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London: a Cultural Audit

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Abstract

This report is a pre-final version of a report published by the Greater London Authority and the London Development Agency in March 2008.

It benchmarks London's cultural offer against four other world cities: Paris, New York, Tokyo and Shanghai and is the first comprehensive such undertaking compiled according to international standards.

The final printed version can be downloaded from http://www.london.gov.uk/mayor/culture/docs/cultural-audit.pdf

The printed version includes full acknowledgement to the several contributors to research into this project, without whom it would not have been possible

London: a cultural audit

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Introduction

This report, commissioned by the LDA together with GLA Economics, complements and extends the GLA's regular series of reports on the creative industries (GLA 2002, 2004, 2007), as part of a long-term goal to give London a comprehensive and robust evidence base for policy-makers, business decision makers, researchers and the interested public.

It has been called an audit because it is an attempt, the first as far as we are aware, to take stock: to pull together in one place, from the bewildering variety of sources that provide such information, all the available data on cultural infrastructure and consumption. It systematically attempts to make this data robust: to verify it, ensure as far as possible that it is not partial or selective, and quantify it in such a way that it allows London to be compared with other cities.

To assist judgement, we have also recorded, as far as possible on a comparable basis, the same data for four other world cities: New York, Paris, Shanghai and Tokyo.

Comparing city cultures contains three dangers: first, there is a general dearth of reliable data about cities and about culture. Second, the definition of culture is disputed, and finally, the definition of a city is disputed. GLA Economics has been working on all three of these questions and in this report, the basis of the definitions that we have adopted has been set out and explained. Our aim has been to follow world, European and expert standards on all of these on the grounds that while they can always be improved, they offer the greatest prospect for comparability.
One of the surest ways to improve the quality of this data in future is to demonstrate its benefits and raise awareness of the importance of collecting it, measuring it accurately, and placing it in the public domain. This is one of the several aims of this report. This is directed particularly to those who can help provide more and better data, both in those active in the field of culture, and our partners and counterparts in other cities. We invite them to join us in making their good data still better.

1.1 Benchmarking city cultures

The first aim of this report is measurement and the second is comparison. It highlights what each of the five cities in our study have in common, and how they differ. The resulting focus on the city as a locus of cultural activities responds to a growing recognition of the role of place in culture, an old idea that has come full circle. Roman civilisation gave us the idea of a 'genius loci', the spirit of a place, which has come to mean its 'distinctive atmosphere', a guiding principle of architectural design.

Under the influence of the Romantics, culture came to be seen as the preserve of the nation. But as cities have became international, so has their culture.[1] By studying this process in widely varying locations, we aim to bring to light the renewed vitality of place and the city's distinctive cultural role.

As meeting points and gateways for diverse national contributions, world cities have increasingly become cauldrons for cultural fusions. London, as it prepares for the 2012 Olympic and Paralympic Games, offers a unique mix of local quarters and global communities from Hampstead to Hackney, Notting Hill to Chinatown, and Brixton to Southall. These coexist with world class sites, combining heritage with a seemingly limitless capacity for innovation.

Each emerging world city offers such a blend, but each blend is unique. The aim of comparison is not a bland global culture but the enhancement of diversity by means of connection. London's 'world in one city' is the heart of its cultural richness. Its attraction, like that of any place, is its distinctness and its variety. This report sheds light on what London shares with its comparators, and what is unique to each.

1.2 The cultural environment and its economic impact

There is an intimate connection between the cultural and economic life of the modern city. This has been most visible in the recent growth of the 'creative industries' now employing one in every eight Londoners (GLA 2007). These industries have economic effects beyond what they sell: spillovers include a capacity for innovation on which all London's design-intensive industries feed. This is why Nissan, Virgin, Nokia, Ford and Volkswagen all have their design HQs in London.

Box 1.1: Indices of human and intellectual capital

In recent years measures of human and intellectual capital have attracted growing attention in financial circles (Y/Zen 2004). PWC's report *Cities of Opportunity* considers a number of these. Its *Intellectual Capital Index* incorporates the number of top universities, the percentage of the population with higher education qualifications and the number of Nobel Prize winners in each city, leading to the following scores:

Financial Centre	Ranking	Intellectual Capital Score
London	1	23
Paris	2	22
Tokyo	3	19
New York	4	18
Toronto	5	17
Atlanta	6	15
Los Angeles	7	12
Chicago	8	9
Frankfurt	9	8
Singapore	10	8
Shanghai	11	4

Yet these commercial outcomes are the tip of the iceberg. What matters most, to those who live or work in a city, as much as its visitors, is its quality of life, of which

[1] See for example Bradbury and McFarlane (1976) Abrahamson (2004), Harvey (2003), and Zukin (1995).

culture is the essence. Cities offer not just a natural environment, but a built and cultural one. London's air, rivers and green spaces are a backdrop; it falls to its building and activities to set the stage on which its life plays out. This is why the cultural quality of life of London's citizens is an object of policy in its own right.

London's cultural environment also has a major impact on its competitive advantage. In the global market for quality personnel, a city's cultural offer can be decisive. When city officials wanted to persuade Boeing to locate their headquarters in Chicago, Abrahamson (2004:128) records that they dined them at the Art Institute, complete with string quartet.

Studies repeatedly show that modern service-led businesses locate where they can find the special talents of the workforce they need. In the City of London's 2005 study on the competitiveness of global centres (Y/Zen 2005:49) 'availability of skilled personnel' was ranked as the most important factor determining competitiveness above business infrastructure, regulatory environment, operational costs, availability of commercial property and ten other indicators. The cultural offer of any city shapes, attracts, and retains such workers.

London's cultural environment is thus one of its prime assets. This asset is not unconditionally available. Extending it, sustaining it, maintaining its diversity, and providing the whole of London's population with access to it, are all essential goals of London policy.

2 *Culture and the city: definitions and choices*

2.1 Scope of the report

This report is the first time that a comprehensive comparison of cultural activity on this scale has been undertaken. It contains unfilled gaps and unresolved complexities, and would have achieved its aim if it did no more than point these out. It has however done more than this, amassing data which sheds genuine new light on London's culture. Our aim is to make this data available, demonstrate its use, and provoke others to help us produce what sound policy requires – a robust and comprehensive evidence base. The next section explains the rationale behind what we have included.

2.2 Culture

'Culture' is not well-defined and its meaning is debated. Freud (2004:110) expressed a widespread nineteenth-century view:

> [C]ulture, by which I mean everything in which human life has risen above its purely animal circumstances…includes on the one hand all the knowledge and skill that humanity has acquired in order to control the forces of nature and obtain from it goods to satisfy human needs, and on the other hand all the institutions that are required to govern the relations of human beings one to another and in particular the distribution of such goods as can be obtained.

In this, its broadest possible sense, culture extends to all mental and spiritual activities through which social relations are reproduced, ranging from morals, manners, and customs, through scientific and political ideas, to aesthetic activities and tastes. As Elias (2000) records, the German Enlightenment used the term to distinguish *achievements*, such as art, music, or literature, from mere *enactments*, such as manners, customs or dress style. As recorded by Williams (1976,1990) the idea then gained ground that culture is a product, outside of society, which is employed by its consumers to make judgements on what they consider good or bad, desirable or tasteless, cool or boring.

It was neither a long nor a difficult path to conceive of culture as a saleable product – entertainment. By the end of world war II Adorno and Horkheimer (1947) had coined the term 'cultural industries' to refer to commercial cultural products, and in the late 1990s, the term 'creative industries', [2] developed in the UK, further refined this idea.

This report applies definitions from the growing literature on the economics of culture,[3] in particular emerging standards promoted by the Organisation for Economic Cooperation and Development (OECD) 2007 and the United Nations Educational, Scientific and Cultural Organisation (UNESCO) 1986. These are, broadly, activities to which one or other of the following applies:

- they are distinguished by some form of symbolic meaning
- they are produced using some form of creativity
- their consumers assign cultural value to it, exercising aesthetic taste or discrimination

[2] See O'Connor (2007) for a comprehensive discussion of the origin of this term.
[3] Throsby (2001), Garnham, N. (1990), Frey (2003), Cowen (2006)

- they are alienated through some form of Intellectual Property

As can be seen from the evolution of the idea of culture, we are reporting, in effect, on the tip of an iceberg: the visible, quantifiable (and frequently, saleable) part of a much larger bulk. We record what is *measurable*, for example numbers of cinemas or galleries, frequencies of visits to the theatre or time spent watching television or reading books.

We make no judgement of cultural value – whether one artistic product is better than another, or whether 'high art' is intrinsically superior to 'popular culture'.[4] Indeed, since variety, diversity and access are all goals of cultural policy, bias must not be introduced by preferring, *a priori*, one particular genre or art form. This would privilege the consumption choices of fans or élites who prefer this art form. As regards its saleable qualities, culture is entirely relative, and there is no known scientific basis to rank the preferences of its purchasers either by the money they are able to pay, by the status that society affords them, or by the judgements that society makes of their merit.

Therefore this audit should not be seen as yet another 'league table'. It does not set out to rank cities by 'cultural performance' and this cannot be done, since there is no objective standard for comparing the worth of a play in Tokyo with a film in New York, a rock concert in London, an exhibition in Paris or an opera in Shanghai.

The report is further confined to *produced* culture, involving work and costing money – but including activities paid for indirectly, through state subsidies or patronage, for example many gallery and museum exhibits. Finally the focus is on *cultural consumption*: what a city's residents, workers and visitors find, enjoy and take part in here, whether sold commercially as with cinemas, books or DVDs, or free to the user as with museums and broadcasts. This leads to two main concerns: *infrastructure*, the institutions which make culture available such as theatres, libraries and other venues, and the *use* made of them: watching, reading, hearing, visiting, and participating.

Our definition does not discount the many aspects of culture that are not measurable, or are informal and not produced, for example family life, community life or religious practices. Finally, because it is reported in more detail elsewhere, we have omitted sport and, for the most part, education. The intention is not to set an arbitrary limit on what is 'acceptable' as culture and we hope future editions of this report will extend its coverage.

2.3 World cities and their influences

Our comparators are all world cities, a concept as debated as that of culture. Originating with Geddes (1915), it was re-introduced by Hall (1966) and developed by Friedman (1986), Sassen (1991, 2001), and others, latterly including work by the Global and World Cities project (GAWC) which emphasises connections between cities, notably travel and the location of global companies. In this report, it refers to cities with a significant independent role in the world economy whose features include one or more of:

[4] For discussions on whether there is an intrinsic standard of artistic or cultural worth, see Throsby (2001:28) or Carey (2007).

- centres for the location of ‘advanced producer services’
- centres of command and control for governments and multinational corporations
- connecting nodes in the world networks established by trade and industry

Box 2.1: the Global and World Cities (GaWC) roster of world cities

The Global and World Cities (GaWC) research centre at Loughborough University classified the world’s cities using a list of advanced producer providers in four fields: banking, advertising, accountancy and legal service centres. They identified centres for global services in these four fields, either having world headquarters, or a large number of branch offices. They then assessed the degree to which these cities were *connected*: a connection exists when two cities contain offices of the same company. This led to the roster or hierarchy given in this box.

