

A group of children are swimming in a pool, viewed from above. They are wearing swim caps and goggles, and are positioned along a white lane line. The water is blue and splashing. The children are wearing various colored swim caps: blue, purple, and pink. They are also wearing goggles. The lane line is white and runs diagonally across the frame. The children are swimming in a line, with their heads above water and arms extended forward. The water is splashing around them.

Culture and Leisure Services



Culture and leisure services have been exceptionally impacted by COVID-19 and face significant challenges in terms of their survival and ability to contribute to the health and wellbeing of Scotland's communities. While the impacts have been significant for all areas, variation in local COVID-19 restrictions and in local staff redeployment strategies will provide important context in relation to the data observed.

In addition to promoting better health and wellbeing of the population and in reducing demand on other core services, the social and economic benefits of culture and leisure services are well documented. Culture and leisure services also connect well with communities who more traditional and regulated services often struggle to reach. This unique relationship provides real potential to achieve impact for people in the greatest need and will be vital in supporting local and national recovery efforts. Concerted focus will be needed to understand and respond to the medium- and long-term impacts of the pandemic on this critical sector, which have intensified the significant existing funding and cost pressures facing culture and leisure services, including the impact on current income streams.

Prior to COVID-19, culture and leisure services had seen their usage grow significantly across the 10-year period, in part reflecting the expansion of digital provision during this time. In 2020/21, culture and leisure facilities were closed for a significant period of the year, significantly impacting usage numbers.

While there had been substantial capital investment in the cultural and leisure infrastructure in Scotland during the lifespan of the LGBF, given there is little in the way of statutory protection for these services, culture and leisure services had been facing a particularly challenging financial context. Since 2010/11, overall gross revenue expenditure on culture and leisure services has fallen by 29.6% in real terms (range: -69% to +5%). This includes a 6% reduction in 2020/21.

All culture and leisure cost measures in the LGBF are presented as net measures. This provides a better basis to compare like by like between councils, particularly in relation to different service delivery models, e.g. in-house/arm's length provision. It also recognises the increasing need for authorities to income generate across culture and leisure services, and ensures this activity is reflected accordingly.

Sports facilities

The data presented below illustrates the net cost per attendance at sports and recreation facilities. Prior to COVID-19, during the ten-year period from 2010/11 to 2019/20 the average unit cost had reduced year on year from £4.43 to £2.92 in real terms. In percentage terms, this represents a 34% reduction, and was driven by a 25% reduction in expenditure in parallel with a 14% growth in visits. This trend was true for almost all authorities, although 4 authorities reported an increase in unit costs during this time.

Table 34: Cost per attendance at sports facilities

2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	% Change 2019-20 to 2020-21	% Change 2010-11 to 2020-21
£4.43	£4.97	£3.78	£3.76	£3.45	£3.38	£3.29	£3.03	£2.85	£2.92	£40.36	1282.2%	810.6%

Over this pre-COVID-19 period, the significant increase in user numbers while the unit cost of sports attendances has fallen indicates that leisure and recreation services had managed to attract more people into using their facilities while managing significant financial pressures. The significant capital investment programme in sports facilities across Scotland in the noughties is likely to be an important factor in the user growth observed.

In 2020/21, the number of attendances reduced by 91.2%, from 50 million to 4.6 million. During this period, expenditure increased by 20.9% as councils moved to compensate ALEOs/Trusts for loss of income as a

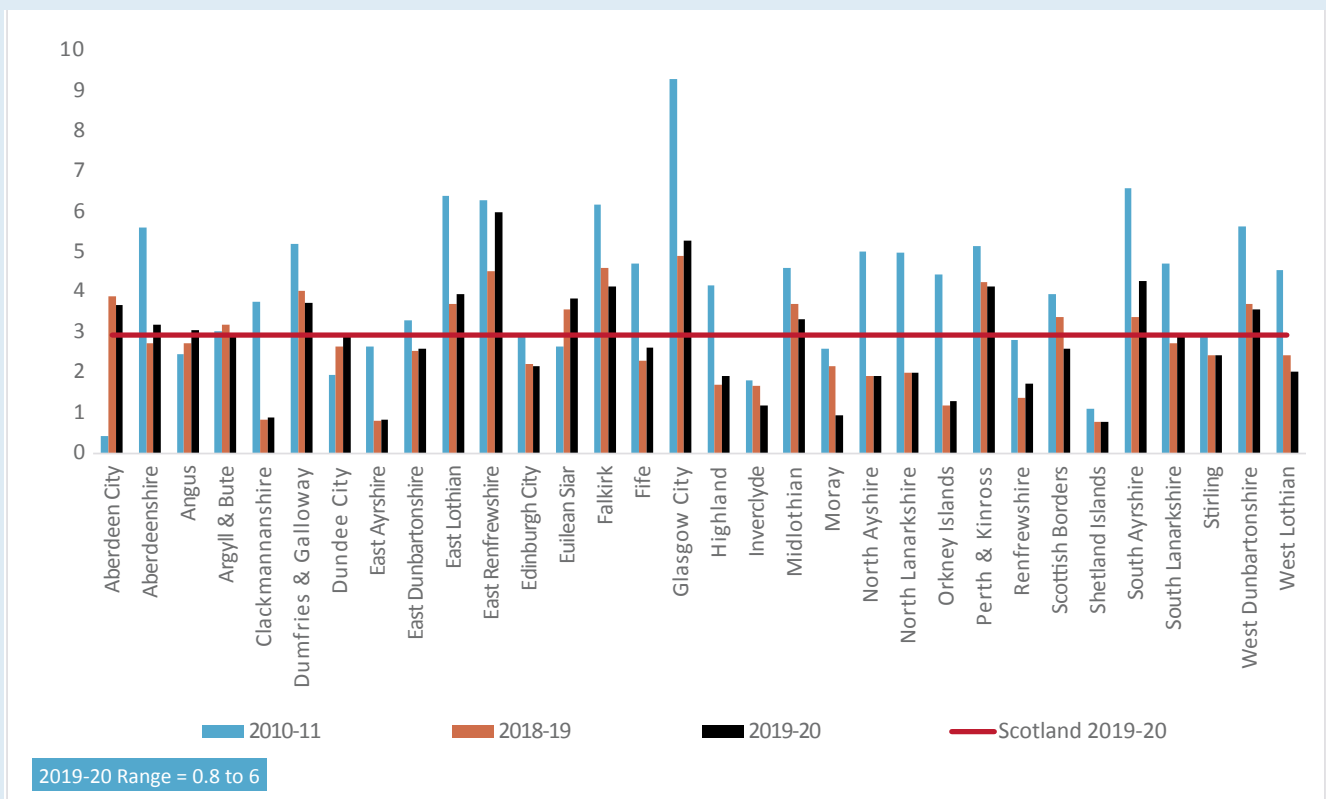


result of COVID-19 restrictions. This has resulted in unit costs increasing from £2.92 to £40.36 (an increase of over 1000%).

While the impact for all authorities on unit costs was significant during 2020/21, there is variation between councils in terms of the scale of this impact. While all authorities saw their visit numbers reduce, this ranged from a reduction of 68% to a reduction of 98%. Meanwhile, while the average expenditure increased during 2020/21, this ranged from a fall of 31.6% to an increase of 143.8%, with one third of councils reducing their expenditure during this time counter to trend. While costs had previously been higher for urban authorities (although not statistically significant due to variation within the family group), this pattern is not evident in data from 2020/21.

It is important to note that some of the variation observed will be influenced by the local lockdown restrictions in place with regulations differing quite significantly across the country at various times during 2020/21 as a result of varying infection rates.

Fig 68: Cost per attendance at sports facilities (£) - pre COVID-19



Source: council supplied expenditure and visitor figures



Local Variation – Cost per attendance at sports facilities

2020/21 Value

Scotland: £40.40; council range: £2.74 - £223.61 (£2.74 - £113.11 excluding outliers). Widened variation in most recent year. Costs had previously been higher for urban authorities (not statistically significant), but this is no longer evident.

