

sportscotland Estate Review

An assessment of the condition and investment needs of the sport estate to deliver high quality, sustainable facilities for an active Scotland where everyone benefits from sport.

October 2025

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1 Executive Summary

This National Review of the Sport Estate in Scotland has been undertaken at the request of the Minister for Drugs & Alcohol Policy and Sport to evaluate the current condition and long-term investment needs of Scotland's sporting infrastructure.

The review sets out the evidence for a long-term, strategic investment programme in the region of £15.5bn¹ to maintain the estate, address ageing infrastructure and align the sport estate with national goals for sustainability, accessibility and inclusivity. It highlights the need for better data and innovative funding solutions as part of a broader systems approach across multiple sectors to deliver an active Scotland where everyone benefits from sport.

In order to participate in sport and leisure activity, people need access to suitable facilities. The review provides a comprehensive snapshot of the public sport estate, revealing a large, diverse, complex estate of over 11,000 facilities at almost 5,000 locations (see Appendix 3 for breakdown and exclusions). The review examines provision, condition and investment requirements across facility types including athletics, bowling, golf courses, gymnastics halls, ice rinks, pavilions, pitches, sports halls, squash courts and tennis courts.

The review outlines three key challenges: Data; Strategic Planning and Investment.

Data: There is a clear lack of consistency, availability and quality of data about the sport estate. Significant challenges were faced collecting the data, highlighting a challenge in relation to understanding and reporting on the health and suitability of the sport estate. To support strategic decision-making, the review recommends standardising and streamlining data collection on facility age, condition, energy consumption, utilisation and suitability metrics. This would also enable facility owners and operators to report key data about their estate more efficiently and effectively.

Improved data management will enable more targeted investment and better alignment with national frameworks such as the Physical Activity for Health National Framework².

Strategic planning for investment in Scotland's sport estate is essential to deliver meaningful health and wellbeing outcomes aligned with Scottish Government priorities, including tackling child poverty, addressing the climate emergency, growing the economy, and improving public services. Linking the conclusions and recommendations of this report to the strategic delivery outcomes of the systems-based approach to physical activity outlined in the Physical Activity for Health National Framework is essential³.

This approach requires greater collaboration across the sport sector and with other sectors to optimise existing facilities, promote co-location of services and a commitment to sustainable and inclusive design. Whilst local planning is important, **sportscotland** believe that this should not be limited to local authority boundaries. It also requires robust, data-driven planning to ensure decisions are evidence-based and investments deliver maximum impact for communities across Scotland.

The findings of the Estate Review echo the conclusions of the 2006 National Audit, reinforcing the need for a strategic, long-term approach to facility investment and stating that the estate

¹ Net present value (NPV) total

² *Physical activity for health: framework*. Scottish Government. October 2024

³ *Ibid*

must evolve to meet changing public expectations, demographic shifts, emerging trends and the need for inclusive, sustainable, and high-quality sports infrastructure.

Investment in the region £15.5bn over the next 25 years is required to address the review findings associated with the age and condition of the infrastructure, position the estate to meet net zero targets, and deliver a desirable level of accessibility and inclusion⁴.

This comprises standard maintenance requirements as well as bringing and maintaining facilities to a satisfactory condition over this period (£12.6bn).

The data shows that the sport estate is ageing, with nearly 40% of built facilities beyond their typical design life. In ten years' time this figure will have risen to 45%. The average age of a facility is now 45 years old, and 50% of built facilities are older than 20 years old. 12% of built facilities and 16% of outdoor facilities are in poor or bad condition.

The review also concludes that the sport estate is in a very poor state of preparedness to meet Net Zero targets or build resilience for future climate change impacts. Retrofitting for energy efficiency and carbon reduction is essential, requiring £2.5bn investment. Investment of £0.5bn is also required to improve access and inclusion provision across the estate to a desirable level.

sportscotland recognises that this scale of investment, against a background of rising costs and declining budgets, is unlikely to be viable within current public funding models. Local authorities (including schools), who own 55% of the sites with sport facilities, are required to focus budgets on statutory services like social care and education, with non-statutory functions such as leisure and sports often the first to face cuts. This has made it increasingly difficult to maintain facilities and has undoubtedly contributed to significant maintenance backlogs being built up across the country.

Ownership by clubs and community organisations makes up 35% of sites in the sport estate, highlighting the important role of community led organisations delivering sport and the scale of the investment challenge which they face. The tertiary education sector owns 1% of sites in the sport estate.

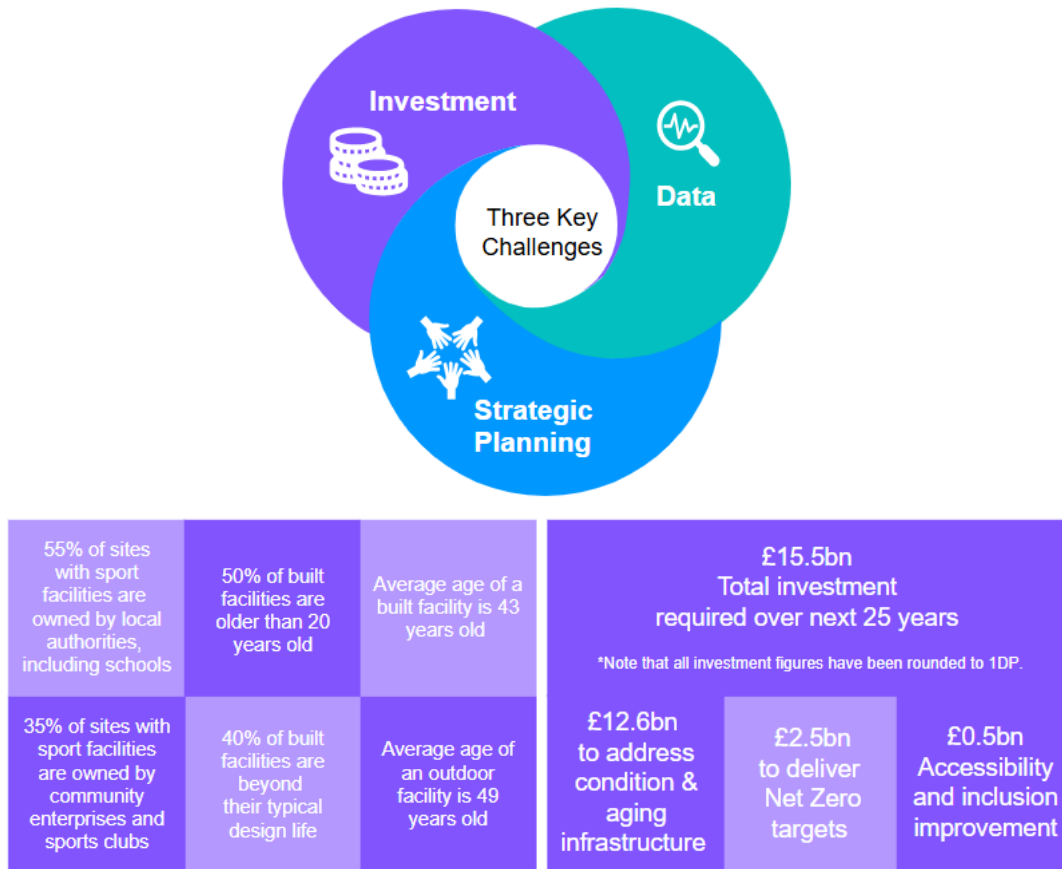
The key question remains around how this scale of investment will be funded⁵. **sportscotland** recognises that, whilst the review recommends the need to explore new and innovative funding sources and models, it is critical that all of the key stakeholders, at both a local and national level, continue to prioritise investment in the sport estate.

The review concludes that investing in the sport estate nationally through a systems approach will yield long-term benefits by improving public health and reducing future burdens on health, education, and social care budgets. Conversely, failure to invest will exacerbate inequalities and increase pressure on public services.

⁴ Investment figures have been rounded throughout to 1DP. The total investment required of £15,497,187,135 has been rounded to £15.5bn throughout this report. Condition total of £12,564,699,559 is rounded to £12.6bn. Net Zero total of £2,460,124,003 is rounded to £2.5bn. Access and inclusion total of £472,363,573 is rounded to £0.5bn.

⁵ As highlighted by stakeholder group (see A.7)

Figure 1: Executive Summary - key findings



2 The Value of Sport and Leisure to Scotland

Participation in sport and leisure activity supports a range of Scotland's National Outcomes across health, economy, education and communities.^{6 7 8}

Being active is essential for good health and is a key part of achieving a healthy and active nation. Recent research has found that over 3000 deaths annually in Scotland are directly attributable to physical inactivity⁹. Achieving our ambition of an active nation requires action across a wide range of sectors and cannot be achieved by sport and leisure alone. The National Physical for Health Framework¹⁰, published in 2024, provides a systems-based approach to this challenge with recommended action across 8 linked sub-systems. Increasing participation in sport and leisure, particularly for disadvantaged groups, plays an important role across a number of these sub-systems.

Sport and leisure contribute both directly and indirectly to the economy. In 2021, Sport in Scotland contributed £10.4bn directly and indirectly to the Scottish economy. The overall multiplier for the sport in Scotland stands at 1.55, this means that for every £1 invested in sport, £1.55 is generated as GVA in the economy. The direct contribution was £6.7billion accounting for 2.44% to the total output of the Scottish economy (GVA), and 69,380 full time equivalent (FTE) jobs, 3.37% of total Scottish FTE¹¹. £3.7bn was generated indirectly in Scotland through the broader supply network outside the sport economy.

There is clear evidence that physical activity can improve educational attainment, either directly (improved grades, school engagement, behaviour and reduced absenteeism) or indirectly (by enhancing skills such as self-control and concentration, team working and time management). The development of physical and health literacy enables children to gain and build the necessary motivation, confidence, physical competence and knowledge and understanding to take responsibility for their engagement in physical activity throughout life.

Participation in sport and leisure helps to build inclusive, empowered, resilient and safe communities. It can be a conduit for people of different backgrounds to interact, building bridging capital, via participating, volunteering and spectating. Although much of the evidence relating to migrants and sport focuses on opportunities to adapt to the host country, it also covers bridging divides between men and women, homeless people and those who are not homeless, and people with different employment backgrounds, building links and bonds with others, increasing the sense of community and citizenship.

⁶ *National Performance Framework*. Scottish Government.

⁷ *The Positive Contribution of Physical Activity and Sport to Scotland*. COSLA.

⁸ *Sport For Life: A vision for sport in Scotland*. sportscotland.

⁹ *Estimating the burden of disease attributable to physical inactivity in Scotland*. Public Health Scotland. September 2024.

¹⁰ *Physical activity for health: framework*. Scottish Government. October 2024

¹¹ *Sport Satellite Account for the UK 2024: Research into a new measure for estimating the value of sport*. Department for Culture, Media & Sport. October 2024.

3 Purpose of the National Review of the Sport Estate

The purpose of this National Review of the Sport Estate is to assess the current condition and investment requirements of the sport estate in Scotland. This has been undertaken at the request of the Minister for Drugs & Alcohol Policy and Sport, who requested: *'We have discussed the longer-term challenges around an ageing sporting estate, which will need a significant capital investment programme in due course. I would welcome work to undertake a review of the sport facilities estate'*.

The Review sets out the scale of investment required to address the key challenges over the next 25 years to deliver high quality, sustainable facilities for an active Scotland where everyone benefits from sport.

The three key questions the Estate Review addresses are:

1. What is the current condition of the sport estate?
2. What level of investment is required over the next 25 years across the national estate to address current condition?
3. How suitable is the estate to meet Net Zero, Accessibility, and Inclusivity requirements and what level of investment is required to address these issues over the next 25 years?

The Review Methodology:

The Estate Review has:

- Considered the key built (sports halls, gymnastics halls, ice rinks, pavilions and squash courts) and outdoor (athletics, golf courses, pitches, tennis courts and bowling greens) facility types, in public and club sector ownership. It is acknowledged that the entire estate is wider than this and includes for example the commercial and independent school sector, and facility types in the outdoor and adventure sector.
- Attributed a condition rating A to D (A=Good; B=Satisfactory; C=Poor; D=Bad) to as many facilities as possible, through completion of condition surveys and collation of condition data held by owner/ operators.
- Cost modelled the interventions required over the next 25-year lifecycle to bring and maintain facilities to a Satisfactory condition (B) rating, using Building Cost Information Service (BCIS) cost and degradation models based on condition, age and construction type data.
- Cost modelled the interventions required over the next 25-year lifecycle to bring and maintain facilities to Net Zero standards.
- Cost modelled the interventions required over the next 25-year lifecycle to address the requirements of the Equality Act 2010, using a minimum, desirable and excellent standard tiered approach.

More detailed information on the scope and methodology can be found in Appendix 3 and 5 respectively.

4 Context

4.1 Policy Landscape

In June 2024, the Cabinet Secretary for Health and Social Care outlined the Scottish Government's vision: A Scotland where people live longer, healthier and more fulfilling lives¹².

This vision is supported by four key areas of work: improving population health, a focus on prevention and early intervention, providing quality services, and maximising access. Making progress towards this vision requires focusing on the Scottish Government's core priorities of eradicating child poverty, growing the economy, tackling the climate emergency, and improving Scotland's public services¹³.

The **Physical Activity for Health Framework (PAHF)** derived from the **Population Health Framework (PHF)**, takes a cross-government, cross-sector approach to improve health outcomes and reduce health inequalities¹⁴. Addressing physical inactivity is integral to improving levels of population health in Scotland and this document provides a preventative approach, to help ensure that the right collective actions are taken to create the conditions which enable people to live healthier lives¹⁵.

The Physical Activity for Health Framework sets out a clear vision for Scotland: More People; More Active; More Often. Within the Framework there are eight strategic cross cutting Delivery Outcomes, as in the diagram below. These eight Strategic Delivery Outcomes do not stand alone but must be seen in the context of the whole system¹⁶.



Figure 2: Physical Activity for Health Framework¹⁷

¹² *Vision for health and social care: Health Secretary speech*. Scottish Government. June 2024.

¹³ *Ibid*

¹⁴ *Scotland's Population Health Framework*. Scottish Government. June 2025

¹⁵ *Physical activity for health: framework*. Scottish Government. October 2024

¹⁶ *Ibid*

¹⁷ *Ibid*

Sport and Recreation and **Places and Spaces** are two of these strategic delivery objectives. Investing in sports facilities, within a systems approach, is therefore integral to delivering the 2024 Scottish Government vision of 'A Scotland where people live longer, healthier and more fulfilling lives'.¹⁸

Places are one of the four enablers that **sportscotland** sets out in its Sport for Life strategy¹⁹ to deliver its outcomes and achieve its vision of *an active Scotland where everyone benefits from sport*. One of the key objectives of Sport for Life is to deliver Inclusivity, providing opportunities to meet the specific needs of diverse groups which this Report directly addresses.