Alpha world cities (full service world cities)	London, New York, Paris, Tokyo; Chicago, Frankfurt, Hong Kong, Los Angeles, Milan. (To qualify as an alpha, a city must be a prime provider in all four advanced producer sectors).
Beta world cities (major world cities)	San Francisco, Sydney, Toronto, Zurich, Brussels, Madrid, Mexico City, Sao Paulo; Moscow, Seoul
Gamma world cities (minor world cities)	Amsterdam, Boston, Caracas, Dallas, Düsseldorf, Geneva, Houston, Jakarta, Johannesburg, Melbourne, Osaka, Prague, Santiago, Taipei, Washington, Bangkok, Beijing, Montreal, Rome, Stockholm, Warsaw, Atlanta, Barcelona, Berlin, Budapest, Buenos Aires, Copenhagen, Hamburg, Istanbul, Kuala Lumpur, Manila, Miami, Minneapolis, Munich, Shanghai

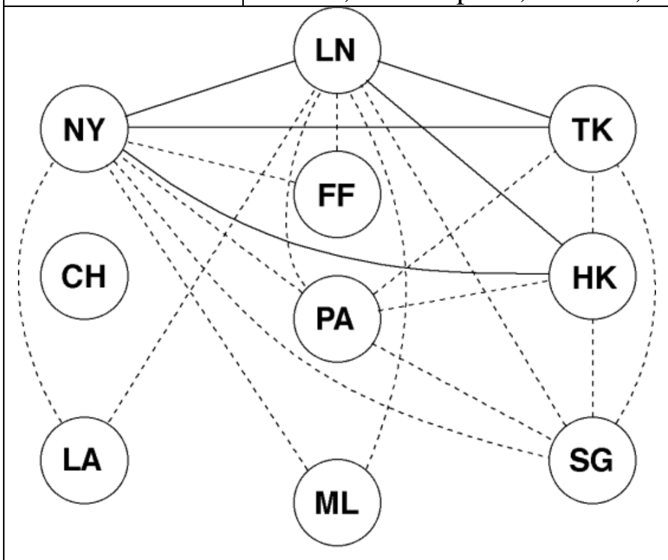


Chart 2.1: connectedness among the top ten world cities

Shared presences of multinational companies

___________<35
---------------<30

Source: Beaverstock et al (1999).

Untraded and networked connections (see Neff 2005) also influence the way that ideas and trends spread from one to the other, being particularly significant for the spread of cultural influences.

Not all world cities are financial centres. For example, Los Angeles does not challenge New York’s hegemonic financial status; Berlin is Germany’s capital though Frankfurt is its financial hub; and Brussels is universally recognised as a major

European capital but an unlikely alternative location of choice for the world banking community. Nor is financial agglomeration sufficient to make a world city: Luxemburg is a financial and government centre and even home to a major media conglomerate, but is not considered a world city.

Cultural offer, as Luxemburg also demonstrates, is not an automatic reflection of financial status and arises independently of it. Santa Fe (Mitchell and Reynis 2004) with the highest proportion of creative businesses per capita in the USA, is a Mecca of cultural tourism. Liverpool in the 1960s, and Nashville still, are bywords for world musical status. Local or satellite centres of cultural distinctiveness or especial creativity, whether transient or stable, play an undeniable role in forging both national and international cultural tastes and offers.

A major reason for this study is to shed more light on the complex connection between world city roles, financial agglomeration, and cultural offer.

2.3.1 World cultural centres

The GaWC roster is not the only possible way to classify world cities, and in particular does not take into account large media conglomerates, seven of which dominate the production and distribution of cultural products: Time-Warner, Disney, Viacom, Bertelsmann, Vivendi, Sony, and News Corporation**.** Of these New York, for example, hosts the headquarters of three (Time Warner, Disney, and Viacom). Conversely, Los Angeles, Toronto, or Mexico, which play a secondary or even minor financial role, have a greater status in the production or diffusion of cultural industry products.

Based on the presence of world and regional headquarters of cultural conglomerates, Abrahamson (2004) has produced a ranking placing New York at the top, followed in second place by London, Los Angeles, Paris (home to the growing Vivendi group), Sydney and Tokyo.[5] Toronto is given third place and fourth goes to Cairo, Hong Kong, Luxembourg, Manila, Mexico City, Mumbai, Nashville and Rio.

There are several reasons for paying attention to these conglomerates. One is their dominant role. The 2006 revenues of the Disney Corporation were \$34bn, with assets of \$53bn (of which \$22bn is listed as 'goodwill' illustrating the importance of intangible assets in the cultural sector). Time Warner reported 2006 revenues of \$44 bn and assets of \$131 bn (goodwill \$41bn). Viacom's revenues totalled \$11bn and its assets \$22bn.[6] Whilst GVA is significantly less than revenue (since it excludes operating costs), an idea of the scale of the conglomerates is provided by noting that the combined 2006 revenue of these three, all headquartered at New York, was approximately three quarters of the 2005 GVA of the UK's creative industries.[7] A more robust comparison is with the revenue of Exxon (\$364 bn), the largest oil major and the largest world corporation by capitalisation.

The second reason to pay attention to these global conglomerates is given by the DCMS Creative Economy Programme (Frontier Economics 2007) which noted the synergy between them and a 'long tail' of small producers, who are often oriented to

[5] Abrahamson's study is confined to music, movies, and television.
[6] All data taken from corporate annual reports.
[7] For the DCMS's annual estimates see DCMS (2007).

them in their search for a world distribution chain. Thus, for example, a small creative startup, far from avoiding competition from a media giant, will often seek it out and may often even aim at being taken over. Foreign Multinationals in the UK accounted for 20% of 'Layer 1' creative employment and 28% of turnover (£28bn) in 2007. [8]

Table 2.2 Foreign-born populations of major cities containing more than one million employees[a]

City	Population ('000)	Foreign born	Per cent foreign born	City	Population ('000)	Foreign born	Per cent foreign born
Miami	2,253	1,148	50.9	*London*	7,172	1,940	27.0
Amsterdam[a]	735	348	47.3	*Brussels*	978	260	26.6
The Hague[a]	442	162	36.6	*Munich*	1,248	282	22.6
Toronto	4,648	2,091	45.0	*Zurich*	1,248	281	22.5
Vancouver	1,967	768	39.0	Calgary	943	205	21.7
Mecca	4,468	1,687	37.8	San Diego	2,814	606	21.6
Los Angeles	9,519	3,449	36.2	Brisbane	1,609	338	21.0
Tel Aviv	2,076	747	36.0	Houston	4,178	855	20.5
Medina	5,449	1,893	34.8	*Montreal*	3,389	664	19.6
New York	9,314	3,140	33.7	*Ottawa*	1,051	194	18.4
San Francisco	1,731	555 (	32.1	*Singapore*	3,319	607	18.3
Riyadh	4,730	1,478	31.2	Cologne	1,019	182	17.9
Sydney	3,961	1,236	31.2	*Paris*	6,162	1,082	17.6
Melbourne	3,367	960	28.5	*Chicago*	8,273	1,426	17.2
Frankfurt[a]	651	181	27.8	*Tokyo*	7,968	191	2.4
Tbilisi	1,339	3701	27.7	*Shanghai*			N/A

Source: Benton-Short et al (2004).World cities ranked alpha, beta or gamma by GaWC shown in italics. City definitions do not always coincide with those in this report.
Note a): Top thirty cities with more than a million inhabitants, plus Tokyo for comparison. Amsterdam and the Hague are included as part of the Randstad agglomeration (population 7.5 million), and Frankfurt as part of the Frankfurt Rhein-Main agglomeration.(population 5.8 million)
Note b) the figure for foreign-born Londoners is lower than more recent results reported elsewhere in this report.

2.3.2 World immigration destinations

World cities are also the locus of immigration flows and a feature of the modern city is the steadily growing proportion of foreign-born residents. This is an important determinant of cultural diversity particularly for London, whose multicultural population is a vital part of its attraction. Whilst the geographical basis of comparison is not identical to our own, a comprehensive study (Benton-Short et al 2004) indicates that though world cities tend to become population magnets, this is not always the case: Tokyo, for example, ranks 88 on a list of 100 cities in that report, in terms of the proportion of its population born abroad. This points to a need for caution in assuming any automatic connection between world city status and diversity.

8

Conversely some significant large cities are the destination of major immigration flows but do not figure in other lists of world cities. Mecca and Jerusalem arguably play a world city role in a different sense from the purely economic. Other cities such as Tbilisi are centres of once much larger multinational territorial entities. Within a broad definition of culture neither can be left out of account, but these cities do not figure in world cities defined in more strictly economic terms. Nevertheless, more than two-thirds of those cities with large non-national populations are world cities on the GAWC list.

2.3.3 London and its comparators

Culture has its own dynamics and determinants, and London is as unique in this respect as its peers. However like these peers, the background to its culture is a unique geography and a unique history, in a certain sense the primary assets of our audit.

Table 2.1 Main characteristics of comparator cities[9]

Indicator	City definition used	Geographical area size, SQ. KM	Total population number	Per cent of national population living in the city	Average income per worker per year ($)	Education level - % with degree level or higher
London	Greater London (GOR)	1,613	7,512,400	12%	$55,051	28%
UK		*244,110*	*60,587,000*		*$45,513*	*19%*
New York	New York City	785	8,214,426	3%	$27,420	30%
USA		*7,769,966*	*299,398,485*		*$25,267*	*25%*
Paris	Ile de France	12,012	11,399,319	18%	$39,424	31%
France		*632,834*	*62,637,596*		*$28,117*	*19%*
Shanghai	Shanghai Municipality	6,341	18,150,000	1%	$4,736	18%
China		*9,600,000*	*1,307,560,000*		*$2,532*	*6%*
Tokyo	Prefecture	2,187	12,576,601	10%	$39,218	23%
Japan		*TBC*	*127,760,000*		*$27,501*	*TBC*

What distinguishes the comparators from each other? They are of similar size, but vary greatly in other respects: the proportion of the country's population accounted for by each city, for instance, is low in China and the United States (where other equally large cities play an important world city role) but much greater in France, the UK, and Japan. Shanghai, the only emerging economy world city, stands out in terms of income per capita, but also in the numbers of the working age population that have tertiary education qualifications.

The data however shows consistently higher levels of income per capita and education than the national average. Both are important factors for the creative and cultural sectors, whose demand is driven by the purchase of leisure products, in which high income earners are known to play an important role and educated earners seem likely to.

[9] The year in which the data is collected (most frequently 2006) varies. A full table including dates of collection is given in the data appendix.

2.4 A tale of four cities: New York, Paris, Shanghai and Tokyo

This section concentrates on the main historical and geographical characteristics of the cities chosen. Most importantly, the cities are distinguished by their geography and history. Three are capitals – London, Paris, and Tokyo, the latter only since the late nineteenth century. New York is the only world class financial centre which is not a capital city, although if Europe is taken as the territory of reference for Paris and London, then both afford some comparison with New York, Brussels being the principal centre for European Federal government. All five are port cities, Paris alone being confined to river access.

New York, New York, twice-named archetype world city, became the dominant US financial centre in the nineteenth century. Having seen off competition from the likes of Chicago, it then rose to world prominence at the turn of the century, harnessing the new technologies of steel, concrete and mobile electrical power to give the world a new iconic skyline – Manhattan. Our only comparator untouched by war, New York's rise to financial superpower status was virtually uninterrupted, the crash of 1929 serving only to consolidate its grip on an emerging postwar order which Wall Street and Washington worked hand in hand to shape.