Change Over Time

In 2020/21: Scotland: +1282.2%. All 32 councils increased (range: +250.5% to +8708%). Attendances: all 32 councils decreased (range: -98% to -68%); Expenditure: 22 councils increased and 10 decreased (range: -31% to +143%).

Since 2010/11: Scotland: +810%. All 32 councils increased (range: +61.5% to +7079.4%)



Fig 69: Change in expenditure on sports facilities between 2019/20 and 2020/21 (%)

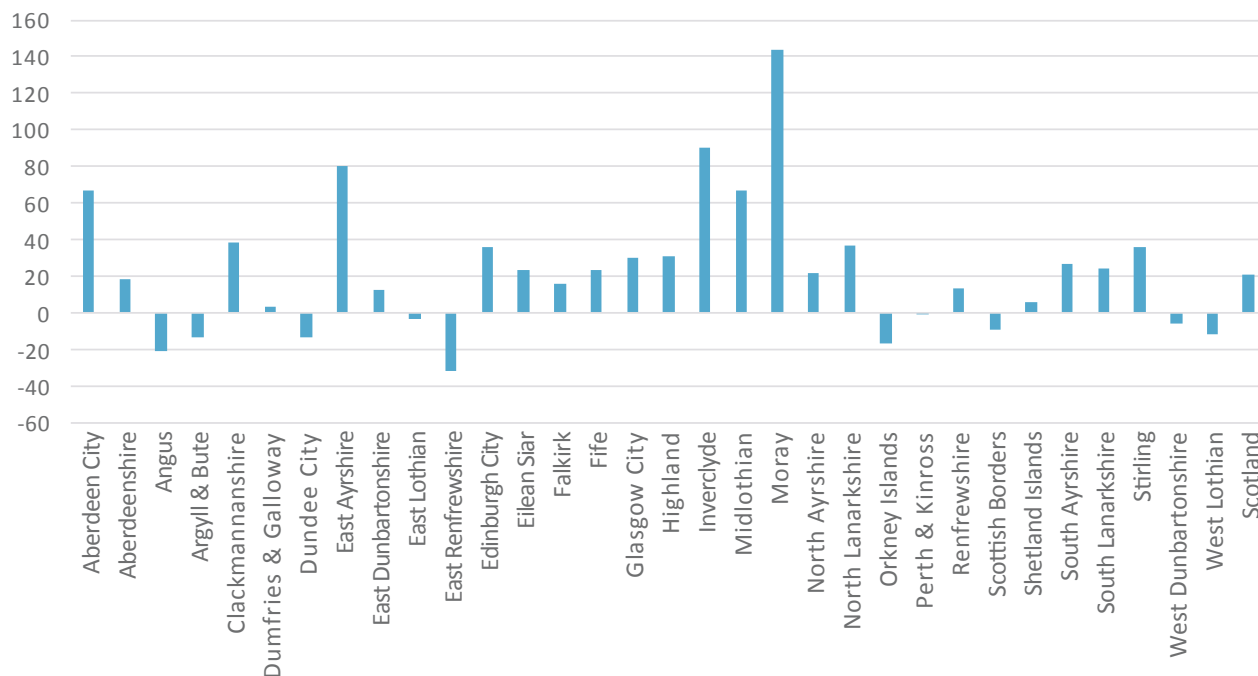
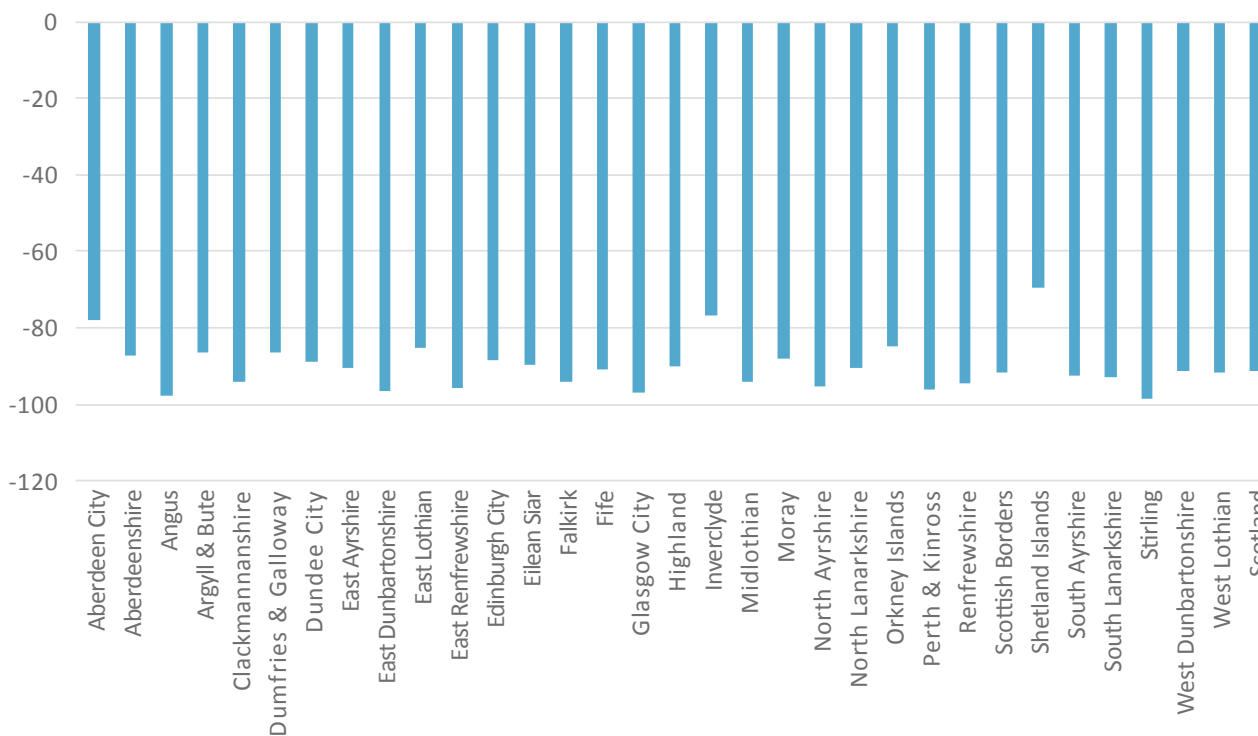


Fig 70: Change in visit numbers at sports facilities between 2019/20 and 2020/21 (%)



Source: council supplied expenditure and visitor figures



Library services

Library costs are represented as the average cost per library visit (both physical and virtual).

Prior to COVID-19, there was a significant 50.1% reduction in unit costs since 2010/11, from £425 to £212. As with sports, this was driven by a 29% reduction in spend across the period, in parallel with a 42% growth in visit numbers. While this trend is true for almost all authorities, three councils reported increasing costs during this time counter to the national trend. Rural authorities saw greater cost reductions on average than urban or semi-rural authorities, -53% compared to -35%.

Table 35: Cost per library visit

2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	% Change 2019-20 to 2020-21	% Change 2010-11 to 2020-21
£4.25	£4.01	£3.80	£3.03	£2.86	£2.83	£2.25	£2.31	£2.24	£2.12	£2.88	35.5%	-32.4%

In 2020/21, library visit numbers fell by 33.8%, while expenditure fell by 10.3%. This had the result of increasing unit costs from £2.12 to £2.88, an increase of 35% in the most recent year, counter to the previous reducing trend.

While the majority of councils reported significant reductions in visit numbers during 2020/21, a small number of councils saw their visit numbers increase due to the growth in virtual visitors. Virtual visits have grown across all authorities in the last few years, increasing by 37% in 2020/21 from 20.3 million to 27.8 million, and by 56% since 2018/19, from 17.8 million to 27.8 million. Rural authorities reported significantly higher rates of virtual visits prior to COVID-19, and additionally saw faster growth in virtual visits during 2020/21. Excluding virtual visits, the number of physical visits to libraries reduced by 92% in 2020/21, which is comparable with Sports/Leisure.