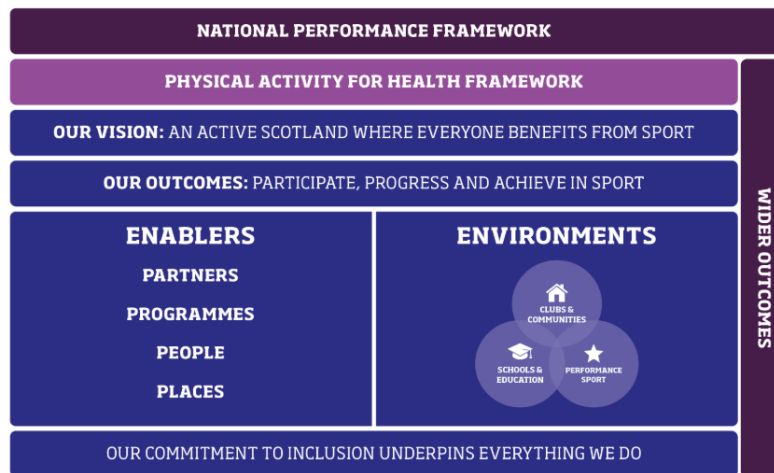


Figure 3: Sport for Life strategy



The **Single Scottish Estate (SSE)** programme promotes a more efficient, collaborative, and sustainable approach to public sector property management²⁰.

As part of the Scottish Government's broader strategy to reduce the public estate footprint and meet Net Zero targets, SSE encourages co-location, shared services, and cross-organisational planning across public bodies.



The **Infrastructure Investment Plan (IIP) 2021-2026** core purpose is to support Scotland's transition to a net zero carbon economy, drive inclusive economic growth, and build resilient and sustainable places through targeted investment in public infrastructure²¹. The framework supports a place-based, collaborative approach to asset planning, aligning with net zero goals, inclusive growth, and efficient public service delivery.

Both the IIP and the **Guide to Property Asset Strategy in the Scottish Public Sector** by Scottish Future Trust stress that new infrastructure should be a last resort, pursued only when existing assets cannot meet service requirements, setting out an investment hierarchy that prioritises maintaining, reusing and enhancing existing assets, and repurposing assets before considering new builds²².

¹⁸ *Health and social care vision*. Scottish Government. June 2024

¹⁹ *Sport For Life: A vision for sport in Scotland*. sportscotland.

²⁰ *Public sector procurement: Single Scottish Estate*. Scottish Government.

²¹ *Government finance: Infrastructure investment*. Scottish Government.

²² *Infrastructure Investment Plan for Scotland: A guide to Property Asset Strategy in the Scottish Public Sector*. Scottish Futures Trust.



The **Scottish National Adaptation Plan 2024–2029 (SNAP3)** Sets out the actions that the Scottish Government and partners will take to respond to the impacts of climate change²³.

With over 200 policies, SNAP3 outlines actions to address the key risks of flooding, coastal erosion, heat stress, and infrastructure degradation. It promotes nature-based solutions, collaborative planning, and community-led adaptation, encouraging local authorities and facility managers to integrate climate resilience into design, maintenance, and operations.



The **Equality Act 2010** has had a significant impact on the design, operation, and governance of sports facilities in Scotland, requiring all facilities to proactively eliminate discrimination and promote inclusion²⁴.

Those managing sports facilities must consider how their infrastructure, services and operations affect people with protected characteristics such as disability, gender reassignment, race, religion, sex, and sexual orientation.



The **Community Empowerment (Scotland) Act 2015** enables communities to take ownership or control of public assets²⁵. Through **Community Asset Transfer (CAT)** community bodies can make requests to Scottish Ministers, local authorities and a range of public bodies for ownership, lease, or management of any land or buildings they feel they could make better use of²⁶.

²³ *Climate change: Scottish National Adaptation Plan 2024-2029. Scottish Government. September 2024.*

²⁴ *Equality Act 2010: guidance. UK Government. June 2015.*

²⁵ *Community Empowerment (Scotland) Act: summary. Scottish Government. February 2017.*

²⁶ *Community empowerment: Asset transfer. Scottish Government.*

5 Key Findings

5.1 Overview of the Composition of the Sport Estate

Numbers and facility types

A total of 11,008 facilities across 4,962 geographical sites were included in the dataset.

The data was categorised into facility types, across outdoor facilities (athletics, golf courses, pitches, tennis courts and bowling greens) and built facilities (pavilions, sports halls, gymnastics halls, ice rinks and squash courts).

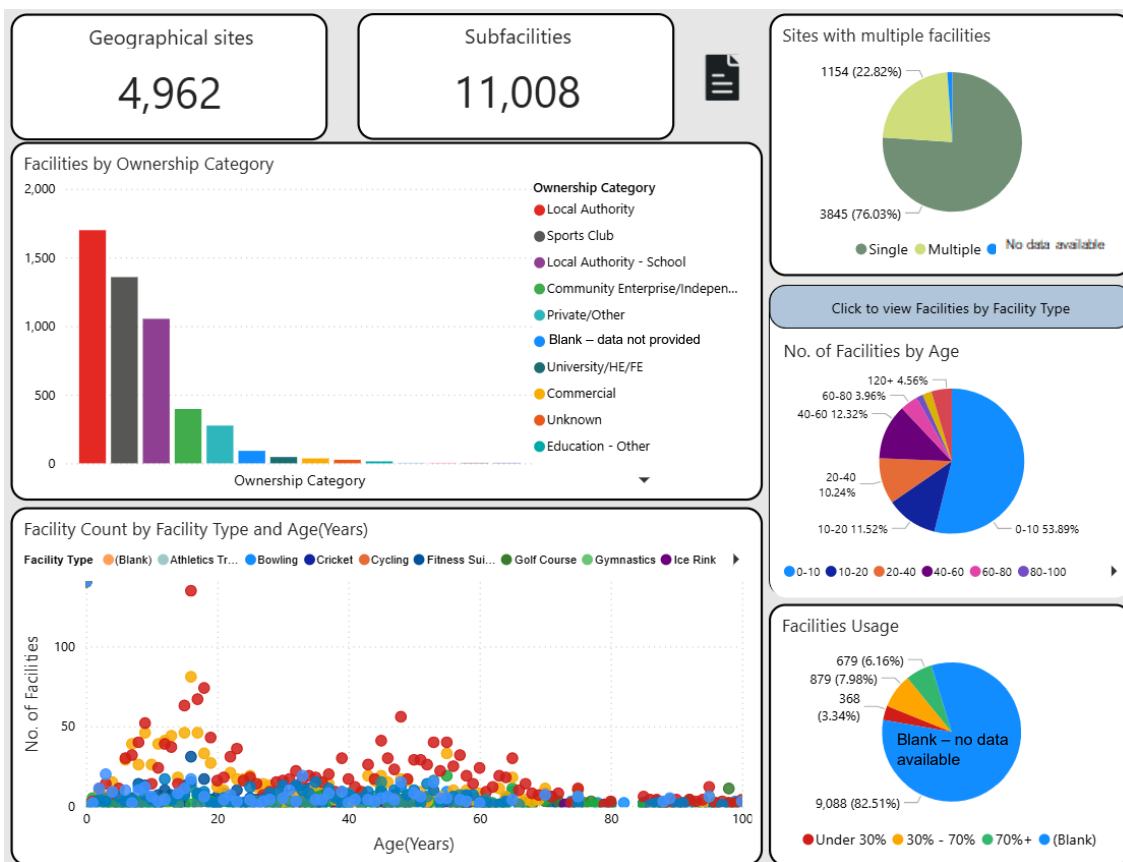


Figure 4: Sport Estate Dashboard

Age

The age profile of the sport estate provides insight into the lifecycle stage of facilities and associated needs for their remaining lifespan. Across the estate, the average age of a facility is 45 years old. The average age of a built facility is 43 years old, and the average age of an outdoor facility is 49 years old.

The built estate is split almost equally in terms of age, with half of facilities younger than 20 years old and half over 20 years old. 15% of the built estate is over 60 years old, with 7% older

than 100 years. Of the built facilities older than 100 years, sports halls predominate. There are 135 sports halls that are 16 years old, as shown by the 'red dot' on the bottom chart of Figure 4.

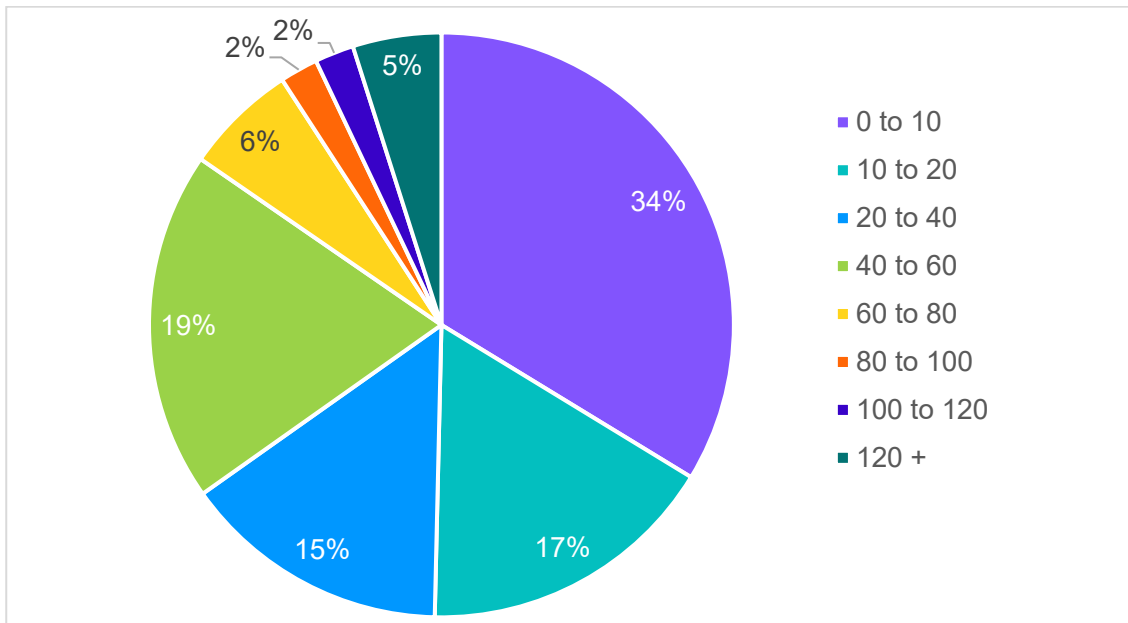


Figure 5: Distribution of built facilities across age groupings

For outdoor facilities, the data collected indicated most are aged between 0 and 10 years old. This reflects the relatively younger average ages of tennis courts, athletics tracks and pitches facility types, which are 44, 28 and 30 years old respectively. Bowling greens and golf courses tend to be older, with average ages of 84 and 101 years old respectively.

Data on the average age of the individual facility types is captured in Appendix 1.

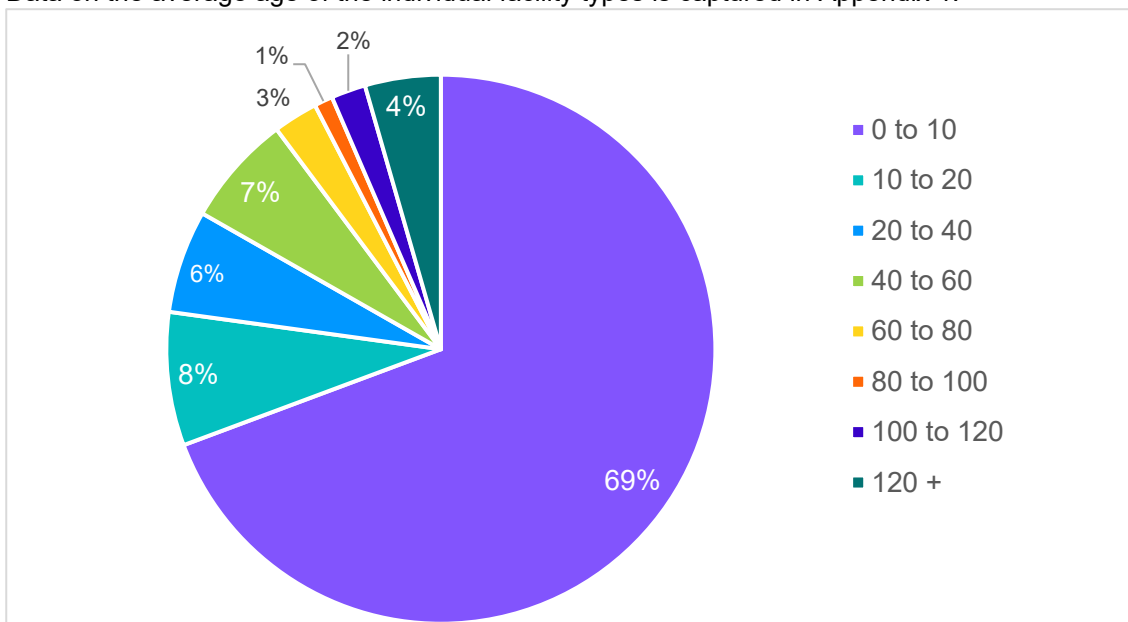


Figure 6: Distribution of outdoor facilities across age groupings

Residual life

The data shows that the sport estate is ageing, with 40% of built facilities beyond their typical design life. In ten years' time almost 45% of the built estate will have exceeded its typical design life.

The values quoted have been based on the typical lifespan values for individual construction elements making up a sports hall facility, as published in the BCIS Construction Data standards²⁷.

Determining a facility's lifespan is complex and depends on factors like design, materials, construction quality, usage, and maintenance. Proactive and frequent maintenance can significantly extend facility life. If such maintenance were consistently applied, the 40% figure could drop to 29%. Given the pressure on local authority maintenance budgets the 40% figure is considered more realistic.

Investment will still be required within the residual life of the built facility. Many elements are likely to be refurbished or replaced before the facility is deemed to be beyond its residual life. For example, in a sports hall the mechanical and electrical systems are likely to require replacement before the superstructure (windows, roofs, cladding) or the substructure (foundations).

Ownership and management

The facilities are managed and owned by a diverse range of organisations, reflecting the complexity and breadth of the sport infrastructure landscape in Scotland. Most sites with sports facilities (55%) are owned by local authorities (with 21% at schools), with a further 35% owned by clubs or community organisations. The figures below indicate that most of the estate (particularly built) is within Local Authority ownership, they also show the importance of club sector ownership in outdoor facilities.

