts, both analyses highlight the importance of investment, diversification, and technological advancements to enhance snowsports participation.

8.0 Snowsport Facility Investment Requirements

- 8.1 The long history of snowsports in Scotland has resulted in a range of operating models across the mountain resorts. These range from publicly owned facilities to privately run facilities operated on behalf of shareholders.
- 8.2 The various ownership and operating models and geographic location of each facility mean that there are unequal opportunities to access grant and public funding support with each facility determining operating strategy and investment requirements based on their specific governance arrangements.
- 8.3 With reference to the mountain resorts, four of the five centres are eligible for, and have previously received funding from, Highlands and Islands Enterprise (HIE) with the exception being Glenshee Snowsport Centre which falls outside the HIE region. Glenshee Snowsports Centre is eligible for, and has previously received funding from, Scottish Enterprise (SE).
- 8.4 The large variances in the individual mountain centres' ability to attract and receive public investment due to the nature of their operating models has been a recurring theme within this review.
- 8.5 Details of the historical investment made by public bodies for snowsports facilities is beyond the scope of this review but can be found within the various economic assessments commissioned by HIE, SE and the Scottish Government, referenced in Section 9.0.



- 8.6 As with the ownership and operating models, the uplift machinery and other equipment across mountain resorts and artificial facilities is diverse - ranging from the funicular railway at Cairngorm Mountain and the gondola lift at Nevis Range Mountain Resort to drag lifts and magic carpets.
- 8.7 It is clear that maintenance of uplift machinery, snow fencing and other equipment is essential in the first instance to ensure that current infrastructure and assets continue to support the provision of snowsports, and related non-snowsports activity, at each of the mountain resorts and artificial facilities.
- 8.8 The maintenance of uplift machinery involves rigorous planning and adherence to safety standards. Maintenance schedules include daily, weekly and seasonal inspections involving repair and replacement.
- 8.9 Typically, uplift cables require replacement every 15-30 years (dependant on usage, load, and environmental conditions) with the lifespan of chairs and gondolas around 20 to 30 years although towers can safely operate for significantly longer (50+ years). Overall, replacement of an entire ski lift should be considered after 25-40 years.
- 8.10 In respect of artificial surfaces, matting typically lasts 7–15 years (dependant on the material, intensity of use, and environmental conditions). Sections of matting can often be replaced individually when damaged or heavily worn, delaying the need for full replacement. Full Replacement typically occurs when the surface shows extensive wear, loses its structural integrity, or no longer provides adequate safety and performance. By adhering to a regular maintenance schedule and monitoring wear, the lifespan of artificial matting can be maximised, reducing costs and maintaining safe, high-performance slopes.
- 8.11 In both instances (uplift and artificial surfaces), the responsibility for maintenance and replacement schedules is determined by each facility, in line with manufacturer’s recommendations and available budget.
- 8.12 Operating models aside, the primary goal of any investment in snowsports at a strategic level are to boost local economies, create jobs, and promote tourism.
- 8.13 Public investment often focuses on infrastructure improvements, such as building ski lifts, roads and public amenities and investment in snowsports infrastructure has demonstrably led to increased growth and participation, in Europe and beyond.
- 8.14 Recent public investment by countries such as Italy, France, Switzerland and Austria support the installation of infrastructure and artificial snow making systems in response to climate change. This investment has resulted in record skier visits, such as in Italy which recorded its highest participation figures in 20 years in 2023/24¹.
- 8.15 Further afield, record investment in the United States Ski Industry (\$812.4m in 2022/23) has also resulted in record participation in 2023/24 with over 10m additional skier days recorded in comparison to the pre-COVID 5-year average¹.
- 8.16 Closer to home, continuing investment in Scottish facilities has also brought demonstrable benefits for facilities.
- 8.17 Glenshee’s investment in snow making facilities provides progression opportunities for snowsports participants, creating a better customer experience. The provision of an intermediate run with artificial snow can accommodate up to 400 skiers per day and provides engagement opportunities for Glenshee’s long-standing school ski programme.