Fig 71: Library visits – breakdown by type

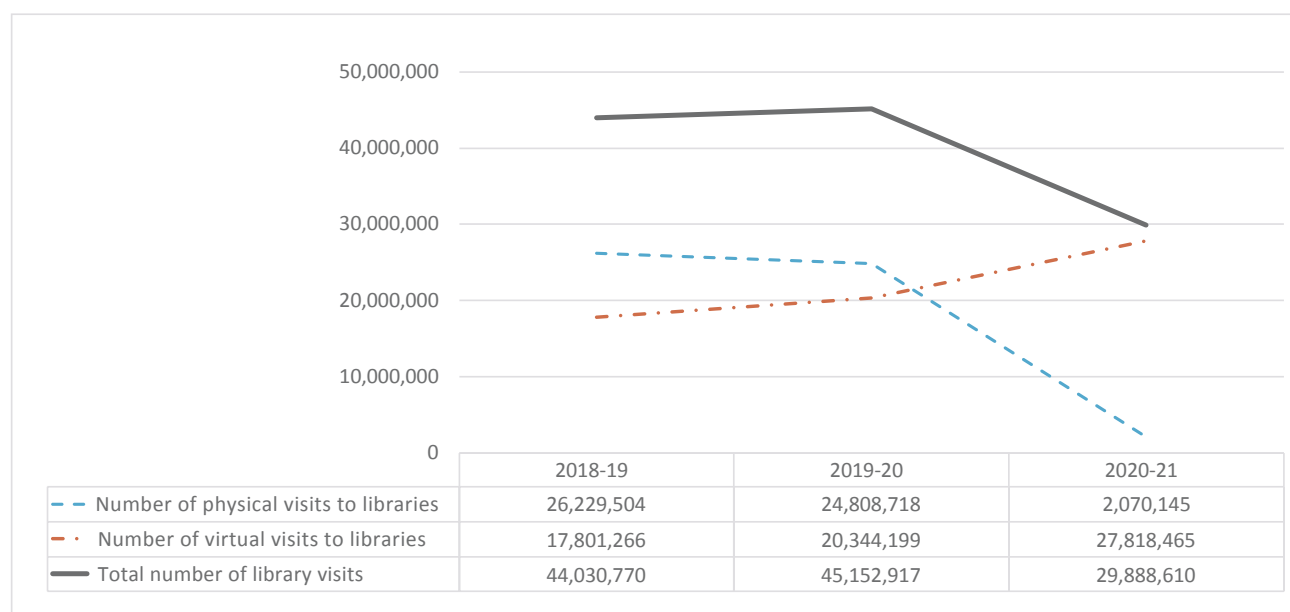
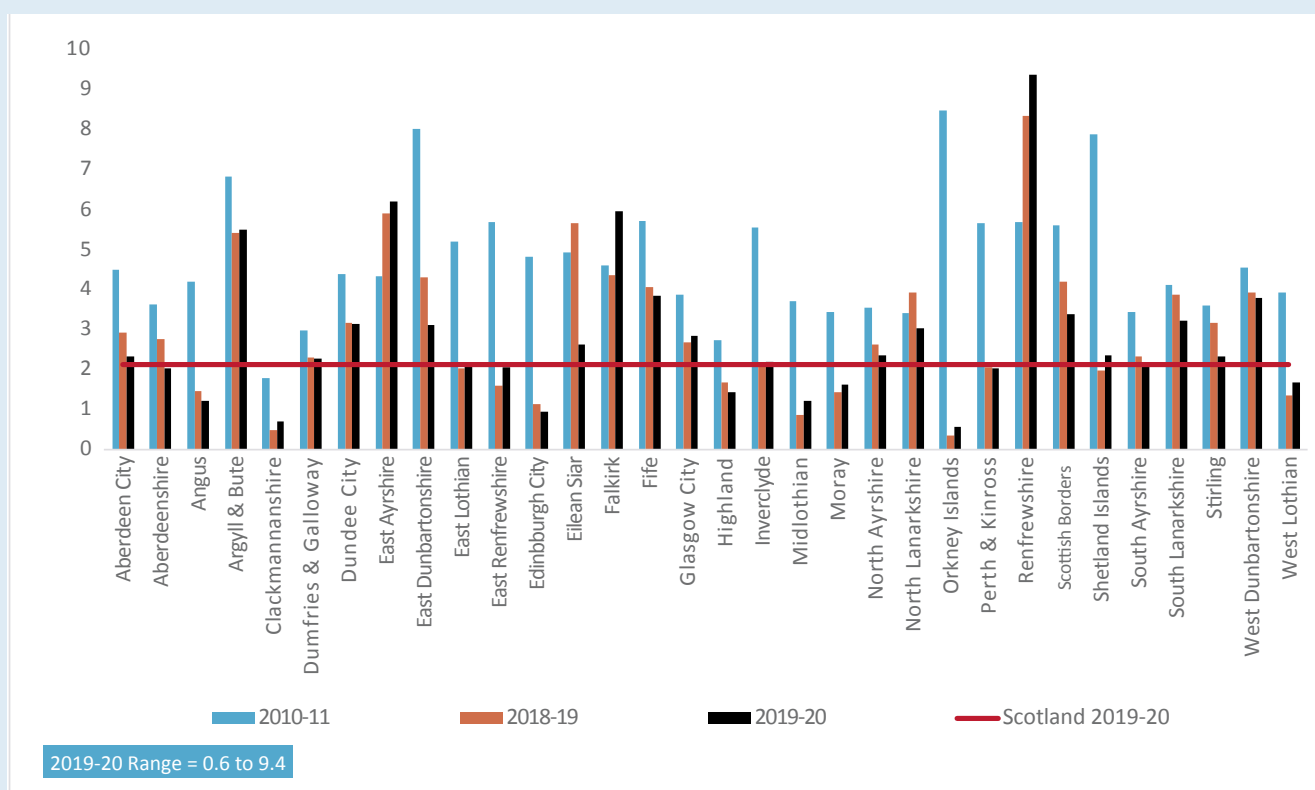


Fig 72: Cost per library visit (£) - pre COVID-19



Source: council supplied expenditure and visitor figures



Local Variation – Cost per library visit

2020/21 Value

Scotland: £2.90; council range: £0.34 - £36.90 (£0.34 - £24.80 excluding outliers). Widening variation in the most recent year. Costs are higher in urban councils compared to rural (£12.88 compared to £7.19, not statistically significant).

Change Over Time

In 2020/21: Scotland: +35.5%; councils: 25 increased and 7 decreased (range: -73.9% to +735.0%); Visits: 5 councils increased and 27 decreased (range: -87% to +261%); Expenditure: 6 councils increased and 26 decreased (range: -49.7% to +50.6%)

Since 2010/11: Scotland: -32.4%; councils: 18 increased and 14 decreased (range: -95.9% to +484.8%)



Fig 73: Change in expenditure on libraries between 2019/20 and 2020/21 (%)