²⁷ *Construction. Building Cost Information Service (BCIS).*

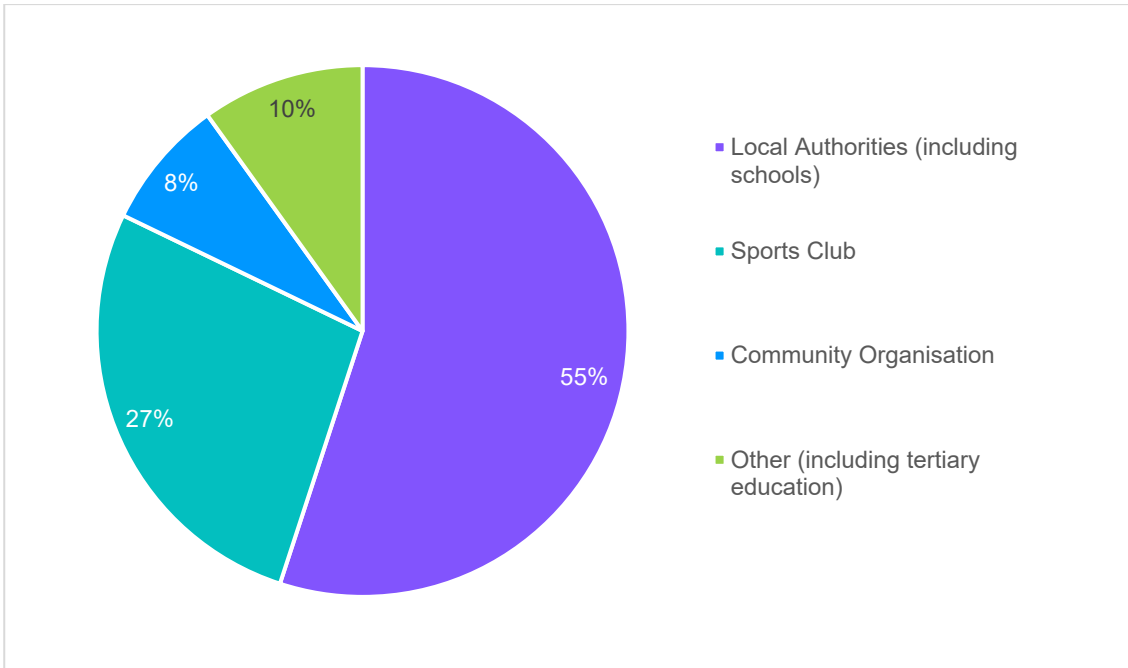


Figure 7: Ownership of sites with sport facilities

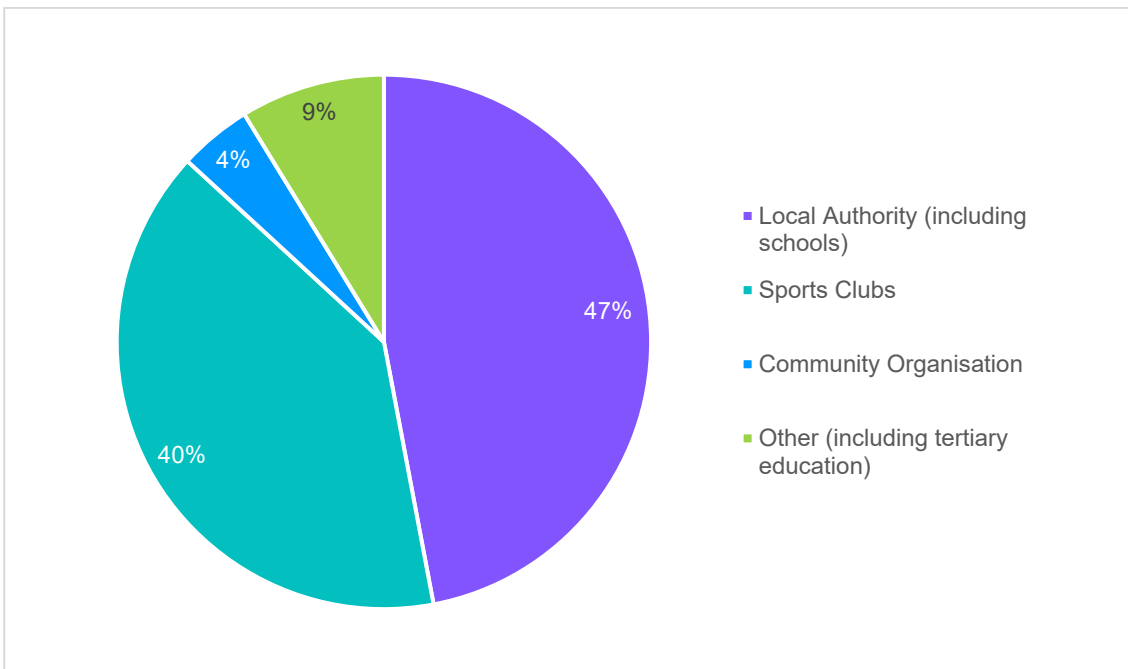


Figure 8: Ownership of sites with outdoor sport facilities

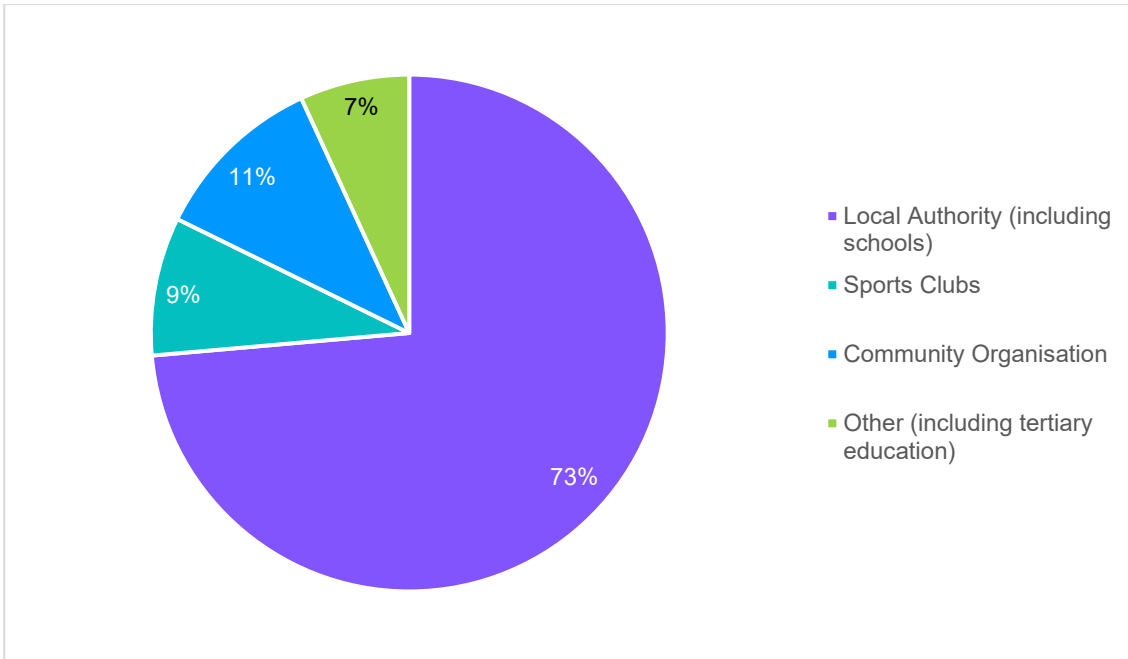


Figure 9: Ownership of sites with built sport facilities

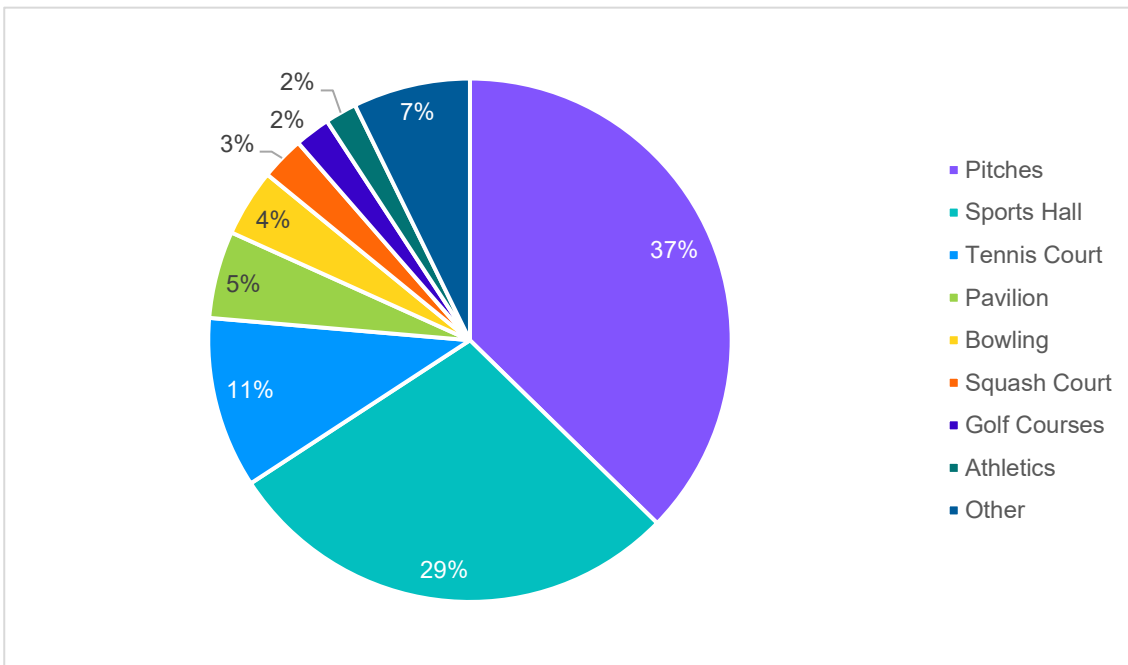


Figure 10: Local authority (excluding schools) ownership across facility types

Of the 4,361 facilities (at 1,699 sites) owned by Local Authorities (excluding schools), 37% are pitches and 29% are sports halls. The remaining facility types (tennis courts, swimming pools, pavilions, bowling greens, golf and squash courts) each represent between 1% and 11%.

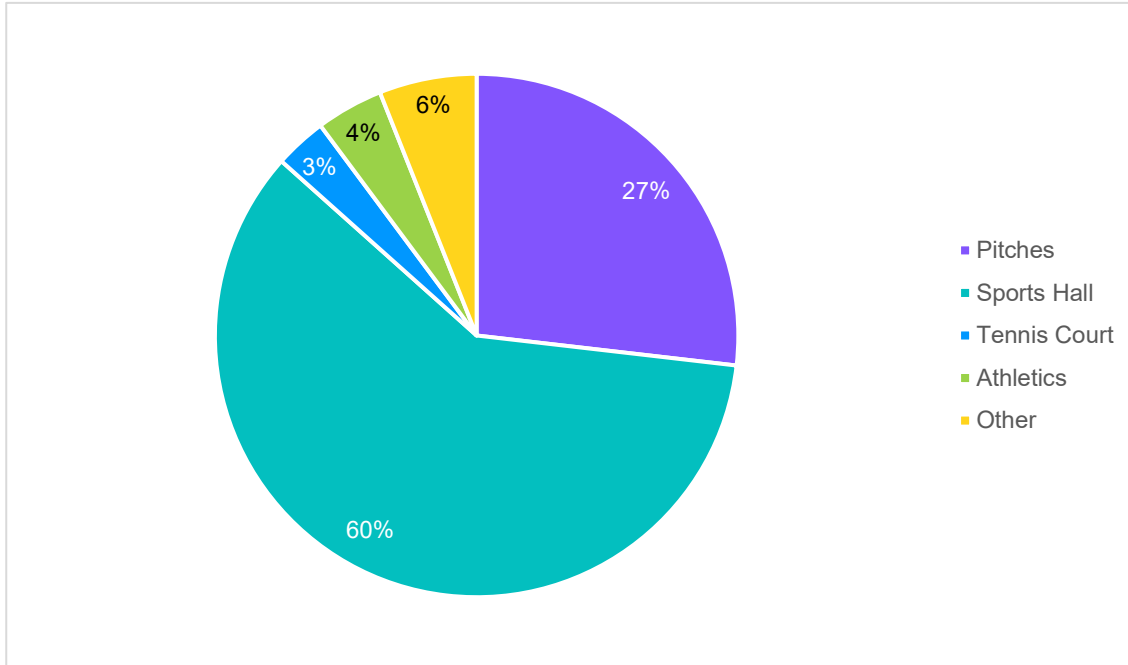


Figure 11: Local authority (schools) ownership across facility types

The majority of the sport facilities within the school estate are sports halls, followed by pitches. Of the over 3,000 sports halls in the country, 45% are at schools, with a further 39% in the wider Local Authority estate. This highlights the importance of the school estate for wider community sports use²⁸. Of sports halls with 3 courts or less, 44% are owned by schools and 32% are owned by local authorities. This ownership pattern flips when the sports halls have 4 courts or more, with 33% owned by schools and 57% owned by local authorities.

Management of Local Authority Facilities

The chart below shows the diverse management types within the public estate.

²⁸ As highlighted by *sportscotland*

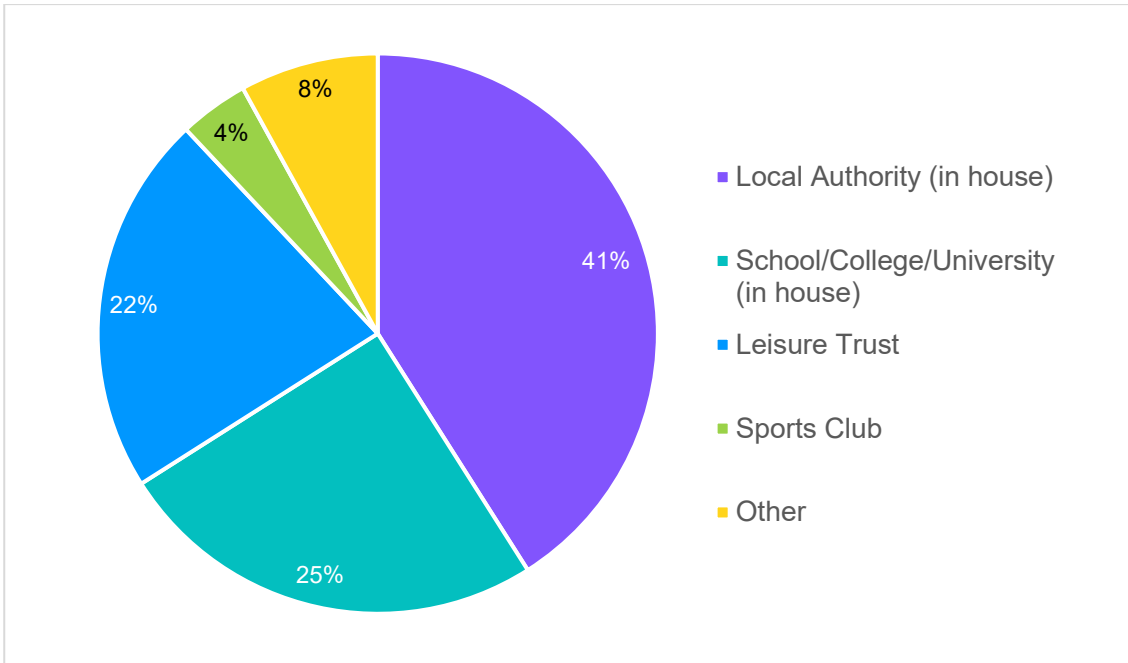


Figure 12: Management of local authority facilities

Sport Club and Community Organisation Owned Facilities

3,279 facilities, across 1,752 sites, are owned by clubs and community organisations.