Drawn to the statue at the Hudson's mouth, waves of immigrants turned it into the most cosmopolitan city on the eastern seaboard, in the process populating the artist-intellectual community of Greenwich Village, to which would-be planners of creative regeneration still turn for inspiration. With less than 3% of the US population, New York is home to over a third of the country's actors, around 27% of its fashion designers, 7% of fine artists and an army of 10,000 journalists. Like London, it has harnessed its cultural diversity to transform multiple experiences into a huge range of cultural activities from world class arts collection to innovative popular music.

Paris, historical centre of the oldest definable national territory in the world dating back to Gallo-Roman times, was for centuries the *de facto* cultural capital of Europe. French (Taylor 1954:xxiii) was the 'world' language of the governing elites and classes of Europe until 1914.[10] The French revolution, exported on horseback by Napoleon, defined the framework of European law and politics throughout the nineteenth century.

Haussmann's majestic mid-century reconstruction gave central Paris its eternal – and skyscraper-free – skyline. A café atmosphere combined with waves of artistic innovation to build, on this foundation, a city almost synonymous with the 'good life'. One need only recall Impressionism, Art Nouveau, Surrealism and Existentialism, not to mention Post-modernism, 1968 and Situationism, to recognise the profound and recurrent impact of Paris on western culture. A synonym for Haute Cuisine and Haute Couture, Paris remains home to popular cultural innovations like the Paris-Plage urban beach, now copied around the world, a vibrant cinema culture and not least, the Pompidou centre, a resoundingly successful early attempt to put contemporary and modern art within popular reach.

[10] Edward Grey, the 1905 Liberal foreign minister who said 'the lights are going out all over Europe', was the first to address European ambassadors in English.

An important illustration of Paris's 'culturally centralising' role, perhaps now characteristic of all cultural world cities, was its early role as diffusion centre for artistic movements which did not originate there. Every tourist in the world can recognise a Paris Metro sign. How many have heard of Victor Horta with whom its *Art Nouveau* style originated, let alone seen the Brussels house from which he launched the movement?

A significant financial rival to London in the mid-nineteenth century, Paris faded in financial terms to second-rank status in the twentieth century. Its attempts to rival London as a financial centre in the 1990s are widely considered, like Frankfurt's, to have failed.[11] But Paris-based media conglomerate Vivendi, having taken over the iconic Universal Studios with its 2000 purchase of Seagram, has risen to rival the US heavyweights, amply demonstrating Paris's capacity for world leadership based on its historical strengths.

The largest city featured in this report, with a population of over 18 million people, Shanghai is also one of the fastest-changing cities in the world. Pudong, on the eastern bank of the Huangpu River, is 'China's Manhattan', a huge area of skyscrapers, all built in the last ten years, on what was previously farmland. Shanghai was an emergent financial hub of South-East Asia's economy in the 1930s and has now aspires again to world city status.[12] It has also been the centre of popular culture in China since the early twentieth century – China's first films were produced in Shanghai – and more recently the city has been investing heavily in new cultural institutions, such as the Shanghai Grand Theatre; the Shanghai Museum, and the Shanghai Art Museum, to better reflect its global profile.

Tokyo, while the largest and most cosmopolitan of Japan's cities, is not widely to be considered to be the cultural heart of the country, which remains Kyoto. However, having witnessed massive population and economic growth in the post-war years, Tokyo has benefited from the increasing concentration of global economic functions such as finance, information services and media. As befits a capital city, though, it is now home to the majority of Japan's national museums and its internationally-acclaimed cuisine recently overtook Paris – with its restaurants gathering twice as many 'stars' in the recent Michelin guide.

Tokyo's recent history is an object lesson in the importance of depth and the error of haste in assessing financial status. The 80s saw a meteoric rise to financial stardom at the end of which all 10 top world banks were Japanese (Cassis 2006:268), only to stagnate through the 90s and end abruptly with the Asian financial crisis of 1997. By 2001 seven top banks were American, two German, one Swiss, none British and none Japanese.

Tokyo's cultural influence arises not just from Japanese contributions to popular culture – think Anime, Pokemon, Sudoku – but the effective capitalisation of an early lead in electronics and information technology, as evidenced from the growth of consumer electronics giants such as Sony. After the failure of its BetaMax video recording format, Sony realised that making devices was an insufficient basis to

[11] See Cassis (2006:271-2)

[12] Qu Shijing (2006) contains a comparison of Shanghai's cultural offer with six other world cities, relating this to their financial status

establish and retain world leadership and turned to the effective management of content (music, films, games), creating a 'vertical empire' of the entertainment world ranking with the greats. The vital relationship between hardware and cultural content was understood even earlier by Nintendo. After successive evolutions as nineteenth century producer of handmade playing cards, 1960s manufacturer of electronic toys, it established, in effect, an entirely new art form, its name with Sony being almost synonymous with computer gaming.

Xxx evidence of success its new HDTV format

2.5 No accident: London's world status and its consequences

The single most globalised World City, London (McKinsey 2007) has in a historically short period become the *de facto* financial capital of Europe, the location of choice for finance, and New York's latest heavyweight challenger. Cassis' (2006:269) incisive analysis, as relevant to culture as finance, spells out the depth, strengths and dangers of its rise:

> The City has never really had, and still does not have, any choice. It could only become, and can only remain, a global financial centre in the same vein as New York and Tokyo by being completely internationalised. The alternative is a financial centre commensurate with the British economy – that is to say, bearing in mind a number of competitive advantages, slightly larger than Paris or Frankfurt.

In culture as in finance, London's history cannot be separated from the world's. What makes it unique is its role in the international economy, above all world commerce.[13] This explains not only its extraordinary financial resilience – persisting and extending as Tokyo, Paris, and Frankfurt fell – but successive reconstructions. First as a political, then a naval, then a commercial centre; next as a financial centre and then in decline as a glorified reshipment centre, transiently as an unexpected manufacturing base and finally, ending a prolonged postwar eclipse in New York's brilliant light, its comet-like resurgence as the latest world financial supernova.

The former heart of an empire once covering 37 million square kilometres – a fifth of all land not under ice – London was the centre of British naval world predominance, and the focus of world trade routes which historical persistence and geographical situation have safeguarded against obliteration. Its situation gives it an opening to the Atlantic, the Baltic and to mainland Europe, a geographical advantage which in the age of information extends to a position as central node between the three key time zones of Europe, the Americas, and Asia. Capital city of the industrial revolution, it was notwithstanding the rise of the Atlantic ports the primary outlet for the manufactured products which assured British dominance until the end of the nineteenth century.

These same circumstances have made London home to the vibrant global culture already described. This has many new elements, but also harks back to earlier phases of 'English' culture whose true debt to the world was veiled by imperial illusions in superiority. Much that is celebrated as English owes more to world insertion than native genius. The Victorian imagination – evangelised by Kipling, dissected by Forster and globalised by Disney – dwelt on the exotic lands the colonisers stumbled

[13] See for example Gieve (2007), Hall (1966), Gordon (2000), and Michie (1992)

on, not the unremarkable hamlets from which they sallied. Four hundred years earlier Shakespeare wrote of Venice, Verona, Denmark, Rome and Athens as if they were neighbouring villages.

As with Paris and Art Nouveau, and for that matter New York with Jazz, London's core strength is its role as diffusion centre and meeting place. Ideas and inventions may happen anywhere, but they come to London to reach the world. This is London's greatest asset and, history has shown, its most enduring.

London is not without weaknesses, and one purpose of this report is to identify them. An undoubted world centre for the enjoyment and dissemination of the arts, it does not enjoy the iconic status for origination occupied by, say, Los Angeles for film, Paris for fashion, or Tokyo for games. True, it is the point of departure for world-shaking cultural innovations – think BritArt, Bhangra and 'Bend it Like Beckham', and it is also the centre of Europe's advertising and design industries. Yet London's need for global cultural commercial reach is highlighted by EMI's difficulties, the limits of a nation so much smaller than its audience which the BBC encounters at every turn, and Murdoch's easy conquest of its popular heights or, depending on viewpoint, depths.

For all these reasons, London's cultural offer should never be taken for granted. The history of all our comparator cities shows that cultural recognition is perhaps the hardest of all endorsements to win, and is earned as much as granted. It is to be hoped this report will assist.

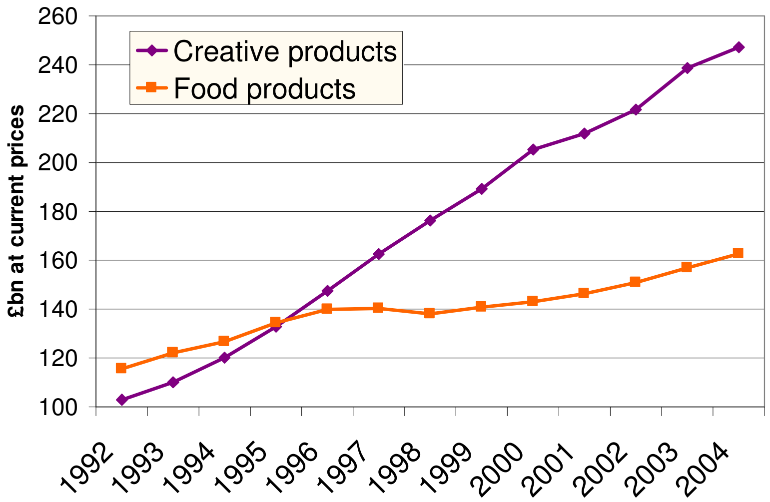
3 Determinants of cultural demand

This section looks at monetary sources of demand for cultural products, as further background to the main part of the report. Evidence is not always available at city level and this is an important goal of future research. However such evidence as there is offers indicators of trends, which helps plan for the future, and sheds light on the relative weight of private consumers, business, exports, and government. This, we hope, provides market intelligence and should also help policy-makers make provision for the infrastructure needed to satisfy the clearly growing demand for culture.

3.1 Drivers of a growth market

The most striking feature of the demand for cultural and creative products (see for example GLA 2002, DCMS 2007, European Creative Industries website xxxx) is that it is growing faster than both income and population. The main drivers of this growth are private consumers and business. By 1996, UK demand for creative products (as defined by the Office for National Statistics (ONS 2006)) exceeded demand for food. And by 1995, business demand for creative products exceeded demand for products of the banking and finance industries.

Chart 3.1Consumer demand for creative products in the UK



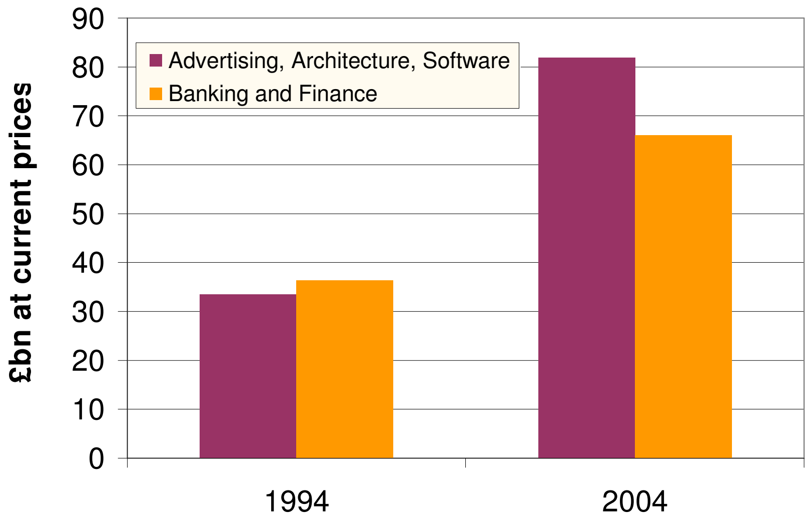
This reflects two changes of which the first is the additional demand created by high incomes, which leads to enhanced spending on income-elastic goods such as creative and leisure products. The second change, which we discuss now, is the transition to a service-based economy.

