



Ryden

EDINBURGH ECONOMIC NEEDS STUDY: LEISURE

A REPORT TO THE CITY OF
EDINBURGH COUNCIL

OCTOBER 2025

EXECUTIVE SUMMARY

PAGE 1

01

INTRODUCTION

PAGE 3

02

LEISURE POLICY & STRATEGY

PAGE 4

03

LEISURE TRENDS

PAGE 12

04

EDINBURGH LEISURE STOCK

PAGE 17

05

EDINBURGH LEISURE MARKET

PAGE 24

06

SUMMARY AND CONCLUSIONS

PAGE 32

EXECUTIVE SUMMARY

1. The **Edinburgh Economic Needs Study** suite of reports supports the City of Edinburgh Council's City Plan 2030 and the evidence base for City Plan 2040. This report covers the city's **leisure market**. Others in the suite assess the city's economy and its visitor accommodation, office, industrial and retail markets.
2. The scope of this leisure market study is primarily focused on the City of Edinburgh Council's planning Use Class 11 Assembly and Leisure, which includes specific venues like cinemas, concert halls, sports facilities, bingo halls, and nightclubs. Although this definition is comparatively narrow and excludes uses like food & beverage and accommodation, the report takes an inclusive approach, noting overlapping uses such as theatres and venues that blend leisure with food and drink.
3. Edinburgh's leisure **planning framework** is governed by National Planning Framework 4 (NPF4) and the City Plan 2030. These documents incorporate key principles such as promoting Local Living and 20-Minute Neighbourhoods, which requires local access to leisure facilities and supports leisure as a crucial economic sector. A sequential Town Centre First Policy is applied to major leisure developments which will generally be supported in existing city, town and local centres. However, major developments relying on private car use will not be supported. Policies also seek to protect existing leisure venues and facilitate wider mixed use on Princes Street. Broader leisure strategy seeks greater financial resilience, accessibility, availability, and sustainability.
4. With regard to **leisure trends**, the sector is currently navigating a period of economic recovery and shifting consumer behaviour where experiences are being prioritised over other discretionary purchases. Notable growth areas are health & fitness/wellness and competitive socialising (often integrating food and beverage), while traditional sectors like nightclubs are in decline. Economic recovery is tempered by rising operating and employment costs for operators, who are responding by focusing on innovation, technology, and customer loyalty. The most significant property trend is the rise of competitive socialising and experiential venues, which are increasingly occupying available retail space, as high development costs and a ready supply of vacant premises mean adaptive reuse of existing buildings is more common than new construction.
5. Edinburgh is a major regional and visitor leisure destination, hosting a diverse stock that serves both local community needs and national/international visitors, including the annual festivals. The **stock analysis** identified 347 leisure properties across the city, ranging from small studios to major sports and cultural venues. Key commercial leisure clusters are found at Fountain Park, St James Quarter, Omni Centre, and Ocean Terminal. The largest planning category by number and known floorspace is the catch-all Use Class 11(e) sports and recreation facilities (210 properties), which includes Edinburgh Leisure's 29 community facilities. The stock also includes 10 cinemas, 1 concert hall (with another under construction), 12 theatres (not Class 11), 3 bingo halls, 3 casinos, 18 nightclubs, and various newer formats like escape rooms and bowling alleys.
6. In terms of **Edinburgh's leisure market**, consultations indicate the sector is highly dynamic, driven by strong consumer demand for integrated experiences that successfully combine leisure with food, beverage, and retail elements, aligning with a younger demographic's increased focus on health and wellbeing and fitness. The city continues to attract new formats like competitive socialising with investment focused on the city centre, commercial leisure centres and Leith. Despite this the sector faces significant constraints: public facilities are often part of an ageing estate with restricted funding, and the viability of the entire sector is challenged by high accommodation and energy costs, competition for skilled staff and poor public transport accessibility to some peripheral locations. However, there is significant anticipation over major new venues like the proposed 8,500-seater arena at Edinburgh Park, which is expected to enhance the city's ability to compete with other UK cities.
7. Looking to future **leisure market needs** and land use in Edinburgh, high development costs and a ready supply of vacant (often retail) premises mean that adaptive reuse of existing buildings is now more common than new construction. While Edinburgh's regional and visitor market roles mean that new development may happen, it is more likely to be one-off projects such as the Edinburgh Arena or Dunard Centre, rather than waves of commercial leisure development such as cinemas which were seen in the 1990s/2000s. Adaptive reuse of existing buildings for new and expanding formats is expected to be the mainstay of the market, alongside refreshing of existing venues – for example new rooms in escape rooms, adding Padel courts to leisure venues, increasing the use of experiential technology or introducing new food & beverage. Where there may be both commercial and community demand for new leisure uses is in the city's expansion and regeneration areas around Granton, West Edinburgh and (along with Midlothian) the

southeast of the city, even in those instances the requirement may be for upgrade and expansion of the nearest existing facilities, public access to high school facilities, and/or leisure units within mixed-use commercial/employment buildings, rather than major new leisure development.

Ryden LLP
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01 INTRODUCTION

- 1.1 The Edinburgh Economic Needs Study comprises five sector reports: offices, retail, leisure, industrial and visitor accommodation. This report covers the city's **leisure market**. The reports are to support implementation of the City Plan 2030 and preparation of the upcoming City Plan 2040, ensuring alignment with the requirements of National Planning Framework 4.
- 1.2 For the purposes of this leisure market study the City of Edinburgh Council has advised that Use Class 11 Assembly and Leisure¹ is the area of interest. The Council defines² Use Class 11 as:
- (a) a cinema;
 - (b) a concert hall;
 - (c) a bingo hall or casino;
 - (d) a dance hall or discotheque; or
 - (e) a swimming bath, skating rink, gymnasium or area for other indoor or outdoor sports or recreation, not involving motorised vehicles or firearms.
- Further examples included by the Council are amusement arcades and parks, bowling alleys, break-out (escape) rooms, casinos, children's soft play areas, and pool or snooker halls.
- 1.3 This planning definition of leisure is comparatively narrow. It excludes wider uses such as food & beverage, accommodation and travel, which some data sources and commentators include in their broadest definitions of leisure. More specifically, although theatres may be sui generis they are noted in this report due to the overlap in events and audiences with concert halls and similar venues; otherwise for example Usher Hall would be included but the Edinburgh Festival Theatre would not. In some instances, a commercial planning consent can allow flexibility between uses, including leisure – Edinburgh's new St James Quarter, for example, has consent as a whole for Use Classes, 1, 2, 3, 7, 10 and 11 and some individual units (Flight Club and Lane 7 for example) blend a particular leisure use with food & drink. There may also be some sports and recreation overlap between Class 11 leisure centres and community buildings such as halls or schools. During peak Edinburgh Festival periods, many types of building temporarily come into use for cultural and entertainment purposes. For this reason of overlapping uses, the analysis of Edinburgh's leisure stock in Section 4 applies the Class 11 definition while taking an inclusive approach.
- 1.4 The remainder of this report is provided in the following sections:
- Leisure policy and strategy (Section 2)
 - Leisure trends (Section 3)
 - Edinburgh leisure stock (Section 4)
 - Edinburgh leisure market (Section 5)
 - Summary and conclusions (Section 6)

¹ The Town and Country Planning (Use Classes) (Scotland) Order 1997

² <https://www.edinburgh.gov.uk/downloads/file/34675/quick-guide-to-changes-of-use>

02 LEISURE POLICY AND STRATEGY

INTRODUCTION

2.1 This section outlines the planning policy and strategy framework relevant to the leisure market in Edinburgh.

PLANNING REFORM

2.2 Planning in Scotland has been through a period of reform following the commissioning of an independent review of Scotland's planning system in 2015. The review concluded that reforms needed to be made in order to realise the potential of the planning system. Subsequently in June 2019, the Planning (Scotland) Act 2019 was passed which set the future structure of a modernised planning system.

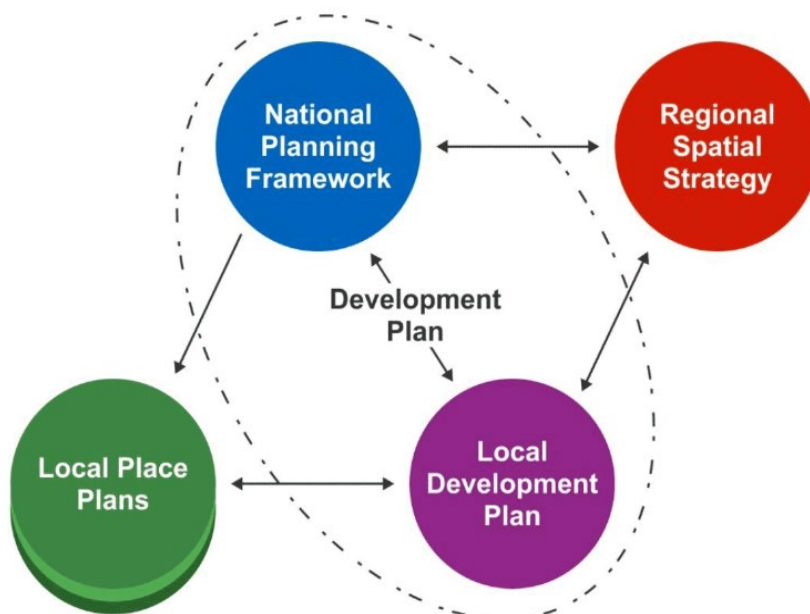
2.3 NPF4 is the national spatial strategy for Scotland and was adopted by Scottish Ministers on 13 February 2023. The statutory development plan for any given area of Scotland now consists of the National Planning Framework and the relevant Local Development Plan (LDP).

2.4 Strategic Development Plans will be replaced by Regional Spatial Strategies (RSS) but these will not form part of the statutory Development Plan system.

2.5 Local Place Plans are community-led plans setting out proposals for the development and use of land. Although they have a role to play in shaping new LDPs, they do not form part of the statutory Development Plan and are standalone documents.

2.6 A summary of the new statutory development plan and its related plans is shown in Figure 2.1.

FIGURE 2.1: STATUTORY DEVELOPMENT PLANNING AND RELATED PLANS



Source: Scottish Government

NATIONAL PLANNING FRAMEWORK 4

- 2.7 Scotland's fourth National Planning Framework (NPF4) provides a blueprint for managing spatial development. It outlines national planning policies, designates significant national developments and emphasises key spatial objectives at the regional level.
- 2.8 NPF4 is built around six spatial principles: **just transition; conserving and recycling assets; local living; compact urban growth; rebalanced development** and **rural revitalisation**. Through the Planning Framework, these principles are applied to achieve:
- **Sustainable places**, with reduced emissions, restored and better-connected biodiversity;
 - **Liveable places**, capable of supporting better and healthier lives; and
 - **Productive places**, supporting a greener, fairer and more inclusive wellbeing economy.
- 2.9 Priorities for the Central region, which includes Glasgow, Edinburgh, Stirling, Dundee and Perth city regions are also identified. A strategy focused on climate change and responding to the Covid-19 pandemic is intended to drive forward change in tackling inequalities and building a greener, more prosperous future for the region.
- 2.10 Key economic sectors to be supported in the city region include retail, leisure, industrial, financial services, life sciences and universities, food and drink, tourism and energy-related development.
- 2.11 National developments are also identified in the spatial strategy of NPF4. The following are relevant to Edinburgh:
- Edinburgh Waterfront;
 - Central Scotland Green Network;
 - Urban Mass/Rapid Transport Networks;
 - Urban Sustainable, Blue and Green Surface Water Management Solutions;
 - Circular Economy Materials Management Facilities;
 - National Walking, Cycling and Wheeling Network;
 - Digital Fibre Network;
 - High Speed Rail;
 - Strategic Renewable Electricity Generation; and
 - Transmission Infrastructure.
- 2.12 In addition to the overarching strategic aims of NPF4, there a number of specific policies relevant to the leisure market.
- 2.13 **Policy 15 – Local Living and 20-Minute Neighbourhoods** – seeks to encourage the application of the Place Principle in creating connected and compact neighbourhoods where people can meet their daily needs within a reasonable distance of their home, preferably by walking, wheeling and cycling. Local access to leisure facilities forms part of this concept.
- 2.14 **Policy 21 – Sport, Play and Recreation** – seek to encourage, promote and facilitate spaces and opportunities for play, recreation and sport.
- 2.15 Development proposals which result in the loss of outdoor sports facilities will only be supported where the proposal:
- is ancillary to the principal use of the site as an outdoor sports facility; or
 - involves only a minor part of the facility and would not affect its use; or
 - meets a requirement to replace the facility which would be lost, either by a new facility or by upgrading an existing facility to provide a better quality facility. The location will be convenient for users and the overall playing capacity of the area will be maintained; or
 - can demonstrate that there is a clear excess of provision to meet current and anticipated demand in the area, and that the site would be developed without detriment to the overall quality of provision.
- 2.16 **Policy 27 – City, Town, Local and Commercial Centres** seeks to encourage, promote and facilitate development in city and town centres, recognising them as a national asset.