¹ *International Report on Snow and Mountain Tourism (2024), Laurent Vanat*

- 8.18 Following a takeover of Glencoe Mountain Ltd in 2008, the ski area’s market share has grown from 9% (2007) to 19% (2022) through strategic investments. Key improvements include:
- An artificial ski slope for operation during inclement weather
 - New beginner-friendly lifts and installation of snowmaking systems
 - Upgraded rental equipment and a streamlined ticketing system
 - Additional ski lifts, sledging areas and magic carpets for beginners
 - Increasing the number of piste machines fourfold for better snow management
- 8.19 Additional investments in accommodation (microlodges) and a larger base café (opened in 2022) have enhanced the resort’s appeal and revenue. These efforts have extended the ski season, improved the customer experience and ensured the business’ sustainability, even in poor snow years.
- 8.20 As part of the engagement process for the National Facilities Strategy review, all facilities were asked to provide a costed summary of facility investment post-publication of the Strategy in 2020, and to identify the level of future investment required to deliver their strategic objectives. Due to the commercial sensitivity of this data, the submissions have been anonymised to determine key themes alongside the total level of investment.
- 8.21 A summary of facility investment post-2020 for mountain resorts is provided below:

Investment Area (post 2020)	Total Amount of Investment (£)
Building Construction/Refurbishment	6,700,000
Access Uplift (e.g. Chairlift)	1,100,000
Car Park	913,000
Diversification (Non-Snowsport)	910,000
Other Snowsport Infrastructure and Equipment (e.g. Piste Groomer/ Artificial Matting)	877,000
Snowmaking Equipment	400,000
IT/Ticketing	158,000
Energy Efficiency/Energy Generation (Renewables)	148,000
Other Uplift (e.g. Drag Lift)	90,000
Other Access (e.g. Road/Track)	35,000
TOTAL	11,331,000

- 8.22 It should be noted that a significant proportion of the total investment above relates to the investment by Nevis Range towards a sustainable business model, including the construction of the Basecamp Hotel in 2023, providing a range of accommodation options centred within the resort.

8.23 In addition, mountain resorts were also asked to submit their future investment requirements as part of their business modelling:

Investment Area (Future Requirements)	Total Amount of Investment Identified (£)
Access Uplift (e.g. Chairlift)	55,000,000
Snowmaking Equipment	6,820,000
Energy Efficiency/Energy Generation (Renewables)	6,070,000
Utilities and Power Upgrade	5,000,000
Diversification	2,300,000
Building Construction/Refurbishment	2,050,000
Other Snowsport Infrastructure and Equipment (e.g. Piste Groomer/ Artificial Matting)	1,210,000
Other Access (e.g. Road/Track)	950,000
Maintenance (e.g. Car Park, Snow Fencing, Machinery, Snowsport Hire)	362,000
Building Construction/Refurbishment	200,000
Other Uplift (e.g. Drag Lift)	150,000
TOTAL	80,112,000

8.24 Of note was that the mountain resorts highlighted a total of £362,000 per annum was required for the maintenance of current facilities and equipment (e.g. car park, snow fencing, machinery, snowsport equipment hire etc).

9.0 Social, Economic and Political Landscape

9.1 The benefits of participation in sport and physical activity are well documented and form the basis of a national approach for the improvement of health including the Scottish Government’s Physical Activity Delivery Plan ‘A More Active Scotland’, **sportscotland**’s (Scotland’s National Agency for Sport) ‘Sport for Life’ strategy and Snowsport Scotland’s strategy ‘Snowsports for Life’. Extensive research exists that shows increased participation in sport and physical activity leads to positive health outcomes at both an individual and population level.

9.2 Previous reports on the Scottish snowsport sector have also highlighted the importance of accessibility to all socioeconomic groups and to ensure activities are inclusive.

9.3 The Euan's Guide Access Survey is the UK’s largest and longest-running survey on disabled access, with over 6,500 participants¹.

9.4 Across Scotland, it’s often unknown how many sporting facilities have disabled access, what opportunities they offer, or what services are available to support disabled athletes, participants and visitors. This lack of clear information can be a major barrier, leaving people unsure of whether they will be able to compete, participate, coach or support.

9.5 According to the Euan’s Guide’s Access Survey 2024, 62% of disabled people say that if they cannot find disabled access information then they will not risk a visit because they presume it will be inaccessible.