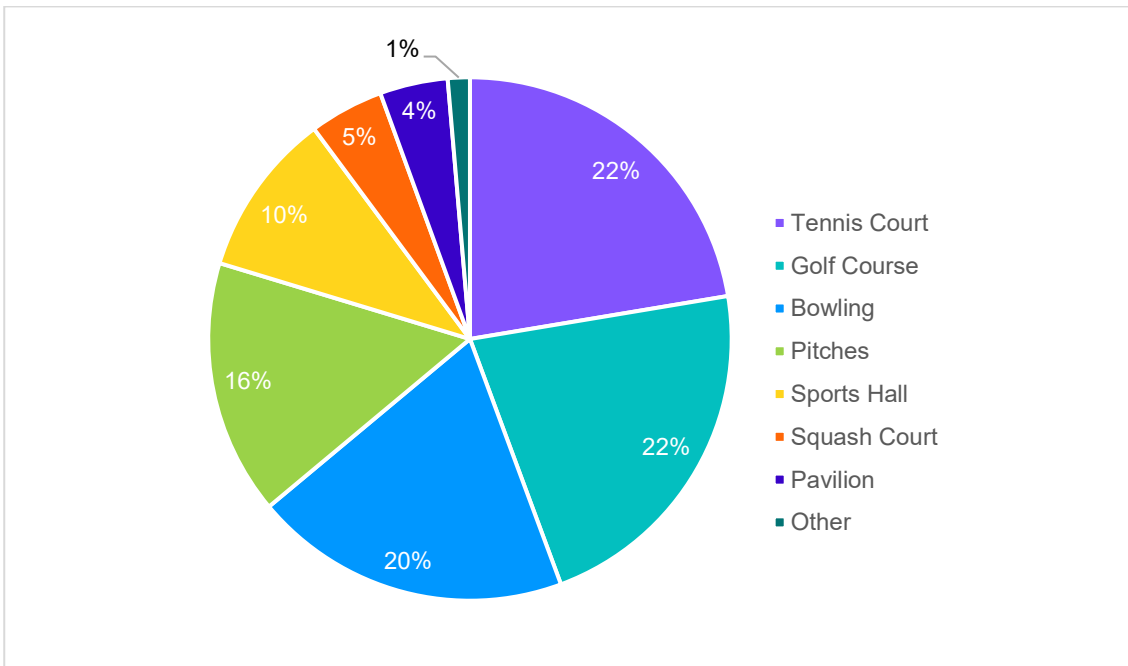


Figure 13: Sports club and community organisation ownership across facility types

Utilisation

Utilisation data was available for 1,926 out of 10,956 facilities, representing 18% of the estate in scope.

Utilisation Rate	Across all facilities	Outdoor facilities	Built facilities
Under 30%	368 (19%)	69 (20%)	276 (21%)
Between 30% and 70%	879 (46%)	148 (44%)	595 (45%)
Over 70%	679 (35%)	122 (36%)	454 (34%)

Table 1: Utilisation data for sport estate

As shown in the table above, the split of utilisation was largely consistent across the built and outdoor facility groupings for which data was available.

The facilities with the highest rates of usage belonged to tertiary education sector. Of the utilisation data provided for tertiary education sector owned facilities, 57 facilities (69%) had a usage of 70%+, 24 facilities (29%) had usage of 30%-70% and 2 (2%) were under 30%.

Where utilisation data was provided for the local authority estate (including schools), 34% had utilisation of 70%+, 46% were between 30%-70%, and 20% were under 30%. When the local authority estate is separated into schools and the wider estate, the utilisation breakdown is as below:

Utilisation Rate	Local Authority Schools	Rest of the Local Authority Estate (excluding schools)
Under 30%	25%	16%
Between 30% and 70%	47%	46%
Over 70%	27%	38%

Table 2: Utilisation data for local authority sport estate

As shown in Table 2, based on the available data, one quarter of sports facilities at local authority schools were underutilised, having a utilisation rate of under 30%. Nearly three-quarters of all sports facilities at local authority schools which provided utilisation data have the potential to be better utilised, with a utilisation rate of less than 70% as shown above.

While the utilisation data available was limited, **sportscotland** noted that this is likely to be indicative of the level of utilisation rates within the local authority owned schools and sports facilities estate across the country. This highlights that large parts of this estate are currently underutilised and therefore likely to be under-performing as a result²⁹.

It is recommended that further data is gathered, and an analysis of supply, demand and utilisation is undertaken to better understand the local picture. This should also consider other contributing factors such as accessibility, affordability and rurality for example.

²⁹ As highlighted by **sportscotland**

5.1.1 SGB (Sports Governing Bodies) Key Facilities

299 facilities have been identified as key facilities by SGBs. Of these, 90 are used for national-level activities, 107 serve regional needs, and 101 support local sport.

These are shown in Figures 14 to 19 below and in Appendix A.4.6.

These facilities form the backbone of Scotland's sporting infrastructure and are essential for the survival, and development of club sport. While comprehensive utilisation data is limited, it is evident that sports clubs are significant users of the public estate, relying heavily on access to these facilities for training and competition.

SGBs require access to affordable, fit-for-purpose venues that can host national events, including spectator seating and specialist infrastructure. While some facilities are designated as national, their availability for sport is increasingly compromised by other non-sport related uses. This creates a disconnect between the perceived availability of national facilities and their actual usability for sport.

Sustainable funding models for facilities that serve national and regional purposes must be underpinned with clarity for governance and operational responsibilities, particularly when facilities are expected to deliver outcomes beyond their immediate local remit. This requires a co-ordinated approach to managing these assets, recognising their strategic importance to Sport Governing Bodies (SGBs) and the wider sporting ecosystem.