- 2.17 Proposals which will generate significant footfall, including leisure facilities, will be supported in existing city, town and local centres and will not be supported outwith those centres unless a satisfactory Town Centre First assessment is provided.
- 2.18 This approach aims to help centres adapt positively to long-term economic, environmental and societal changes by encouraging sustainable transport, densification and local living.
- 2.19 **Policy 31 – Culture and Creativity** – seeks to encourage, promote and facilitate development which reflects Scotland’s diverse culture and creativity, and support culture and creative industries.
- 2.20 Development proposals that would result in the loss of an arts or cultural venue will only supported where there is no longer a sustainable demand for the venue and after marketing the site for at least 12 months. Alternative provision of equal standard should be made available within the local area and the loss of the venue should not result in loss or damage to significant cultural assets.
- 2.21 Development proposals within the vicinity of existing arts venues will fully reflect the agent of change principle and will only be supported where they can demonstrate that measures can be put in place to ensure that existing noise and disturbance impacts on the proposed development would be acceptable and that existing venues and facilities can continue without additional restrictions being placed on them as a result of the proposed new development.

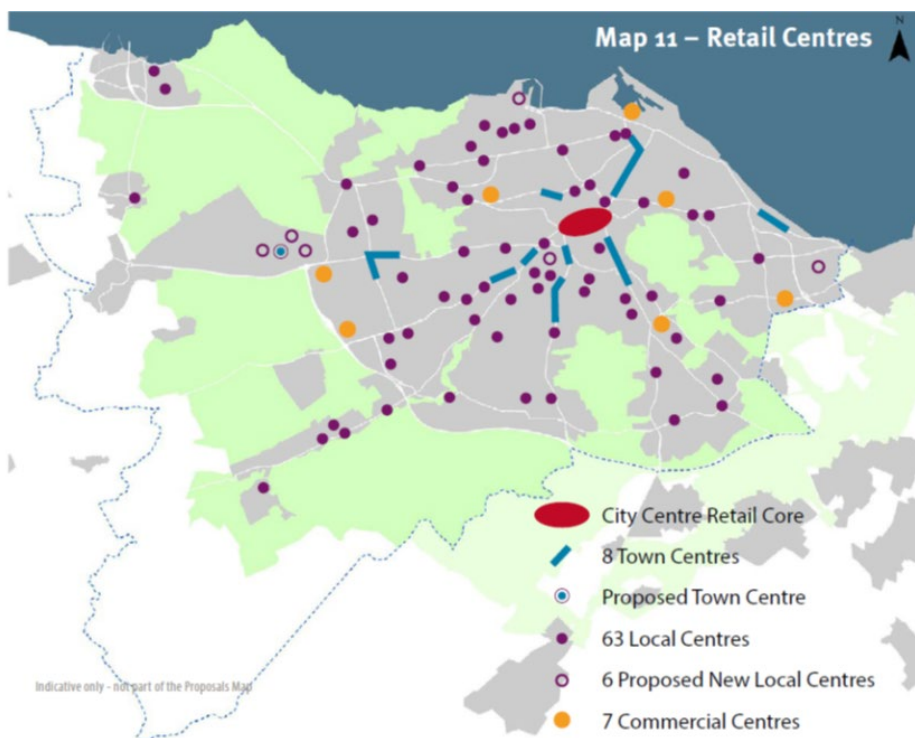
REGIONAL SPATIAL STRATEGY

- 2.22 As above, the Planning (Scotland) Act 2019 removes the need for the preparation of Strategic Development Plans and introduces the new concept of Regional Spatial Strategies. These are non-statutory documents which provide a spatial representation of the key regional land use issues across the region. Annex C of NPF4 contains guidance and information intended to guide the preparation of Regional Spatial Strategies and LDPs to help deliver Scotland’s national spatial strategy.
- 2.23 Although non-statutory in nature (they do not form part of the development plan and will not hold status in planning decisions), their purpose is to guide the development of National Planning Frameworks and Local Development Plans.
- 2.24 An interim Regional Spatial Strategy for Edinburgh and South East Scotland City Region, approved by SESplan, the City Region Deal Directors and the constituent SESplan authorities, was submitted to Scottish Government for consideration as part of the engagement process for NPF4.
- 2.25 The interim Regional Spatial Strategy is based on the Strategic Development Plan 2 spatial principles, City Region Deal projects, the latest Local Development Plan from each SESplan authority and recognition of the need for cross boundary sustainable transport initiatives and infrastructure to address connectivity and capacity issues which are too heavily dependent on private car usage.
- 2.26 The strategy promotes a place-based approach community development and recognises the need to repurpose town centres where retail units are not performing optimally. This might include leisure, integrated service provision such as education and community uses as well as supporting the Health and Social Care agenda.

EDINBURGH CITY PLAN 2030

- 2.27 City of Edinburgh Council's Local Development Plan, City Plan 2030, was adopted on 7 November 2024. City Plan reflects the national and strategic economic priorities set out within the NPF4 and the interim Regional Spatial Strategy.
- 2.28 City Plan aims to ensure that the planning of housing, employment and services addresses the need for quality, connected, net-zero developments which are resilient to climate change and provide access to green space. Delivery of community infrastructure and job opportunities where people live will also be important. The Plan intends to meet these aims by:
- Taking a Place-based Approach to the delivery of 20-minute neighbourhoods;
 - Directing development to brownfield sites;
 - Setting Place Briefs;
 - Requiring new buildings to be net-zero;
 - Delivering heat networks;
 - Promoting climate change adaptation and mitigation;
 - Meeting local housing needs by securing a minimum 35% affordable housing contribution from new developments in Edinburgh;
 - Taking an Infrastructure-First approach; and
 - Delivering Edinburgh's key economic land use needs.
- 2.29 The economic strategy seeks sustainable growth through investment in jobs – focussing on development and regeneration, inward investment, support for businesses and helping unemployed people into work or learning.
- 2.30 The plan recognises that the strength of Edinburgh's economy is based on a range of key sectors, for example retail, leisure, tourism, financial services, life sciences and higher education. Edinburgh also has a wide range of cultural, arts and sports venues which bring economic benefits as well as enhancing the wellbeing of residents and visitors.
- 2.31 Shopping and leisure uses are major providers of jobs in Edinburgh, and have strong links with other economic activities, particularly tourism.
- 2.32 The overarching spatial strategy is to encourage proposals for cafés and restaurants, leisure and entertainment facilities and visitor attractions in the City Centre, at Leith and Granton Waterfront, in town centres and in local centres.
- 2.33 City Plan takes a place-based approach by setting out a number of Place Policies which provide guiding principles for development in a number of existing areas and emerging growth areas. The majority of Place Policies include an element of leisure uses in order to create vibrant mixed-use neighbourhoods.
- 2.34 Town, local and other centres have an important role in providing shopping, entertainment, places to eat and drink and local services in accessible locations. In Edinburgh, shopping and leisure uses are mainly provided in a network of centres distributed across the city (see Figure 2.2).

FIGURE 2.2: EDINBURGH RETAIL CENTRES



Source: Edinburgh City Plan 2030

- 2.35 The retail core of the city centre is the largest shopping centre in the Edinburgh City Region with a wide range of shops and other entertainment, leisure and cultural uses and excellent public transport services.
- 2.36 In September 2024, the Council’s Planning and Transport and Environment Committee approved the Princes Street and Waverly Valley Strategy which signals a proactive approach to repurposing commercial space on Princes Street including encouragement of mixed uses (including leisure). The strategy emphasises investment in key assets to anchor the leisure and cultural offering in the area including the Ross Bandstand and other facilities in West Princes Street Gardens and seeks opportunities to enhance the retail, leisure, community, tourist, entertainment and cultural experience on Princes Street.
- 2.37 Through **Policy Place 1**, the Strategy is required to set out the Council’s long-term plan to guide the regeneration of streets and buildings in the city centre, establish a place-making vision for Princes Street’s public realm and manage the outstanding urban landscape of the Waverly Valley.
- 2.38 In addition, City Plan includes a number of policies relevant to the leisure market.
- 2.39 **Policy Re 1 Town Centres First Policy:** Planning permission will be permitted for retail and other uses which attract a significant amount of people including commercial leisure uses, community and cultural facilities and where appropriate libraries, education and healthcare facilities in the following order of preference:
- Town centres (including city and local centres)
 - Edge of town centre
 - Other commercial centres as identified in the plan
 - Out of centre locations that are or can be made easily accessible by a range of sustainable transport modes.
- 2.40 Where a retail or leisure development with a gross floorspace over 2,500 sq.m. or occasionally for smaller proposals, if proposed outwith a town centre and contrary to the development plan, a retail impact analysis will be required sufficient to demonstrate that there is no significant adverse effect on the vitality and viability of existing town centres.
- 2.41 **Policy Re 9 – Entertainment, Leisure and café/restaurant Developments – Preferred Locations** states that planning permission will be permitted for high-quality, well-designed arts, café/ restaurant, leisure and

entertainment facilities and visitor attractions in the City Centre, at Leith and Granton Waterfront, in town centres in and local centres subject to compliance with other policies.

- 2.42 This policy applies a sequential approach to the location of entertainment and leisure uses such as cinemas, theatres, restaurants, nightclubs, ten-pin bowling, bingo halls and soft play centres. These policies will also be applied to proposals for visitor attractions supporting Edinburgh's role as a major tourist destination and cultural centre of international importance.
- 2.43 **Policy Re 10 – Entertainment, Leisure and Café/Restaurant Developments – Other Locations** states that planning permission will be granted for entertainment, leisure and café/restaurant developments in commercial centres and other locations in the urban area provided that no suitable alternative in an existing centre is identified and subject to compliance with other policies. It is important that proposals are compatible with surrounding uses and will not lead to a significant increase in noise, disturbance and on-street activity at unsocial hours to the detriment of living conditions for nearby residents.
- 2.44 **Policy Re 11 – Food and Drink Establishments** seeks to ensure that proposals do not have a detrimental impact on the amenity of neighbouring residents in terms of noise, smell, disturbance or on-street activity. Proposals will not be acceptable in areas where there is considered to be an excessive concentration of such uses to the detriment of nearby residents. *Note that while food and drink use is not in scope here, it often forms a core part of a leisure operation or centre.*
- 2.45 **Policy Inf 5 – Location of Major Travel Generating Development** – states that proposals for major development, including leisure, which would generate significant travel demand will not be supported where there is a reliance on private car use. Such uses will only be permitted on suitable sites with very good accessibility by sustainable transport.
- 2.46 **Policy Econ 1 – Supporting Inclusive Growth, Innovation and Culture** – proposals for development associated with social enterprises, business start-ups, university linked education, research and innovation and culture will be supported in principle where they meet relevant LDP policies and are associated with either addressing poverty/inequality, city centre transformation, **cultural events and festivals** throughout the city, universities and colleges or life science research.

EDINBURGH CITY PLAN 2040

- 2.47 A new legislative framework for development planning was provided by the Planning (Scotland) Act 2019 for 'New Style' development plans. New regulations and new local development planning guidance came into force in May 2023. LDPs will have more limited policies than they had previously, as many policies are now within the National Planning Framework. NPF4 will therefore be used alongside the LDP to determine planning applications with the latter expected to focus on context-specific policies of particular relevance to their jurisdiction. There is an expectation that 'new style' LDPs will be in place 5 years after the new regulations were published.
- 2.48 LDPs will be accompanied by a statutory Delivery Programme which is used to ensure delivery of the plan. It includes a timeline for delivery of housing and necessary infrastructure which will have a knock-on effect on the office market.
- 2.49 Going forward, Edinburgh's next LDP will be known as City Plan 2040. It will be prepared as a new style plan under the new legislative framework and guidance, including NPF4, the Regional Spatial Strategy, Local Place Plans and other Council strategies and plans. As well as a new process, the expectation is that the new style plans will be more place based, people-centred and delivery-focused.