¹ <https://www.euansguide.com/get-involved/access-survey/>

- 9.6 With 21 venues across the artificial facilities and mountain resorts, snowsports has a unique opportunity to become the only one in Scotland where every venue has publicly available disabled access information. This isn't currently possible for many other sports due to the number and variety of venues involved.
- 9.7 There are a number of ways to build a trustworthy picture of access at each venue. This could include accessibility audits carried out by trained professionals, venue staff sharing clear details of the facilities they have in place and disabled participants and visitors contributing their own lived experiences. Each perspective adds unique value, and together they can create a rich, practical, and honest resource that helps others feel confident about visiting, whether they're competing, coaching, or coming along to spectate or support.
- 9.8 In addition, the cultural importance of the snowsport sector should not be underestimated with the mountain centres specifically providing a focus for local communities in addition to providing opportunities for participation with artificial facilities providing a year-round foundation for participation, delivering the majority of all snowsport participant sessions per annum for individuals and clubs.
- 9.9 The Ski Club of Great Britain survey estimates that the number of active UK skiers and snowboarders in 2022/23 equated to 1.8 million, noting that this figure was a drop of about 12% from the pre-COVID-19 peak¹. However, as participation continues to increase following a return to normality, European, American and Asian countries are reporting record participation¹.
- 9.10 Although UK skiers and snowboarders are concerned about the wider impacts of climate change, very few cited lack of snow coverage or climate change in general as a reason they are no longer skiing or snowboarding. The reported drop in market size since COVID-19 is overwhelmingly linked to economic factors².
- 9.11 The snowsport sector in Scotland has been subject to a number of economic reviews which have assessed the sector as contributing:
- £30m per annum alongside supporting 634 full time equivalent jobs (2011)³
 - £44.4m per annum alongside supporting 948 full time equivalent jobs (2016)⁴
 - £20.1m per annum alongside supporting 510 full time equivalent jobs (2022)⁵
- 9.12 It should be noted that although SSMG and Snowsport Scotland were contributors to the 2022 economic assessment, neither organisation have endorsed the conclusions and recommendations within the report citing the lack of data used to determine the outcome of the assessment.
- 9.13 Although the strategic reviews noted above have been informed by the economic conditions and data available at the time of each review, it is clear that snowsport facilities, and in particular the mountain resorts, are important assets within their respective rural areas and play a critical role in supporting economic activity, especially within the winter months.
- 9.14 The 2022 assessment in particular noted that the snowsport sector in Scotland *'lacks strategic cohesion with no real shared vision or shared plans to ensure a successful, sustainable future'*.
- 9.15 Public services in Scotland are also facing unprecedented pressures on budgets with non-statutory services for Local Authorities coming under sharp review. Local authorities are assessing investment into sport and leisure services and leisure trusts and, due to their non-statutory status, local authorities are having to make difficult decisions with resulting cuts to budget and provision in many areas. This has been acutely felt by local communities through the closure of a significant number of swimming pools and leisure centres post-pandemic and a focus on potential opportunities for community asset transfer for public buildings and assets.

¹ International Report on Snow and Mountain Tourism (2024), Laurent Vanat

² Ski Club of Great Britain Consumer Research, 2024

³ Scottish Snowsport Strategic Review (2011), Highlands and Islands Enterprise / Scottish Enterprise

⁴ Snowsports in Scotland: Progress Update (2016), Highlands and Islands Enterprise / Scottish Enterprise

⁵ The Economic, Social, and Cultural Impact of Scotland's Snowsport Sector (2022), Scottish Government