By 2005, 60% of all US consumer expenditure was on services, double what it was in 1945.[14] Behind this lies two powerful and interconnected factors: the rise of cities and the service revolution. In 2005, for the first time, the majority of the world's population was living in urban areas. Urbanisation is driven by both supply and demand. The 'pull' of new employment is not automatic: the 'push' of emigration takes place whether or not city jobs are created. Latin America is more urbanised than

[14] US Bureau of Labour Statistics

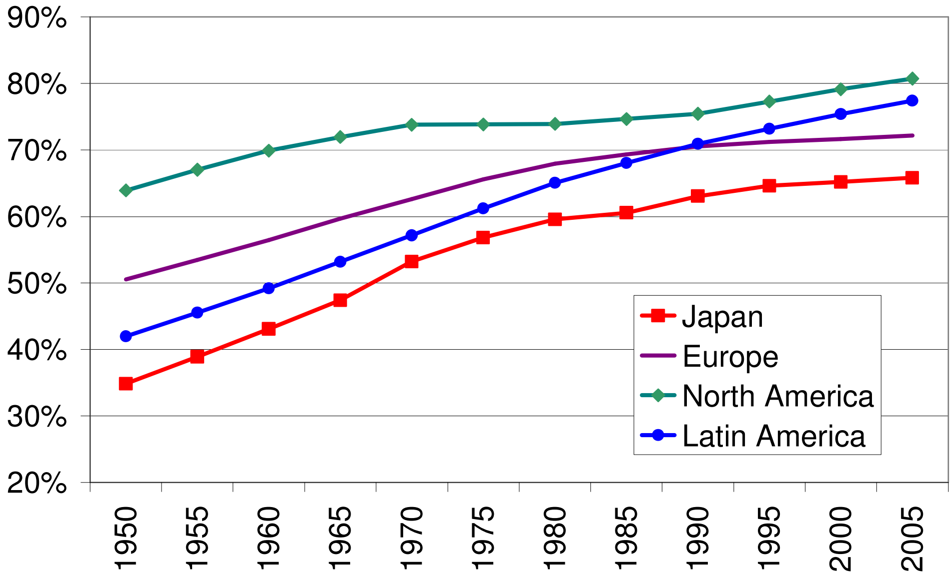
both Europe and Japan, but as in the rest of the third world, Latin American cities are overshadowed by slum growth, a sure sign that new drivers of employment have not arisen to absorb migration.

Chart 3.2 Business demand for creative products in the UK



Source: GLA Economics and ONS input-output tables

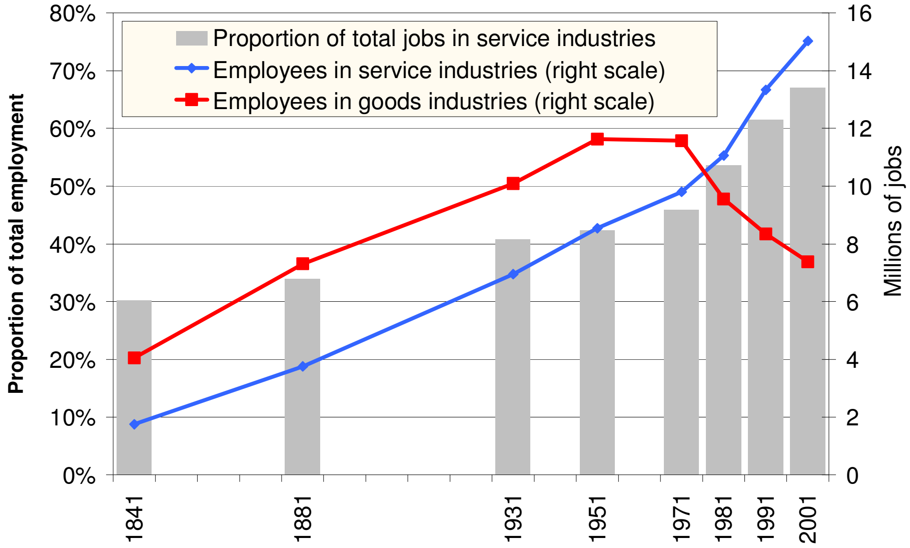
Chart 3.3 proportion of the world's population living in urban areas



Source: United Nations

In the developed countries a new source of jobs has been found, in which cities lead the way: services. By the 1970s, employment in the goods industries in the industrialised countries began to fall absolutely, a particularly steep decline starting in the UK as shown in chart 3.4. But service employment, which has risen continuously since 1841, took up most of the slack. In the US this pattern began even earlier, with service employment rising from 55% of jobs in 1940 to 83% in 2005.

Chart 3.4:UK employment in goods and service industries 1841-2001



Source: UK census and Humphrey Southall, Portsmouth
Goods industries = manufacturing, agriculture, utilities, and construction

The goods-producing sectors, accounting now for only 22% of UK employment and 17% of US employment, are thus not responsible for the modern growth of the major cities of the industrialised world. The city and its culture must be understood as a locus of service production.

The service relationship requires humans to interact directly with each other. Because of mass communications and the internet, this interaction now spans continents. But as commentators have noted (Sassen 1991), this has actually concentrated service providers in the cities, which offer the most prized forms of interaction such as 'face-to-face' meeting. This has driven the rise of the business district, the skyscraper, the concentration of global headquarters, and the emergence of a the new city hierarchy described in section 2. It also determines several critical aspects of city culture.

- A characteristic cityscape in which tightly agglomerated offices, shops and passenger transport nodes replace factories, docks and goods yards, producing characteristic central business and skyscraper districts
- Increasingly skilled, mental and creative work processes
- A 'global professional' class for whom the location of jobs is often more important than country of origin
- A 'cultural consumer' class for which leisure and cultural activities as an integral part of the quality of life

This does not imply homogenisation. Cities remain divided by income, status and qualification - income differentials being higher than thirty years ago. Service industries still use manual labour, and the modern low-paid are transport workers, cleaners, security staff, or retail and hospitality staff. In today's world city, the £2,000-a-day consultant will be carried to work by a £2,000-a-month train driver, where she or he will be admitted by a £50-a-day guard to an office made usable by £5-an-hour cleaner. The city's culture is a complex reflection of the conflicts and synergies to which this potent mix gives rise.

3.2 Creativity: a core activity

Table 3.1 Workforce employment in the creative industries

	Thousands of workforce jobs					
	London 1995	London 2000	London 2005	UK 2005	London percent of total creative	London percent of UK
Publishing	66	80	78	197	14%	40%
Leisure software	42	77	78	349	14%	22%
Music and the Visual and Performing Arts	58	74	70	213	13%	33%
Radio and Television	37	44	48	90	9%	54%
Advertising	28	42	38	104	7%	36%
Film and Video	19	24	25	60	5%	42%
Architecture	13	12	12	65	2%	18%
Arts and Antiques	6	8	7	40	1%	18%
Fashion	3	5	4	19	1%	23%
Creatively occupied outside the creative industries	132	181	194	1,047	35%	19%
Total	403	547	553	2,184	100%	25%

Source: GLA Economics (2007). The classification in this table is the DCMS mapping table which differs slightly from that employed in the remainder of this report.

We now briefly turn to the new sources of demand that have arisen in the new, service-driven, city. The best source of evidence for this demand, as noted, comes from the 'creative industries'. As stressed in this report, culture cannot be reduced to its commercial sale. These industries almost certainly do, however, provide the best evidence of trends, otherwise beyond the scope of this report. They provide particularly strong evidence that demand is rising ahead of that for most other products.[15] This has important policy implications: an activity for which demand is rising requires a disproportionate growth in provision.

Public attention has focussed on these industries as a source of both wealth and growth. Table 3.1 summarises employment in these industries and shows how they compare with employment in the UK as a whole. It illustrates the dominance of the 'big three' creative employers: Publishing, Leisure software, and Music and the Visual and Performing Arts. It also illustrates London's tremendous dominance in the creative industries when compared with the UK, with particularly heavy concentrations of Radio and Television, Film and Video, Publishing, Advertising, and in Music and the Visual and Performing Arts. When its surrounding regions are included London can be seen to provide nearly 60% of UK creative employment, the comparable figure for employment as a whole being 38%.

[15] The DCMS 'Creative Economy Programme' has rendered a great service in making a huge volume of evidence available which yet needs to be digested: see DCMS (2007b). In addition, the European Creative Industries Laboratory (see data appendix) has amassed an enormous and, in the UK, largely unrecognised mass of comparative data.

Finally a comparison of growth in the 90s with that from 2000-2005 illustrates the sensitivity of London's creative employment to the business cycle, discussed at greater length in GLA Economics (2007).

Table 3.2 Growth of GVA of the creative and other sectors of the UK Economy

	Annual average growth rate 1992-2004
Advertising	8.5%
Creative Industries	6.8%
Whole Economy	5.5%
Banking and Finance	2.8%

The size of the creative industries as a source of employment is reflected in their contribution to output and above all trade. UNESCO (1999) estimates that world trade in all cultural goods amounted to $125 billion in 1985 and had by 1999 grown to $400bn. Xxxx add most recent.

Up-to-date figures for London Gross Value Added (GVA) are not available, but the ONS (2006) input-output tables supply figures for the UK which permit approximate comparisons with other sectors. Creative Industry GVA on the ONS definition (which differs slightly from that of the DCMS) was £92bn, larger than the GVA of the whole financial sector (£85bn) and 14% of the private non-financial sector (£643bn) and nearly 9% of the whole economy.[16] These industries are also among the fastest growing as shown in table 3.2

3.2.1 Creative drivers: Advertising, Design, Architecture and Software

Since UK industries spend more on creative products than on financial services, it is hardly surprising that by 2005, 52% of all demand for creative products came from private businesses.[17] It is easy to ignore this key source of demand because its customers are mainly businesses, and the 'consumer-facing' focus of this report obliges us to spend less time on them than they deserve. There are however at least three reasons for singling them out for attention.

First, business-oriented creative providers are producers of wealth and suppliers of value in their own right and account for much of the growth of the creative industries. Between them they account for 42% of creative industry output.

[16] ONS (2006:26 and table 6.8).

[17] As noted in (GLA 2007), the definition of creative industries used here, which comes from the ONS, is slightly different from the DCMS definition used elsewhere in GLA work on creative industries. In particular, the analysis presented here does not distinguish software in general from leisure software.

Box 3.1 London's advertising industry

Two thirds of all international advertising agencies have their European headquarters in London. (DCMS 2001 xxxx). London's advertising industry can be simplistically split into 'creative' advertising agencies, which think up and turn creative ideas into advertisements, and media agencies, which buy and place these adverts in the most appropriate media – TV, press, radio, online, and so on. According to the Institute of Practitioners in Advertising, Advertising funds 75% of commercial television, 95% of national press, 80% of magazines and 95% of commercial radio.