LEISURE STRATEGY

- 2.50 Public policy and strategy in relation to leisure has a particular focus on culture and on sports and recreation. Relevant current strategies are reviewed below.
- 2.51 Creative Scotland is a non-departmental public body of the Scottish Government responsible for funding and supporting Scotland's arts, screen and creative industries. As a national development organisation, funder, and

advocate, Creative Scotland distributes funding from the Scottish Government and the National Lottery to help develop creative ideas, support new work, and promote cultural experiences across Scotland.

- 2.52 Creative Scotland's budget has experienced significant financial challenges and uncertainty in recent years, which included a £6.6 million budget cut in 2023 that forced the temporary closure of a fund for individual artists. However, following campaigns from the cultural sector, the Scottish Government has recently committed to increasing funding. The new multi-year funding programme will see Creative Scotland's budget increase from £66.5 million in 2024-25 to £89 million in 2025-26, allowing them to support a greater number of organisations with enhanced grant levels. As outlined in **Creative Scotland's Annual Plan 2025/26** this increased funding will provide stability to the sector helping organisations to thrive and better plan for the future. By supporting a more geographically and demographically representative portfolio of organisations, the plan aims to ensure that cultural and creative offerings are available in more parts of the country and to a more diverse set of creative and cultural organisations that are major assets to their communities.
- 2.53 The City of Edinburgh Council's **Citywide Culture Strategy 2023-30** aims to ensure Edinburgh residents can easily access and shape local cultural provision, the City is welcoming and supportive to creative and cultural practitioners and is a world leading cultural capital. Leisure facilities are a key part of any cultural provision and act as significant social and cultural spaces where people can come together, engage in shared activities and build a sense of community. The Strategy brings together several areas, including libraries, sport and wellbeing to create a clear direction for the future and seeks to ensure cultural and sporting assets *"are effectively delivering maximum value for money from cultural, social, wellbeing, and economic perspectives"*. It recognises that cultural and sporting activities require a variety of spaces, and states that these needs must be considered in city planning and developments. A key goal is to create a network of *"well run, ambitious and accessible local creative and cultural hubs"* to address the current concentration of facilities in the city centre and provide residents with easily accessible cultural services near their homes in-keeping with the 20-minute neighbourhood concept.
- 2.54 Earlier this year, **Edinburgh's Events Strategy 2025-2030** was approved by the Council which aims to deliver the Citywide Culture Strategy through events and festivals by supporting and prioritising the delivery and development of environmentally responsible events and festivals that offer meaningful opportunities in which to participate, and which to celebrate cultural heritage. Events and festivals are a key part of the leisure sector. The strategy aims to expand Edinburgh's events by shifting investment away from temporary, external events and focusing on those that are rooted in Edinburgh's culture and provide sustained benefits to local communities. It also seeks to widen the geographical reach of events, prioritising funding for activities in underserved areas. The strategy also plans to support events in the "shoulder months" (February-May and September-November) to balance the portfolio throughout the year.
- 2.55 The **Physical Activity and Sport Strategy for Edinburgh 2024-2034** focuses on the strategic development of physical activity and sport to improve the well-being of the city's residents. The strategy seeks to increase participation across the board and ensure Edinburgh's active places and spaces are safe, welcoming and accessible to everyone. Active partnerships is a key priority and a strategic estates working group with the Council and Edinburgh Leisure aims to ensure an integrated approach to estates management. The strategy includes actions to improve the quality and usability of sports pitches and explore the potential for new facilities including a BMX track and disc golf.
- 2.56 The **Sports Pitch Strategy 2025-2035** recognises the role of sports pitches in the provision of outdoor sport and physical activity opportunities whilst contributing to participation levels and the health of communities across Scotland. The strategy notes that over the last 15 years there has been a significant increase in artificial pitches along with the growth of pitch sports, in particular girls and women's football. Whilst Edinburgh has a "robust array of sports pitches" provided by various organisations, the strategy highlights the need to optimise existing, underused pitches, particularly those within the school estate and to improve the quality of pitches and their ancillary facilities. The strategy also aims to improve maintenance practices and ensure future investments are targeted to deliver the greatest impact, while also exploring new operating models like community asset transfers.
- 2.57 **Edinburgh's 2030 Tourism Strategy** is also relevant as it treats the cultural offer, attractions, public spaces and general quality of life as central components of the city's tourism product. The core focus of the strategy is managing tourism growth to ensure it benefits residents and the environment, rather than simply driving growth. This impacts the supply of leisure spaces by requiring major projects and tourism developments to protect the city's unique cultural and natural heritage, while addressing capacity issues like overcrowding in popular areas. Finally, the strategy tackles **demand** by pushing for the visitor economy to spread its footprint to less-visited neighbourhoods and promoting investment from the Tourism Visitor Levy to enhance the city's cultural assets for both visitors and locals.

- 2.58 **Edinburgh Chamber of Commerce’s Call to Action for Edinburgh’s Economic Future**, published in 2024 focuses on ‘creative’ as one of its 5 key sectors and clusters for growth in Edinburgh. This includes arts, culture, film production, design, gaming and virtual reality and heritage. Growth leaders for this sector are named as Creative Scotland, Festivals Edinburgh and Screen Scotland. Initial actions focus on the fundamentals of creating the right economic environment, supporting businesses and the workforce and attracting more inward investment.
- 2.59 A wider **Review of Culture and Leisure Services in Scotland** completed by EKOS on behalf of Community Leisure UK, Creative Scotland and sportscotland, published in 2024 notes the “*challenging picture of investment in culture, sport and leisure across Scotland*”. It also confirms that local government investment in leisure has reduced by at least 20% in real terms between 2010/11 to 2022/23 with libraries, parks, recreation and open space noted to be most affected. The Review goes on to note that post-pandemic income growth has resumed but not reached previous levels, reflecting cost of living pressures, while operating costs have increased sharply. Some local government providers have closed facilities or reduced services or financial support or changed pricing, and most expect further reductions. The report cites the importance of these services and the wellbeing benefits of participation in culture and sport.

SUMMARY

- 2.60 Edinburgh’s planning framework is governed by National Planning Framework 4 (NPF4) and the City Plan 2030. These documents incorporate major principles that directly influence the leisure property market, including promoting Local Living and 20-Minute Neighbourhoods (requiring local access to leisure facilities) and supporting leisure as a key economic sector delivering regeneration and local footfall and activity. NPF4 applies these principles to achieve sustainable, liveable and productive places.
- 2.61 Core planning policy applies a sequential Town Centre First Policy to all major uses, particularly those that generate significant footfall, including leisure facilities. Proposals for these uses will generally be supported in existing city, town and local centres. The overarching spatial strategy of the City Plan 2030 is to encourage proposals for leisure and entertainment facilities and visitor attractions in the City Centre, at Leith and Granton Waterfront, in town centres and in local centres. However, developments that generate significant travel demand will not be supported where there is a reliance on private car use, restricting major developments in less-accessible locations.
- 2.62 The City Plan and NPF4 include policies aimed at managing the existing leisure property stock and facilitating new types of use. This includes the proactive approach to repurposing commercial space through the encouragement of mixed uses (including leisure) on Princes Street. It also seeks to enhance the retail, leisure, community, tourist, entertainment and cultural experience on the street, including emphasising investment in key assets. Policies also seek to protect venues and limit the loss of sports facilities and arts or cultural venues.
- 2.63 In terms of wider leisure strategy, the sector seeks greater financial resilience while ensuring accessibility, availability and sustainability of provision. The sector, which includes a specific focus on culture and sports and recreation, has seen investment challenged by public sector budget cuts.

03 LEISURE TRENDS

INTRODUCTION

- 3.1 This section review trends in the leisure sector. As noted in the introduction, the area of interest is Class 11 Assembly and Leisure however many information sources adopt a wider definition and this is made clear where required.

ECONOMY AND LEISURE

- 3.2 During the second quarter of 2025,³ Scotland's economy grew by 0.2%, contributing to year-on-year growth of 0.9%. The Scottish Fiscal Commission forecasts growth of 1.2% for 2024/25 and for 2025/26 and 1.8% for 2026/27.
- 3.3 In July 2025, the rate of consumer price inflation in the UK rose again to 3.8%. The Bank of England now anticipates inflation will fall to within its 2% target closer to 2027. Accordingly, the Bank has continued its cautious reduction in interest rates with a fifth cut since August 2024 to reach 4%.
- 3.4 During the inflation and interest rate cycle of 2022-24, Scotland recorded its largest drop in living standards since records began in 1988 (Scottish Fiscal Commission). As these economic conditions ease, real disposable income driven by earnings growth is now expected to recover to 2021/22 levels by 2026/27. This allied to the reduced price inflation and falling interest rates noted above are positive medium term signals for consumer expenditure, although rising operating and employment costs including in the leisure sector are dampening operator performance too.
- 3.5 Consumers continue to show some concern, with the most recent (Q2 2025) Scottish Consumer Sentiment survey published by the Scottish Government showing a net balance of -8.9% (where a balance of zero would be neither negative nor positive). SRC footfall figures for July 2025 show a fall of -1.3% year-on-year for Scotland although Edinburgh city centre's footfall increased by 0.6%.
- 3.6 In its **Growth Tracker Special Report** (August 2025), RBS reports increased output in travel, tourism and leisure, but the weakest employment trend and highest cost inflation (due to higher payroll costs) among services. RSM also reports that national insurance, minimum wage and business rate rises during 2025 all fall disproportionately onto the hospitality sector. RBS's **Retail and Leisure Outlook Report** (2025) reports stabilising price inflation but shifting consumer behaviours and rapid technological advancements, with more affluent households driving discretionary spending as leisure operators invest in transformation. The report highlights four *megatrends*: the customer journey; leveraging technology for increased sophistication; automation and workforce management; and sustainability-driven consumer choices. Leisure sub-sector trends are explored below.
- 3.7 Experian reports that annual leisure expenditure per UK household is £9,469 (2022 data and prices). The definition of leisure used by Experian is very wide. Expenditure categories directly relevant to this report have much smaller spend per household, including for example leisure class fees (£178 per household per annum), spectator sports (£32), leisure subscriptions (£68), admissions to clubs etc. (£39), miscellaneous entertainment (£127) and cinemas/ theatres/ museums (£221).
- 3.8 Experian⁴ further reports that UK leisure spending grew faster than convenience retailing 2011-19, but slower than comparison retailing (which also a discretionary sector). However, UK leisure floorspace increased at a faster rate than expenditure, leading to falling sales densities. Following the pandemic restrictions and associated dip, spending recovered to 2022, but fell again by 0.9% in 2023 due to the cost-of-living crisis. Experian's forecast total UK leisure sales imply annual compound growth rates (real terms) of around 1.1% over the medium to long term.

³ GDP First Quarterly Estimate 2025 Q2 (April to June)

⁴ Retail Planner Briefing Note 21 – Leisure (February 2024)

- 3.9 For Edinburgh, a number of expenditure categories within the base Experian data for the Economic Needs retail study are relevant to the leisure sector. The resident population available expenditure (2022) is:
- Cultural services:
 - £52.08m cinema, theatre and museums etc.
 - £20.01m miscellaneous entertainments (admissions, events, leisure subscriptions)
 - £85.86m recreational & sporting services (admissions, participation, subscriptions, fees, equipment hire).
- 3.10 These totals may underestimate income at leisure venues which also sell food & drink and other services. They will also underestimate the inflow of expenditure from the wider regional catchment; as a modelled example, comparison expenditure inflow adds an estimated two-thirds to residents' expenditure. Additionally, a total of 5.05 million overnight visits to Edinburgh plus day visits will have a significant positive impact upon many leisure venues, particularly in the city centre
- 3.11 There is no exact match between economic data and Edinburgh's leisure sector as defined in this report. As the closest proxy, BiGGAR Economics' report for this Economic Needs Study notes⁵ that the *Arts, Entertainment, Recreation and Other Services sector* has 20,000 employees in Edinburgh. This is 5.4% of the city's employment, higher than the 4.4% of employment which the sector accounts for across Scotland. Temporary employment during the Edinburgh festivals will be additional to this.
- 3.12 The sector gained a net 3,000 employees between 2015 and 2023, placing it 8th—highest for employment growth among 18 sectors in the city. It also gained a net 130 businesses between 2015 and 2024, placing it 6th-highest on that measure.
- 3.13 Typical business sizes in the sector are small; in 2024 there were 1,920 business units, indicating an average of a little over 10 employees/business and composed of⁶:
- 1,565 micro businesses (<10 staff)
 - 290 small businesses (10-49 staff)
 - 60 medium sized businesses (50-249 staff) and
 - 5 large businesses (250+ staff).