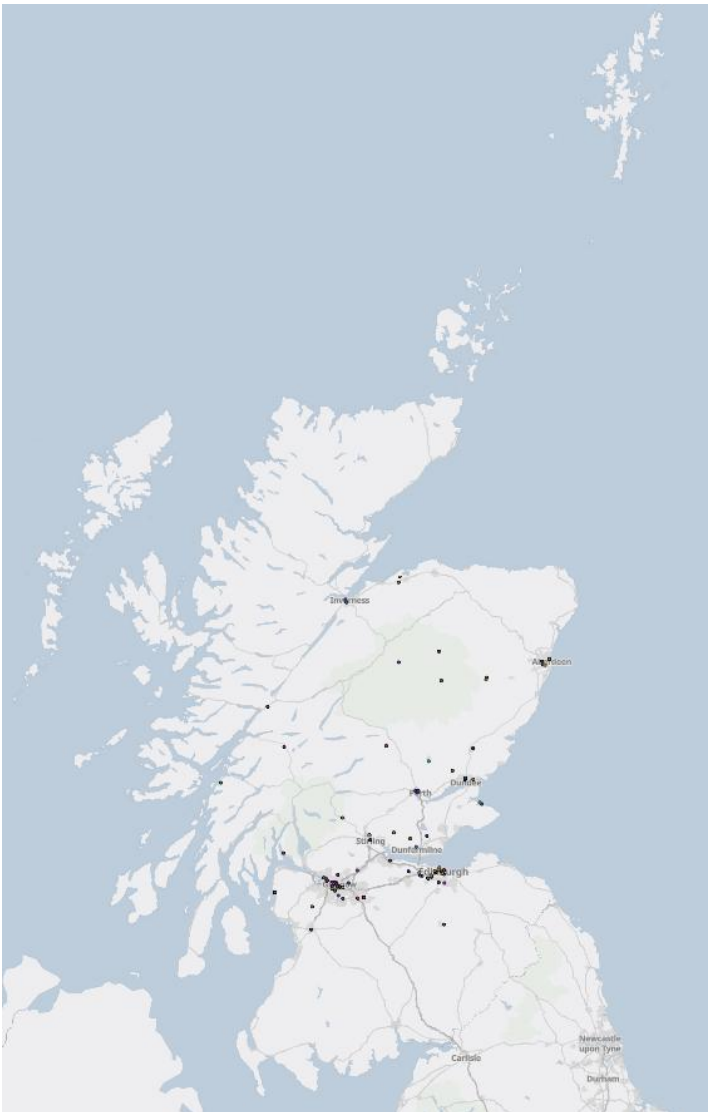


Figure 14: Map of National SGB Facilities

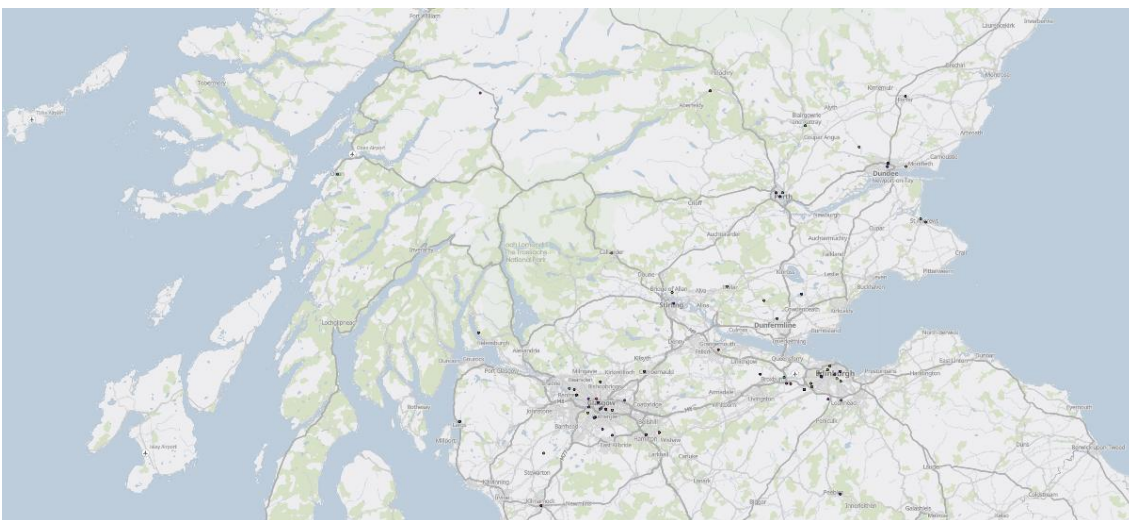


Figure 15: Map of National SGB Facilities - Central Belt

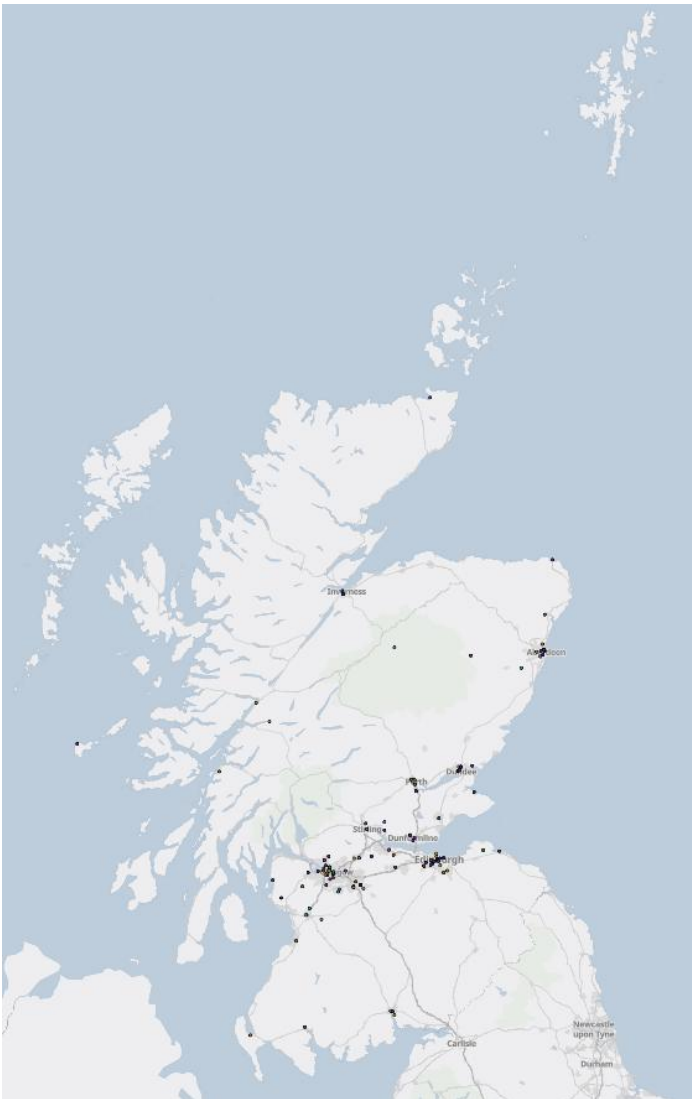


Figure 16: Map of Regional SGB Facilities

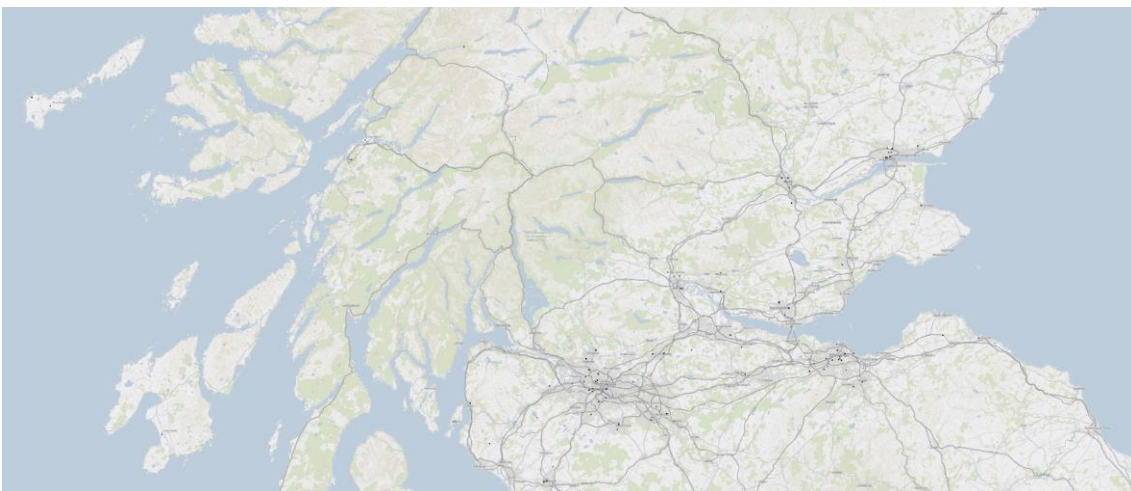


Figure 17: Map of Regional SGB Facilities - Central Belt

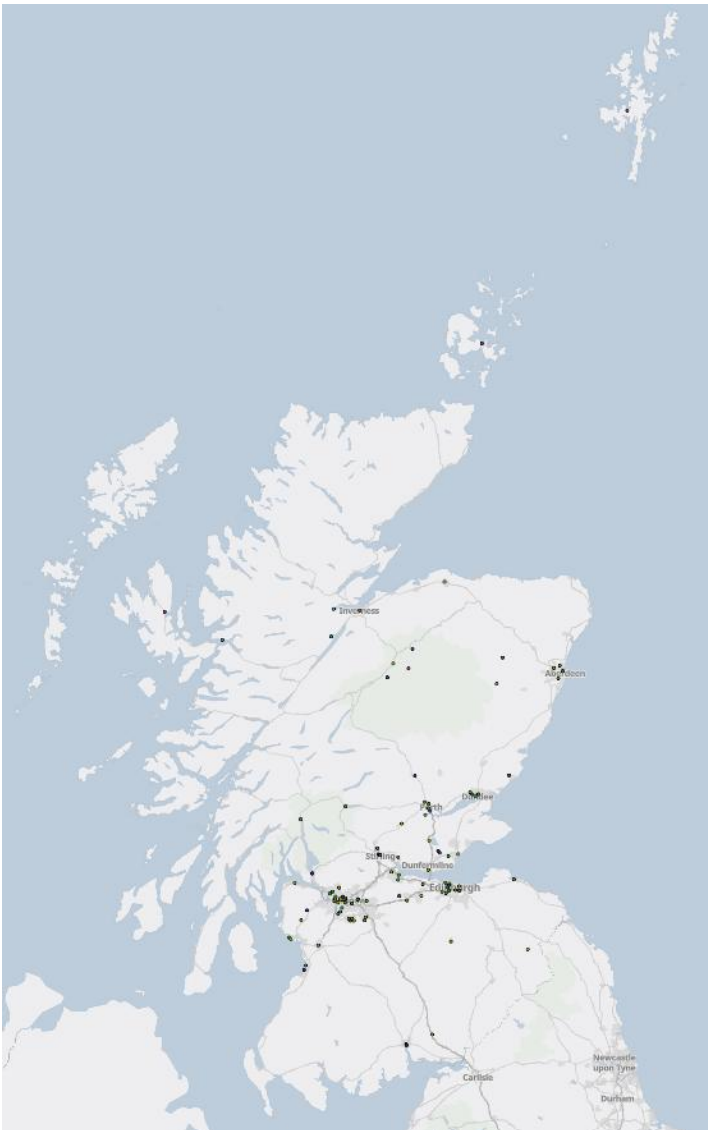


Figure 18: Map of Local SGB Facilities

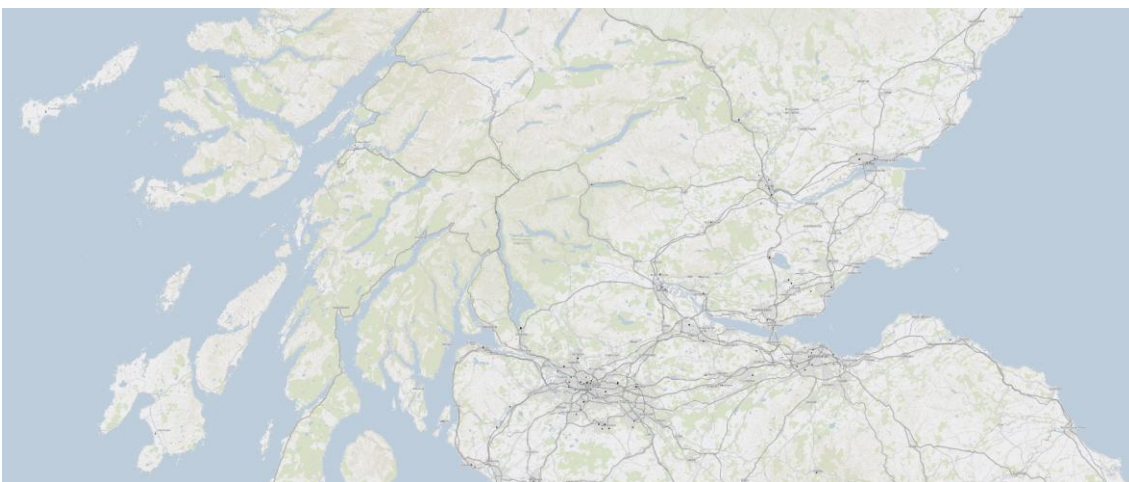


Figure 19: Map of Local SGB Facilities - Central Belt

5.2 Condition of the Sport Estate

Condition data was available for 4,708 facilities across 2,004 sites, offering a snapshot of the physical state of the sport estate.

Facilities condition data uses a standardised rating system from A (good) to D (bad), with an average condition rating of B across the estate. This approach to rating aligns with the condition ratings used to assess condition of the schools estate.

Stakeholders across the sport estate noted that there may be significant difference in condition between facilities with the same rating, depending on whether they are assessed to be at the 'top' of the rating or the 'bottom'³⁰. An allowance has been incorporated into the lifecycle cost model to cover this.

Further detail on the condition ratings and methodology can be found in Appendix 5

A breakdown of condition ratings can be seen in the chart below:

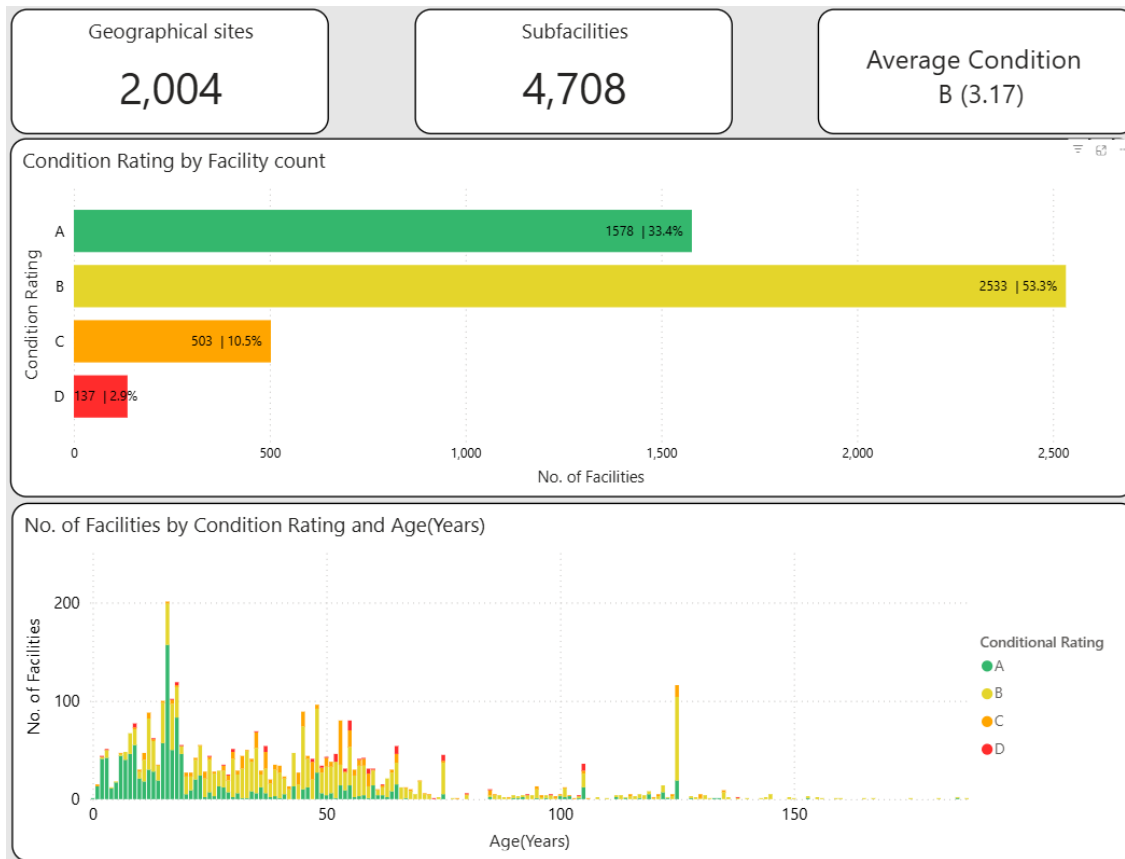


Figure 20: Condition data for the sport estate

Of the 1,578 facilities with Condition rating A, 75% are aged 1-20 years, this suggests that the facilities in the best condition are predominantly newer facilities. There are variances in different parts of the estate, and these are considered below.

³⁰ As highlighted by stakeholder group (see A7)

5.2.1 Ownership and Condition

Condition data has been provided for 3,925 facilities across 1,775 sites owned by Local Authorities (including schools). The average condition rating of these facilities is B. The prevalence of A rated facilities is greater in the school estate (39%) compared to the rest of the Local Authority estate (25%). While 91% of facilities in the school estate are rated A or B, this figure is 84% for the remainder of the Local Authority estate.

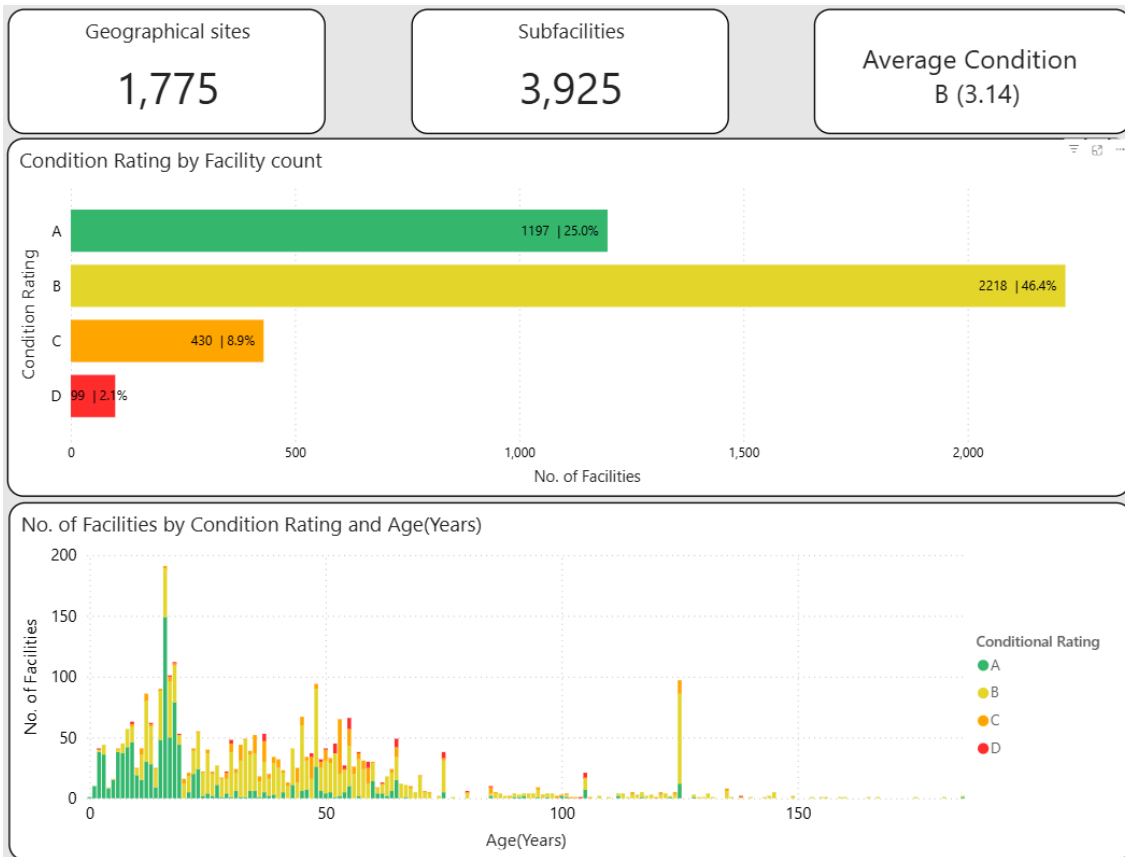


Figure 21: Condition ratings of facilities in local authority ownership (including schools)

Percentages in charts showing condition ratings refers to all facilities within that type or ownership, including those without condition data.

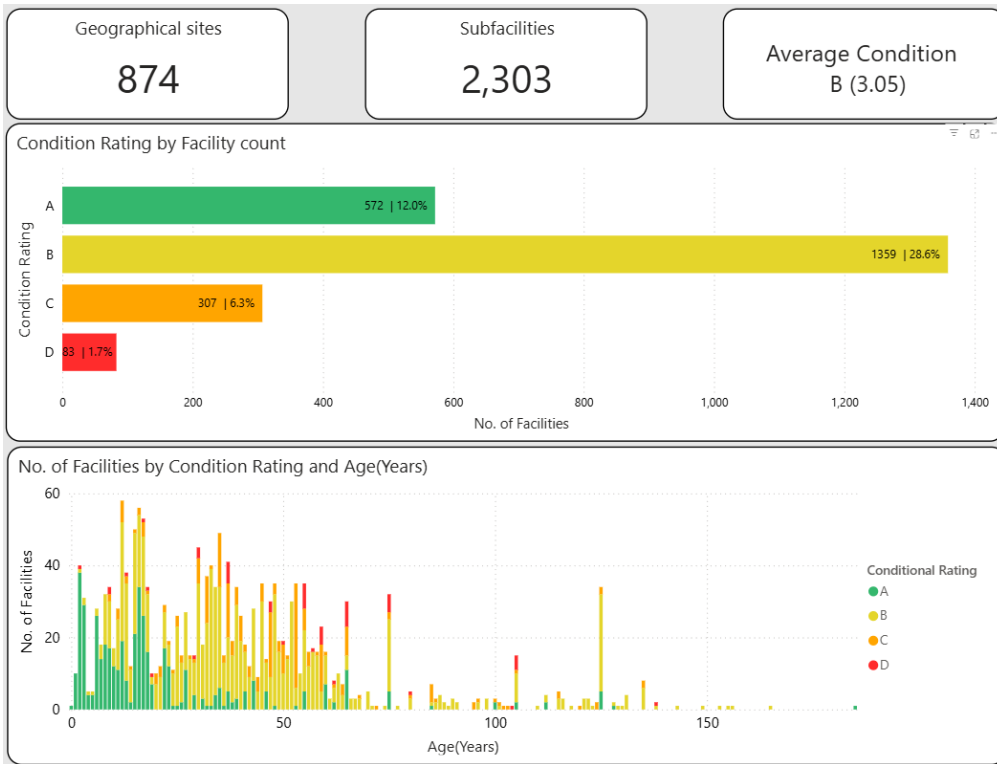


Figure 22: Condition ratings of facilities in local authority ownership (excluding schools)