- 9.16 Although the 2022 report highlights that the funding of public services is facing unprecedented pressure, it should be noted that large scale investment in the development and improvement of snowsport facilities is actively underway at a number of publicly owned facilities including Cairngorm Mountain and Midlothian Snowsports Centre to ensure long term sustainable provision across mountain and artificial centres.
- 9.17 Climate change will undoubtedly have a significant impact across the snowsport sector in Scotland in the long term, particularly for mountain resorts whose business models rely heavily on consistent snow cover to generate a significant proportion of their annual operating income. Rising temperatures and shifting weather patterns are likely to result in shorter, less predictable snow seasons, increasing the need for resorts to adapt through sustainable practices.
- 9.18 Snowmaking has become an essential tool for snowsport resorts to ensure consistent and reliable conditions. By using advanced snow guns and fan guns, resorts can create artificial snow when natural snowfall is insufficient. Modern snowmaking systems also optimise energy and water usage, incorporating both renewable energy and recycled water. Snowmaking can ensure early and late-season skiing, thereby extending seasons and helping to stabilise revenue streams, crucial for the local economy.
- 9.19 Investment in artificial snowmaking, while a short-term solution, requires additional water and energy consumption, emphasising the importance of exploring all environmentally responsible options. Additionally, diversification of outdoor activities, such as mountain biking, hiking, and eco-tourism, could provide economic resilience while promoting year-round sustainable tourism.
- 9.20 The sector must also consider baselining and reducing its carbon footprint by adopting sustainable practices, enhancing energy efficiency in resort operations and integrating renewable energy sources. A proactive approach to sustainability will be crucial in ensuring the long-term viability of Scotland's snowsport sector.
- 9.21 Research into climate change and the potential future impact in Scotland by the James Hutton Institute has noted an overall decline in observed snow cover in the Cairngorms National Park between 1969 and 2005 but that there is variability in significant snow events occurring, noting that snow cover may have again increased in the 10 years prior to the report's publication¹.
- 9.22 The report concludes that, even with seasonal variability, snow coverage across Scotland is likely to decline from the 2040s onwards.
- 9.23 The impact of climate change on the sector, and the snowsport sector's environmental impact and route to Net Zero, will be more fully addressed within Snowsport Scotland's Environmental and Sustainability Strategy due for publication in 2025. However, it is apparent that long term financial sustainability for mountain resorts will be increasingly dependent on the generation of income from non-snowsports activity.
- 9.24 Conversely, the challenges posed by climate change present an opportunity for the sector to transition towards 'clean' on-site energy production by adopting newer technology with lower energy requirements and reduced carbon emissions, as well as improving the conservation and management of water for snowmaking. Notably, Nevis Range Mountain Resort has already achieved Carbon Neutral status and is working towards reaching Net Zero ahead of the Scottish Government's target of 2045.

¹ *Snow Cover and Climate Change in the Cairngorms National Park (2020)*, Mike Rivington and Mike Spencer



- 9.25 During the COVID-19 pandemic, the sector benefited from closer working relationships as a sector, led by Snowsport Scotland, to mitigate the impact of the national restrictions on physical distancing and travel. In total, the Scottish Government allocated £4 million in grants providing critical assistance to the snowsports sector during the pandemic to offset a projected economic loss to the Scottish Economy of £8.6 million due to the closure of snowsport sector facilities over this period¹.
- 9.26 Scottish Government support for snowsports in Scotland, delivered through its development agencies (HIE and SE), plays a vital role in advancing key national priorities, including rural economic development, tourism, and public health. The sector has consistently demonstrated an overwhelmingly net positive impact, as evidenced by various economic reviews. To sustain and enhance these benefits, continued investment and strategic backing will be essential, ensuring that Scotland's snowsports industry remains a cornerstone for outdoor recreation, community wellbeing and economic resilience.

10.0 Conclusion and Recommendations

- 10.1 The review of progress against the 2020 Strategic Action Plan provides evidence that whilst the production of the 2020 Strategy vision and mission were aspirational and should be commended, it is clear that the strategic objectives and action plan did not accurately reflect the structure of the sector in regard to roles and responsibilities and, as a consequence, the Strategy was never formally adopted or implemented, either by Snowsport Scotland or by the individual facilities.
- 10.2 In addition, the 2020 Strategic Actions delivered to date by Snowsport Scotland were the result of the timing of other planned activities rather than a direct focus on achieving the strategic objectives as contained within the Strategy.
- 10.3 The snowsport sector contains a diverse range of public and private operating models, with varying levels of engagement with each other and with Snowsport Scotland. As such, the Strategy incorrectly assumed that Snowsport Scotland has a high level of influence or control in the planning and delivery of snowsport facilities strategic and/or management plans, and that the mountain resorts and artificial facilities based their operations in some capacity on the direction or guidance of Snowsport Scotland.
- 10.4 It is apparent that participation in snowsports remains a popular activity, both domestically and internationally. This is evidenced by the significant number of people in the UK taking part in skiing and snowboarding activities and by the continuing popularity of holidays within European and worldwide resorts to take part in snowsport activities.
- 10.5 Globally, the 2023/2024 season also recorded record participation in snowsports for countries who have continued to invest in snowsport facilities and resorts.
- 10.6 Research by the James Hutton Institute into snow cover on the Cairngorms concludes that although observed snow cover has declined since 1969, there is significant seasonal variability with some years within the timescale of the current Strategy (to 2030) likely to have similar or even possibly greater snow cover than in the past. The research indicates that seasonal variations are likely to persist, with overall snow cover beyond 2040 likely to be decline.
- 10.7 The long-term challenges of climate change also present opportunities for the sector, such as creating a strong evidence base for investments in sustainable infrastructure like hydroelectric projects or wind turbines. These initiatives can help mountain resorts and artificial facilities reduce their environmental impact by generating green electricity and managing water use.