LEISURE TRENDS

- 3.14 Leisure activity is driven by free time and discretionary expenditure, rather than being a staple good such as food/groceries. This discretionary spend brings constant change as the leisure offer responds to the consumer economy. This is particularly the case in Edinburgh, which as a regional hub and capital city serves a large catchment and its visitor demographic will often be first or high on the list for new formats.
- 3.15 Leisure consumers are increasingly seeking experiences including travel, entertainment (including concerts and live sports) and eating-out, and may prioritise that over the purchase of other discretionary goods. Within this, health & fitness (and wellness), and competitive socialising (darts, bowling, indoor golf, often with food & beverage) are among the notable growth sectors.
- 3.16 In response, leisure operators are prioritising customer value, engagement and loyalty. Examples of this include using technology to not only improve operations but also to personalise the customer experience and regularly adapting the leisure offer to keep it fresh, encouraging repeat visits. Sustainability is also reported as growing in importance especially for younger customer cohorts. Generally, this investment and adaptation/ diversification is taking place during a period of higher operating costs including employment, supply chain and energy costs.

⁵ ONS 2024, Business Register and Employment Survey 2023

⁶ This additional data provided by BiGGAR Economics is additional to that in their report.

- 3.17 The **Scottish Household Survey** includes a section on cultural engagement. At the most recent survey in 2023, 76% of adults attended a cultural event or place of culture (including libraries) in the last 12 months. Under a quarter (24%) had not attended any cultural event or place in the last 12 months. The most common types of cultural attendance were cinemas (50% of respondents), live music events (36%), visits to historic places (33%) then museums and theatres (both 30%). Attendance by activity in 2023 was either higher than in 2022 or sustained; the biggest increases were for theatres and live music events.
- 3.18 Among Scottish local authorities, **Edinburgh** and Stirling had the highest percentage of adults who attended a cultural event or place of culture in 2023 (both 87%). Attendance is variable by population cohort, for example historic places, museums and live music events have a much higher patronage among those with higher qualifications, while younger groups overall were noticeably more likely to have attended a cultural event or visited places of culture in the last 12 months. The most frequently cited factors limiting or preventing people from attending cultural events and places were 'lack of time' (14%) followed by 'cost of tickets' (12%).
- 3.19 Considering trends by leisure sector (with reference to the Class 11 a) to e) list and examples in the introduction to this report):
- 3.19.1 **Cinema** attendance recovered from the forced closures of the pandemic in 2020 and 2021, to 126.5 million UK admissions in 2024, a 2.3% increase on 2023. The pre-pandemic peak in 2019 however reached 176.1 million. The household survey cited above showed that 50% of adults visit the cinema, although the audience skews to younger age groups (16-24), and to urban areas (such as Edinburgh) rather than rural areas. Industry reports suggest that major cinemas chains may be weathering rising operating costs better than independent venues, although the most notable closure in Scotland recently is of a multi-storey Cineworld in Glasgow city centre. The recent reopening of Edinburgh's Filmhouse on Lothian Road also runs counter to that trend although perhaps is an exception given its status and profile. The shift towards streaming movies on devices and at home is likely to have a dampening effect to some extent upon future growth in cinema attendance.
- 3.19.2 **Concert halls** deliver a range of events and may overlap with theatres and venues offering live events. The Scottish Household Survey reported that 36% of adults in Scotland attended a live music event in 2023, totalling 1.4 million people (plus 110,000 visitors). The sector has been boosted recently, particularly in Edinburgh by artists including Harry Styles, Taylor Swift, Oasis and AC/DC performing at Murrayfield Stadium and Sam Fender at Ingliston.
- 3.19.3 The UK **bingo** industry delivered a gross gambling yield⁷ of around £770 million in 2022/23 (ONS). Seventy-eight percent of this was derived from 659 in-person bingo halls while the balance of 22% came from the expanding online bingo industry. The ONS also reports 145 casinos in the UK; these include venues in Edinburgh which are reviewed in Section 4 (one of which, the Mecca Bingo site on Leith Walk is due to be redeveloped for purpose-built student accommodation).
- 3.19.4 The **nightclub** industry has suffered a sharp decline. A combination of the pandemic, cost of living, operating costs and lower alcohol consumption among younger people is cited as contributing to the decline. Difficulties with late night transport are also mentioned in some locations although that comment may be less applicable in Edinburgh. The NDML reports that the number of UK nightclubs fell by 50% between 2013 and 2024, to 787 venues, including a 33% fall over the past 5 years. Nightclub numbers in Scotland fell from 125 in 2020 to 83 in late 2024. The rise of competitive socialising and health & fitness cited below may be a corollary of the decline in nightclubs.
- 3.19.5 Although **health & fitness** is generally reported as seeing sustained and in some places growing demand, the Scottish Household Survey reported a slight decline with 51% of adults participating in sport and physical activity (excluding walking) in the previous 4 weeks compared with 54% in 2019. Multigym/weight training (16%), swimming (14%), keep fit/aerobics (13%) and cycling (12%) were among the most common activities. Participation was lower among older people, those with disabilities and those living in deprived areas, and slightly lower among women than men. Health & fitness covers both the community leisure sector including sports halls, pitches, swimming pools and gyms, and the commercial gym / health club sector. The latter includes a broad range of upmarket and expanding low-cost chains as well as local independent operators. The total turnover of the health & fitness market is reported as £5.7 billion from 5,607 venues (ukactive/Deloitte). The sector is reportedly growing again following a dip during the pandemic.

⁷ Gross income after paying out winnings.

- 3.19.6 The further **examples** included with the Council's Class 11 definition include amusement parks, break-out (escape) rooms, soft play areas, and pool or snooker halls. This spans a very wide range of traditional and emerging new areas, the most notable of which is competitive socialising around activities such as go-karting, darts and a resurgence of indoor bowling. Analysts Cavendish report a 40% increase in UK experiential leisure venues between 2018 and 2024 while Savills report that multi-player 'combo' experiences are rising much faster than single activities. Food & beverage income at these venues may exceed income from the experience but is generally not reliant upon alcohol sales. In demographic terms, 18-34 years-old account for 60% of spend which is double their share of wider hospitality spend (Mintel), skews towards men on above-average incomes and to cities such as Edinburgh (given the lack of venues outside of cities).

LEISURE PROPERTY MARKET

- 3.20 Leisure is part of the wider commercial property market and is often symbiotic with retailing and with food & beverage, increasing customer dwell-time and expenditure for a venue. Many leisure-type uses not within the scope of this report such as cafés, bars and restaurants fit well into standard commercial/shop units on streets or in malls. Larger leisure uses that do not fit into standard shops units such as cinemas and health clubs may be purpose-built or delivered through adaptations of existing buildings.
- 3.21 The multiplex cinema-anchored leisure model which emerged in the UK during the 1990s delivered Edinburgh's Fountain Park and the Omni Centre, and also invested in Westside Plaza, Ocean Terminal and at Edinburgh Fort. However, that development phase ended as cinemas stopped expanding and is further curtailed now by substantially higher development costs. Similarly, the health club sector went through a parallel growth phase which has now eased, although budget gyms continue to expand.
- 3.22 As noted above, the most recent trend is for social leisure such as re-emerging bowling and bingo, pool, go-karting, VR, mini-golf, and darts in units within shopping and leisure centres. Some of that investment has been post-pandemic in response to permanent retail vacancies rather than leisure operators out-competing retailers for prime units.
- 3.23 While new formats in new developments may emerge, the combination of high development costs and ready availability of vacant premises, especially shops, means that adaptive reuse of buildings and refresh of existing venues is currently more common than planning applications for new developments, including in Edinburgh (see Section 5).
- 3.24 The impact of online activity on demand for physical leisure spaces does not appear to be well researched. In the retail sector, online sales are a known quantity with a measurable impact in reducing the need for sales floorspace (or changing the nature of that floorspace to more omni-channel and experiential). In the leisure sector, online gaming and streaming of entertainment could have a dampening effect on demand for leisure property, but other than bingo which is clearly split into halls and online sales the competition from online seems less clear or other leisure uses.

SUMMARY

- 3.25 The leisure sector is currently navigating a period of economic recovery and shifting consumer behaviour, making it a highly dynamic market, particularly in a regional hub like Edinburgh. Despite a recent drop in Scottish living standards, a medium-term outlook suggests a positive signal for consumer expenditure, driven by anticipated recovery in real disposable income, reduced price inflation, and falling interest rates. However, this optimism is tempered by the reality of rising operating and employment costs, which are challenging operator performance.
- 3.26 Consumers are increasingly prioritising experiences over other discretionary purchases, with notable growth areas being health & fitness/wellness and competitive socialising (such as indoor golf, darts, and bowling), often integrated with food and beverage offerings. Leisure operators are responding by prioritising customer value, engagement, and loyalty, heavily leveraging technology to personalise experiences and regularly adapting their offerings. This focus on investment and diversification is a necessity against the backdrop of increased operating costs.
- 3.27 Data confirms the capital's high engagement with culture: Edinburgh has one of the highest percentages of adults

attending cultural events in Scotland, with cinemas, live music, and historic places being the most popular forms of attendance. While some traditional sectors face headwinds—notably the significant decline in nightclubs—others like cinema are recovering from pandemic lows, though future growth may be dampened by the shift to streaming. The most significant property trend is the rise of competitive socialising and experiential venues, which are increasingly occupying available retail space given the symbiotic relationship between these two consumer-facing sectors. High development costs and a ready supply of vacant premises mean that adaptive reuse of existing buildings is now more common than new construction. The overall picture is one of constant evolution, with operators focusing on innovation and experience to capture discretionary spend in an increasingly competitive environment.

04 EDINBURGH LEISURE STOCK

INTRODUCTION

- 4.1 This section develops the trends commentary in Section 3 by contextualising then analysing Edinburgh's stock of leisure locations.
- 4.2 The stock analysis has been built up from a range of sources using the Class 11 definitions provided by the Council. As noted in the introduction, accommodation such as hotels is not included nor is food & beverage unless it is contained within a wider leisure use such as bowling or health & fitness centres. Some potentially relevant individual uses may not be captured, however as a whole the analysis should provide a good guide to the breadth and mix of the city's leisure uses.

CONTEXT

- 4.3 In addition to the wide range of leisure activities to be expected in a large UK regional city and visitor destination, Edinburgh is also Scotland's capital city and hosts the annual Edinburgh International Festival and the world's largest arts festival, the Edinburgh Festival Fringe. This creates a market not only for local and community leisure, but destination leisure regionally and nationally, and a vast range of temporary activities and venues during August (those temporary venues are not included in the analysis here).
- 4.4 Community and commercial leisure venues have different catchments. Community leisure such as sports centres is provided throughout Edinburgh.
- 4.5 In the commercial leisure sectors, aside from local provision such as bingo or health & fitness, the nearest destinations outside of Edinburgh are some distance away at The Centre in Livingston (17 miles west of the city centre) and Fife Leisure Park at Dunfermline (18 miles north). Midlothian and East Lothian have no commercial leisure destinations. This means that Edinburgh's commercial leisure catchment extends beyond the city. St James Quarter is major addition to this regional leisure offer. Analysts PMA estimate that Edinburgh's Consumer Base is 1.48 million people, indicating a substantial reach into the region and Central Scotland generally. Indeed, for major events such as national sports and major live music the catchment may be national and for the festivals, international. Other leisure destinations immediately outside of Edinburgh which form part of the regional offer include East Lothian's golf courses, Deep Sea World (North Queensferry), Musselburgh Racecourse and Midlothian Snowsports Centre (Hillend).