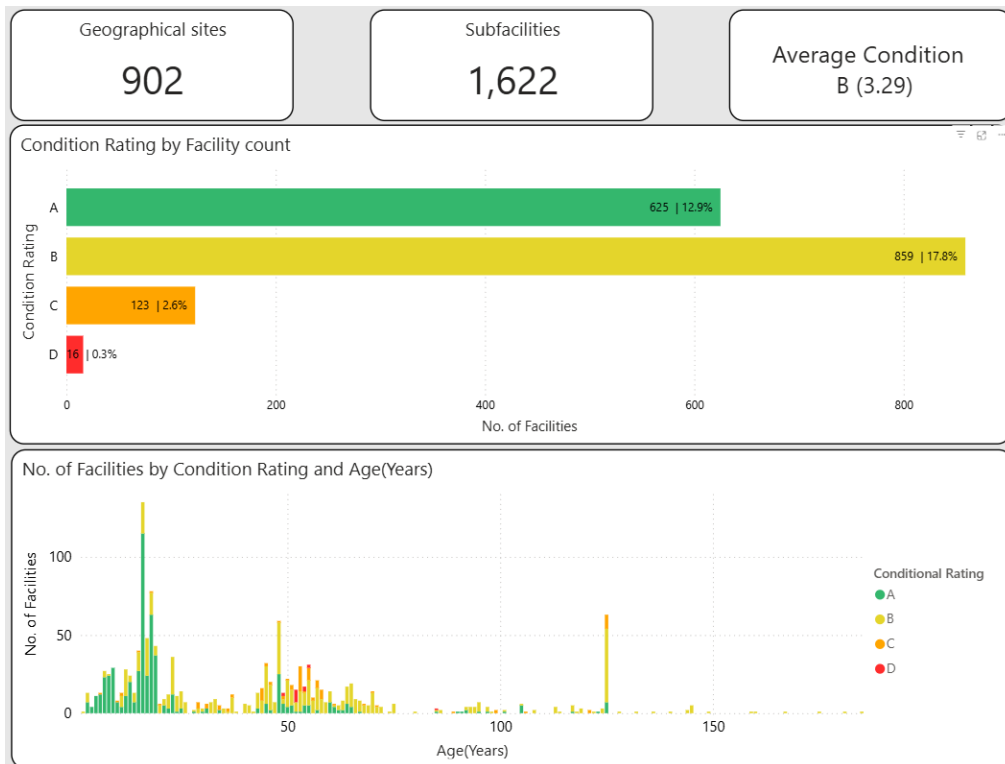


Figure 23: Condition ratings of facilities in local authority (school) ownership

Of the sports facilities in other ownership (not owned by local authorities or local authority schools) where condition data was available, 88% were condition A and B.

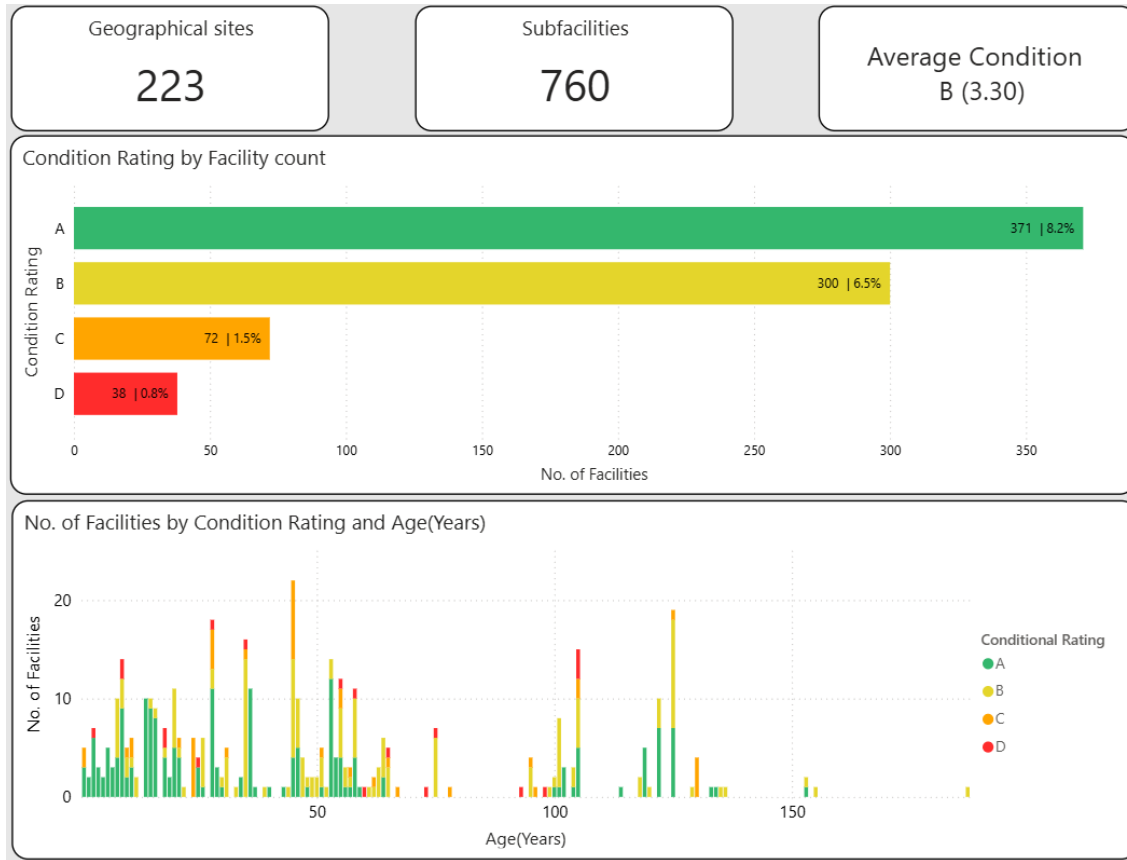


Figure 24: Condition ratings of facilities in other ownership (i.e. not local authority)

5.2.2 Condition of built facilities

Condition data has been provided for 3,060 built facilities at 1,797 sites. 31% of these facilities are rated A, 57% are rated B, 10% have a condition rating of C and 2% have a rating of D. The spread of condition ratings across the age range is captured in the figure below.

Facilities under 20 years old make up half of the built estate dataset and represent 46% of the built facilities that provided condition data, suggesting that there is not a bias towards local authorities providing condition data for newer sites only.

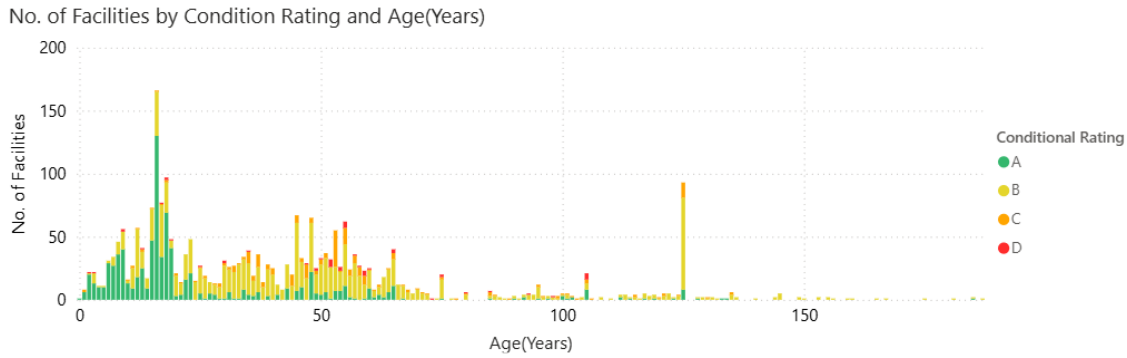


Figure 25: Number of built facilities by condition rating and age (year)

Nearly 50% of built facilities under the age of 20 years have a condition rating of A (good) and 45% condition rating B (satisfactory). This percentage drops significantly when looking at built facilities aged between 20 and 60 years, with A rated facilities making up 16%.

Facilities rated C (poor) and D (bad) for the same age groupings are 6% for facilities under 20 years, rising to 17% for facilities between 20-60 years.

Of the built facilities between 40 and 60 years old (i.e. those built between 1965 and 1985), 23% are rated as C (poor) and D (bad). Of the facilities over 60 years old, 85% have a condition rating of A or B.

5.3 Total Investment Requirements

£15.5bn is the investment that will be required over the next 25 years to bring and maintain the sport estate into a satisfactory condition (condition rating B), meet Net Zero standards, and improve accessibility and inclusion provision.

The investment cost is set out as a total and broken down to illustrate the investment required to address condition (bringing and maintaining facilities rated C and D up to condition rating B); the amount required to meet net zero standards, and the cost of improving the accessibility and inclusion provision. The spend is also shown as a spread across the 25 years up to 2050. It should be noted that this is not all new investment, the sector already spends a significant amount in capital and operating expenditure.

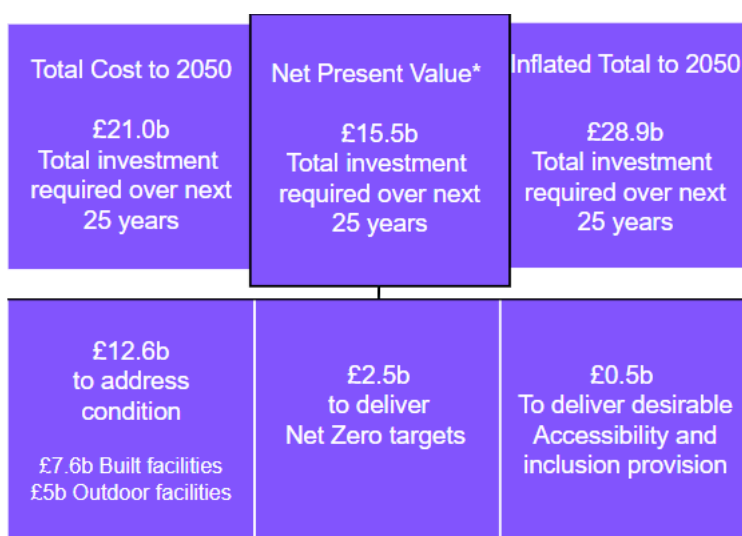


Figure 26: Investment required by sport estate

The total has also been broken down by facility type where appropriate, as well as by average annual cost facility type, where appropriate.

*The Life Cycle cost model expresses costs in three forms: total/undiscounted, discounted (Net Present Value) and Inflated costs. Net Present Value is used throughout this report.

5.4 Investment Requirements to address Condition and Maintenance

The level of investment required over the next 25 years to address current condition has been calculated at £12.6bn³¹.

This investment will bring and maintain all facilities to a satisfactory condition (rating B) for the next 25 years lifecycle. This includes the cost to uplift all facilities that are currently rated C or D to B and then maintain them at that level. Many facilities will also reach the end of their useful life and will require replacement within the next 25 years. This is also included in the costs.

³¹ All investment figures to address condition, both in the text and the figures, refer to the cost to bring all facilities rated C and D up to Condition rating B and maintain at this condition B rating.

A comprehensive 25-year Life Cycle Cost (LCC) model was developed. This model evaluates the financial implications of various asset interventions such as maintenance, renewal, disposal, or replacement, across all facility typologies.

An allowance is incorporated into the lifecycle cost model to cover perceived discrepancies within condition rating bands as previously noted.

To cover perceived discrepancies in condition between condition ratings, especially B and C ratings, as noted by stakeholders across the sport estate³² **sportscotland** noted a contingency of 7.5% on the total costs would be appropriate. Applying this uplift would increase the total investment to address condition from £12.6bn to £13.5bn, and increase the overall total investment figure including NetZero, Access and Inclusion improvements to £16.4bn.

Further detail on the methodology and cost modelling can be found in Appendix 5.

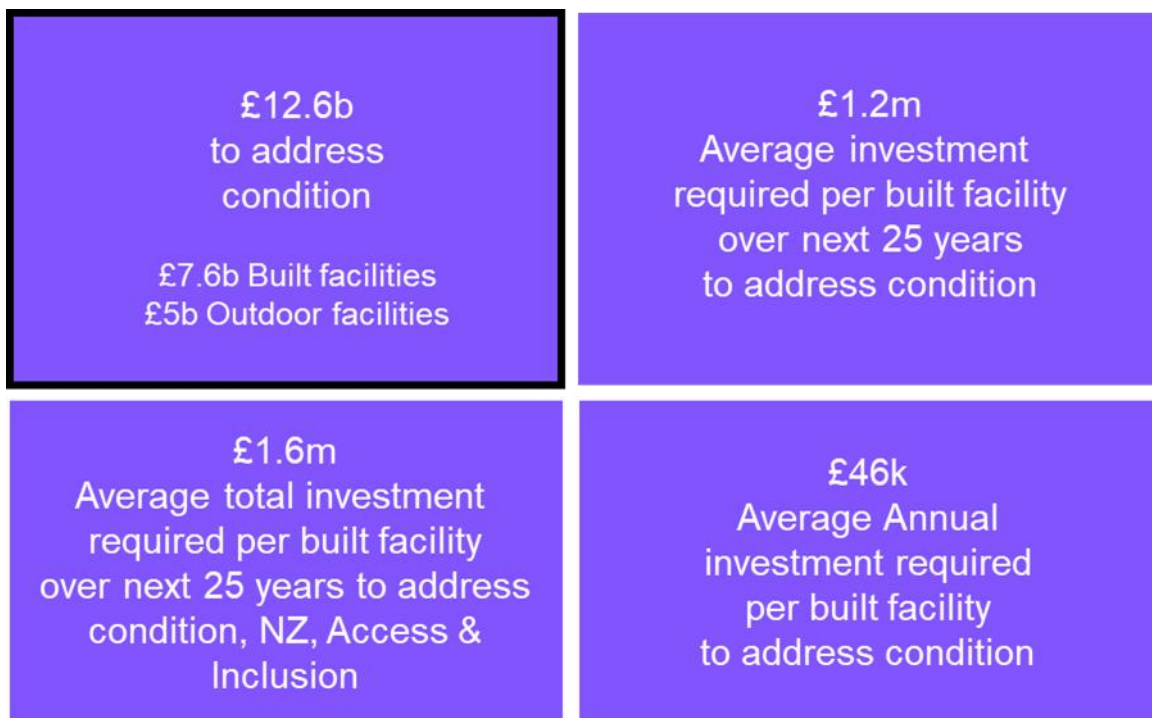


Figure 27: Investment required to address condition and maintenance

³² As highlighted by stakeholder group (see A7)