The UK has the biggest advertising expenditure in Europe and the third biggest in the world after the USA and Japan. (ASA 2007).

London is acknowledged as one of the three global capitals for advertising alongside New York and Tokyo (NESTA 2006), as one of the two world centres for creative advertising. It has a particularly central role in co-ordinating advertising briefs that span several countries and a number of media types. Subcontracts are farmed out to specialists in each media branch and often other countries, but London agencies tend to play the role of 'creative director' for the campaign as a whole. This can make it difficult to estimate the true impact of a given specialist enterprise, but one measure is furnished by awards created by the industry itself, which has a relatively high degree of self-regulation.

The table below, taken from the industry- recognised *Gunn Report* (Flaxman Wilkie 2004) ranks top agencies, together with their headquarters city, by their creative prizes won worldwide.

Agency	Country	Points
Wieden and Kennedy	US	165
Dentsu	Japan	150
Abbot Mead Vickers DDBO	UK	150
BMP DDB	UK	148
Lowe	US	116
Bartle Bogle Hegarty	UK	107
Arnold Worldwide	US	106
Saatchi and Saatchi	UK	106
TBWA London	UK	101
Fallon	US	100

Second they are, with government, a driver of indirect demand for cultural products. This can be seen for a core element of London's creative industries: its advertising industry. The value directly added by the advertising industry in 2004 was £5.7 billion, and its output as £9.8billion. Demand for advertising products was £22.4 billion. The industry was hence responsible, directly or indirectly, for £16.7 billion in purchases from other industries. It purchased just over four billion pounds worth of services and goods from other industries, and (assuming that it was responsible for the remaining demand) it generated a further £12.6 billion in advertising revenue accruing to industries – principally creative – not classified as advertisers.

The third and perhaps most important role of business-oriented industries is that they directly impact the private consumer because, as with so many cultural products, they generate spillovers or, to use the technical economic term, 'external benefits' (or, if handled badly, detriments) which impact not on the purchaser but the public as a whole.

This is as obvious as it is ignored for the *sine qua non* of culture: architecture. After food and possibly clothing, architecture is arguably the most universally-consumed product of modernity. Some people use machines, and some do not. Some use power and some do not, some the telephone and others not. However, *everybody* uses buildings. Next to language, they are the most enduring, and definitive hallmark of any culture, and that of each of our comparators is indissociable from its skyline.

This report focuses on cultural buildings such as museums, theatres, cinemas or galleries, but it should not be forgotten that there is no cultural activity described in this report which does not take place either in buildings or in a spaces defined by them.

3.3 Forgotten but not gone: public spending and patronage

The copious further evidence of the growth in private consumption (DCMS 2007, GLA Economics 2002, 2004, 2007, European Creative Industries website) will not be repeated here. Before finally moving to the main body of the report however, a final brief mention of two further important sources of demand is needed: public spending and private patronage.

There is a surprisingly wide political consensus on the need for public spending on the arts. This consensus can be concealed by very passionate disputes about the merits of particular investments, which disguise the fact that disputes are less about whether money should be spent, than what it should be spent on. As Cowen (2006) notes, national arts funding bodies in the US, after considerable discussion, survived the 'Gingrich revolution' in strong shape. As this report shows, US cities are certainly not under-endowed when it comes to bedrock investment in galleries and museums. The UK Arts Council is often considered to be one of the most intact parts of the UK welfare state. It is probably no exaggeration to say that the defence of French culture is virtually sacred, and Japanese and Chinese approaches to the preservation and extension of culture are legendary.

There are two reasons for this. One is an emerging economic consensus, as recognised by Frey (2006), Throsby (2001) and Cowen (2006). Many economists who are otherwise strongly committed to the market also support public spending on the arts. A wide variety of reasons are advanced (see for example Frey 2006:2 and Cowen 2006) of which the strongest are that culture generates 'external benefits': the rationale of public spending is to ensure that these benefits are realised and captured. These include benefits peculiar to culture, for example 'non-user' benefits which accrue to society as a whole, not any particular individual, 'existence' value, which means that the benefit of a cultural asset applies to individuals who never see or hear it, 'option value' which means that people benefit from being able to go to an event, even if they choose not to, and 'bequest value' which means they benefit from being able to leave culture to future generations.

A second reason is that culture, and access to it, is in effect a human right, something indispensable. It is an intrinsic part of having a society, and therefore, the option of doing without it does not exist any more than, for example, the option of doing without the planet Earth. Put less dramatically, it is a matter of political and social choice, which is why, for example, the GLA has a statutory duty, under the GLA Act, to have a Cultural Strategy.

This does not make hard-headed decision-making about economic policy irrelevant, since both public subsidy and the market are an important means of delivering the objectives of policy and since different policies lead to different social objectives being achieved. One policy, for example, may be to privilege 'high' art and another to privilege popular art; yet a third may value experimental art forms. Alternatively a mix of all of these corresponds to the objective of pluralism of art forms, general access to culture, and social inclusion. This is however a choice between different forms of intervention. The case for economic intervention is widely accepted and the issues surrounding policy tend to focus on what kind of intervention is appropriate.

Beside the recognition of the merit of directly public support there is a long-standing recognition by US private business, and a growing recognition by UK private business, of the benefits of patronage and philanthropy towards the arts. The strength of the US business arts lobby is well known and attempts to marshal business and private patronage in the UK, though lagging those of the US, are growing. Thus the organisation 'Arts and Business' (see Appleyard 2006) estimates that total private sector funding of the arts rose £600,000 at its foundation to £530 million in 2006 although Selwood (2006) sounds a note of caution in arguing that at least some of this arises (often a pitfall in cultural measurement) from changes of definition.

Table 3.3 Sources of public spending on culture in the UK

	Spending	**Estimated per cent growth**
Central government	**2004/5 outturn**	**97/98-07/08**
DCMS total	4,245,663	432.0
Museums, Galleries and Libraries	450,031	73.7
Arts	366,955	113.9
Architecture and the Historic Environment	162,297	2.1
Regional Cultural Consortiums	6,458	N/A
Local government	2003/4 outturn	Estimated per cent growth 01/02-03/04
Archives	47,647	1.0
Heritage	33,679	N/.A
Museums and Galleries	203,836	12.2
Arts development and support; theatres and public entertainment	361,568	25.9
Community centres	86,663	N/A
Library services	914,716	N/A
Total cultural and related services	3,823,679	12.3

Source: Selwood (2006).

Table 3.3, from Selwood (2006), estimates the principal sources of public spending and their rate of change in recent years. Definitions are important, and to this must be added two additional streams of funding: television license fees, and also the considerable amount of procurement of public buildings which, if the DCMS definition is adhered to, constitutes spending on architectural services – for the reasons given in the last section , with some justification – but is usually omitted from tallies of public spending on culture. Xxxx add tax benefits foregone and check selwood totals.

4 Approach and method of the audit

This report is an 'audit' which concentrates on elements of culture that can be quantitatively measured. It is entirely based on secondary data and no new data collection has been undertaken. In selecting indicators, the report has been guided by three principles: comparability, emerging best practice and recommendations, and avoiding undue repetition of existing work. The importance of emerging international standards is the prospect they offer of robust comparisons. Best practice has therefore led us to:

- define culture using the 'domains' and 'functions' embedded within UNESCO's (UNESCO 1986) Framework for Cultural Statistics, the EU's Leadership Expert Group on Culture Statistics (2000), and the DCMS Evidence Toolkit (DCMS 2004)
- develop a 'Culture Satellite Account Framework' as outlined in OECD (2007)

To minimise repetition of existing work, this study does not focus on the supply of cultural and related creative products, their employment, or their output, though a brief summary was given in Section 3. Since the publication of the first DCMS Creative Industries Mapping Document in 1998, there have been many studies of this nature, including GLA Economics' regular reports on London's creative industries.

Instead, our focus is on the experience of culture. This therefore means principally organisations and sites where culture is performed, exhibited or sold – here termed 'cultural infrastructure' – the output produced by this infrastructure, and the audience that participates in and consumes this output. This is represented graphically in Table 4.1, with the density of the shading indicating which of the DCMS DET cultural domains and functions have been covered most comprehensively in the research.

In addition, further data is presented on two cross cutting themes that are not typically included within cultural statistical frameworks that use a logic of domains and functions, but are nevertheless important to understanding the culture of cities:

- cultural vitality: informal cultural production and consumption, together with other factors that add to the vibrancy (or 'buzz') of a city as experienced at street level
- cultural diversity: cultural production and consumption by, and for, a diverse range of demographic groups

Despite our aim of providing comparable data there are limits to what they can reveal. As stated in section 2.2, culture expresses preferences on which absolute judgements cannot be made. It is not enough to know how many cultural assets a city has, but also their quality and how various communities of taste experience them. This study did not include qualitative research, but we have sought to place the data within an interpretative narrative to make sense of the raw data.

Table 4.1 Main cultural domains and functions covered in the audit

DOMAINS	FUNCTIONS					
	Creation	Making/ Production	Dissem-ination	Exhibition/ Consumption	Preservation	Education
Visual Arts						
Performance						
Cultural Heritage						
Audio-visual						
Books and Press						
Tourism						
Sport						

Source: Adapted from DCMS (2004)

4.1 Data and indicators

In undertaking the audit, a wider range of indicators were considered for inclusion in the report than appear in this final report. Those that did not make the grade were excluded either because data was not available for a sufficiently large enough number of the cities or because the data was simply not sufficiently comparable in some key way (time period, areal unit, category of activity/organisation and so on.). Similarly, there are instances where data has been reported for most of the cities but omitted for others because it is not adequately comparable.[18] Lastly on some occasions, the data is not sufficiently comparable to place in a table but is instead discussed discursively in the body of the text. This means that the remaining chosen indicators, which appear in the tables throughout the report, are internationally comparable and can be rolled forward as a time series.

The chosen areal unit for the cities is:

- Greater London (32 London boroughs and the City of London)
- New York City (the five boroughs)
- Paris City (postcode 75000; 20 arrondissements)
- Shanghai (19 districts and counties)
- Tokyo Prefecture (23 districts)

When it has not been possible to obtain data for these geographies, but for others such as the New York Metropolitan area or Paris Ile de France, this has been clearly indicated in the main body of the report. GLA Economics reports (GLA 2007b) on the measurement of world cities further clarify this point.

[18] See the discussion of bookshops in Section 5.5 and the reason for omitting the data for Tokyo.

4.2 How the data is presented

The data used in the audit is drawn from a wide range of sources. Further, within each set of data tables, data items from across the cities can also refer to different dates. In order to improve the readability of the document, the information on data sources and dates has been omitted from the tables contained within the main body of the report. Instead, this information is contained in a full set of expanded data tables contained within the Technical Appendix (Appendix A).