LEISURE CLUSTERS

- 4.6 There are clusters of commercial leisure and community sports and recreation uses around the city.
- 4.7 Commercial leisure venues tend to comprise a mix of leisure units alongside food & drink operators. These are most notably at Fountain Park in Fountainbridge, St James Quarter and Omni in the city centre, and Ocean Terminal in Leith, each of which has a multi-screen cinema. Looking at these more closely:
 - 4.7.1 **Fountain Park** was completed in 1999 and totals c. 22,200 sq.m. (239,000 sq.ft.). It is currently c. 98% occupied by leisure operators including Cineworld cinema, Funstation amusement arcade, Genting Casino, Gravity indoor trampoline centre and climbing wall, Laser station laser tag gaming, Tenpin bowling, Volcano Falls indoor golf, a Nuffield Health club, and Hotpod Yoga. In addition, food & beverage operators here include Burger King, Nando's, Pizza Hut and Five Guys in a terrace of purpose-built units created at the front of the complex. The former McCowans pub at the west end of the complex is currently vacant (465 sq.m). The centre has its own 800 space multi-storey (underground) car park.

- 4.7.2 The recently constructed **St James Quarter** is Scotland's only recent new destination mall and has helped to position Edinburgh as the country's top retail destination⁸. It provides retail stores, food & drink, hotels and leisure experiences. The centre is covered by a mixed-use class: Class 1 (Retail), Class 3 (Food and Drink), Class 4 (Offices/Business), Class 7 (Hotel), and Class 10/11 (Leisure and Culture/Assembly & Leisure). Leisure operators here are Everyman Cinema, Lane7 bowling and entertainment centre, and social darts Flight Club. Leisure uses here total 3,962 sq.m.
- 4.7.3 Within the **Omni Centre**, located on Greenside Row in the city centre opposite St James Quarter, leisure uses sit alongside food & beverage occupiers and comprise a Vue Cinema, Boom Battle bar entertainment centre which includes Escape Hunt (escape room), and Nuffield Health club. Leisure uses here total 11,056 sq.m.
- 4.7.4 At **Ocean Terminal**, leisure operators comprise Vue Cinema, a recently opened Club 3000 bingo, PureGym, The Dance House dance school and The Royal Yacht Britannia visitor experience. These leisure uses total c.8,797 sq.m. A Level X/ Gutterball tenpin bowling, mini golf and arcade centre are planned to open as part of the ongoing part-redevelopment of the centre. However, a roller skating rink and indoor skate park closed at Ocean Terminal in 2023.
- 4.8 Other commercial centres in Edinburgh with leisure uses include **Fort Kinnaird** with a cinema (c. 3,134 sq.m.) alongside food & drink uses, cinema and food & drink uses at **Westside Plaza** in Wester Hailes (a town centre) with a gym and inflatable park here too and a total leisure stock of c.6,093 sq.m. There is also a gym within **Cameron Toll** Shopping Centre and one at **Craigeleith** Retail Park.
- 4.9 More widely, Edinburgh's leisure uses are located across a mix of property types. For example, within industrial units, such as FunParx (formerly Ninja Warrior UK) on Salamander Street and Time Twisters, children's soft play centre at Catalyst Trade Park on Bankhead Drive. Many of the entertainment-type centres are located within shopping centres or retail premises.
- 4.10 Health clubs / gyms tend to be located within retail/ retail warehouse premises for example PureGym in Ocean Terminal, Craigeleith Retail Park and at Conference Square; and Nuffield Health within Omni Centre and at Fountain Park as noted above. Some are purpose built, for example David Lloyd Leisure on Glasgow Road. There are also smaller operators, often sole ownership, of yoga/ pilates/dance/ studios which tend to be located in retail units and offices.
- 4.11 **Edinburgh Leisure** is the leading provider of sports and recreation facilities throughout the city. These are purpose built across 29 facilities and include leisure centres, sports facilities within schools, swim centres and sports complexes. Their holdings include: the Royal Commonwealth Pool, Meadowbank Sports Stadium, EICA Ratho (these are national assets); High Schools of Balerno, Currie, Queensferry and Wester Hailes; golf courses at Braid Hills, Carrick Knowe, Silverknowes and Craigentiny; swim centres of Dalry, Glenogle, Leith Victoria, Portobello and Warrander; leisure centres at Ainslie Park, Kirkliston, Craiglockhart, Drumbrae; and specialist facilities at Meggetland and Saughton Sports Complexes and Meadows Tennis.

STOCK ANALYSIS

- 4.12 There is no definitive list/ database/ register of leisure/ Class 11 stock in Edinburgh. However, using the Scottish Assessors database as a starting point and building up using multiple sources as set out at paragraph 4.2, Ryden has compiled a list of the city's leisure properties. The analysis has not checked against individual planning consents to whether these are operating as consented Class 11, it is simply a collation of uses in Edinburgh which fall within the stated uses.
- 4.13 The trawl and analysis has identified **347 leisure properties** in Edinburgh. Those with available size data total 436,402 sq.m. (4.7 million sq.ft.) of floorspace, however 162 (47%) have no floorspace recorded. Due to the vast range of leisure facilities from small studios up to major sports and cultural venues it is not appropriate to extrapolate from the known sizes to estimate the unknown ones.

⁸ Edinburgh Economic Needs Study – Retail (Ryden and Roderick MacLean Associates, September 2025)

4.14 Using the City of Edinburgh Council Use **Class 11** categories there are:

4.14.1 **a)** 10 cinemas which total c. 31,407 sq.m. Three of these are independent cinemas: the recently re-opened Filmhouse on Lothian Road, the Dominion in Morningside and Cameo Picturehouse at Tollcross. The others are operated by chains Odeon, Vue, Cineworld, and Everyman. These total c. 31,407 sq.m. with Cineworld at Fountain Park being the largest at 8,361 sq.m., followed by the Vue at Omni which is c. 5,002 sq.m. and at Ocean Terminal which is 4,450 sq.m.

4.14.2 **b)** 1 concert hall, the Usher Hall which is c. 12,542 sq.m. A further concert hall, the Dunard Centre is a purpose-built 11,347 sq.m. concert venue off St Andrew Square in the city centre, is currently under construction.

There are also 12 theatres in Edinburgh not included as Class 11 (they are most likely *sui generis* under the Use Classes Order). This does not include temporary venues used as theatres during the Festivals, such as public halls and churches. Major venues include the Playhouse on Greenside Place, King's Theatre on Leven Street which will shortly re-open following a major refurbishment, and the Festival Theatre on Nicolson Street. There are proposals to convert the Rose Theatre on Rose Street into an apartment hotel. Eleven of these have known sizes which total 43,788 sq.m. (there is no size available for one theatre). These theatres are included in the leisure analysis presented here as they form part of the city's portfolio of cultural venues.

4.14.3 **c)** 3 operational bingo halls totalling 7,024 sq.m. at Mecca Bingo 26 Manderson Street, Buzz Bingo at Meadowbank Retail Park and the recently opened Club 3000 at Ocean Terminal. This excludes inactive but still extant bingo halls like Bath Street in Portobello and 40-50 Nicolson Street. There are also 3 casinos in the city: two are run by Genting at Fountain Park and on York Place, with a Grosvenor Casino at Maybury. Casinos total 5,364 sq.m. The 6 bingo halls and casinos together total 12,388 sq.m. of leisure floorspace.

4.14.4 **d)** dance hall or discotheque: the city has 18 nightclubs, primarily located around the city centre and in particular the Old Town. Sizes are only available for 9 of these, totalling 5,564 sq.m. There have been nightclub losses over recent years which are part of a wider trend noted in Section 3.

4.14.5 **e)** the largest Class 11 category is something of a catch-all which captures remaining commercial leisure uses as well as community sports and recreation facilities across the city: there are 172 swimming baths, skating rinks, gymnasiums or areas for other indoor or outdoor sports/ recreation. These include the major Meadowbank Sports Centre, Oriam (at Heriot-Watt University) and Ratho Climbing Centre. In addition, a further 38 studios are identified offering activities such as yoga, pilates and judo. Only 96 of these 210 properties have a reported size, totalling 174,806 sq.m.

4.14.6 The Council's definition of Class 11 also included a number of **examples**; analysis of these shows:

- 6 amusement arcades
- 4 amusement parks (including entertainment centres)
- 4 bowling alleys
- 8 break-out (escape) rooms
- 3 casinos as noted above
- 10 childrens' soft play / fun parks
- 6 pool or snooker halls

These total 38 additional leisure venues within the above Class 11 examples. Of these, 32 have known sizes (6 do not) which total 47,425 sq.m.

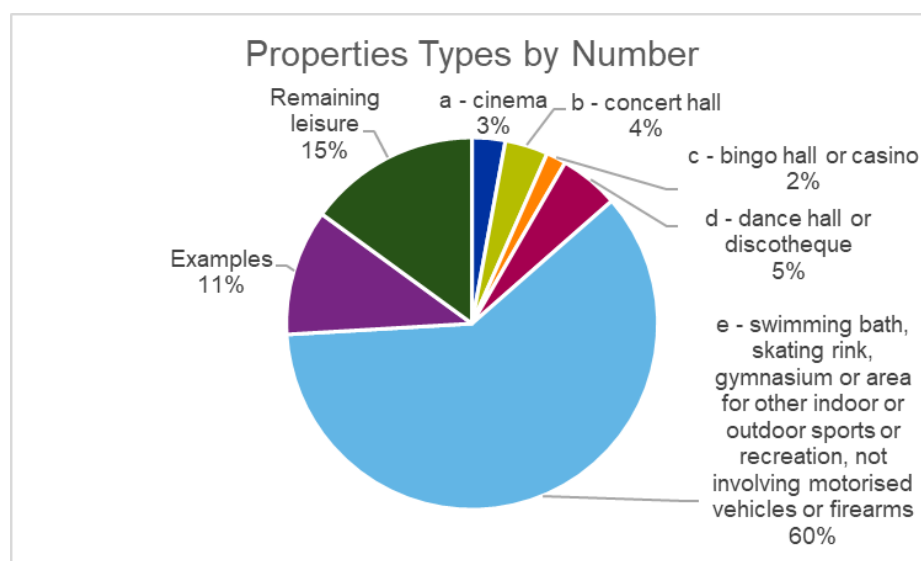
4.15 Looking beyond Class 11 a) to e) and the named examples analysed above, Ryden has collated **further examples** of the city's venues which are relevant to the leisure market. It is not known whether these are operating with Class 11 planning consents, or may be *sui generis* or indeed other use class such as 1a:

- 3 arts centres, including the large City Arts Centre on Market Street
- 1 board games café
- 1 bridge club
- 16 sports and recreation clubhouses
- 2 karaoke rooms in the city centre

- 1 indoor karting venue at Newbridge
- 1 marina in the north of the city at Port Edgar. The area around this has been enhanced in recent years and includes restaurants and retail.
- 27 museums/ galleries/ visitor attractions. This comprises many of Edinburgh's prominent cultural assets, including Edinburgh Castle, National Museum of Scotland, Museum of Childhood, Johnny Walker Experience, The Georgian House, Royal Yacht Britannia, Edinburgh Dungeon, Real Mary Kings Close, Dynamic Earth and the Royal Botanic Garden. The 14 of these with known sizes total 95,323 sq.m. (sizes have not been identified for the remaining 13, some of which are large).

4.16 Figure 4.1 shows these 347 leisure uses within and outwith the use class category. The chart shows the split by number, which clearly records the catch-all 11e) as the largest sub-group with 60%. It is also the largest sub-group by known floorspace size, with 40% of that stock, although as above the floorspace data is incomplete. The further leisure uses category has the next-highest number with 15% of the total.

