London

CASE Regional Insights

The CASE (Culture and Sport Evidence) programme is a joint strategic research programme, led by DCMS in association with Arts Council England, English Heritage, Museums, Libraries and Archives Council and Sport England. The programme aims to influence the policy agenda in culture and sport in England by generating high quality, relevant research with easy access to a range of analysis and data for partners to build sound arguments.

As part of the CASE programme, Regional Insights has been developed to provide partners with data and evidence on the position and role of culture and sport within key local and regional agendas.

The purpose of this work

The aim of the project is to provide culture and sport agencies, local authorities and other public bodies with a set of statistical data about CASE sectors. The data is organised within a number of themes such as the economy, education and engagement. Within each theme, the data is broken down by region and, where possible, local authority area. The consistent format allows for comparison across and within sectors and geographies. The importance of particular themes and sectors will vary by place, but the overall approach to accessing, comparing and using the data will be similar.

Regional Insights has been designed to deliver a quantitative picture, to help local partners to identify key trends in culture and sport in their area and where there is potential for growth. Combined with other research and local knowledge, this data can point to areas where further investment is justified.

The purpose is to provide consistent quality data, which enables users to quickly and easily identify quantitative evidence to support the development of clear arguments for investment in culture and sport.

How should it be used?

Regional Insights is a dataset – a compendium of quantitative data and facts. The dataset is accompanied by a summary report for each region. These reports are not intended to provide a comprehensive interpretation of the data. Rather, they provide an overview of the type of data available so that you can choose what to interrogate in more detail.

This report is the 2010 London Regional Insights report. The dataset used to support this report contains the most current data available from the various different sources. The data should be used alongside the qualitative insight you have about the working context of your locality or region. It is not designed to provide the whole story, but to support you in writing it. You decide what data is most important and how to link it to your priorities.

Where you can find the data

The dataset is available to download from the CASE website.[1]

There are 8 sections in the dataset:

Section	Data contained
CASE Economy	Gross value added, businesses, turnover, employment, volunteering, and business start-up.
Non-capital Investment	Local authority, central government, lottery and private investment in the sector.
Capital Investment	Sector specific capital investment, local authority land acquisition and construction.
Tourism	Domestic overnight tourism, inbound tourism, visits to visitor attractions
Education	Participation in Higher Education, Further Education GCSE level education and in non mainstream CASE related education programmes
Physical Assets	Number and density of physical assets.
Engagement	Participation in activities across CASE sectors and levels of satisfaction
Community & Wellbeing	Feelings on community cohesion, belonging, community safety

For further information on the CASE programme please visit www.culture.gov.uk/case/ or email case@culture.gsi.gov.uk.

[1] http://www.culture.gov.uk/what_we_do/research_and_statistics/7276.aspx

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London

2010: Key Statistics

The CASE economy in London:

- Employs 539,000 people
- Includes 50,600 businesses
- Contributes £25.5 billion in Gross Value Added (GVA)
- Generates £2.2 billion/year in spend from domestic tourists

Across the CASE sectors in London:

- 432,000 people work on a voluntary basis
- The average business turns over £1.1 million
- 23,284 new businesses were started in the past 3 years
- There are 19,200 physical assets

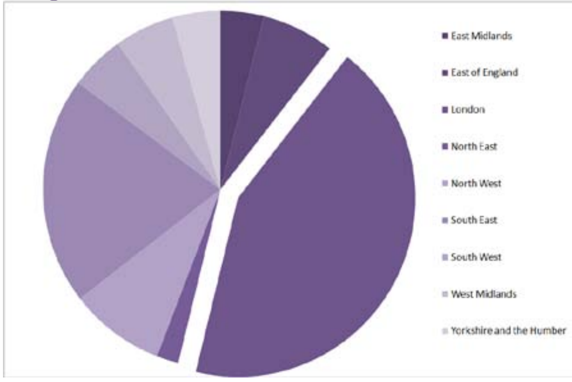
Investment in the sector totals:

- £512 million in non-capital investment from local government
- £96 million[2] in capital focused investment from local government
- £71 million[3] in other non-capital investment (lottery investment)
- £450 million in private investment in the arts[4]

Engagement in the sector is extensive:

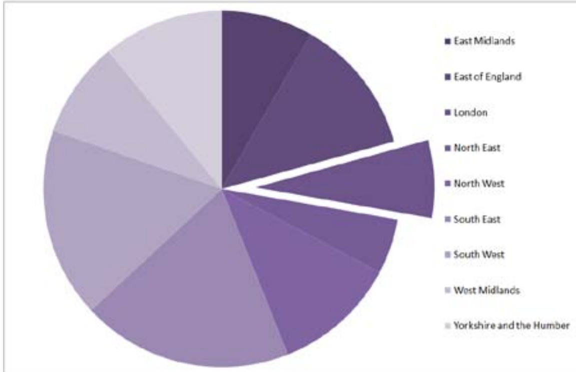
- 3.1 million people participating in cultural activity[5]
- 1.0 million participating in 3 sessions of sport per week
- 112,600 people studying at GCSE level
- 60,400 higher education students
- 246,100 people studying at FE institutes

London GVA as a proportion of total GVA for the CASE sectors across England



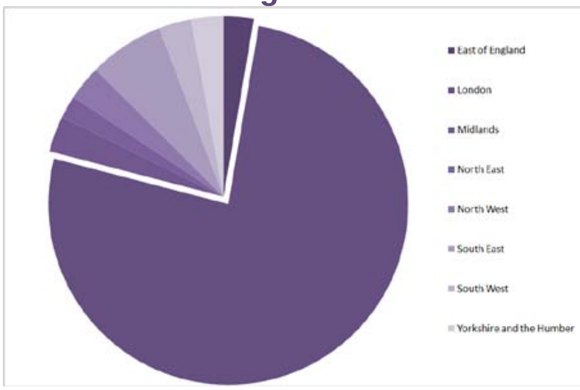
Source: ONS, ABI (2009)

London physical assets as a proportion of the total assets in the CASE sector across England



Source: IM, POI (2009)

London private investment in the arts as a proportion of total private investment in England



Source: A&B (2009)

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[2] Not including Heritage spending, this is captured under non-capital investment.
[3] Investment in the arts, sports and heritage.
[4] This data source combines East and West Midlands into the 'Midlands'.
[5] Includes participation in: craft, dance, literature, music, theatre and the visual arts.

CASE Economy

Data in this section is drawn from the CASE Economy data tables available from the Regional Insights website. Key sources include:

- *Annual Population Survey (APS)*
- *Annual Business Inquiry (ABI)*
- *Inter-Departmental Business Register (IDBR)*
- *Trends Central Resource (TCR)*

Across London, 539,000 people are employed in the CASE sectors. This increased by 2% between 2006 and 2008.

London has the highest regional employment in the creative sector. Heritage and MLA employment in the region were also the greatest in both 2006 and 2008. This was despite London MLA employment falling by 9% between 2006 and 2008, reducing from 27,800 to 25,200.

CASE sectors attract high levels of volunteer engagement. Approximately 432,000 people undertook voluntary work in London in 2007/08 in the arts, museums and galleries, heritage, libraries, archives and sports.

There are 50,600 CASE organisations in London, contributing £25.5 billion GVA in 2007/08. Of these, 23,300 are new start-ups since 2006. The large majority (22,900) of new start-ups are creative businesses.

GVA produced by CASE sectors increased in London by 10% between 2005/06 and 2007/08, from £23.2 billion to £25.5 billion. In 2007/08, 94% of CASE GVA produced was contributed by creative firms.