¹ The Ski Centre Fund and Ski Centre and Ski School Fund, Scottish Government



- 10.8 Investment in sustainable infrastructure supports the Scottish Government's aspiration of achieving Net Zero by 2045 and would also increase the attractiveness of the sector to an increasingly environmentally conscious public. High-level engagement with the Scottish Government and planning authorities will be required to support, manage and mitigate any proposed restrictions on their development and implementation.
- 10.9 Although the pandemic contributed to a rise in 'staycations' over this period, these trends have reversed since 2022 as international air travel returns to pre-pandemic levels.
- 10.10 The Scottish Tourism Alliance Industry Survey (October 2024) provides insight on the shift in business performance between 2023 and 2024. This includes:
- Self-catering business reporting a decrease in domestic visitors of 20%, and an increase in international visitors of 22%.
 - Serviced accommodation reporting a decrease in domestic visitors of 30%, and an increase in international visitors of 31%.
 - Attractions and activity operators reporting a decrease in domestic visitors of 29%, and an increase in international visitors of 34%.
- 10.11 The importance of international tourism to Scotland's economic growth is captured in Scotland Outlook 2030, a shared vision between the Scottish Tourism Alliance, The Scottish Government, VisitScotland, HIE, Skills Development Scotland and Scottish Enterprise.
- 10.12 The Economic, Social, and Cultural Impact of Scotland's Snowsport Sector report of 2022 concluded that snowsport participants in Scotland are almost entirely domestic (99%), a figure that reflects the excellent access to snowsport centres for the vast majority of Scotland's population.
- 10.13 Mountain centres like Nevis Range Mountain Resort have successfully transitioned to an increased focus on the international market as part of a sustainable business model, significantly increasing revenue whilst retaining the ability to deliver snowsport activities when commercially viable.
- 10.14 The economic assessments undertaken within Scotland of the snowsport sector conclude that the sector, and specifically the mountain resorts, make a significant net positive financial contribution to Scotland's rural economy on an annual basis, to the value of tens of millions of pounds, playing a key role in supporting economic activity, especially within the winter months.
- 10.15 Snowsports activity, and particularly activity in Scotland's rural areas, will continue to be a critical economic driver for the foreseeable future, providing facilities to support participation in snowsport activities to improve health and wellbeing alongside delivering the Scottish Government priorities for rural economic development and tourism.
- 10.16 Over this period both public and privately owned mountain resorts will require significant investment in both snowsport and non-snowsport facilities. Investment in facilities that improve attractiveness of the offering (i.e. food and beverage, accommodation) and increase the opportunities for diversification will be key for the development of sustainable business models for all facilities to meet the challenges of the future.
- 10.17 If realised, the identified investment of £80 million in the Scottish snowsport sector is a significant commitment aimed at enhancing infrastructure, sustainability and accessibility. The largest portion, £55 million, is allocated to access uplift (such as chairlifts), which will improve visitor flow and reduce congestion, enhancing the overall experience. Investments in snowmaking equipment (£6.8 million) and renewable energy (£6 million) will ensure more reliable conditions and reduce environmental impact. Additionally, upgrades to utilities, diversification projects, and facility refurbishments will modernise resorts and broaden their appeal beyond traditional snowsport activities. This investment will strengthen Scotland's snowsport industry by improving resilience to climate change, attracting more visitors and supporting economic growth in mountain regions.