As a working example, the first indicator in table 5.1, the number of national museums, appears in the main body of the text as follows:

Indicator	London	New York	Paris	Shanghai	Tokyo
Number of national museums	22	16	19	6	8

Source: Compiled by BOP/Experian (2008)

The corresponding entry for this indicator in the expanded data tables in the Technical Appendix looks like this:

Indicator	City	Figure	Date	Source
National museums	London	22	2005	DCMS Annual Report
	New York City	16	2005	Alliance for the Arts
	Paris	19	2006	Office du Tourisme
	Shanghai	6	2006	Shanghai Statistical Yearbook 2007
	Tokyo	8	2005	Statistical Abstract: Social Education by The Ministry of Education, Culture, Sports, Science and Technology (MEXT)

In terms of structure, the report is divided into two main sections:

- Supply: cultural infrastructure and output
- Demand: participation/consumption and the value of consumption

5 Supply: Cultural infrastructure and output

5.1 Introduction

Cultural infrastructure

London's present day cultural infrastructure, as with that of Paris, represents the accumulation of literally centuries of sunk investment. The British Museum was founded in 1753 by an Act of Parliament, Kew Gardens was established in 1759 and the Royal Academy of the Arts established a decade later in 1768. The National Gallery, now known as Tate Britain, and the museum quarter on Exhibition Road, all opened their doors to the London public in the nineteenth century. The twentieth century continued this aggregation of major cultural assets in the capital with the establishment of (among many) the BBC in 1922, and the South Bank and Barbican Arts Complexes in 1951 and 1982. The Tate Modern fittingly ushered in the new millennium, going on to become the world's most visited contemporary art gallery.

But London's cultural infrastructure is not just the history of public investment and royal patronage in predominantly 'high' culture. It is also the historic centre of the UK's commercial, popular culture and entertainment industries: the book publishing trade, commercial theatre, London's cinemas, musical and variety theatres and ballrooms – many of which live on in other guises, principally as popular music venues (Shepherd's Bush Empire, 1903, and Brixton Academy, 1929). In fact, as a result of this past investment, London has always excelled in the multi-use and re-use of its built and natural environment; in the continual choice of pubs, squares and parks as performance spaces, or in the transformation of its industrial heritage – from tramshed to avant garde theatre (Centre 42, now The Roundhouse), or power station to modern art gallery (Tate Modern).

Measuring the output produced by this infrastructure is not easy. Straightforward economic analyses of output in the cultural and creative sectors would focus on indicators such as GVA. While these are important to measure, there are real difficulties in assessing the output of some elements of the cultural sector using such traditional measures. Some cultural products and services such as museums, libraries and parks, are supplied free (or at least heavily subsidised) at the point of use. As Throsby (2001:chapter 2) notes, methodologies for estimating the 'economic value' of cultural consumption are gaining acceptance. However they are complex and are not attempted here.

Another measure of the productivity of the sector is to look instead at the cultural output of the sector. This is the approach taken in this report, which examines the numbers of shows, performances, exhibitions and titles etc., that are produced and sold by the consumer-facing cultural infrastructure in London and the comparator cities.

Collecting data on a city's cultural output is doubly difficult. Firstly, as for many cultural statistics, it is not collected by national statistical agencies (in general). Secondly, as this research is interested in understanding the range and volume of cultural products and services that are available to the consumer in each of the cities, the purpose is not to identify products and services that are exported or intermediate, for example those sold to institutional users, such as the books that publishers sell directly to libraries and universities.

The statistics cannot always be derived from supply-side data on production, as this may include both of these categories. Rather, this report covers the supply of products and services to the *local consumer market* by the organisations that make up the cultural infrastructure in each city. This is analogous to the component of GVA or GDP which corresponds to demand from private consumers.

Thankfully, some cultural support agencies and trade associations do collect this kind of data on cultural output, as do listings publishers such as *Time Out* (albeit not for these purposes). And this is a key weakness of some data of this type. Comparisons become difficult as the data is shaped by the original purpose for which it was collected, rather than by other considerations that might seem more abstract, such as comparability and consistency over time, that would nevertheless produce better data for research purposes. For all of these reasons, much more information on output is presented for London than for the comparator cities.

5.2 Cultural heritage

The 'turning over' – transformation, adaptation, re-use – of built and natural assets is what, arguably, stops London from succumbing to what has been claimed of other cities in 'old Europe', that 'Europeans tiptoe in their cities as in museums *because their cities are museums*'[19]. Thus while London actually has more UNESCO World Heritage Sites than any of the other cities (four), these are relatively isolated assets: The Tower of London, Palace of Westminster, Greenwich Maritime College and Kew Gardens. The designation does not relate to whole areas or quarters of the city, as it does in many cases. One of Paris' two World Heritage sites, for instance, is a large area of the banks of the River Seine. London has no quarter of comparable scale that exemplifies such a historical unity in its architecture. It is a mélange of styles and juxtapositions. UNESCO World Status designation, then, is not only difficult to compare on a numerical basis, but it is also ambiguous in what it says about a city's present day culture.

Museums

The comparisons with the other cities in the research does, though, show that London is a city of museums. The growth of museums for the general public has been directly linked to the development of an audience via education, and England was a pioneer in this respect. Universal compulsory education provided a major stimulus to transforming what were previously the 'cabinet of curiosities' of the rich into the modern day museum. This long tradition of museology still shows, London and Paris leading in terms of the number and (likely) diversity of museums. As with libraries, municipal provision of museums is a feature of many societies and local state run or supported museums account for many of the 'other museums' counted in table 5.1 in both London and Paris.

In part, of course, variations arise from cultural differences. Museums in Japan, for instance, are a relatively new cultural innovation in comparison with the European capitals. The oldest museum in Japan, the Tokyo National Museum, opened in 1878, approximately a century after the British Museum and The Louvre (the 'Muséum Central des Arts' as it was then known). The other four of the 'Top five' most visited museums in Japan (see xxxx get this right) were all established after 1920 onwards,

[19] Italics taken from the original quotation by the Hungarian writer and philosopher Agnes Heller, cited in Kevin Robins in Carter et al (1993)

and both the Japanese and Chinese are still enthusiastic builders of new public museums and galleries.

While New York has three cultural behemoths of the museum world – the Metropolitan, Museum of Modern Art (MoMA) and the Guggenheim – the city arguably suffers by dint of not being the US capital. Washington, and not New York, has the country's greatest mass of major museums, largely due to the Smithsonian Institution's 17 museums and the affiliated National Gallery of Art. The greater polycentricism of the US urban system – when compared with France and the UK for example – also means that there are large museums with high quality collections in many other US cities, such as Chicago, Philadelphia, Houston and Los Angeles.

Libraries

Public libraries have arguably a longer duration than museums in both European and American societies. Early libraries that were under the stewardship of municipalities existed in Norwich in England and Boston in Massachusetts, in the seventeenth century for example. But in England, public libraries as we now know them date from the Public Libraries Act of 1850. Public libraries have always had a clear pedagogic as well as a cultural role and, largely because of this status, they are the only form of cultural provision for which local authorities in England are statutorily obliged to provide. In turn, the universal nature of their provision in the UK – and in many other countries – means that public libraries are the element of cultural infrastructure that is most evenly distributed, and this shows up well across the comparators in table 5.1.

Table 5.1 Cultural heritage infrastructure and output in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Number of national museums	22	16	19	6	8
Number of other museums	162	85	138	100	71
Number of public libraries	395	255	303	248	369
Number of public libraries per 100,000 population	5	3	N/A	1	3
No. of book loans by public libraries per year (million)	38	15	N/A	11	84
No. of book loans by public libraries per capita per year	5	2	N/A	1	7
Number of UNESCO world heritage sites	4	1	2	0	0
% of land mass accounted for by green space and water	66%	5%	N/A	36%	36%

Source: Compiled by BOP/Experian (2008)

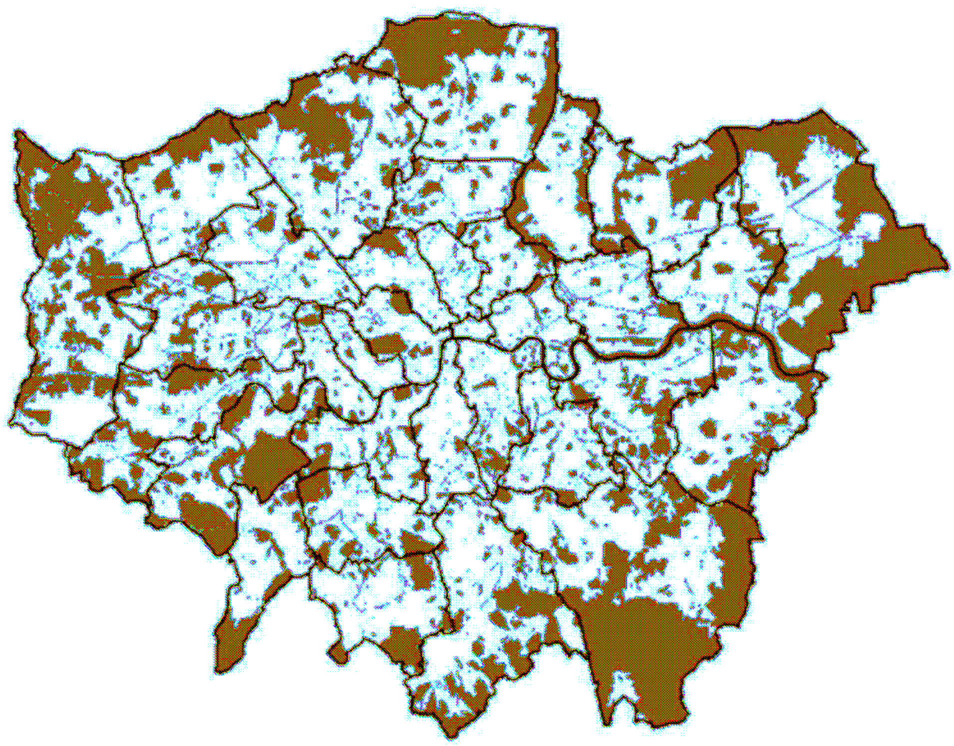
Looking at the output of London's public libraries, 38.4m books were lent in 2005-06, according to the industry-standard CIPFA (2006) Public Library Statistics. This equates to approximately five book loans per person per year. Tokyo's libraries lend more books per capita per year than in London, with London leading in number of libraries.

Natural environment

London's parks, gardens and squares are culturally produced and are also part of our cultural heritage, having been worked upon by creative labour over the centuries. This encompasses the formal and commercially-transacted activities of architects and landscape designers in the design of London's major green spaces, such as John Nash's and Victorian garden designer William Nesfield's work in designing Regent's

Park. But it also includes a myriad of smaller-scale and often informal interventions by residents and businesses. Parks and gardens, when combined with the capital's rivers and other green spaces – woodlands, meadows, grasslands, golf courses, sports pitches etc. – account for a remarkable 66% of Greater London's land mass. As table 5.2 has shown, this exceeds any other comparator city and the amount of green space contributes significantly to the 'liveability' of London, as well as providing 'lungs' for the city.

Chart 5.1 Strategic green spaces in London



Source: GLA Biodiversity Strategy 2001

5.3 Visual and Performing Arts

Theatre

There are few things more closely associated with London in the eyes of international tourists and business travellers than West End theatre, the contemporary visual arts and London's live music scene. Despite this, counting the number of venues in which these activities take place is one of the more challenging areas of the research, starting with theatre.