Top 5 Local Authorities in London by number of CASE businesses

Local Authority	Businesses
Westminster	5,800
Camden	3,800
Wandsworth	2,500
Islington	2,400
Richmond upon Thames	2,300

Source: IDBR (2009)

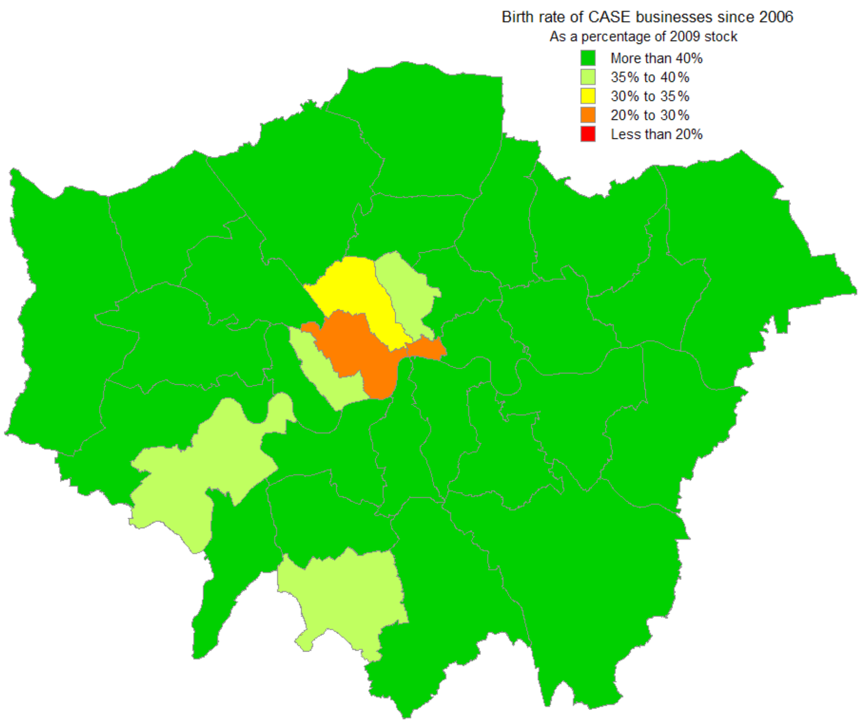
Top 5 Local Authorities in the London by level of CASE employment

Local Authority	Employment
Westminster	**74,600**
Southwark	**58,800**
City of London	**53,100**
Camden	**31,000**
Hammersmith & Fulham	**18,300**

Source: ONS, APS (2009)

Start-up rates across the region by local authority

Source: TCR (2009)



Non-Capital Investment

Data in this section is drawn from the non-capital Investment data tables available from the Regional Insights website. Key sources include:

- *Department for Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)*
- *Department for Culture Media and Sport (DCMS), National Lottery database (NLD)*
- *Arts Council England, (ACE) Regularly Funded Organisations (RFO) Annual Submission Dataset*
- *Arts & Business (A & B) Annual Investment in Culture Survey*
- *Heritage Lottery Fund (HLF) Initial Grant Decisions Data*

This report focuses on non- capital investment in sector development by Local Authorities. For example, service or community development.

Between 2004/05 and 2008/09 local authority investment in CASE sectors increased in real terms in all regions bar one[6]. The percentage increase in CASE sector investment in London (4%) was the second lowest regionally between 2004/05 and 2008/09; resulting in investment of approximately £512 million in 2008/09.

In most regions, sports and MLA expenditure represent the majority of local authority spending on CASE sectors. In London in 2008/09 sports funding was worth £135.7 million and MLA funding was worth £266.0 million of all local authority spend in the region.

Local authority investment in the arts increased by 4% (from £103.3 million to £107.7 million) between 2004/05 and 08/09. This was the smallest proportional increase in arts spending by local authorities in any region.

Local authority investment in sports services was £135.7 million in 2008/09. London has the lowest regional density[7] of local authority investment in sport, with £287,000 per 10,000 people invested in 2008/09; the national average was £428,000.

In real terms, investment in the region's library services increased by 5% between 2004/05 and 2008/09, remaining the highest investing region in both years – in 2008/09 this was £222.0 million.