- 10.18 This review proposes that there is a fundamental shift in the focus of the National Facilities Strategy - that sustainable business, inclusive of both snowsports *and* non-snowsports activities, are essential for the continued long-term (post 2040) delivery of snowsports by the mountain resorts and artificial facilities in Scotland. The proportion of income derived from snowsports is, and continues to be, a matter for consideration for each facility in line with business plans and wider organisational strategies.
- 10.19 In this way, the sector will be able to continue to develop independent and integrated business models that build resilience in the face of social, economic and political challenges. An opportunity therefore exists for a lead organisation, or association, to provide a forum for a greater level of partnership working based on the adoption of a clear strategic approach for the sector.
- 10.20 The 2025 Strategy review therefore recommends that a different approach is adopted going forward, shifting the focus from providing direction to all facilities on the ideal level of provision across the sector, to supporting the sector in developing sustainable business models tailored to their unique target markets and aspirations, enabling the facilities to more effectively support the pathway and performance requirements of the governing body.
- 10.21 This new direction places a strong emphasis on the continuing delivery of snowsports by ensuring that each facility can adapt and thrive in a competitive and evolving environment. By fostering innovation and encouraging facilities to align their offerings with the specific needs and desires of their local or national markets, this approach aims to ensure that snowsports remain accessible, engaging, and viable for the long term. Furthermore, the approach advocates for a collaborative environment where facilities share best practices, learn from one another, and invest in technologies and infrastructure that enhance the quality and availability of snowsports, allowing the sector to grow sustainably while maintaining its appeal to a broad range of participants.
- 10.22 The snowsport sector recognises that diversifying income streams, especially for mountain resorts, enables year-round income generation supporting the longer-term provision of snowsports within a sustainable business model. Diversification support, provided via the snowsports sector and by key stakeholders, will be critical to the continued provision of snowsports at all facilities (mountain and artificial) going forward. Ultimately sustainable business models are required for snowsports delivery, irrespective of the proportion of income generated by snowsports participation.
- 10.23 Overall, the 2025 Strategy review recommends that, subject to the adoption of the revised vision and priority actions, the timeframe of the National Facilities Strategy should be extended beyond 2030 towards 2040, providing additional scope for investment and development of sustainable business models for both mountain resorts and artificial facilities, supported by an integrated and strategically aligned snowsports sector.

11.0 Refinement of the 2030 Vision

- 11.1 The previously published 2030 vision is:

For the maximum number of people possible to be able to enjoy their chosen snowsport discipline in convenient, appealing and inclusive facilities that are viable and capable of meeting future challenges and sustaining growth in the sport.

- 11.2 Following consideration of the conclusion and recommendation of this review, a revised vision for the snowsport sector is proposed as follows:

For the maximum number of people to be able to participate in snowsports in Scotland, facilitated by an integrated sector providing high-quality experiences, underpinned by resilient business models which prioritise long-term environmental, social and economic sustainability.

- 11.3 The adoption of this revised vision to 2040, with its associated priority actions, will provide certainty to the sector of the national strategic approach over this period and will enable a further review to be undertaken pre-2040 to establish the evidenced impact of climate change against the current models towards the production of a post-2040 strategy.
- 11.4 The Strategy review also committed to identify priority actions in support of the revised 2040 vision. These actions have been shaped by the conclusions and recommendations within the review and by key stakeholders via a snowsports sector forum comprising mountain resorts and artificial facilities, led by Snowsport Scotland.

12.0 Proposed Priority Actions

- 12.1 These actions, in support of the revised 2040 vision, collectively aim to secure a sustainable future for the Scottish snowsport sector by balancing environmental, social and economic priorities.

No.	Action	Detail	Owner(s)	Proposed Timescale for Delivery
1	Endorsement of the Recommendations and Priority Actions in the 2025 National Snowsports Facility Strategy Review	<p>The Snowsport Scotland Board, and wider snowsport sector, to endorse the Conclusions, Recommendations and Priority Actions within the Strategy review, ensuring inclusion of Priority Actions within future organisational strategies and operational plans.</p> <p>Extend the timeline of the National Snowsport Facilities Strategy to 2040, allowing for phased investment and development in alignment with evolving market and environmental conditions.</p>	Snowsport Scotland, Snowsport Facility Forum	July 2025
2	Establishment of a Snowsports Facility Forum and Action Group	<p>The Scottish snowsport sector to agree the format and function of a long-term collaborative forum and action group to enhance partnership working across the sector and provide a cohesive, strategic approach to shared challenges and opportunities.</p> <p>The forum will play a role in data collection and collation (including participation data) across all facilities to strengthen collaborative working in support of individual and sector investment and development by external agencies.</p> <p>Representation at the forum will include Snowsport Scotland, mountain resorts, Scottish Government and Development Agencies amongst other key stakeholders.</p>	Snowsport Scotland, Mountain Resorts, Artificial Facilities	Autumn 2025