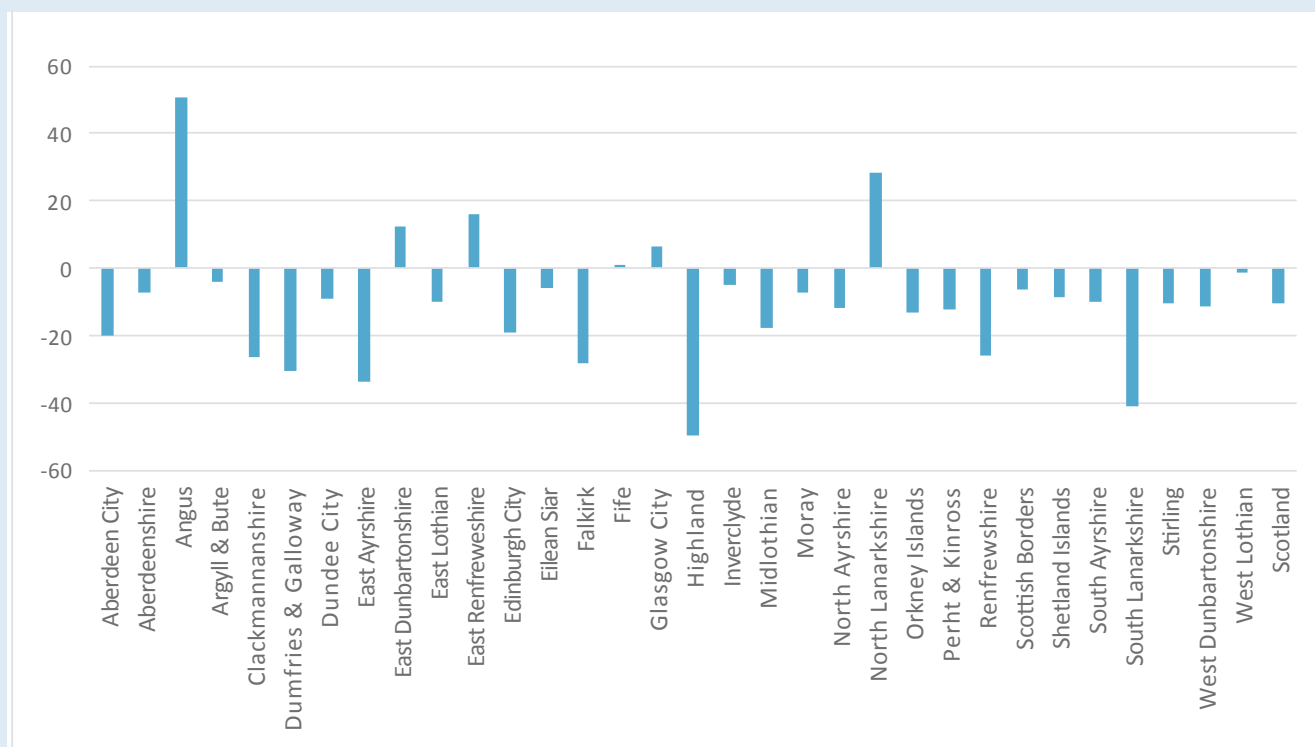
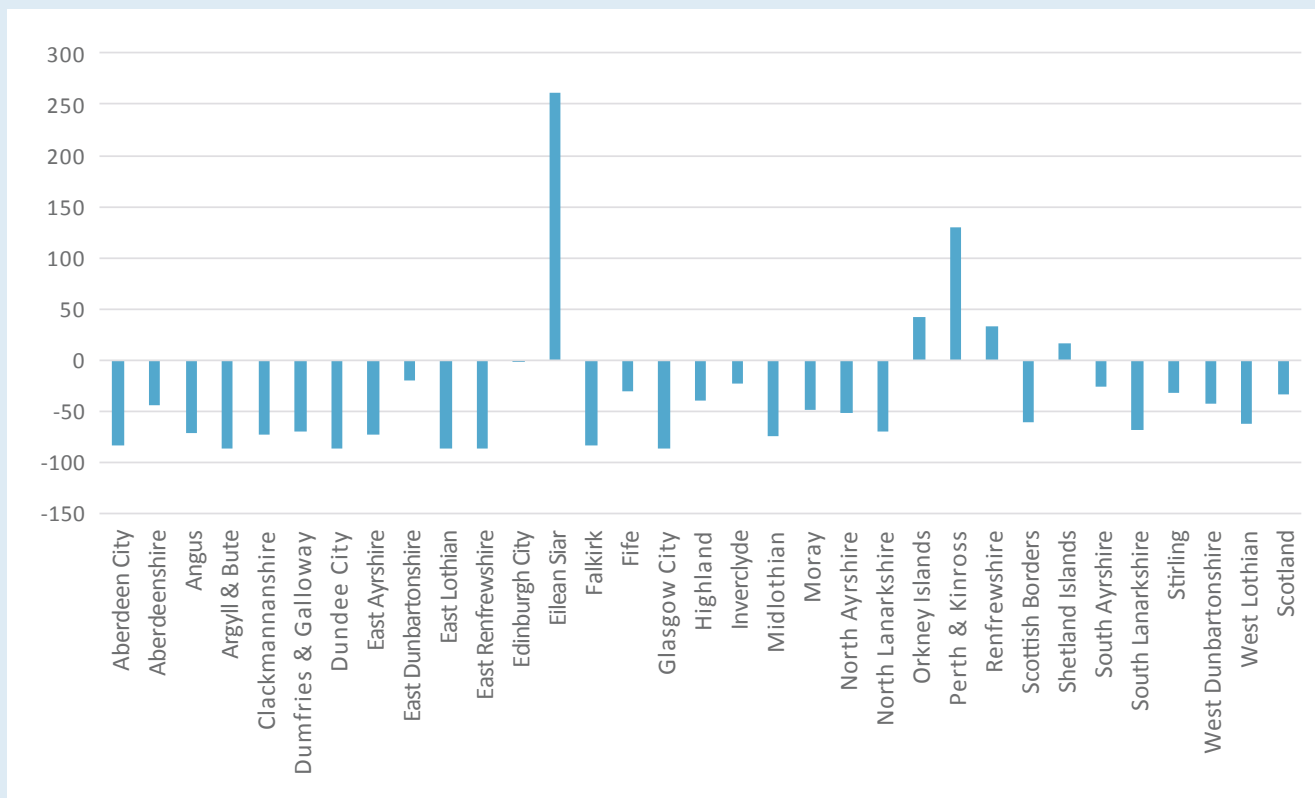


Fig 74: Change in visit numbers at libraries between 2019/20 and 2020/21 (%)



Source: council supplied expenditure and visitor figures



Museum services

With respect to museum services, the pattern is similar to library and sports services both over the longer term, and in terms of the impact observed during 2020/21.

In the ten-year period prior to COVID-19, there was a real terms reduction of 33.5% in cost per visit, from £5.25 to £3.49 between 2010/11 and 2019/20. This represents a 10.0% reduction in net expenditure in parallel with a 35.3% increase in museum visits (from 9.3 million visits to 12.5 million visits). Although the average cost per visit reduced during this period, 9 authorities reported increasing costs per visit counter to the national trend. Council variation reveals no pattern with deprivation, geography or council size.