Local authority investment in heritage increased from £1.3 million to £3.0 million across 2004/05 – 2008/09. The density of heritage spending in the region was lower than average in 2008/09, at just £6,000 per 10,000 people compared to an average of £22,000 across England.

Top 10 LAs for non-capital investment in CASE sectors in 2008/09

Local Authority	Investment £000s
City of London	70,300
Southwark	22,200
Wandsworth	17,700
Camden	16,600
Westminster	16,100
Newham	16,000
Tower Hamlets	15,700
Enfield	15,200
Kensington & Chelsea	15,100
Lewisham	14,800

Source: DCLG, LGFS (2009)

[6] Investment in CASE sectors in the East of England reduced by less than 0.02% between 2004/05 and 2008/09.

[7] Investment in thousands of pounds per 10,000 of the working age (WA) population of that administrative area – local authority or region.

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Capital Investment

Data in this section is drawn from the Capital Investment data tables available from the Regional Insights website. Key sources include:

- *Communities and Local Government (DCLG), Local Government Finance Statistics (LGFS)*
- *Department for Culture, Media and Sport (DCMS), National Lottery database (NLD)*
- *Sport England (SE) Exchequer Funding Data*

Local authority capital expenditure is divided between acquisition of land and existing buildings (hereafter acquisition investment) and new construction, conversion and renovation (new construction investment). References to 'CASE sectors' in this section exclude heritage, as data was not available.

Between 2004/05 and 2008/09 local authority capital investment in CASE sectors increased in real terms in all regions bar one[8]. In London, local authority capital expenditure increased by 41% over the period; reaching approximately £96.0 million in 2008/09. In most regions sports expenditure represents the majority of local authority capital spend[9], in London, sports investment was worth 74% of London capital investment in 2008/09.

A significant proportion of capital investment in the arts in the region in both 2004/05 and 2008/09 was made on new construction as part of the arts facilities and activities funding stream. In 2004/05 this accounted for 86% of London capital investment in the arts, and reduced to 54% in 2008/09.The remainder of London arts capital expenditure was on new construction as part of museums and galleries funding and a small amount on acquisition of museums and galleries assets.

This pattern is typical of most regions, where new construction makes up the vast majority of investment, far exceeding that made in acquisitions. A decrease of 60% in capital investment in the arts between 2004/05 and 2008/09 within London resulted in the region declining from 6th to lowest when the nine English regions are ranked by expenditure in these years.

Local authorities in London made the second greatest regional investment in sports capital assets, spending almost £71.4 million in 2008/09. This was a 72% increase on 2004/05 expenditure. However, most regions increased their expenditure over this period by at least 30%. The majority of London expenditure was on new construction of sports facilities (85% in both years).

London increased expenditure on capital assets within its library services between 2004/05 and 2008/09 by approximately 64%, increasing expenditure from £11.3 million to £18.6 million. All of this investment in 2008/09 was on new construction.

Top LA sfor capital investment in new construction conversion & renovation by investment area in 2008/09

Investment Area	Local Authority	Investment £000s
Museums and galleries	Barking & Dagenham	929
Arts activities and facilities	Richmond upon Thames	649
Sports facilities	Hillingdon	18,800
Library services	Lewisham	2,751

Source: DCLG, LGFS (2009)[10]

[8] Capital investment in CASE sectors in the North East reduced by 2% between 2004/05 and 2008/09.
[9] LA expenditure on capital investment only covers the arts (which includes museums and galleries), sports and libraries.

[10] Please note that there is no data available for heritage.

London

Tourism and Physical Assets

Data in this section is drawn from the Tourism and Physical Assets data tables available from the Regional Insights website. Key sources include:

- *Visit Britain (VB), ONS International Passenger Survey (ONS-IPS)*
- *Enjoy England (EE), UK Tourism Survey (UKTS)*
- *Enjoy England (EE), Annual Visitor Attractions Survey via (AVAS)*
- *InterestMap (IM), Points of Interest (POI)*

Between 2006 and 2009, London was the destination for 11% and 10% of domestic tourist trips respectively, remaining joint 4th most popular region in both years. Trips to the region fell by 1% across the period. Domestic tourists to the region spent a total of £2.2 billion in 2009, a 2% reduction compared to 2006.