3	<p>Confirmation of Strategic Support for the Development of Sustainable Business Models</p>	<p>Snowsport Scotland to endorse and actively support mountain resorts in diversifying their income streams.</p> <p>By incorporating non-snowsport activities, these facilities will generate year-round revenue, ensuring long-term viability, resilience and the sustainable growth of the sector.</p>	Snowsport Scotland	From Autumn 2025
4	<p>Production of Snowsport Infrastructure and Asset Maintenance and Replacement Guidance to Facilitate a National Assessment of Snowsport Facility Needs</p>	<p>To provide reassurance to the snowsport community and to assist individual facilities with regard to their legal responsibilities in relation to the operation of snowsport infrastructure;</p> <ul style="list-style-type: none"> a) Snowsport Scotland to work with the snowsport sector and industry partners to produce guidance in relation to the maintenance and replacement of snowsport infrastructure, detailing the maximum acceptable lifespan for snowsport assets (i.e. artificial matting, tows and lifts) before recommending or mandating replacement. b) This guidance can then be utilised to assess the national position of snowsport infrastructure to identify priority investment areas to be supported through the Snowsport Facility Forum. 	Snowsport Scotland, Snowsport Facility Forum	<ul style="list-style-type: none"> a) December 2025 b) May 2026
5	<p>Production of a Sporting Needs Assessment</p>	<p>Following a national assessment of snowsport facility needs, and in collaboration with each facility, a detailed report to be created outlining the assets, equipment, and infrastructure necessary to meet the Scottish Governing Body's recreational and performance needs for the sport. This report will ensure that each facility is equipped to support both recreational users and high-performance athletes, aligning with national sporting standards and requirements.</p> <p>For mountain facilities, the report may include key aspects such as public access and transport, car parking, ticketing, hospitality and conveniences, uplift systems, snow fencing, snowmaking, snow farming, piste maintenance, and emergency and safety cover.</p>	Snowsport Scotland	December 2026



6	<p>Engagement with Scottish Government and Funding Bodies to Invest in Infrastructure</p>	<p>The snowsport facility forum to engage with the Scottish Government, Development Agencies and Local Authorities to secure backing for snowsport and non-snowsport facility developments, ensuring alignment with environmental and economic goals and prioritising investment to support long-term growth and visitor satisfaction.</p> <p>Highlight the economic benefits of snowsports to rural communities to attract investment and foster public-private partnerships that support the sector's sustainability.</p> <p>Investment that enhances the attractiveness of facilities, such as accommodation, food and beverage services, and other amenities to support long-term growth and visitor satisfaction should be prioritised.</p>	<p>Snowsport Scotland, Snowsport Facility Forum, Scottish Government, Development Agencies, Local Authorities</p>	<p>Present to 2040</p>
7	<p>Support for Upgrade to Environmentally Responsible Infrastructure</p>	<p>Support the Scottish mountain resorts to install environmentally responsible infrastructure, such as hydroelectric and wind power, to reduce environmental impact and align with the Scottish Government's sustainability Net Zero target by 2045, working with Local and National Government to jointly identify solutions for any planning restrictions, as required.</p>	<p>Snowsport Facility Forum, Mountain Resorts, Artificial Facilities</p>	<p>Present to 2040</p>
8	<p>Alignment of Strategies to Achieve Sport and Sector Outcomes</p>	<p>Snowsport Scotland to develop future organisational strategies in partnership with the Snowsport Facility Forum, clarifying how the recreational and performance participant pathway for each snowsport discipline relates to, benefits from, and is supported by mountain resorts and artificial facilities.</p>	<p>Snowsport Scotland, Snowsport Facility Forum</p>	<p>April 2026</p>
9	<p>Maximise Benefits of International Tourism</p>	<p>Working with industry partners and Scottish Government agencies, leverage the post-pandemic increase in international visitors for year-round mountain experiences, using Scotland's status as a unique, accessible and environmentally conscious destination.</p>	<p>SSMG, Snowsport Scotland, Snowsport Facility Forum, VisitScotland</p>	<p>Present to 2040</p>



<p>10</p>	<p>Engagement with Broader Research and Academic Sources to Inform Future Strategic Planning</p>	<p>Collaborate with academic and research institutions such as the James Hutton Institute to monitor snow cover trends and plan facility adaptations accordingly, ensuring the sector remains viable despite climate variability.</p> <ul style="list-style-type: none"> a) Snowsports Scotland to publish an Environmental and Sustainability strategy outlining how the Scottish Governing Body of Sport will support the sector to achieve the Scottish Government’s Net Zero target by 2045. b) Snowsport Scotland to consider research evidencing the impact of climate change in snow cover for the development of any future facilities strategy in 2040. 	<p>Snowsport Scotland</p>	<ul style="list-style-type: none"> a) December 2025 b) Present to 2040
-----------	---	--	---------------------------	--