FIGURE 4.1: EDINBURGH LEISURE USES BY CATEGORY



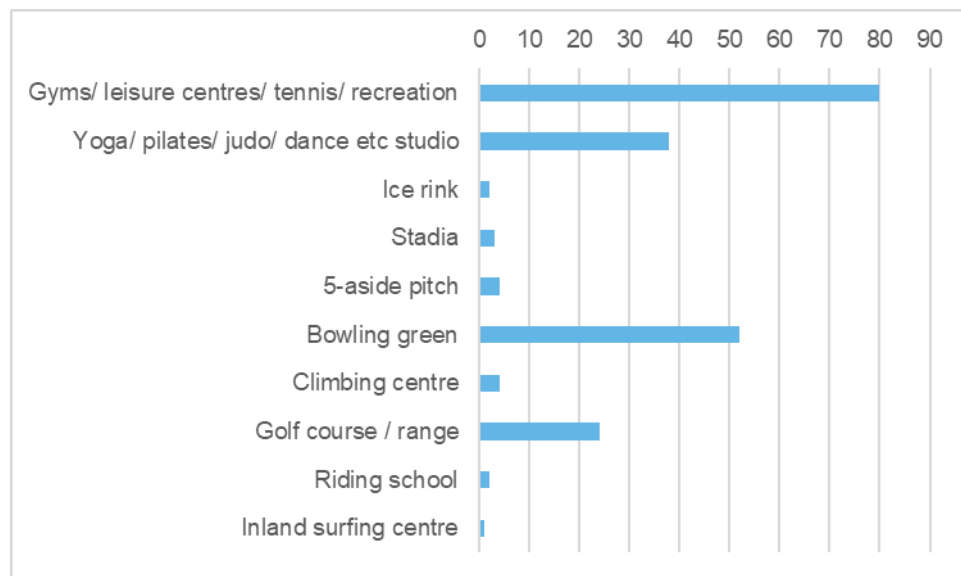
Source: Ryden/ Scottish Assessors Association/ CoStar

4.17 Due to having the majority of leisure units (210) across the city, **Use Class 11 (e)** is further split into activity types on Figure 4.2. This shows:

- A wide range of indoor and outdoor sports facilities includes privately run gymnasiums / health clubs (i.e. PureGym, The Gym Group, JD Gyms), along with smaller gyms. Private tennis clubs and courts are recorded. Edinburgh Leisure's venues include gyms, swimming pools, tennis courts and golf courses. There are 80 of these of which known sizes for 42 total 108,627 sq.m. (25 have no size).
- A total of 38 yoga/ pilates/ judo/ dance et cetera studios. These are generally located in small retail and office properties. The majority have a recorded size and total 11,536 sq.m. The largest is the 6,290 sq.m. Dance Base in the Grassmarket. Excluding that asset, the mean size for these studios is small, at 154 sq.m.
- There are 2 ice-rinks at Murrayfield, one for skating and the other for curling.
- There are 3 major stadia in the city: Murrayfield Rugby Stadium; Hibernian FC football ground at Easter Road and Hearts FC football ground at Tynecastle. In addition, there are stadia facilities within Meadowbank Sports Centre; Meggetland Sports Complex; Raeburn Place Sports Ground and Stadium; Peffermill Sports Complex; and Myreside.
- Four 5-aside football pitches are operated by Powerleague and Marcos/World of Football.
- There are 52 bowling greens located across the city, typically located in residential areas.
- 4 climbing centres include the major purpose-built Edinburgh International Climbing Arena at Ratho in a former quarry, plus one in a former church and two in industrial units. These total 39,337 sq.m.
- 24 golf courses and golf driving ranges tend to be located at the edges of the city and in green areas in the suburbs.

- 1 stand-alone Padel court has been developed at Edinburgh Park, although additional padel courts are provided in some locations alongside tennis courts.
- 2 horse riding schools are located to the southern side of the city.
- A newly constructed inland surfing centre, Lost Shore Surf Edinburgh, is sited at Ratho.

FIGURE 4.2: USE CLASS 11(E) BY ACTIVITY TYPE (NO.)

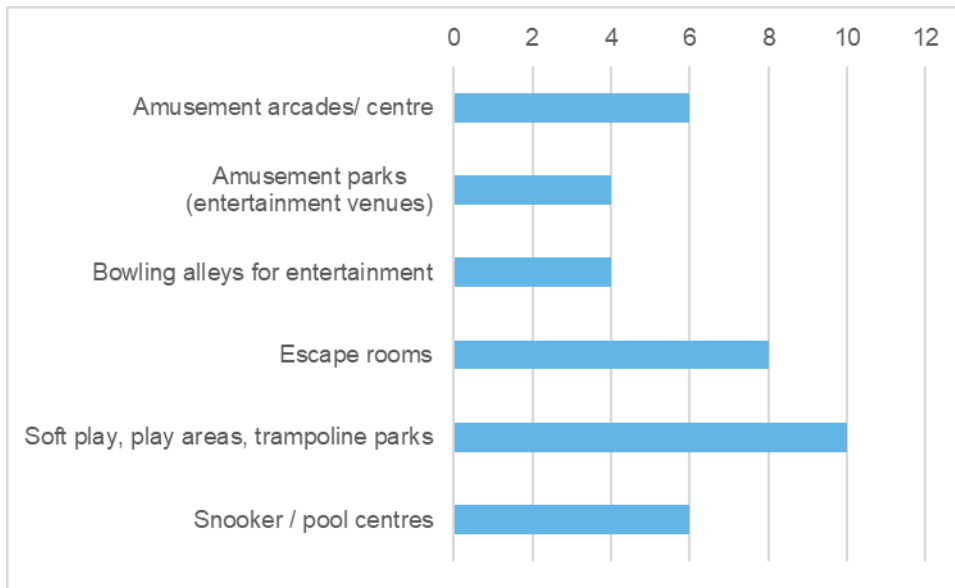


Source: Ryden/ Scottish Assessors Association/ CoStar

4.18 The Council's **Use Class 11 examples** account for the next-highest number of leisure use; these are summarised below and shown on Figure 4.3:

- There are 6 amusement arcades/ centres, located at Fountain Park, Portobello, and around the city centre. These total 2,496 sq.m.
- 4 amusement parks, which for the purposes of this analysis comprise entertainment venues but does not include those which have a bowling alley. The venues are social competitive and comprise a social darts venue, indoor golf, funfair games, and variety of sports-type activities and total 3,774 sq.m. (although 1 property has no size).
- There are 4 bowling alleys for entertainment. Generally, these have additional leisure activities such as ice-free curling, karaoke, pool tables or shuffleboard. These total 24,718 sq.m.
- Escape rooms / break-out rooms are a comparatively recent sector; Edinburgh has 8 providers of these totalling 1,438 sq.m. which are located in and around the city centre.
- There are 10 childrens' soft play and play areas and trampoline parks. A few are located within leisure centres, some in industrial units, two at outdoor centres (Conifox and Craigies Farm). These total 13,913 sq.m. (2 have no size allocated to them as they are included within a larger leisure facility).
- 6 pool or snooker halls are located in the city's suburbs. Only 3 of these have identified sizes, totalling 1,087 sq.m.

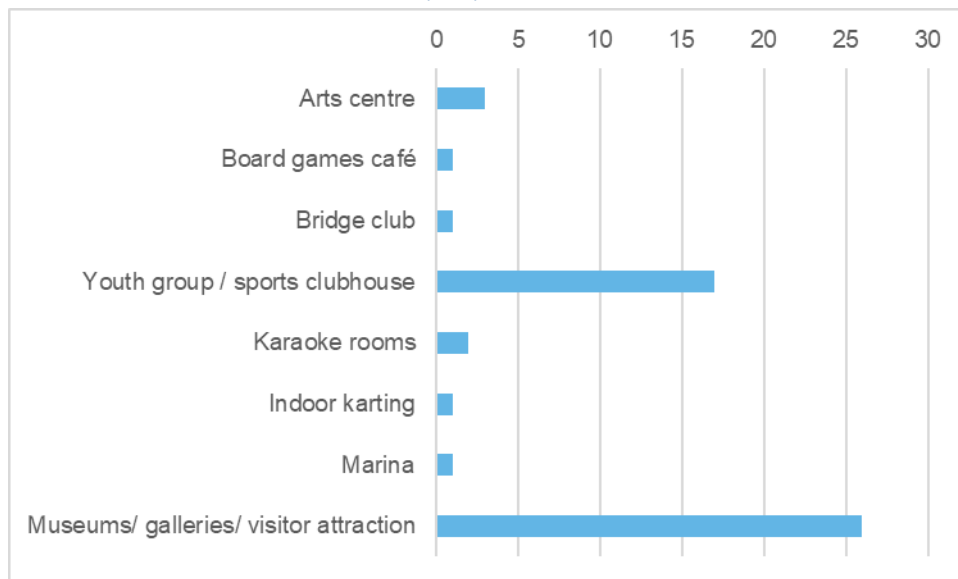
FIGURE 4.3: USE CLASS 11 EXAMPLES (NO.)



Source: Ryden/ Scottish Assessors Association/ CoStar

4.19 Finally, the 52 additional uses not specifically covered by the Class 11 definition and added by Ryden are noted below and shown on Figure 4.4. The 21 with known sizes total 108,482 sq.m., however the majority (31) have no size reported in the information sources analysed.

FIGURE 4.4: LEISURE FURTHER EXAMPLES (NO.)



Source: Ryden/ Scottish Assessors Association/ CoStar

SUMMARY

- 4.20 Edinburgh is a regional leisure destination for the resident population and also attracts high volumes of visitors, including to the annual festivals and major live events. Community sports and recreation facilities are provided throughout the city in 29 facilities operated by Edinburgh Leisure. In the commercial leisure sector Edinburgh has a very strong position across a number of commercial centres which face limited regional competition. The city attracts new leisure formats and St James Quarter has been a major addition to this. The relevant economic sectors in Edinburgh have grown over the past 10 years, including notable numbers of smaller businesses.
- 4.21 This report has identified 347 leisure properties in Edinburgh. These range from small studios up to major sports and cultural venues, including (using the Council's Class 11 sub-categories and examples):
- a) 10 cinemas (3 of which are independent);
 - b) 1 concert hall (the Usher Hall) and 1 under construction (the Dunard Centre) as well as 12 theatres not included as Class 11, excluding temporary venues used during the Festivals;
 - c) 3 bingo halls and 3 casinos;
 - d) 18 dance halls or discotheques (nightclubs);
 - e) 172 swimming baths, skating rinks, gymnasiums or areas for other indoor or outdoor sports/ recreation; and 38 sports/fitness studios.
- 4.22 A further 38 leisure venues are identified within the Class 11 examples, including amusements, soft play, bowling alleys, pool/ snooker and break out/ escape rooms.
- 4.23 In addition, information on a further 52 leisure venue types not specified within Class 11 has been collated, most notably 27 museums/ galleries/ visitor attractions and also examples such as karaoke rooms, indoor karting, clubs and a marina.

05 EDINBURGH LEISURE MARKET

INTRODUCTION

- 5.1 This section examines market activity within the leisure market in Edinburgh, including closures, new openings, planning applications and further requirements for representation in the city. It reflects both the wider leisure sector trends identified in Section 3, and also Edinburgh's status as a regional / capital city with both strong local demand and major visitor economy. The section begins with a summary of a consultation exercise held to support the Economic Needs studies generally and this study specifically, before moving onto market activity and a market summary.

CONSULTATIONS

- 5.2 According to consultees, the leisure sector in Edinburgh is dynamic, driven by evolving consumer behaviour but in some areas faces specific challenges around provision, funding, and infrastructure. Consultations with leisure/cultural venue managers, operators and tourism representatives have revealed several key themes shaping the demand and supply of floorspace and services in the city. Organisations consulted included:

- City of Edinburgh Council
- Scottish Enterprise
- Scottish Futures Trust
- Essential Edinburgh
- Edinburgh Chamber of Commerce
- Federation of Small Businesses
- St James Quarter
- Edinburgh Leisure
- Capital Theatres
- Edinburgh Visitor Economy Partnership
- Ryden Leisure Agents

- 5.3 Key themes from these consultations are summarised below.

- **The Drive for Experiences and Integrated Leisure**
 - Consultees highlighted a market increasingly focused on "experiences" over simple transactions and cited successful examples of facilities which now combine leisure, food and beverage and also retail. The St James Quarter is a prime example, being Scotland's first purpose-built, fully integrated retail and leisure destination. The success of venues which combine food and beverage and leisure elements such as Lane 7, Flight Club and the Everyman Cinema is notable and offers a distinct experiential focus which makes it distinct from other more traditional shopping centres or retail parks. Cultural facilities also reported greater demand for experiential work including circus style performances and investment has been made in improving bar areas in theatres and concert halls across the city.
 - Consultees reported that the private gym sector is reaching market maturity with the two largest national players, PureGym and Gym Group, having a significant presence in the City targeting the low cost/budget market. There are also a number of premium/full-service clubs such as Nuffield Health, David Lloyd Leisure and Village Gym as well as boutique/speciality gyms such as Gleneagles Townhouse as well as independent yoga, pilates and cross fit studios which often operate on a pay-as-you-go model or focus on a specific niche. It was noted that the mid market gym sector had potentially lost ground to the low cost and boutique/speciality studios driven by consumer preference for community and personal service. Despite the potentially maturing market there are reported to be active opportunities for new franchises in Edinburgh, such as Snap Fitness which sit in the speciality/boutique studio sector.