Visits to London by international visitors increased by 10% between 2004 and 2008. Despite this, the proportion of all visits by international tourists to London decreased from 63% in 2004 to 54% in 2008.

Overseas visitors spent a total £8.1 billion in London in 2008, representing 57% of total expenditure that year. This was down from 62% of total overseas expenditure in 2004 and was largely due to a lower than average increase (26%) in the amount spent within the region between 2004 and 2008.

Overall, visits to attractions in London increased by 12% between 2004 and 2008, the national average proportional increase was 8%.

London has lower than average numbers of arts, sports and MLA physical assets per 10,000 people. The largest proportion of these assets are sports related (61%). This follows the national trend.

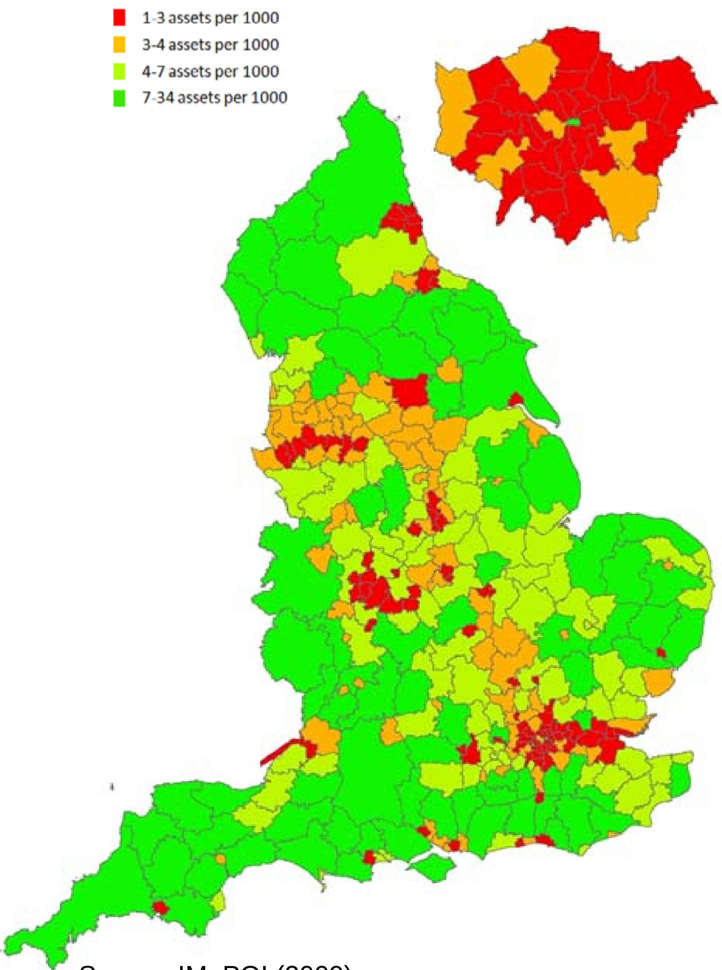
The number of heritage assets per 10,000 people in London (7.47) however, is much lower than the England average of 21.36.

Top 5 visitor attractions by number of visits 2008

Attraction	Visitors (000s)
The British Museum	5,900
The Tate Modern	4,900
The National Gallery	4,200
The Natural History Museum	3,300
The Science Museum	2,700

Source: AVAS, EE (2008)

Density of all arts, museums, libraries, sports and heritage assets per head of population in 2008/9



Source: IM, POI (2009)

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Education

Data in this section is drawn from the Education data tables available from the Regional Insights website. Key sources include:

- *The Department for Children, Schools and Families (DCSF, Research and Statistics Gateway (RSG), GSCE results in maintained schools by Local Authority*
- *Higher Education Statistics Agency (HESA) Students in Higher Education (SHE)*
- *The Data Service (DS) Individualised Learner Record (ILR)*
- *Arts Council England (ACE, Regularly Funded Organisations (RFO) Annual Submission Dataset*
- *English Heritage (EH), Heritage Counts (HC)*
- *Sport England (SE), Active People Survey (APS)*

The total number of students studying a CASE related subject at GCSE level in London fell by 6% between 2007/08 and 2008/09. The average change for CASE GCSEs was a fall of 8% in the same time period.