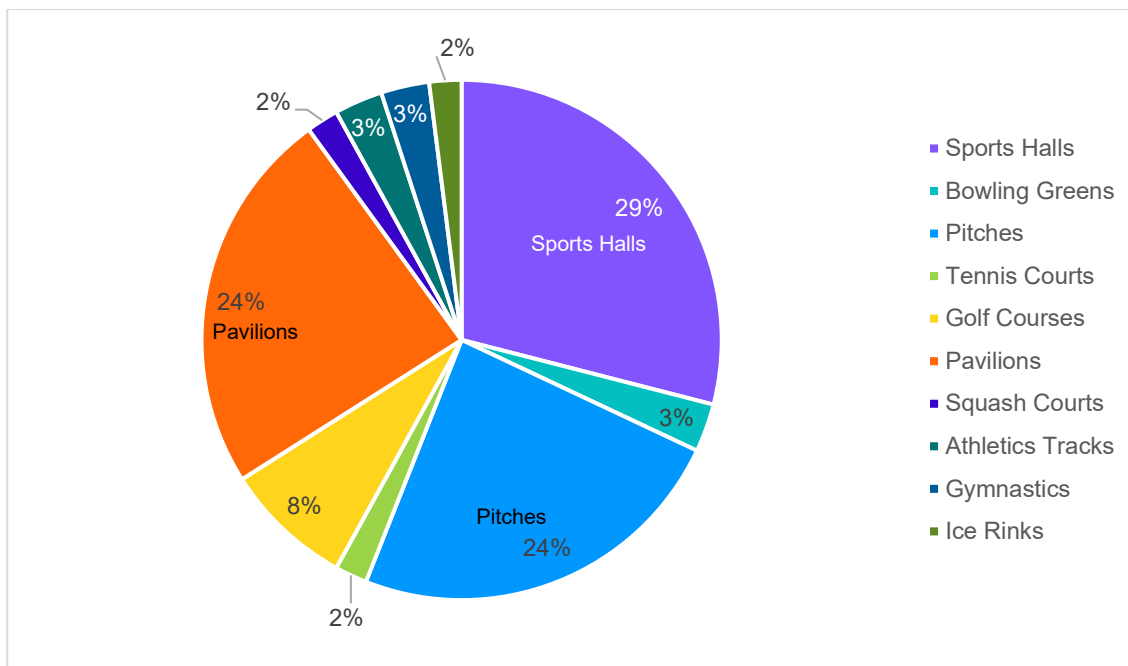


Figure 28: Investment to address condition and maintenance across all facility types

5.5 Investment Requirements to deliver Net Zero

The estate is in a poor state of preparedness to meet likely future needs of a changing climate or National Net Zero requirements over the next 20 years.

Approximately **£2.5bn** of investment is required to deliver Net Zero across the next 25-year period. (While the Scottish Government's net zero target is 2045, and the interventions costed here will meet this target, costings have been provided over a 25-year period to align with the comprehensive 25-year Life Cycle Cost (LCC) model developed and with the costings of the condition and maintenance and accessibility and inclusion requirements.)

Such interventions could be considered critical for eliminating direct carbon emissions and reducing energy consumption. If not addressed, these issues may pose a risk to achieving Net Zero by the Scottish Government's 2045 target. The implications of not undertaking these measures include rising operational costs, increased carbon emissions, and the potential for stranded assets.

This investment can be phased over the next 20 years, prioritising high-impact interventions such as heat decarbonisation in line with public sector zero direct emission heating (ZDEH) standards by 2038 (excluding Biomass, Biofuel and District Heating systems), interventions to improve energy efficiency and maximise on-site energy generations where feasible. Facilities classified under the category 'swimming pools' are excluded from this analysis.

These interventions include improving:

- Fabric improvements – to reduce overall building energy consumption
- Heat Decarbonisation – removal of fossil fuelled and other combustion building services with high efficiency electric services such as heat pumps
- Improved Control & Efficiency Improvements – smart controls and energy efficiency improvement, such as LED lighting replacement and heat recovery technologies
- Renewable energy generation – such as photovoltaics (PV)

Further detail on the Net Zero methodology and cost modelling can be found in Appendix 5.

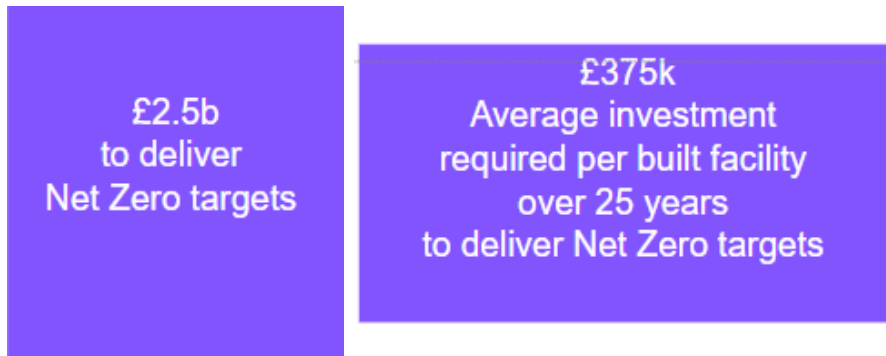


Figure 29: Investment required to deliver net zero for the built estate

5.6 Investment requirements to deliver Access and Inclusion improvements

The investment required to improve access and inclusion across the sport estate to a desirable level has been calculated as £472.4m.

This investment figure will address improvements to provide a **desirable level** of accessibility and inclusion provision across the estate in line with good practice.

Interventions include improving lack of step-free access; inaccessible and lack of inclusive changing rooms/toilet provision; poor lighting; lack of hearing loops and uneven flooring/slippery surfaces, glare on screens at reception desks, and provision of quiet/restorative spaces.

This investment figure includes £310.3m of improvements to provide a minimum level of accessibility and inclusion provision and overcome the main access barriers and improve facilities in line with current standards. These elements are essential for basic functionality. The implications of not addressing these elements will be to prevent certain users from safely or independently accessing or using the facility.

Accessibility, in the context of the built environment, refers to ‘the provision of buildings, parts of buildings, or outdoor built environments for people, regardless of disability, age or gender, to be able to gain access to them, into them, to use them and exit from them’³³. Inclusive design, in the context of the built environment, ‘seeks to create spaces that...welcome everyone, regardless of their identity or characteristics e.g. age, race, disability, sexuality etc. It aims to remove the barriers that create effort and separation and it enables everyone to participate equally, confidently and independently in everyday activities’³⁴.

Signage that includes appropriate languages for a variety of users from different cultural backgrounds and allows them to feel a sense of ownership for the building is a good example of a physical intervention that also addresses one aspect of inclusion.

Three levels of investment have been included in the cost model: Minimum, Desirable and Excellent.

Classification	Minimum	Desirable	Excellent
Total Cost of interventions	£310.3m	£472.4m	£537.9m

Table 3: Cost of intervention classifications

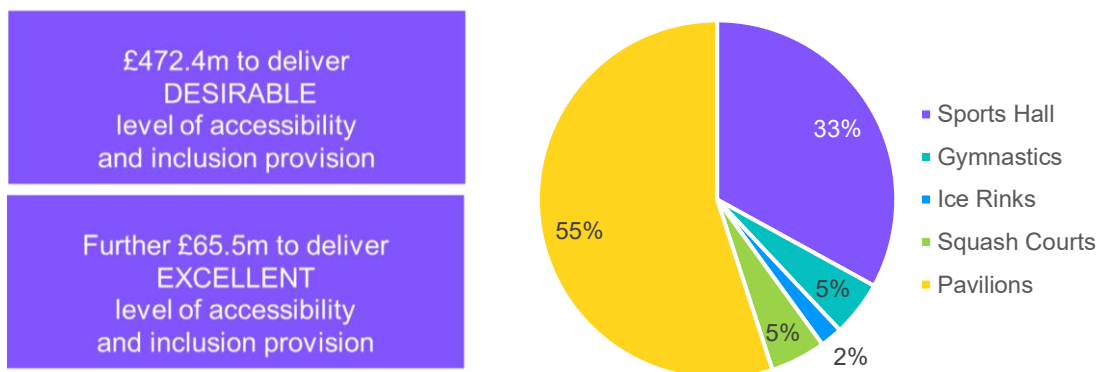


Figure 30: Investment required to deliver access and inclusion improvements

³³ BS EN 17210:2021 *Accessibility and usability of the built environment. Functional requirements*. BSI Group. March 2021

³⁴ *Inclusive Design Overlay to RIBA Plan of Work*. RIBA. July 2023.

6 Challenges and Opportunities

This section sets out the key Economic, Environmental and Social Challenges and Opportunities and explores how a Systems Approach could deliver opportunities to improve cross-sector planning and data driven decision making.

6.1 Financial

The financial strain on sports facilities, especially those owned, operated or supported by Local Authorities and clubs and community organisations, is severe. This is not a new challenge and the previous National Audit in 2006 highlighted that most local authority facilities operate at a deficit and face growing competition from the commercial leisure sector.³⁵

Local Authority sports facilities face significant challenges due to reduced funding, rising operational costs, ageing infrastructure and declining post-pandemic usage. There is often huge pressure on Local Authorities to optimise, repurpose underutilised space or rationalise their public estate, and sports facilities with high operating costs are often key candidates for closure in order to prioritise statutory obligations. Recent additional requirements for public funds, for example measures to mitigate Reinforced Autoclaved Aerated Concrete (RAAC) issues have increased pressures even further in some regions.

Current operating budgets mean that maintenance tends to be reactive at best, rather than planned or pro-active, storing up future burdens for capital budgets. This has led to significant maintenance backlogs being built up across the country, impacting on both the indoor and outdoor estate³⁶. There is also a need to balance competing investment requirements across portfolios, for example balancing the focus on improving fabric condition with the pace of new builds to achieve access and sustainability targets.

An extensive review of Leisure and Culture services in Scotland, commissioned by Community Leisure UK, Creative Scotland and **sportscotland** in September 2024³⁷ concluded that:

- Local government investment in culture, sport and leisure services across Scotland has reduced by at least 20% in real terms between 2010/11 and 2022/23. analysis suggests that net revenue expenditure on culture has fallen by as much as 33% in real terms with sport and leisure reducing by around 25% in real terms.
- Most Councils and ALEOs³⁸ (Arm's Length External Organisations) have already had to make substantial savings through reducing hours, closing facilities and staff reductions. Around a third of ALEOs have closed facilities including indoor and outdoor sports facilities.
- Operating costs have increased sharply since the pandemic, particularly in relation to energy and staff, exerting further financial pressure on what are already stretched services.

³⁵ *National Audit of Scotland's Sports Facilities: Summary Report. sportscotland. 2006*

³⁶ *Review of Culture and Leisure Services in Scotland: Report for Community Leisure UK, Creative Scotland and sportscotland. Final Report. ekos. 2024*

³⁷ *Ibid*

³⁸ For the most part, councils either deliver culture and sport and leisure services in-house or through an arm's length external organisation (ALEO). Some authorities may retain some service delivery responsibilities in house (a hybrid model) while others may transfer all to an ALEO.

- Long term funding reductions have now meant that there is little left to do other than withdraw services and close facilities.
- Income has not returned to pre-pandemic levels, reflecting the current cost of living pressures on households.
- There is little sign of optimism as most councils and ALEOs expect further cuts over the next few years.

The analysis in the Leisure and Culture services in Scotland Report paints a very challenging picture for culture, sport and leisure services. *With the pressures facing local government likely to continue, this need for transformational change is ever more urgent. In considering future options, it is important to remember how much these services matter*³⁹.

*Sector leaders spoke of their concerns that the current landscape is no longer sustainable, and that long term funding reductions have now meant that there is little left to do other than withdraw services and close facilities*³⁷.

Audit Scotland's recent overview report on Local Government in Scotland noted that *Culture and Sport and leisure Services were severely affected by the pandemic and future risks are significant. The impact on these services was severe.... With little resilience in these services owing to long-term funding reductions, future challenges are significant*⁴⁰

As set out in the **sportscotland** report on Charges for sports facilities⁴¹, increased energy costs are impacting facility charges as well as opening hours. Of the 27 authorities who responded to the request for information relating to the impact on increased energy costs on facilities charges, 13 advised that they had increased their facility charges because of increased energy costs. 3 local authorities reported an over 50% increase in facility running costs (excluding staff salaries), with 7 reporting an increase of between 20 and 50% and another 4 reporting an increase of less than 20%. Other impacts from rising energy costs, as reported by 21 local authorities, include the closure of facilities, reduced opening hours and fewer activities⁴².

The cost per attendance at sports facilities in 2022/23 increased by 59% since pre-covid levels; and the measures of satisfaction at leisure facilities fell by 4%⁴³. The cost to participants in sports also increased by as much as 18% between 21/22 and 22/23⁴⁴.

6.2 Environmental

Sports facilities face challenges due to ageing infrastructure and, in particular, the pressures on budgets because of increasing energy costs and the physical impacts of climate change. The physical impacts of climate change, such as increased flooding, extreme heat, and more frequent storms, pose significant risks to sports facilities across Scotland. These events are likely to damage infrastructure, disrupt schedules, and increase maintenance costs in the near future.

Sport and leisure buildings are energy-intensive, particularly swimming pools and ice rinks, and therefore will require significant investment in energy efficiency upgrades to ensure climate and

³⁹ *Review of Culture and Leisure Services in Scotland: Report for Community Leisure UK, Creative Scotland and sportscotland. Final Report. ekos. 2024*

⁴⁰ *Local government in Scotland: Overview 2023. Audit Scotland. May 2023.*

⁴¹ *Review of Culture and Leisure Services in Scotland: Report for Community Leisure UK, Creative Scotland and sportscotland. Final Report. ekos. 2024*

⁴² *Charges for sports facilities: Scotland 2023/24. sportscotland.*

⁴³ *Local Government Benchmarking Framework: National Benchmarking Overview Report 2022/23. Improvement Service, 2023*

⁴⁴ *Charges for sports facilities: Scotland 2023/24. sportscotland.*

energy efficiency targets are achieved and maintained. This may not always result in lower operational costs due to fluctuating energy costs but will reduce the detrimental effect they have on the climate. It is also important that the operational management of the building is appropriate - achieving an energy efficient building does not guarantee low energy use if the use of the building is not optimised.

Local Authorities are currently reviewing and implementing energy efficiency and carbon reduction interventions across their estates. The impact of this investment is significant and likely to deliver carbon savings at scale, contributing to national NetZero targets. This is however adding further pressure to Local Authority budgets that are already under significant pressure.⁴⁵

Clubs who own and operate their facilities also have an important role to play at an individual site level. There are many good examples of clubs that have invested in energy efficiency measures including insulation, LED lighting, solar PV panels, air and ground source heat pumps, however the scale and pace of this is constrained by affordability and the availability of grant funding.

Many of these have been delivered through government funding, and examples can be seen here: [Salix Finance Case Studies](#).