Table 36: Cost per museums visit

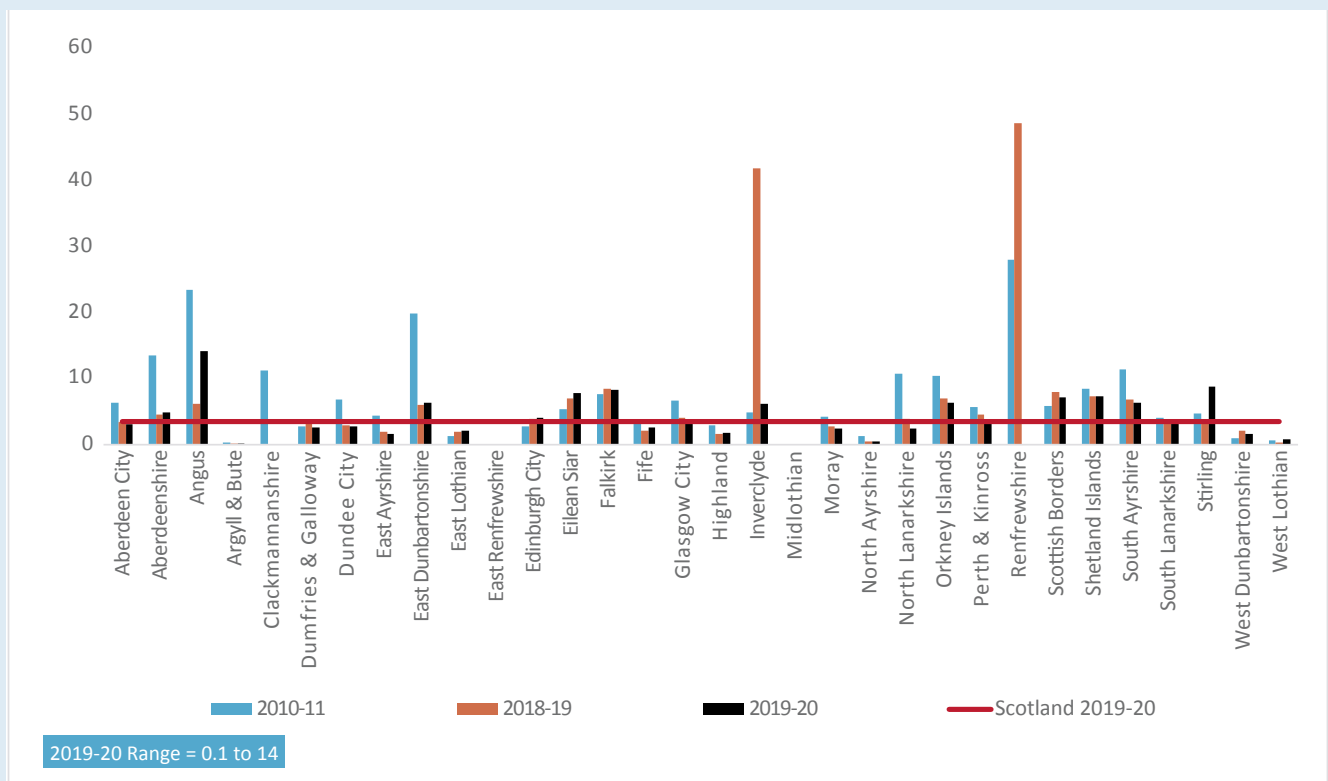
2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	% Change 2019-20 to 2020-21	% Change 2010-11 to 2020-21
£5.2	£4.3	£4.3	£3.9	£3.9	£3.5	£3.8	£3.9	£3.8	£3.5	£10.1	190.8%	93.4%

Source: council supplied expenditure and visitor figures

In 2020/21, museum visit numbers decreased by 68%, (from 12.5 million to 4.0 million) while net expenditure decreased by 8.1%. This had the result of increasing the cost per visit from £3.49 to £10.14, counter to the previous reducing trend.

While the majority of councils reported significant reductions in museum visit numbers during 2020/21 as a result of COVID-19 restrictions, a small number of councils saw their visit numbers increase due to the growth in virtual visitors. Similarly, just under a fifth of councils saw their net expenditure increase during 2020/21, counter to the national trend.

Fig 75: Cost of museums per visit - pre COVID-19



Source: council supplied expenditure and visitor figures

Note: Missing values for Clackmannanshire, East Renfrewshire and Midlothian reflect no council provided museum service



Local Variation – Cost of museums per visit

2020/21 Value

Scotland: £10.10; council range: £0.06 - £1242 (£0.06 - £348 excluding outliers). Widening variation in the most recent year, and not systematically related to deprivation, geography or authority size.

Change Over Time

In 2020/21: Scotland: +190.8%; councils: 21 councils increased and 6 decreased (range: -80.3% to +8755.8%). Visits: 4 councils increased, 23 decreased (range: -100% to +172%); Expenditure: 6 councils increased, 25 decreased (range: -100% to +67%)

Since 2010/11: Scotland: +93.4%; councils: 18 councils increased and 9 decreased (range: -81.6% to + 7645.2%)



Fig 76: Change in expenditure on museums between 2019/20 and 2020/21 (%)

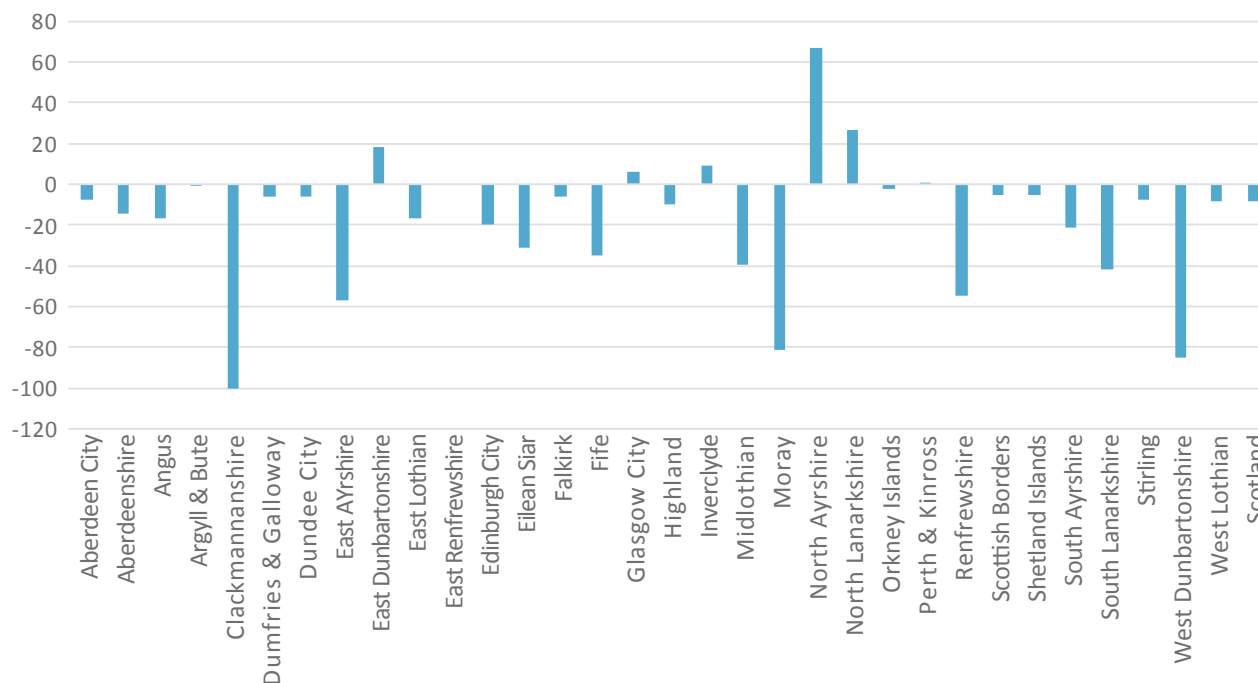
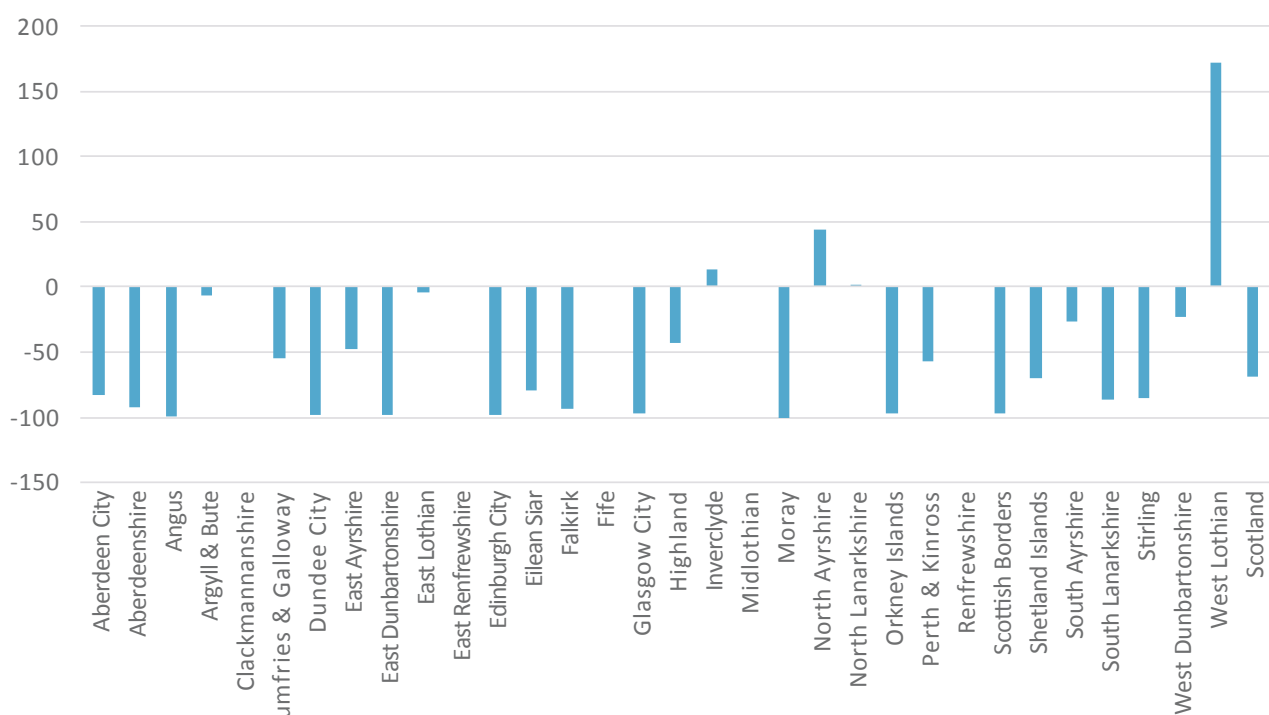