In 2008/09, the largest proportion of CASE GCSE students (25%) in London studied a design and technology course, a similar proportion to the England average (28%).

The number studying a physical education GCSE fell between 2007/08 and 2008/09, by 6%. History subjects experienced the smallest fall in the number of students, dropping by 2% in London, a slightly smaller proportional change than the average in England which was a 3% fall between 2007/08 and 2008/09.

Whilst the number of people studying a CASE related GCSE has fallen, these subjects have grown in popularity at a higher education level in recent years.

In London, the number of students studying CASE related subjects in higher education increased by 12% between 2004/05 and 2008/09 from 53,900 to 60,400. This compared to an increase of 13% across England.

In London in 2008/09, 77% of CASE students in higher education were studying arts, 16% heritage, 6% sports and 1% MLA. In all these subject areas, more students were studying in 2008/09 than in 2004/05.

Top 5 HEIs for number of students studying a CASE subject

University	Students (000s)
Uni. of the Arts, London	12.3
Kingston University	4.5
Middlesex University	4.1
London Met.	3.8
Brunel University	3.6

Source: HESA, SHE (2008/09)

Change in participation in London CASE HE courses and average across all courses between 2004/05 and 2008/09

Course	Percentage change)
Arts	8%
Sports	40%
MLA	13%
Heritage	28%
CASE total	12%
All Higher Education	4%

Source: HESA, SHE (2008/09)

Top 5 LAs for number of students achieving A-G in a CASE subject in 2008/09

Local Authority	Students (000s)
Bromley	6.4
Redbridge	5.5
Enfield	5.4
Barnet	5.3
Bexley	5.1

Source: DCSF, RSG (2009)

Engagement

Data in this section is drawn from the Engagement data tables available from the Regional Insights website. Key sources include:

- *Department for Culture Media and Sport (DCMS), Taking Part Survey (TPS)*
- *Sport England (SE), Active People Survey (APS)*

The proportion of people that had participated in a cultural event in the last year in London was 50% in 2007/08. This compared to the England average of 53%.

As with the whole of England, the proportion of people that had taken part in each type of cultural activity in London varied considerably. For example, whilst 56% of people had participated in a literary activity in 2007/08, only 12% had participated in a craft activity.

In 2008/09, 16.7% of people in London took part in at least three sessions of moderate intensity sport per week. If recreational walking and cycling are included in the calculations, this figure increases to 21%.

The area with the highest percentage of sporting participants (including recreational walking and cycling) is Kensington & Chelsea (29%), whilst the lowest is Newham (15%).

The percentage of people that had attended a sporting event (as a spectator) in the previous four weeks increased from 11% in 2005/06 to 12% in 2007/08. This average for the whole of England in both years was 15%.