- Theatre covers a wide range of programming and venues and, with the partial exception of New York, exhibits a typically mixed economy across all cities in the research, in which wholly commercial provision sits alongside publicly-funded theatres; and venues at all points in between
- 'Fringe' theatre – short run, often experimental and/or produced by semi-professionals or amateurs – is a crucial part of a city's theatrical innovation system. It is also the hardest to track as it largely takes place outside of theatres: in rooms above pubs and cafes, in mixed use arts centres, and in the deserted and

marginal spaces of the city: empty warehouses, disused underground stations, de-commissioned hospitals, and so on

- In some countries, it is not possible to make a distinction between theatre venues and other cultural venues that host similar performing arts events, such as music and dance. This is the case in Tokyo, where multi-purpose venues function as theatres, concert halls and general performance spaces

For this reason, the statistics presented in table 5.2 focus firstly on ‘major’ theatres. For London, these are the venues covered by the Society of London Theatres (SOLT), which means the major commercial and grant-aided theatres in central London. Although the 55 SOLT members include organisations such as The National Theatre, The Royal Court and the Barbican Theatre, it is an appropriate comparison to make with the 39 Broadway Theatres listed for New York by The Broadway League (formerly League of American Theatres and Producers).

The next tier of theatre provision is the neighbourhood-based, but not Fringe, theatre. In London this would cover venues such as The Tricycle or Queens Theatre Hornchurch, and *Time Out London* lists 20 of these venues in its ‘Off West End’ category. In New York, there are a further 59 venues classed as ‘Off Broadway’ by The Broadway League. As these figures indicate, the infrastructure of probably the two most famous theatrical cities in the world is, in the round, almost identical. This trend continues for venues that programme fringe theatre: on the same day in December 2007 (20^{th}) there were performances of ‘Fringe’ theatre in 32 venues in London and performances in 27 ‘Off off Broadway’ venues in New York[20].

The total number of theatre and concert halls in each city was identified as a second indicator that would allow for a better comparison across more of the cities. Looking at this indicator, while the strength of London’s infrastructure remains, New York has fewer venues than the other three cities. This may be due to the general lack of public-funding for cultural organisations and venues in New York when compared with all the other cities.

The strength of the London stage is also demonstrated in its output, with the number of performances produced by the capital’s major commercial and grant-aided theatres eclipsing those in other cities. Paris surprisingly appears as London’s closet rival on this indicator, but this is not a strictly direct comparison as the Paris figures includes all private theatres, rather than simply the major ones. For this reason, New York is still the closest comparative city as the figures relate to Broadway theatres only.

Table 5.2 Visual and performing arts infrastructure and output in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Number of major theatres	55	39	N/A	19	N/A
No. of theatrical performances at major theatres per year (1)	17,285	12,045	15,598	3,117	8,281
Total number of theatres and concert halls	215	111	158	137	132
Number of music venues	400	151	122	148	132
Number of major concert halls	9	12	5	2	N/A
No. of music performances per year (2)	32,292	22,204	3,612	11,736	7,419
Number of public art galleries	92	N/A	59	6	40
Number of specialist arts/cultural HE establishments	12	7	3	15	N/A
No. of students at specialist art and design institutions	50,130	N/A	1,440	10,000	7,355

[20] Figures obtained from *Time Out London* and *Time Out New York* via a like-for-like web search carried on 19/12/2007.

(1) Figures for Paris and Tokyo relate to performances at all theatres not just major ones

(2) Figures for Paris derived from a national figure for France

Source: Compiled by BOP/Experian (2008)

Looking at the type of output of London's theatres, *Time Out* data shows that there were 111 different theatre productions (not performances) staged in just one week in October 2007[21]. While there is no question that the biggest and most popular shows are in the West End, the bulk of theatrical productions are actually put on by Fringe venues (48%) or Off West End venues (29%), compared with the 23% of productions that take place in the West End. Arguably, it is this diversity of output – rather than simply the headline-grabbing blockbuster productions – that is the best indicator of the health of a world city's theatre scene.

Music

Counting the number of music venues presents similar problems to identifying theatres in that live music is performed in three distinct types of site: dedicated music venues such as The Astoria or the Vortex; other cultural venues (for example The Barbican Theatre or the Bloomsbury Theatre) and the many 'non-cultural' venues ranging from pubs, churches, bars and student campuses to sports stadia and parks. While other cities have a broadly comparable number, London appears to have a disproportionately larger set of music venues. This may be effected by differences in what has been classified as a 'music' venue across each of the data sources. However the London figure is consistent with the large volume of output of musical performances produced in the UK capital.

When looking at output, London emerges as the undisputed home of live music., according to the data presented in table 5.2. The major note of caution to sound is that the statistic for Paris is derived from a figure for the total number of performances in France and looks unusually low (though even if the 'true' figure were five times larger than at present, it would not alter the position of the top two cities using this indicator). The London *Time Out* data presented in box 5.3 fleshes out exactly how one city manages to produce over 32,000 musical performances in a year.[22]

Galleries

Identifying the gallery infrastructure of cities presents different problems again to theatre and music. In particular, discretely identifying commercial art galleries that are open to the public is difficult, as many classifications combine these organisations and venues with art *dealers*, who work predominantly in a business-to-business market. Even here, combined figures could only be identified for London and New York. The two figures do seem to indicate the continued pre-eminence of New York as the centre of the commercial contemporary art world, as the city is home to 1,522 art galleries and dealers, compared with 766 in London.[23]

[21] *Time Out* No.1939, October 17-23 2007.

[22] This figure is an estimate based on the number of performances over one week, 621, listed in *Time Out* No.1939 (see box 5.3). Although it may seem high, it only represents those events that choose to advertise in *Time Out* and it is comparable with the 700 musical performances per week identified by an earlier report on The value of music in London (Laing et al (2001)

[23] Both figures are for 2007 and come from comparable data sources – Superpages.com for New York (the Yellow Pages directory equivalent) and Experian's National Business Database for London (which incorporates Yellow Pages and Thomson directories).

Chart 5.2 Map of visual arts galleries in East London that participate in the Time Out/ACE 'First Thursday' late openings

Source: First Thursdays (Time Out/ACE)/Google Maps (2008)

A second issue, however, relates to the small-scale and often economically marginal nature of running a gallery. This means that contemporary visual arts galleries can be transitory; opening to take advantage of temporary, and/or temporarily cheap space. It is therefore difficult to identify many small galleries in traditional data sources on businesses and organisations. In particular, the density of galleries, studios and artists that has taken root in east London over the last decade is mainly invisible using standard business database sources.[24] But a small indication of their number is provided in chart 5.2. This maps 80+ galleries of the 150 located in the East End that are participating in the Time Out/Arts Council England (ACE)-sponsored 'First Thursday' series of late gallery openings on the first Thursday of every month.[25] The reason for their inclusion is that while London has very many public art galleries, arguably it is the ability to sustain a large presence of commercial galleries that really distinguishes the art scene in cities such as London and New York from smaller domestic comparators such as Birmingham or Detroit.

In looking at the number of 'public' art galleries in London, it firstly needs to be noted that there may be some overlap in the statistics between the 92 public galleries and the number of museums. For instance, the National Portrait Gallery, both Tate Galleries and the National Gallery are all considered national museums but are also art galleries. However, even if the figure includes a likely degree of double counting, the

[24] For instance, in data collation for a study of the cultural sector in Hackney carried out by BOP in 2004/5, Experian's National Business Database failed to capture almost all of the 60+ art galleries that were listed in the now unavailable 'East End Art Map' (BOP 2005)

[25] For a full listings of the participating galleries, and other non-participating galleries in the East End, see http://www.firstthursdays.co.uk/

numbers of publicly supported galleries in London, such as The Whitechapel Gallery or The Serpentine Gallery, presents a difficulty shared across the cities for which comparable data is available (Paris, Tokyo and Shanghai).

Arts, design and cultural Higher Education Institutions (HEIs)

Lastly, this section looks at the specialist arts, design and cultural HEIs across the cities. London can rightly lay claim to having some of the finest such institutions in the world: the Royal Colleges of Art and Music, and the Royal Academy of Dramatic Art (RADA) to name but three. Moreover, the number twelve, cited in table 5.2, while factually accurate, disguises the fact that there are actually many more specialist arts and design HE colleges in London which have however have been amalgamated in some way, changing the reporting basis for the data. For instance, the creation of the University of the Arts London in 2004 brought six internationally renowned colleges including Central St Martins, and the London College of Fashion under one data-reporting roof. RADA is actually part of the Conservatoire for Dance and Drama, which spans eight small, specialist conservatoire-level vocational training colleges across the UK in dance, drama, music and circus. All but two are located in London. The breadth and depth of London's arts and design HE institutions is not, therefore, best served by this indicator alone.

The number of students that study across these 12 institutions gives a much better approximation of the importance of this resource to maintaining the innovation and quality of London's cultural sector. In 2005-06, figures provided by the Higher Education Statistical Agency (HESA) show that there were 50,130 students studying at these specialist universities and colleges. This total far outstrips that of all the other cities for which comparisons are available. Figures for the numbers of students of specialist art, design and cultural HE institutions are not available for New York. However, we do know that there were 4,705 graduates of these courses in 2005/06. This means that it is likely that there will be no more than approximately 20-25,000 students of these institutions at any one time, around half the number for London.

5.4 Audio-visual

Film

The main public (as opposed to domestic) consumer infrastructure for the audio-visual sector is cinemas. London is the undisputed centre of the UK's film industry and the largest production base in Europe, but how does it fare in terms of cinema exhibition? In comparison with the other four cities, it ranks joint second with Tokyo in terms of the simple number of cinemas. New York, however, has more than twice as many cinemas as London, which in turn outstripsall other comparator cities.

Of course, the basic number of cinemas in a city does not tell the whole story as much depends on the number of screens and the capacity of seats for each screen. Within the resources available it has not been possible to identify the aggregate like-for-like capacity of all cinemas across the five cities. But data is available for three of the cities on the total number of screens. What this shows is a higher number of screens per cinema in London than in both Paris and particularly Tokyo; which is quite dramatic when scaled against population, as in table 5.3.

Table 5.3 Cinema infrastructure and output in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Number of cinemas	105	264	88	49	105
Number of cinema screens	516	N/A	376	N/A	211
Number of cinema screens per million population	70	N/A	30	N/A	20
No. of film releases per year (1)	505	607	N/A	169	821
Number of film festivals	62	128	43	1	27

(1) - London figure is a national figure for UK and Republic of Ireland. Similarly New York and Tokyo figures are for USA and Japan

Source: Compiled by BOP/Experian (2008)

In turn, this is likely to reflect a greater proportion of 'multiplexes' in the cinema infrastructure of London in comparison with the other cities. In 2003, multiplexes already accounted for 45% of all London cinemas and 77% of its screens.[26] However, the greater number of screens at multiplex cinemas does not necessarily mean a greater range of film programming. Another structural issue is the ownership of distribution and exhibition of film. In the UK there is massive concentration in cinema ownership. The remaining independent cinemas in London mean that it does better in terms of diversity than the rest of the country. But this diversity is dependent upon a fragile funding structure. Operators of independent and arthouse cinemas in central London have to contend with the most expensive property costs in the UK[27], and draw on a patchwork of public sector funding from EU, national, regional and local sources.

London's cinemas are also strongly concentrated in Inner London, which is home to more than a third of all cinemas, and the West End in particular. A 2003 London Assembly report examining cinema provision in the capital described cinema provision in Outer London as 'mixed at best', pointing out the total lack of any cinema in two London boroughs (Lewisham and Waltham Forest), and below national average levels of provision in several more (London Assembly 2003).