Fig 77: Change in visit numbers at museums between 2019/20 and 2020/21 (%)





Parks and open spaces

Spend on parks and open spaces is reflected as spend per 1,000 population. Over the 11-year period from 2010/11 to 2020/21 spend has reduced in real terms by 41.0%, from £32,377 to £19,112. There has been a year on year reduction across the period, including a 10.9% reduction in 2020/21

While average costs have reduced by 41.0%, the range in movement across councils is -86% to +16%, with three councils reporting increasing costs counter to the national trend.

Table 37: Cost of parks and open spaces per 1,000 population

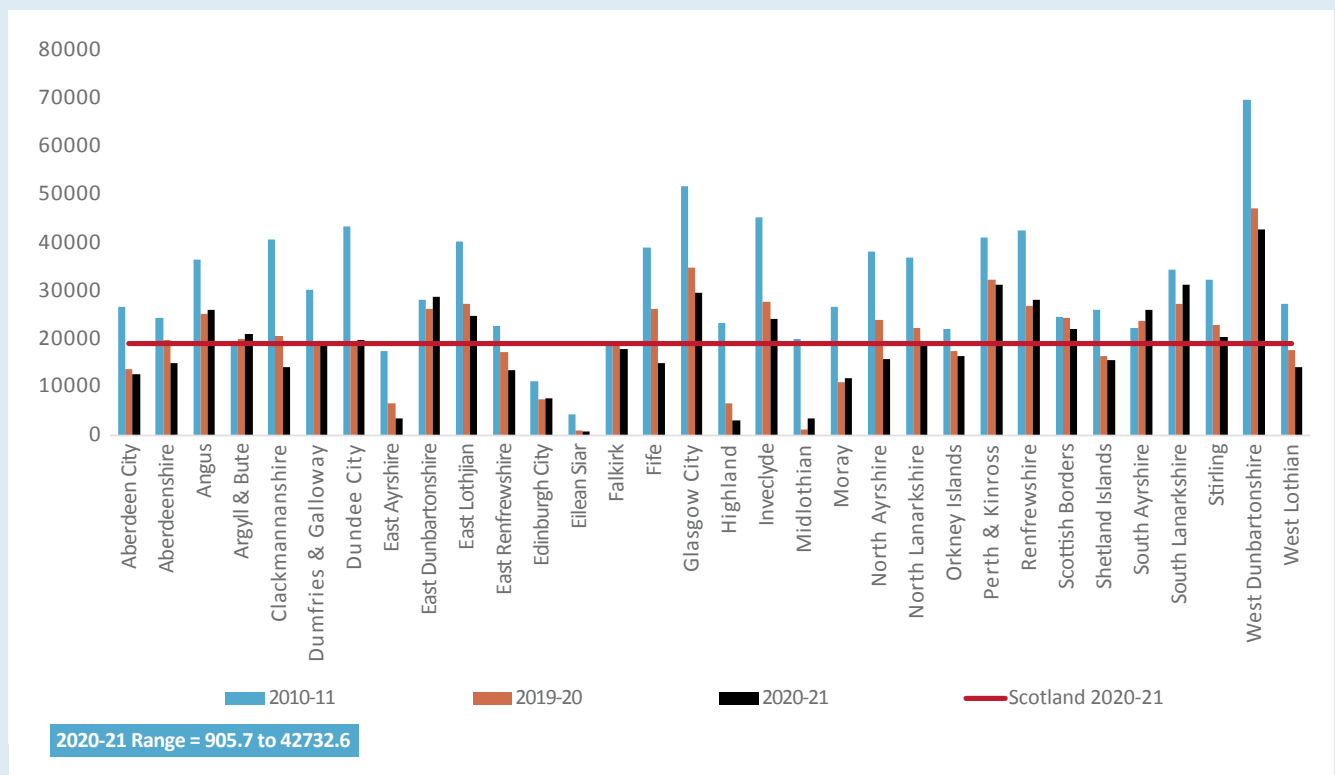
2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	% Change 2019-20 to 2020-21	% Change 2010-11 to 2020-21
32,377	29,866	28,530	27,460	27,275	25,240	23,600	22,063	21,998	21,453	19,112	-10.9%	-41.0%

In 2020/21 the average cost of parks and open spaces was £19,112, ranging from £906 - £42,733 with variation across councils narrowing since the base year. In previous years, councils with higher levels of deprivation spent significantly more on parks and green spaces. However, due to a sharper reduction in spend in more deprived authorities (including during 2020/21) this is no longer the case. Costs have reduced by 49% in the most deprived councils compared to 30% in the least deprived councils since 2010/11, and by 15% compared to 6% in 2020/21.

Work within Family Groups has identified the following factors as important in understanding the variation between authorities in culture and leisure services:

- *Local political and strategic priority given to the role of culture and leisure in supporting improvement in wider outcomes e.g. health and wellbeing, tackling inequality, economic development, community empowerment*
- *Scale of provision and level of service*
- *Digital channel shift*
- *Service delivery model and balance between in house and arm's length/trust delivery*
- *Service structure and integration with other services*
- *Staffing composition, level and roles*
- *Level of volunteering, community involvement and asset transfer*
- *Income generation capacity*
- *Asset management and co-location/multi-use venues*

Fig 78: Costs of parks and open spaces per 1,000 population (£)



Source: Mid-year population estimates, National Records Scotland (NRS); council supplied expenditure figures



Local Variation – Cost of parks and open spaces per 1,000 population

2020/21 Value

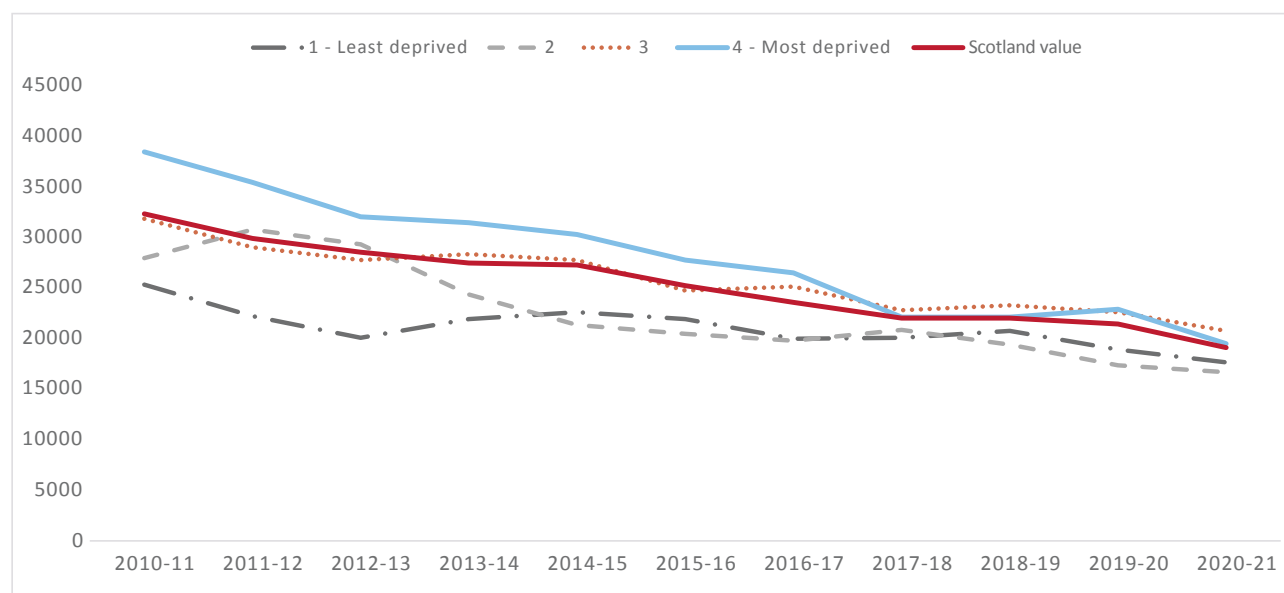
Scotland: £19,112.30; council range: £905.66 - £42,732.64 (outlier); Narrowing variation on previous year. Costs are higher in the most deprived councils compared to least deprived councils (£19,535 compared to £17,651, no longer statistically significant).