- In the cultural sector, it was noted that due to rising costs producers are creating less work and choosing alternative locations to the traditional theatre districts of New York's Broadway and London's West End to launch new works. Consultees considered that Edinburgh could move into this area but noted that there would be investment required in workshop facilities to help provide a more integrated offering.
- **Ageing Estate and Funding**
 - Many of Edinburgh Leisure's over 50 sites are part of an ageing estate with funding remaining a key issue. In early 2024, a number of venues earmarked for closure were saved when the Council was able to provide additional funding to cover operational deficits caused by rising energy costs and inflation. Similar pressures are being felt by cultural venues including theatres and concert halls with the King's Theatre currently closed a major redevelopment. However, Edinburgh's visitor levy may provide additional funding for culture, heritage and events in the future.
- **New cultural venues**
 - Consultees were excited by the potential new 8,500 seater arena at Edinburgh Park being promoted by AEG. It was considered that there was real demand for this size of facility in Edinburgh which will help it compete with other cities around the UK. Whilst consultees were also supportive of the new 1,000 seater Dunard Centre development at St Andrew Square there was some trepidation around whether it may compete with other venues across the city in particular the Queen's Hall and Usher Hall. Some consultees were also concerned it may shift its focus from classical music and look to attract productions in other sectors traditionally served by other venues.
- **Barriers to Business and Development Growth.**
 - Cost of Living: Consultees reported that the rapid rise in accommodation costs in Edinburgh over recent years is having a knock-on effect in terms of the City's ability to support artists and attract new productions. The Edinburgh Festival Fringe is a particular pinch point. All venues also reported hugely increased energy costs with a particular concern around the ongoing viability of some swimming pools.
 - Labour is a key issue: Consultees reported that there is competition for staff at all levels and a specific struggle to recruit senior technical posts in the leisure and broader cultural sector. It was reported that this problem is exacerbated by housing affordability in Edinburgh forcing many workers to live elsewhere and commute into the city.
 - Net Zero Deficiencies: Consultees reported that the move to Net Zero is being frustrated by a lack of coordinated energy infrastructure across Edinburgh. Cultural and leisure operators have had to put gas back in to refurbished properties or delay investment due to delays in planned district heating systems across the City.
 - Public transport challenges: the EICA located at Ratho and the recently opened Lost Shore facility are not well served by public transport, according to consultees, which makes them hard to access from other parts of the city. There was considered to be real potential to create a leisure or destination hub in this area but that this would struggle to be achieved without better public transport.
 - Lack of coordination on events: Consultees considered there was a lack of coordination around events particularly in Summer 2025 which saw large scale concerts from Oasis and AC/DC being held at the same time as the Edinburgh Festival Fringe. Consultees considered that this put unnecessary pressure on the City by further exacerbating hotel prices and straining its transport infrastructure. There was also considered to be increased pressure on residents at this time.

LEISURE MARKET ACTIVITY

- 5.4 Activity in the leisure market include new investment, closures and demand for further representation. As noted earlier, this is formal market activity and will not pick up the regular reinvestment required to maintain and upgrade existing venues to meet customer demand and expectations.
- 5.5 Table 5.1 highlights notable examples of recent gains for Edinburgh's leisure sector. As with the stock analysis in Section these are not definitely Use Class 11 but are within the general scope. A notable feature is that Edinburgh as a major city and visitor destination is attracting the leading edge of new formats such as competitive socialising. Also notable is the geographic spread of new investment which is particularly focused on the city centre, existing commercial leisure centres, and Leith. The two largest investments, at Lost Shore in Ratho and the redevelopment of Meadowbank Sports Centre, are of national significance.

TABLE 5.1: EXAMPLES OF LEISURE GAINS

OPERATOR	ADDRESS	TYPE
Lane 7	St James Quarter	Ten-pin bowling and entertainment centre
Flight Club	St James Quarter	Social darts
Everyman Cinema	St James Quarter	Cinema
Boom Battle Bar	Omni	Entertainment centre which includes indoor crazy golf, escape room, axe throwing and augmented reality darts.
Roxy Lanes	Rose Street	Ten-pin bowling and entertainment centre which includes shuffleboard, beer pong pool, ice-free curling, karaoke rooms and pool tables.
Bingo 3000	Ocean Terminal	Bingo club opened early 2025.
Escape Edinburgh	26-28 Morrison Street	Escape room.
Fayre Play	14 Picardy Place	Indoor crazy golf and fairground games opened in 2023.
Level X	Ocean Terminal	Tenpin bowling, mini golf and arcade centre due to open.
Places Leisure	Engine Yard, Leith Walk	Gym opened in 2025.
Lost Shore S2urf	Ratho	Inland surfing resort opened 2025.
Tidal Yoga	115 Leith Walk	Yoga studio opened 2025.
Meadowbank Centre	Sports London Road	New (redeveloped) sports centre and stadium opened in 2022.
Filmhouse	Lothian Road	Cinema re-opened in 2025.
Splatter Art Studio	4 Bernard Street, Leith	Painting studio opened in 2024 in former bank.
Hot Pod Yoga	Fountain Park	Yoga studio opened in 2024.
Currie Community High School leisure facilities	Dolphin Avenue	Leisure facilities at the new High School opened in September 2025 by Edinburgh Leisure. Includes a gym, swimming pool, sports hall and dance studio.

Source: Ryden/ internet

5.6 Recent losses within Edinburgh’s leisure sector are detailed in Table 5.2. Some were lost through the redevelopment and market repositioning of Ocean Terminal. The former Cavendish nightclub in the city centre was also lost to redevelopment. Other losses simply reflect change within and between the city’s leisure uses. Although only two nightclubs are listed in the table as having been lost, the research process of identifying the city’s current stock for Section 4 noted a further six buildings which had formerly housed nightclubs, the loss of which would be consistent with wider trends. In addition, it was recently confirmed that the World of Football in Chesser will be lost with a planned residential development by Watkin Jones receiving planning permission in October 2025.

TABLE 5.2: EXAMPLES OF LEISURE LOSSES

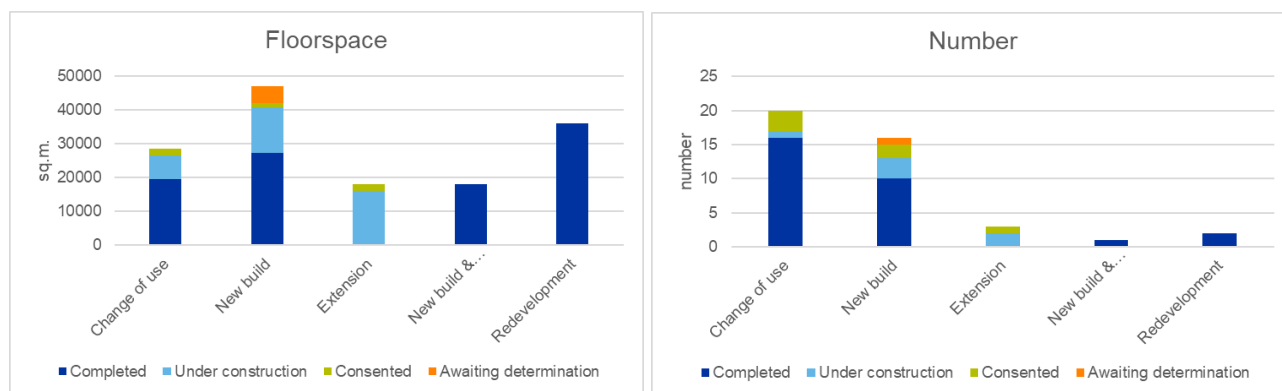
OPERATOR	ADDRESS	TYPE
Boardwalk Roller Rink	Ocean Terminal	Indoor roller skating rink.
Transgression Park	Ocean Terminal	Indoor skatepark.
Oceanplay	Ocean Terminal	Soft play.
Gymboree	3 Gorgie Park Road	Children’s play gym and music classes.
F45 Cross Fit	54 Fountainbridge	Group fitness sessions.
Noughts & Coffees	28-28 Morrison Street	Board games café.
Ballie Ballerson	14 Forrest Road	Adult ball pit with cocktail bar.
Meadowlark	43 Argyle Place	Yoga studio.
Atik/ The Cavendish	3 West Tollcross	Nightclub.
Leith Ex-Servicemen’s Club	7 Smith’s Place	Ex-servicemans club.
Eastside	51a George Street	Nightclub.
World of Football / World of Bowling	New Mart Road, Chesser	5-aside football pitches and bowling alley.

Source: Ryden/ internet

DEVELOPMENT ACTIVITY

- 5.7 Completed and proposed leisure development activity provides an insight into demand and investment trends, and future leisure supply within Edinburgh.
- 5.8 City of Edinburgh Council provided information on leisure development in the city since 2019. Forty-two leisure projects have either been completed, are under construction or have been consented but not yet started on site. Figure 5.1 shows this development firstly by floorspace (totalling 147,172 sq.m.) and then by number. New build development has the most floorspace among these planning consents while change of use has the most by number.

FIGURE 5.1: LEISURE DEVELOPMENT 2019 TO 2024






Source: Ryden/ City of Edinburgh Council

- 5.9 Change of use applications include (to) fitness uses, gyms, dance studios, visitor centres and indoor entertainment centres. New build (and new build with refurbishment) applications include an adventure park, golf facilities, events space, stadium facilities, cinema, music & performing arts venue, and 3G pitches. Extension applications comprise caravan pitches, hotel entertainment space and an indoor equestrian arena. Redevelopments are sports facilities/ stadia.
- 5.10 Change of uses (from leisure) include former a yoga studio, club, sauna, nightclub, art gallery, bowling club, casino and bingo hall. The change of uses are proposed (to) children’s day care, residential, retail, church, office (Class 4) uses and food production. Losses to stock include the proposed change of use from a nightclub at 12 Shandwick Place to an aparthotel, and the demolition of a nightclub at 3 West Tollcross for the potential development of student accommodation.
- 5.11 Significant recent leisure development projects and proposals in Edinburgh (including developments not within the planning consents analysed above) are noted in Table 5.3. The portfolio is very high value in terms of providing national and regional-level facilities across a wide range of mainly sports and also commercial leisure and cultural, funded by the public sector, higher education, private clubs, third sector and commercial developers.