Two reports commissioned by Scottish Swimming in November 2023: *The Future of Swimming Facilities in Scotland*, and *A Sustainable Future: Enhancing Energy Efficiency in Scotland's Swimming Pools* identified the urgent need to ensure that investment produces sustainable facilities, both economically and environmentally, highlighting that environmentally, the urgency to act cannot be overstated^{46,47}.

6.3 Social

Providing accessible and inclusive facilities for all communities across Scotland is a challenge. There remain many inequalities in participation and provision of opportunity, for example with research showing that people who live in areas of greater deprivation are less active than those in lower areas of deprivation. As reported in Edinburgh Leisure's 2024-25 Impact Report, only 33% of residents living in the most deprived areas take part in sport, compared to 63% in the least deprived areas⁴⁸.

Improving participation for women, individuals aged 75 and over, those with disabilities and long-term health conditions, and some ethnic groups will be a key focus moving forwards.

Research into equality, diversity, and inclusion (EDI) in Scotland's sporting sector, carried out by **sportscotland** in February 2025, concluded that whilst there has been a recent shift toward greater inclusivity in the sector, with improvements in leadership, guidance, and visibility around equality, more needs to be done to be fully inclusive⁴⁹.

Barriers such as financial constraints, negative attitudes toward gender identities, racism, and discrimination against individuals with disabilities persist. Findings show that equality is more integrated in schools and education compared to performance sports and community clubs. Many professionals working in the sporting sector feel supported in promoting and embedding

⁴⁵ *Review of Culture and Leisure Services in Scotland: Report for Community Leisure UK, Creative Scotland and sportscotland. Final Report.* ekos. 2024

⁴⁶ *The Future of Swimming Facilities in Scotland.* Scottish Swimming, November 2023

⁴⁷ *A Sustainable Future: Enhancing Energy Efficiency in Scotland's Swimming Pools.* Scottish Swimming, November 2023

⁴⁸ *2024-25 Impact Report.* Edinburgh Leisure.

⁴⁹ *Equality and Sport Research: Final Report.* Horizons Research and **sportscotland**. February 2025

equality-related practices, but the report recommended a call for increased resources and guidance.

The Physical Activity Health Framework (PAHF) states that strengthening access and ensured sustainability of good quality public and green spaces, green networks, recreational spaces, play and sports amenities is critical to achieve the Active Places and Spaces strategic outcome⁵⁰. Placemaking is key to the development of active places and spaces.

One of the Sport for Life key objectives is to address inequalities in sport to ensure marginalised groups have access to resources and support, including physical access to facilities⁵¹.

The **sportscotland** Sports Facilities Fund is highlighted in the PAHF as an exemplar of action to deliver the Places and Spaces strategic outcome at a national and local level⁵². By investing in facilities and projects that offer more and better opportunities for people to participate for the first time or a better experience for those who are already engaged in sport and physical activity.

Opportunities exist to integrate sport and physical activity into routine healthcare and existing clinical pathways as part of treatment and rehabilitation for people diagnosed with long term conditions e.g., heart disease, stroke, diabetes, cancer, and mental health conditions.

Work is ongoing to develop partnerships between NHS Scotland and physical activity providers across Scotland to embed the provision of appropriate physical activity opportunities and programmes for different patient populations, for example, those living with mental health problems. The development of Physical Activity Referral Standards demonstrates how sport can link and help deliver active health and social care. Public Health Scotland has articulated the relationship between social prescribing, signposting, and physical activity referral through a tiered approach to physical activity interventions⁵³.

6.4 Community Asset Transfer

The **Community Empowerment (Scotland) Act 2015** enables communities to take ownership or control of public assets⁵⁴. Through **Community Asset Transfer (CAT)** community bodies can make requests to Scottish Ministers, local authorities and a range of public bodies for ownership, lease, or management of any land or buildings they feel they could make better use of⁵⁵.

Community bodies can use Community Asset Transfer to secure long-term tenure of land or buildings, enabling them to invest in infrastructure, grow community impact and access funding streams not available to public bodies⁵⁶. **sportscotland** noted that it is well recognised there are also challenges for community groups including complex legal and financial processes, a range of liabilities, and limited governance or capacity to deliver ongoing services and responsibilities.

⁵⁰ *Physical activity for health: framework*. Scottish Government. October 2024

⁵¹ *Sport for Life: A vision for sport in Scotland*, **sportscotland**

⁵² *Physical activity for health: framework*. Scottish Government. October 2024

⁵³ *Physical activity referral standards*, Public Health Scotland, 2022

⁵⁴ *Community Empowerment (Scotland) Act: summary*. Scottish Government. February 2017.

⁵⁵ *Community empowerment: Asset transfer*. Scottish Government.

⁵⁶ *Ibid.*

6.5 A Systems Approach to deliver value

It has been recognised by Public Health Scotland that Sport and Physical Activity are a key element in a joined up, holistic strategy to improve the health of the nation.

Some robust work has been completed on this to date, including the **Systems-based Approach to Physical Activity in Scotland: A Framework for action at a national and local level**, published by Public Health Scotland in November 2022⁵⁷.

“Providing equitable and inclusive access to appropriate sport and active recreation places, spaces and services” is stated in this framework as one of the key strategic delivery outcomes.

Single Scottish Estate (SSE) programme promotes a more efficient, collaborative, and sustainable approach to public sector property management⁵⁸.

As part of the Scottish Government’s broader strategy to reduce the public estate footprint and meet Net Zero targets, SSE encourages co-location, shared services, and cross-organisational planning across public bodies. The Single Estate programme opens opportunities for sports facilities to be integrated into multi-use public hubs, enhancing accessibility and community engagement while reducing overheads and operating costs.³⁷

⁵⁷ *A systems-based approach to physical activity in Scotland: A framework for action at a national and local level*. Public Health Scotland. November 2022

⁵⁸ *Public sector procurement: Single Scottish Estate*. Scottish Government.

7 Conclusions

The findings of the review reveal a vast, diverse, and ageing estate that needs significant investment to deliver national ambitions for health, wellbeing, sustainability, and inclusion.

The three core challenges identified in the review relate to: Data, Strategic planning and Investment. A systems-based approach will be essential to address these issues.

Without investment, Scotland's sport estate will continue to deteriorate—limiting participation and increasing pressure on public services. Current funding models are unsustainable, decisions are often made without robust, consistent data and strategic planning is fragmented. Addressing these challenges requires a coordinated approach that aligns investment with national health, wellbeing, equality and climate priorities.

Many of the themes outlined echo with the findings of the National Audit of Scotland's Sports Facilities 2006 which stated:

'What we need to ensure is that we have the right quality and mix of facilities across the country to provide opportunities to participate in a range of sports and to do this in such a way that we can increase participation and support those who wish to compete at a higher level. Facility operators will need to undertake detailed condition surveys of individual facilities before investing in upgrade or replacement, but investment decisions should always be based on a strategic assessment of long-term needs, priorities and sustainability. This approach must recognise changing patterns of demand for different types of facilities and changes in the way particular sports are being developed as well as demographic changes at national and local levels'⁵⁹

Data

There is a lack of consistency, quantity and quality of data about the sport estate for age, condition, energy use and utilisation, held by those who own and manage facilities. Further data is required to better understand estate utilisation at a local level to support data driven decision making.

Significant challenges were faced collecting the data, highlighting a challenge in relation to understanding and reporting on the health of the sport estate. Datasets to support utilisation, suitability and energy consumption at facilities were particularly challenging to source.

The availability of improved and additional datasets will enable a more consistent and data-driven approach to investing in and managing the estate, critical to ensuring long-term sustainability and aligning the estate with national health, wellbeing, and climate goals. Improvements are required in the collation, management and reporting of key asset information relating to age, location, condition, energy consumption, utilisation and suitability across the estate.

Further analysis at a local, regional and national level around the supply, utilisation and future demands for the sport estate and the suitability of current facilities to meet these would help inform how the estate is best used in the short, medium and long-term.

⁵⁹ *National Audit of Scotland's Sports Facilities: Summary Report. sportscotland. 2006*

Strategic planning

There are opportunities to build solutions for a future sustainable sport estate as part of a systems approach that delivers broader outcomes in line with Government priorities to eradicate child poverty; tackle the climate emergency; grow the economy and improve public services.

To deliver a place-based approach, that prioritises the reuse and optimisation of existing assets to support net zero goals and inclusive growth, opportunities must be explored that encourage collaboration across public sector organisations, promoting co-location and shared facilities to improve service delivery and efficiency. **sportscotland** recognises that this requires a better understanding across all stakeholders of local, regional and national supply, demand and utilisation rates. This will enable more strategic planning, rather than attempting to maintain the status quo.

Such a holistic, systems-based approach is essential to deliver lasting change and align with the ambitions of the Single Scotland Estate⁶⁰, Community Asset Transfer and Scottish Government's Infrastructure Investment Plan (IIP)⁶¹.

The predication to reuse or repurpose existing assets, as set out in the asset hierarchy outlined in the Scottish Government's Infrastructure Investment Plan⁶² (IIP) and adopted in the *Guide to Property Asset Strategy in the Scottish Public Sector*, is likely to be challenging for many asset owners.

Investment:

£15.5bn of investment nationally is required over the next 25 years to bring and maintain the national sport estate into a satisfactory condition (£12.6bn), meet Net Zero targets (£2.5bn) and deliver accessibility and inclusion improvements (£0.5bn).

The investment requirements are a direct response to the following key findings of the Estate Review:

Ageing facilities: Scotland's sport estate is ageing, with 40% of built facilities currently beyond their typical design life. This figure will rise to 45% in ten years' time. The average age of a facility is now 45 years old, and 49% of built facilities are older than 20 years old.

Deteriorating condition: While nearly 50% of built facilities under the age of 20 have a condition rating of A (good) and 45% condition rating B (satisfactory), this percentage drops significantly at age 20 years and over, with 16% of built facilities and 23% of outdoor facilities in poor or bad condition. For built facilities between 40-60 years old 21% are in poor or bad condition, with significant investment required to bring and maintain these facilities to a satisfactory condition.

Net Zero readiness is a critical challenge for Scotland's sport estate. Sports facilities currently contribute significantly to local authority carbon emissions, and without targeted intervention, they will continue to fall short of national climate goals. Retrofitting facilities with energy reduction measures presents a major opportunity to reduce operational carbon and support Scotland's Net Zero ambitions. However, it is important to note that these interventions may not always result in direct cost savings due to fluctuating energy prices.

⁶⁰ *Public sector procurement: Single Scottish Estate*. Scottish Government.

⁶¹ *National Mission with Local Impact: Infrastructure Investment Plan for Scotland 2021-22 to 2025-26*. Scottish Government. February 2021.

⁶² *Ibid*

Building resilience to the physical impacts of climate change is essential for the sport estate, as increased flooding, extreme heat, and more frequent storms pose growing risks to infrastructure, disrupt operations, and strain maintenance budgets. To ensure long-term sustainability, facilities must adopt a climate-adaptive approach, retrofitting buildings to withstand extreme weather, integrating nature-based solutions like green spaces for flood management, and ensuring inclusive access during climate disruptions.

Equality, Diversity and Inclusion (EDI) Requirements: To meet the obligations of The Equality Act 2010⁶³, the sport estate must embed inclusive design principles into all planning and refurbishment, ensuring accessible layouts, toilets, changing areas, and spaces that remove barriers for underrepresented groups. In addition to physical improvements, investment in staff training and community engagement is essential to create welcoming environments for all protected groups and fully comply with EDI standards.

sportscotland recognises that the scale of investment required to address these issues, against a background of rising costs and declining budgets, is unlikely to be viable within current public funding models. sportscotland noted this will require the key stakeholders to better understand local, regional and national supply, demand and utilisation rates, enabling them to plan more strategically for an estate that reflects need rather than attempt to maintain the status quo. This does not however negate the need for continued investment being made in the estate.

Within this context the **Key conclusions** of the Estate Review are:

1. Better Data Management is required to inform decision making:

There is limited consistency between the quantity and quality of data, on age, condition, energy use and utilisation, held by those who own and manage facilities. Further data is required to better understand estate utilisation at a local level to support data driven decision making.

2. Strategic planning is essential to deliver lasting change:

Investing in the national sport estate will improve the health and wellbeing of the nation and reduce future burdens on health, social care, education and community budgets. Conversely, if investment is not made to the required levels, the health and wellbeing of the nation will deteriorate and the future burden on national health, social care, education and community resources will increase.

3. Investment Requirements:

£15.5bn is required over the next 25 years to address the ageing assets, condition, Net Zero, Access and Inclusion requirements. The estate is in a poor state of preparedness to meet Net Zero, Accessibility, and Inclusivity requirements over the next 25 years. £2.5bn of investment is required to deliver Net Zero; and £0.5bn for Accessibility and Inclusivity improvements.

⁶³ *Equality Act 2010: guidance*. UK Government. June 2015.

8 Recommendations

In response to the conclusions of the Estate Review, the recommendations below set out a strategic roadmap to transition Scotland's sport estate into a financially sustainable, accessible, inclusive, and resilient national asset.

These recommendations are designed to catalyse a strategic, cross-sector, systems approach to investment planning, ensuring that sports infrastructure plays a pivotal role in advancing Scotland's national priorities to eradicate child poverty; tackle the climate emergency; grow the economy and improve public services.

At the heart of this transition is the need for robust data, collaboration, and innovative funding models that embed sport within the broader framework of public service delivery. These recommendations aim to align stakeholders, resources, and actions to deliver an active Scotland where everyone benefits from sport.

Data

1. Establish a Standardised Asset Data Framework

Develop and implement a consistent methodology for collecting, managing, and reporting key data on publicly owned sport estate assets—mirroring the approach used in the learning estate. This should include metrics such as age, condition, floor area, and energy consumption.

Introduce a unified approach to capturing utilisation and suitability data across the sport estate. This will inform future planning across the wider public estate, including schools and tertiary education facilities.

Strategic planning

2. **Align with National Frameworks.** Integrate the findings and recommendations of this review with the strategic outcomes of the Physical Activity for Health National Framework, ensuring a systems-based approach to physical activity.
3. **Strengthen Stakeholder Collaboration.** Foster greater collaboration across government, local authorities, education, health, and community sectors to ensure the sport estate supports participation at all levels and remains financially viable. This should be aligned with the principles of a Single Scottish Estate.
4. **Strategic Planning.** Whilst local planning remains critically important, this should not be limited to local authority boundaries and should also recognise the specific needs of sports at a local, regional and national level. It also requires robust, data-driven planning to ensure decisions are evidence-based and investments deliver maximum impact for communities across Scotland.

Investment

5. **Prioritise Investment to improve health and wellbeing outcomes.** Ensure that future investment in the sport estate is strategically targeted to improve national health and wellbeing, while reducing long-term pressures on health, social care, education, community, and climate budgets.
6. **Explore Innovative Funding Models.** Investigate and explore deployment options for new funding mechanisms to unlock sustainable investment and maximise impact.