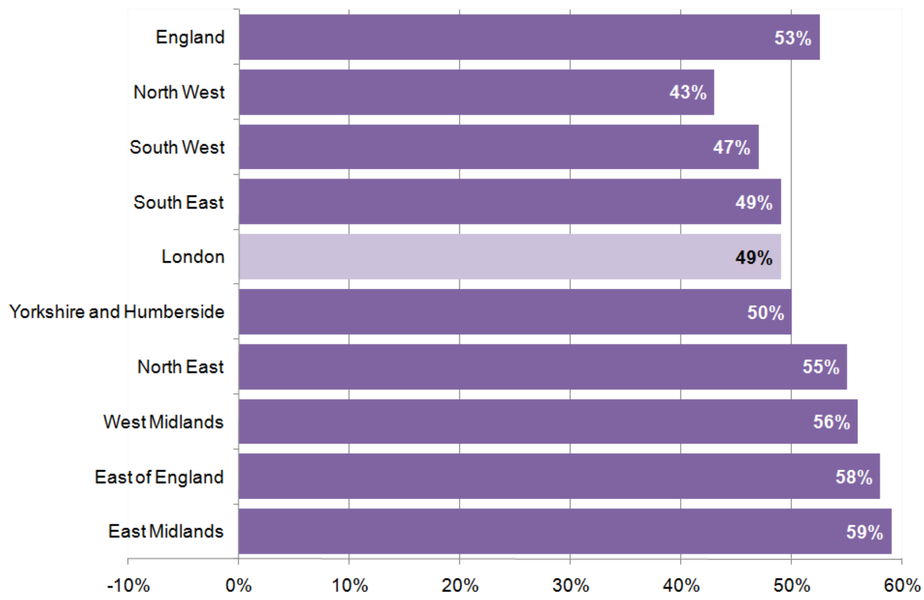
In 2007/08 attendances at archives (5%), libraries (50%) and museums or galleries (52%) were the same or higher than the percentages across England as a whole.

In London in 2007/08, 13% of people had attended a place connected with industrial history, the lowest regional proportion and much lower than the England average of 20%.

The percentage of people in London that had attended an arts event in the previous year was 67% in 2007/08. The same proportion across England had attended an arts event the previous year.

Attitudes towards arts activities rated on a scale of 1-10 scored an average of 8.0 in London in 2007/08, reduced from 8.1 in 2006/07.

The percentage of people that participated in a cultural activity in 2007/08, by region and compared to the average for England



Source: DCMS, TPS (2007/08)

Community and wellbeing

Data in this section is drawn from the Community and Wellbeing data tables available from the Regional Insights website. Key sources include:

- *Department for Communities and Local Government (DCLG), Citizenship Survey (CS)*

Within London, 86% of those surveyed think that people from different backgrounds get on well together and 14% think that people from different backgrounds do not get on well together. The region had higher than average agreement rates, with the average for England being 83% agreement and 17% disagreement.

London has the joint highest rate of agreement with the statement that 'I have friends with different incomes to me', at 69%. The average rate of agreement was 64%. The region also had the highest rate of agreement with the statement 'I have friends from different ethnic groups to me': in London 76% agreed with the statement, compared with 52% for England.

People in London have the greatest fear of crime; 49% of individuals stated that they were worried about crime compared with the national average of 42%. London has the joint highest percentage of regional respondents who are very worried about crime (13%).

However, the majority of individuals (66%) do feel very safe or fairly safe walking alone in their neighbourhood after dark. This is slightly lower than the national average of 73%.

A slightly greater than average proportion of people feel either very unsafe or never walk alone in their neighbourhood after dark (12%). Nationally, only 10% feel this way.

When considering life in their neighbourhood, 74% of respondents in London felt strongly that they belonged to their neighbourhood. Approximately 18% thought that their local area had improved in the past 2 years, a little higher than nationally (15%).

11% of people in London stated that they did not feel part of British society, the highest regional proportion. Of those surveyed in London, 37% thought that the number of immigrants entering Britain should be reduced a lot, 24% thought it should be reduced a little and the remainder thought it should either remain the same or be allowed to increase. The national average for people believing immigration levels should be reduced a lot is 52%.

The percentage of people that feel that they strongly belong to their neighbourhood in 2008/09, by region and compared to the average for England

Region	Percentage population
West Midlands	80%
North East	80%
North West	79%
East of England	78%
Yorkshire and the Humber	78%
South West	77%
East Midlands	76%
South East	76%
London	74%
England	77%

Source: DCMS, CS (2008/09)

Produced by Trends Business Research Ltd in 2010 for:

dcms department for culture, media and sport · Arts Council England · English Heritage · MLA Museums Libraries Archives Council · Sport England