TABLE 5.3: SIGNIFICANT RECENT DEVELOPMENTS AND PROPOSALS

DEVELOPMENT		DETAILS
<p>Meadowbank Sports Stadium</p>		<p>A redevelopment to provide a sports stadium totalling 16,527 sq.m. which completed in 2022. Owned by City of Edinburgh Council and operated by Edinburgh Leisure. The centre includes gyms, cycle and group fitness studios, games halls, outdoor and indoor athletics tracks, 3G pitches and squash courts.</p> <p>Planning use type: Class 11 Assembly and Leisure.</p>
<p>Murrayfield Stadium, Roseburn Street</p>		<p>Development of stands and a 3G synthetic pitch completed in 2021. Totals 19,495 sq.m. of redevelopment. Owned and operated by Scottish Rugby Union.</p> <p>Planning use type: Class 11 Assembly and Leisure.</p>
<p>Jack Kane Community Centre</p>		<p>New development and refurbishment including bike tracks, 3g pitches and a centre refurbishment. Totalling 18,000 sq.m. and completed in 2022.</p> <p>Owned by City of Edinburgh Council and operated by Edinburgh Leisure.</p>
<p>Raeburn Place / Portgower Place</p>		<p>New build rugby stadium for Edinburgh Academicals Football Club, comprising hospitality, office, museum and retail space, extending to 7,893 sq.m. and completed in 2020.</p> <p>Planning use type: Class 11 Assembly and Leisure.</p>
<p>Wavegarden, Ratho Quarry</p>		<p>Lost Shore Surf Resort is a new build inland surfing and water sports complex built on the site of a former quarry. It totals 6,221 sq.m. and completed in 2024</p>
<p>Johnnie Walker Experience, Princes Street</p>		<p>A refurbishment of the former House of Fraser department store into a whisky-themed visitor attraction. Totals 6,000 sq.m. and completed in 2021. But the planning application stated change of use of the listed building from a vacant department store (Class 1) to whisky-themed visitor experience with ancillary retail, bars, offices, training and event space.</p> <p>Note this is a Use Class 10 development identified on the Council's leisure projects list for this study.</p>
<p>Oriam Sports Performance Centre, Heriot Watt University</p>		<p>A new build indoor sports facility totalling 4,380 sq.m. completed in 2023. Developed in a partnership between Heriot-Watt University and the City of Edinburgh Council.</p> <p>Planning use type: Class 11 Assembly and Leisure.</p>

<p>Cinema, St James Quarter</p>		<p>New build cinema as part of the St James Quarter development. Totals 3,738 sq.m. and completed in 2022. Operated by Everyman Cinema and includes 5-screens and two bars.</p> <p>Planning use type: Classes, 1, 2, 3, 7, 10 and 11.</p>
<p>IMPACT Scotland/ Dunard Centre, St Andrew Square</p>		<p>New purpose built concert hall, 11,347 sq.m. under construction.</p> <p>Planning use type: Class 11 Assembly and Leisure.</p>
<p>Ten-pin bowling and entertainment centre, Waverley Mall</p>		<p>Proposals for a 1,842 sq.m. entertainment centre including bowling alleys, mini-golf, shooting range, curling lanes, pool tables and dart boards to be developed on the ground floor of the centre.</p> <p>Planning use type: Class 1 Assembly and Leisure and Class 3 / sui generis.</p>
<p>Cramond Campus development on the former Moray House Cramond Campus site, adjacent to Cramond Road North</p>		<p>AMA has plans to develop an outdoor sports facility (including a synthetic pitch and active loop), and a sports hub building with padel tennis, gym and other associated facilities, including a social café/restaurant space as part of the wider development. The site is subject to a number of planning applications with the most recent 24/02112/PAN stating Proposed mixed-use development comprising sport and leisure facilities (Class 11) (including synthetic pitch, active loop and sports hub featuring gym, padel tennis and other associated uses); later living accommodation (Class 8/Class 9/flatted residential); Care Home (Class 8); and other commercial facilities (including potential for Class 1A (Shops, financial and other professional services), Class 3 (Food and Drink) and Class 4 (Business); landscaping and open space; access; car parking and other associated works.</p>
<p>Edinburgh Park Arena, Lochside Court</p>		<p>AEG propose an 8,500 capacity indoor arena at Edinburgh Park for live music and sports. Planning application 24/00820/FUL for the development of an arena Class 11 including ancillary Class 1A (retail), Class 3 (restaurants and cafes) and hot food /bar amenities with associated public realm, access, landscaping, and infrastructure was granted in June 2024.</p>

Source: Ryden/ City of Edinburgh Council/ internet

MARKET REQUIREMENTS

5.12 Sources accessed by Ryden indicate where operators are currently seeking to invest in a location; these are termed 'requirements' and are from commercial operators rather than community sports & recreation. There are currently seventeen reported leisure requirements for Edinburgh, due to some requirements indicating potential ranges these total from 16,600 sq.m. to 25,130 sq.m. Individual leisure requirements range from 110 sq.m. (a small unit in a parade or mall) up to 2,787 sq.m. (a large unit or stand-alone building). Locations required include highly visible sites, in shopping centres/ retail/ leisure parks, retail warehousing and city centre – mirroring the recent investment patterns noted above.

- 5.13 By leisure activity type, there are seven requirements for health and fitness operators which includes gyms, padel, boxing and action sports. Remaining requirements are mainly competitive socialising including immersive bingo, electric shuffleboard, indoor bowling and golf, escape room, immersive performance and entertainment. In addition, there is a requirement for a baking events experience in the city.
- 5.14 More widely rather than specific to Edinburgh, there are general leisure requirements seeking representation across a range of locations. These are often franchise-led, for trampoline centres, indoor family fun parks (for example SuperPark, of which one has just opened at Braehead west of Glasgow), gyms, indoor golf and an F1 arcade experience.

SUMMARY

- 5.15 Consultations reveal that Edinburgh's leisure sector is highly dynamic and driven by consumer demand for integrated experiences and a greater focus on health and wellbeing. Operators, including major developments like the St James Quarter, are successfully combining leisure with food, beverage, and even retail elements to create more compelling, experiential offerings. This trend aligns with a reported shift among younger demographics toward reduced alcohol consumption and increased interest in fitness, with traditional gyms reporting growing youth membership and demand rising for newer, more accessible sports like padel and pickleball. Cultural venues are also investing in their bar areas and seeing greater demand for experiential work.
- 5.16 However, consultees note the sector faces significant constraints on both provision and floorspace. Existing public leisure facilities are largely housed in an ageing estate, and the public sector's ability to redevelop or create new facilities is restricted, particularly as developer contributions are currently focused on the school estate rather than wider leisure provision. While the private gym market is maturing, new niche franchises continue to find opportunities. In the cultural sphere, rising costs are restricting producers from creating new work, although there is excitement over major new venues like the proposed 8,500-seater arena at Edinburgh Park, which is expected to boost the city's ability to compete with other UK cities.
- 5.17 Finally, according to consultees, the viability and growth of the sector are challenged by a number of barriers to business and development. These include the rapid rise in accommodation costs and competition for skilled staff, which forces many workers to live outside the city. Energy costs remain a critical issue, threatening the viability of some venues like swimming pools. Furthermore, progress toward Net Zero is hampered by a lack of coordinated energy infrastructure. The sector is also struggling with public transport deficiencies to key leisure locations outside the city centre, and a perceived lack of coordination around major events is creating unnecessary strain on city infrastructure and residents.
- 5.18 In the current leisure market, Edinburgh is attracting the leading edge of new formats such as competitive socialising. New investment is particularly focused on the city centre, existing commercial leisure centres, and Leith. The city has attracted many notable new projects across sports, commercial and cultural leisure activities. Further market requirements for leisure uses are mainly for health and fitness or competitive socialising, typically seeking prominent commercial locations. Lost leisure uses have arisen through market change, the redevelopment of Ocean Terminal and the loss of former nightclubs.

06 SUMMARY AND CONCLUSIONS

- 6.1 City of Edinburgh Council commissioned Ryden to deliver the Edinburgh Economic Needs Study to support the implementation of City Plan 2030 and the Evidence Report for the forthcoming City Plan 2040. This report covers the **leisure** sector. It has a particular focus on planning Use Class 11, while recognising that leisure is a broad sector. The report does not cover the food & beverage or accommodation and travel sectors.
- 6.2 Edinburgh's **planning** framework is governed by National Planning Framework 4 (NPF4) and the City Plan 2030. These documents incorporate major principles that directly influence the leisure property market, including promoting Local Living and 20-Minute Neighbourhoods (requiring local access to leisure facilities) and supporting leisure as a key economic sector delivering regeneration, activity and footfall. City Plan 2030 encourages proposals for leisure and entertainment facilities and visitor attractions in the City Centre, at Leith and Granton Waterfront, in town centres and in local centres. A sequential town centre-first policy is applied and developments that generate significant travel demand with reliance on private car use will not be supported. The City Plan and NPF4 also include policies aimed at managing the existing leisure property stock and facilitating new types of use, including the proactive approach to repurposing commercial space through the encouragement of mixed uses (including leisure) on Princes Street. Policies also seek to protect venues and limit the loss of sports facilities and arts or cultural venues.
- 6.3 In terms of wider leisure **strategy**, the sector seeks greater financial resilience while ensuring accessibility, availability and sustainability of provision. The sector, which includes a specific focus on culture and sports and recreation, has seen investment challenged by public sector budget cuts.
- 6.4 The leisure sector is currently navigating shifting **consumer** behaviour amid **economic** recovery. The leisure market is highly dynamic as consumers prioritise experiences over other discretionary purchases. Notable growth areas are health & fitness/wellness and competitive socialising, often integrated with food and beverage. Economic recovery is however, tempered by rising operating and employment costs for leisure operators, who are focusing on innovation and experience to capture discretionary spend in an increasingly competitive environment.
- 6.5 Leisure comprises a diverse range of **sectors**. Some traditional activities such as nightclubs are in decline, while others like cinema are recovering from pandemic lows, though future growth may be dampened by the shift to streaming. The most significant property trend is the rise of competitive socialising and experiential venues, which are increasingly occupying available retail space given the symbiotic relationship between these two consumer-facing sectors.
- 6.6 **Edinburgh** is a regional leisure destination for the culturally-engaged resident population and also attracts high volumes of visitors, including to the annual festivals and major live events. Community sports and recreation facilities are provided throughout the city in 29 facilities operated by Edinburgh Leisure. In the commercial leisure sector Edinburgh has a very strong position across a number of commercial centres which face limited regional competition. The city attracts new leisure formats and St James Quarter has been a major addition to this. The relevant economic sectors in Edinburgh have grown over the past 10 years in both employment and business numbers, including a notable cohort of smaller businesses.
- 6.7 This report has identified 347 **leisure properties** in Edinburgh. These range widely from small studios up to major sports and cultural venues, including (using the Council's Class 11 sub-categories and examples): 10 cinema complexes; 1 concert hall (and 1 under construction), plus 12 theatres not under Class 11 and excluding temporary festival venues; 3 bingo halls and 3 casinos; 18 nightclubs; 172 sports and recreation facilities; 38 sports/ fitness studios; and 38 mixed including amusements, soft play and bowling alleys. A further 52 non-Class 11 museums/ galleries/ visitor attractions and other such as karaoke rooms and indoor karting are also recorded.
- 6.8 **Consultations** reveal that Edinburgh's leisure sector is highly dynamic and driven by consumer demand for integrated experiences and a greater focus on health and wellbeing. Operators are successfully combining leisure with food, beverage, and even retail elements in compelling, experiential offerings. Cultural venues are also investing in their bar areas and seeing greater demand for experiential work although rising costs are a restriction.

However, public leisure facilities are ageing, with limited ability to redevelop or create new facilities. Consultees are enthusiastic about the proposed 8,500-seater arena at Edinburgh Park. Reported barriers to the viability and growth of the city's leisure sector include the rapid rise in accommodation costs, competition for skilled staff, energy costs and infrastructure, public transport deficiencies outside of the city centre, and a perceived lack of coordination around major events.

- 6.9 In the current **leisure market**, Edinburgh is attracting the leading edge of new formats such as competitive socialising. New investment is particularly focused on the city centre, existing commercial leisure centres, and Leith. The city has attracted many notable new projects across sports, commercial and cultural leisure activities. Further market requirements for leisure uses are mainly for health and fitness or competitive socialising, typically seeking prominent commercial locations. Lost leisure uses have arisen through market change, the redevelopment and redevelopment of Ocean Terminal and the loss of former nightclubs.
- 6.10 Looking to future **leisure market needs** and land use in Edinburgh, high development costs and a ready supply of vacant (often retail) premises mean that adaptive reuse of existing buildings is now more common than new construction. While Edinburgh's regional and visitor market roles mean that new development may happen, it is more likely to be one-off projects such as the Edinburgh Arena or Dunard Centre, rather than waves of commercial leisure development such as cinemas which were seen in the 1990s/2000s. Adaptive reuse of existing buildings for new and expanding formats is expected to be the mainstay of the market, alongside refreshing of existing venues – for example new rooms in escape rooms, adding Padel courts to leisure venues, increasing the use of experiential technology or introducing new food & beverage. Where there may be both commercial and community demand for new leisure uses is in the city's expansion and regeneration areas around Granton, West Edinburgh and (along with Midlothian) the southeast of the city, even in those instances the requirement may be for upgrade and expansion of the nearest existing facilities, public access to high school facilities, and/or leisure units within mixed-use commercial/employment buildings, rather than major new leisure development.

Ryden LLP
October 2025

EDINBURGH

7 Exchange Crescent
Conference Square
EH3 8AN
0131 225 6612

GLASGOW

ONYX
215 Bothwell Street
G2 7EZ
0141 204 3838

ABERDEEN

The Capitol
431 Union Street
AB11 6DA
01224 588866



Ryden