Change Over Time

In 2020/21: Scotland: -10.9%; councils: 10 increased and 22 decreased (range: -53.2% to +175.1%)

Since 2010/11: Scotland: -41%; councils: 3 increased and 29 decreased (range: -86.4% to +16.5%)

Fig 79: Costs of parks and open spaces per 1,000 population (£) by family group - deprivation



Satisfaction with culture and leisure services

The publication of Scottish Household Survey satisfaction data at council level has been delayed this year due to COVID related changes which were required to be introduced to the standard survey methodology in 2020. This change in methodology has introduced comparability issues in relation to data from previous years which will need to be addressed in future publications. Satisfaction data for 2020/21 is therefore not currently available for inclusion in the LGBF.

Historic data shows that satisfaction levels for all areas of culture and leisure remain high at around 70% or above. All areas have, however, experienced declining satisfaction between 2010/11 and 2019/20, except parks and green spaces. While this is a consistent picture across most authorities, a small number of authorities have experienced increasing satisfaction levels during this period. In 2019/20, national satisfaction rates for libraries, museums and parks have all improved, while leisure continues to show a small decline. Significant local variation exists beneath each of these national trends.

Table 38: Percentage of adults satisfied with culture and leisure services

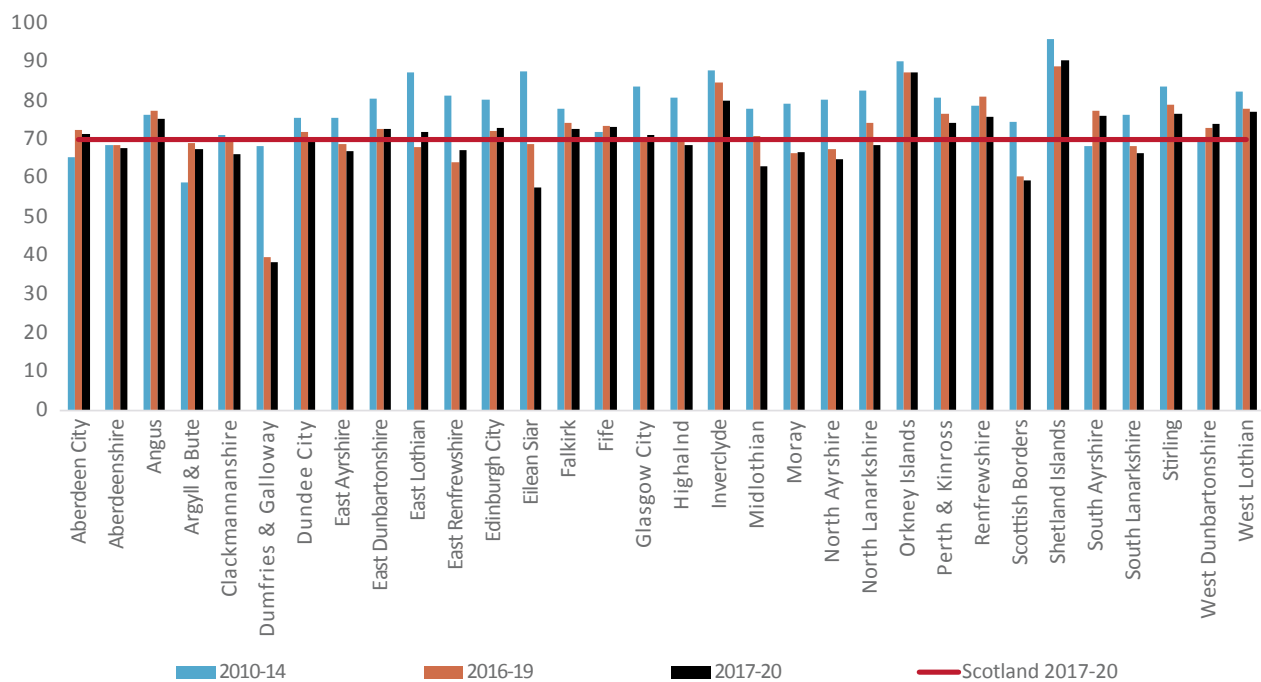
	2010-11	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Value Change 2018-19 to 2019-20	Value Change 2010-11 to 2019-20
Libraries	83.5	83.0	81.0	77.0	74.0	73.0	72.0	72.1	73.0	dna	0.9	-10.5
Parks and Open Spaces	83.1	86.0	86.0	86.0	85.0	87.0	85.0	82.5	83.0	dna	0.5	-0.1
Museums and Galleries	75.5	78.0	76.0	75.0	71.0	70.0	69.0	68.9	70.0	dna	1.1	-5.5
Leisure Facilities	74.6	80.0	78.0	76.0	73.0	73.0	72.0	69.3	69.0	dna	-0.3	-5.6



As with satisfaction with local schools, to boost sample sizes 3-year rolled averages have been used to ensure the required level of precision at local levels. From 2018/19, questions used in the LGBF have also been included in the Scottish Surveys Core Questions (SSCQ) which provides a boosted sample size. The data used represents satisfaction for the public at large rather than for service users. It should be noted that satisfaction rates for service users are consistently higher than those reported by the general population, but the smaller sample sizes available for service users mean it is not possible to present this data with any level of confidence.

For all culture and leisure services, satisfaction levels vary considerably across councils and this variation has been widening. In leisure, satisfaction rates range from 38% to 90%; in libraries, it is 49% - 92%; for museums, 43% - 90%; and finally, for parks the range is 37% - 91% (71%-91% excluding Eilean Siar as an outlier). There are no systematic effects of deprivation, sparsity or council size on satisfaction levels in relation to culture and leisure services.

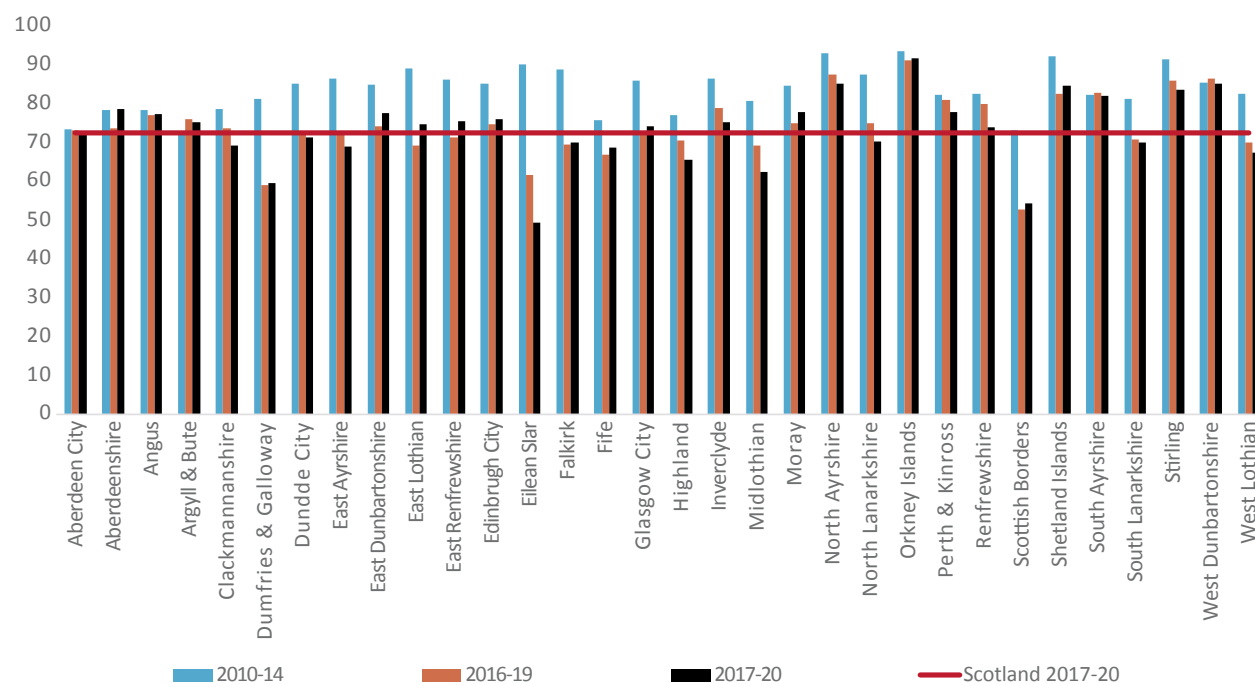
Fig 80: Percentage of adults satisfied with leisure facilities



2017-20 Range = 38.3 to 90.6

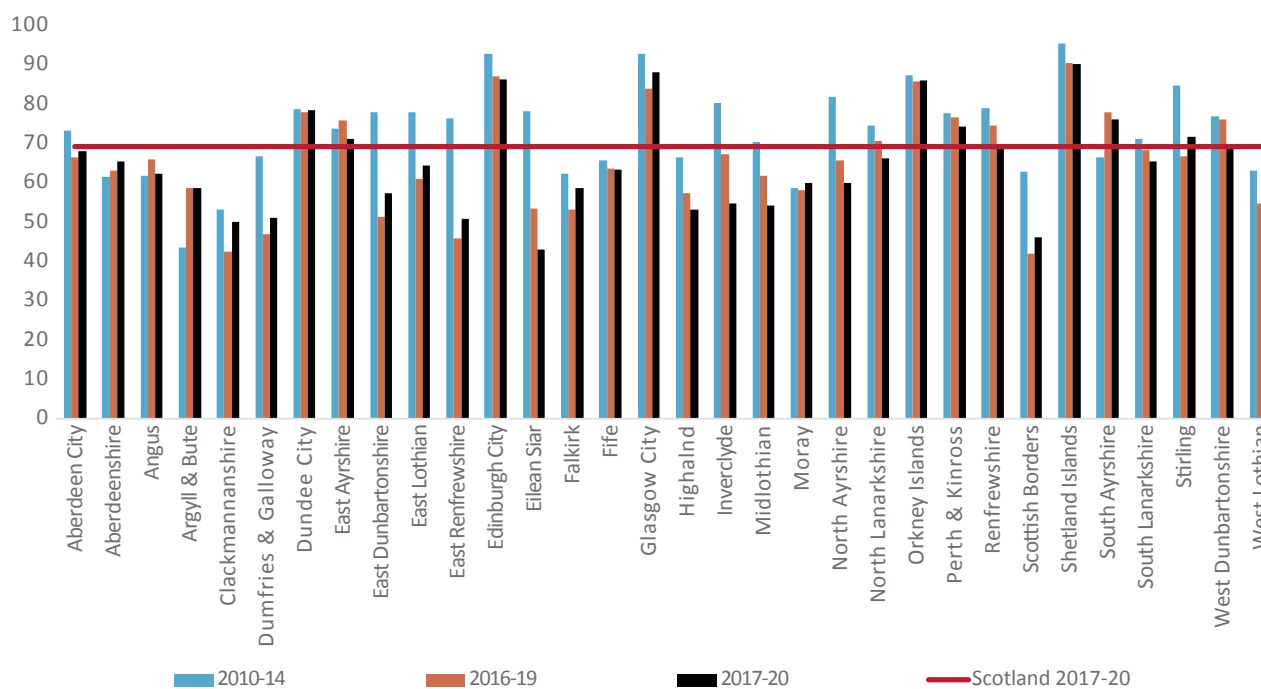


Fig 81: Percentage of adults satisfied with libraries



2017-20 Range = 49.2 to 91.7

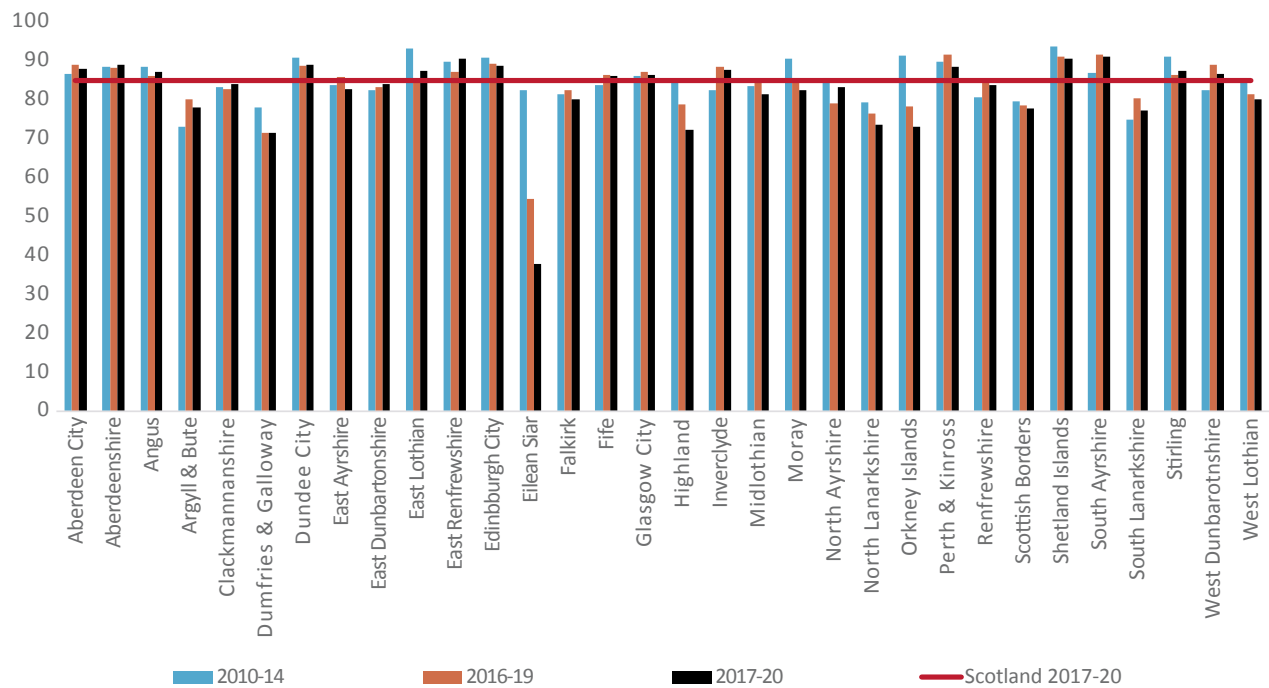
Fig 82: Percentage of adults satisfied with museums and galleries



2017-20 Range = 42.9 to 90.2



Fig 83: Percentage of adults satisfied with parks and open spaces



2017-20 Range = 37.8 to 91

Source: Scottish Household Survey