Tracking down figures for the number of films released at cinemas in the individual cities proved futile. As film distribution deals are assigned by territory, it is very difficult to obtain figures that relate to the sub-national level. For this reason, all of the data in table 5.3 is based on the number of films gaining theatrical release nationally. Indeed, for London, the data actually relates to the whole of the UK and the Republic of Ireland (RoI).

What can be said about the output of London's cinemas is that it is highly likely that they showed all of the 505 films that were released in the UK and RoI in 2006, which would not be the case in most other cities in the country. But the UK and RoI compares relatively poorly across the other countries in terms of the number of films released, though it is the smallest territory of those covered. Secondly, as with the number of cinemas, the range of programming produced by cinemas in London varies significantly.

Inner London, with its mix of art house, independent, repertory and multiplex provision, exhibits a greater number and variety of films than in Outer London, in which provision is almost exclusively multiplex. The 2003 London Assembly cinema report evidenced this through a weekly snapshot in August, which showed that a

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[26] London Assembly (2003)

[27] An astronomical rent increase, for instance, was the reason given by City Screen, the owners of The Other Cinema just off Leicester Square in London's West End, when it's closure was announced in 2005.

hundred different films were exhibited in the West End, compared to fewer than 70 in the rest of the London (which had three times more cinema screens at the time). Instead, 75% of all screenings outside the West End were accounted for by just six films. Similarly, only 8% of screenings outside the West End in a week were in a foreign language compared to a quarter of all screenings in the West End (London Asssembly 2003). Wary of precisely this kind of effect on programming, the city government in Paris passed planning legislation to restrict the growth of multiplex cinemas in the 1990s, to protect French film programming and smaller cinemas.

Table 5.2 also provides data on the number of film festivals held annually in each city. To the lay person, it is perhaps surprising that there is more than one film festival in all but one city (Shanghai), as each city is known for one large film festival that bears the city's name, such as the Times BFI London Film Festival. However, as the large numbers for Tokyo, London and, particularly, New York demonstrate, these cities are the home of many more smaller and niche film festivals, that help to develop and sustain audiences for a much wider range of film programming than is typically offered on theatrical release throughout the rest of the year.

Interestingly, despite covering arguably many of the world's greatest cities, the main international film festivals that play a significant role in market *making* in the film industry – i.e. where the festival 'jury' prizes can significantly boost a film's chances at the box office and where films are bought and sold – take place elsewhere, such as Cannes, Berlin or Sundance. The film festivals in the cities in the research are, instead, more audience-driven. So, while there are film festivals driven by film genre and format (e.g. animation, short films, documentary), many reflect and represent the diverse communities that live in these world cities. Either explicitly: such as the International Black Film Festival and the Bosnian Herzegovinian Film Festival held in New York, London's Latin American and Lesbian and Gay Film Festivals, or the Festival of Israeli Cinema and TokyoZone Festival in Paris; or implicitly, through neighbourhood-based festivals, such as London's Made in Camden and East End Festivals, or the Williamsburg Brooklyn and Lower East Side Festivals.

Internet infrastructure

Notwithstanding the continued importance of the, by now, century-old cinema infrastructure of cities, digital Information and Communications Technologies (ICTs) are increasingly transforming the way that culture is produced, distributed and consumed. At the cutting edge of these transformations is audio-visual content: recorded music, computer and video games, film and TV programming. Therefore a vital element of a city's cultural infrastructure is the broadband internet infrastructure that allows its residents and visitors to access, participate and produce online, digital culture.

But measuring this new form of cultural infrastructure at the city level is difficult as most data collection is driven by the demands of national telecommunication regulation and policy. Thus for each of the cities, it is possible to assemble data for the host country – though for differing time periods – but data is not always available at city level. For instance, Ofcom's 2007 Communications Market Report outlines that by March 2006, 53% of all UK households had broadband internet access. It is not unreasonable to suggest that the figure may be higher than this for London. The large domestic and business base of metropolitan areas makes them 'hotspots' of demand for telecommunications companies. This means that – within a competitive,

Box 5.1: South Korea leads the way in digital culture

Although it is not the most (physically) wired city in the world Seoul in South Korea liberalised telecommunications market – advanced communications infrastructure and services are rolled out in these areas first. The cost of doing so is cheaper per subscriber (due to density) and demand is greatest (due both to sheer volume but also sophistication of demand), when combined with other more sparsely populated settlements.

Statistics available for other cities indicate that broadband adoption is currently between slightly more than a third and slightly more than half of all households across the overall grouping. For instance, in Tokyo and a number of other government-designated cities, 47% of all households had broadband internet access in 2006[28] and the proportion for Shanghai was 36% in the same year[29]. Figures for France and the US for the same year of 2006 were published in Ofcom's 2006 Communications Market Report. At this time, take-up of broadband by households stood at 39% in France and 38% in the US. These earlier figures show the importance of when exactly the statistics date from, as in 2006, Ofcom reported UK broadband take-up at only 39% – it therefore increased by a full 14 percentage points within the space of one year.

Of course, simply the number of connections is not the only broadband infrastructure consideration that needs to be taken into account: the speed of connections is also important. In relation to the speed of connection, as well as the proportion of households that have access to high speed internet, it is clear –although perhaps surprising – that the leading cities in the world fall outside of the group considered in this research. Box 5.1 illustrates the lead that Seoul and South Korea have taken in broadband infrastructure, and what this means for cultural consumption and production.

[28] Information & Communication Policy Bureau of Japan (2007)
[29] Shanghai Municipal Statistics Bureau (2007)

[add box 5.1 here instead]

5.5 Books and press

London has historically been the centre of both the UK's publishing and printing industries. While the last decade has seen the capital's printing industries shrink in the face of strong international competition, technological change and a move towards greater proximity to the motorway network, London has consolidated it's position as the publishing centre of the UK (BoP 2004). Book publishing and selling in particular has always been rooted in the capital. Hatchards in Piccadilly is the UK's oldest surviving bookshop, and some of London's neighbourhoods and areas are synonymous with the book trade, whether this is the second-hand bookshops clustered on and around Charing Cross Road, or Bloomsbury's association with book publishing.

Traditional book retailing, of course, is one of the service activities that has faced the greatest competitive threat from online book stores, such as Amazon. The last decade has therefore seen major transformations in the UK's book retailing landscape. In addition to online competitors, this has also included the entry of supermarkets into book selling, offering deep discounts to consumers – but only across a very limited number of titles –and major industry consolidation through merger and acquisition. Indeed, many book consumers and those working in the industry were concerned enough at the recent takeover of the Ottakar's chain by Waterstones to successfully lobby the Office of Fair Trading to refer the merger to the Competition Commission, although it was eventually given the green light[30]. In addition to knowing what (if any) effect, consolidation and online competition is having on the number of bookshops, arguably the more pertinent question is what effect this might be having on the range and number of titles that are made available to consumers.

Given the continuingly competitive environment in which dedicated bookshops operate, it is perhaps heartening to see that there remain so many on the streets of London, 927 to be precise. This figure is approaching twice as many as in New York, more than three times the number in Shanghai, though slightly less than Paris. Figures for bookshops in Tokyo have not been included as in Japan, books are predominantly sold through shops that also sell stationery, as opposed to specialist bookshops, and there are many thousands of these combined stationery/bookshops (6,409)[31]. The discrepancy between London, Paris and New York is so great that it would be a useful area for further research.

Table 5.4 Bookshops in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Number of book shops	927	498	1,076	300	N/A
Number of rare & second-hand bookshops	149	100	N/A	148	N/A

Source: Compiled by BOP/Experian (2008)

All the cities for which we have data are centres for the rare, second-hand and antiquarian book selling. This does, however, prompt the question as to how much longer can we assume that this specialised activity will continue to take place right in

[30] For more information, see *The Guardian* (2005) 'Book buyers force inquiry into takeover of Ottakar's', 7/12/05, at http://books.guardian.co.uk/news/articles/0,,1660608,00.html.
[31] Japanese Statistics Bureau (2004).

the centre of these world cities (e.g. in Charing Cross Road), where property price pressures are greatest?

5.6 Cultural vitality and diversity

London is often praised as much for the dynamism of its ‘street’ culture as much as it is for its formal cultural provision. Yet finding quantitative indicators to try and capture this vibrancy and buzz is difficult. Little work has been undertaken internationally on this, and what does exist, has tended to focus more on diversity indicators of a city’s population (e.g. Richard Florida’s work).

For cultural infrastructure, we have focused on two different areas:

1. the ‘new leisure infrastructure’ (Lovatt and O’Connor 1995) or the ‘night-time economy’ as it is more regularly referred to – bars, cafes, pubs and clubs
2. cultural festivals – street festivals, carnivals, and some consumer/industry trade fairs (e.g. Frieze Art Fair, 100% Design)

Both of these areas seek to shed some light on how the city’s spaces are animated, how new combinations of cultural production and experience are produced and consumed. As the night-time economy indicators are in part determined by a society’s attitude towards alcohol, it is important to include other indicators to control for cultural differences towards alcohol.

The new leisure/cultural infrastructure

The Mayor of London’s *London Plan* acknowledges the contribution that the capital’s night-time economy makes to London’s world city status. Urban culture needs to be constantly renewed if it is to maintain vibrancy and energy. One place that this process happens is in the informal spaces attached to bars and cafes. Although they have long been venues, or had venues attached, the true mixed-use, informal bar is a crucial asset. For the bar owner, the risk is minimal as takings are related to drinks sales. Moreover, audiences may be encouraged to try something new ‘because they are already there’. Here experimental or super niche performance activities can be seeded and grown. Many innovations in comedy, theatre and music have emerged from such ‘back rooms’. In Shoreditch, for example, pubs were commonly converted into informal art galleries in the late 1990s. Such flexible spaces are the true incubators of urban culture.

Although obtaining appropriate comparisons for the Asian cities was not possible for nightclubs, discos and dancehalls, of the Western cities, London has marginally more than both New York and Paris. Bars and pubs are another matter however, with Tokyo having more than twice as many as any other city. But a different story emerges when scaled to population: Paris has more bars per 1,000 population than any other city, by a considerable margin.

Festivals

Festivals are big business. Although there are no definitive numbers, every year seems to bring a new clutch of festivals to the summer scene, while established festivals go from strength to strength. Under the general rubric of festivals, fall international cultural events such as LIFT (London International Festival of Theatre), city-wide celebrations like Thamesfest or the Notting Hill Carnival and literally thousands of small community, neighbourhood and even street festivals – celebrating places or communities, art forms and historical events. The London borough of Southwark alone receives around 250 requests a year to stage festivals or outdoor events, and local authorities themselves are keen promoters of festivals as well as regulators, funders and suppliers.

Table 5.5 Cultural vitality and diversity infrastructure and output in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Number of nightclubs, discos and dance halls	306	279	277	N/A	N/A
Number of bars	3,117	1,800	2,618	2,996	9,476
Number of bars per 1,000 population	0.41	0.22	1.22	0.17	0.75
Number of festivals	200	81	40	22	N/A
No. of international newspapers available across public library service	39	49	20	N/A	21
No. of international HE students studying in city (1)	85,718	64,253	50,158	26,190	40,316
No. of international HE students studying in city as % of all HE students (2)	22%	12%	16%	3%	TBC

(1) Figures for New York relate to the New York Metropolitan Area

(2) Figures for New York calculated for the New York Metropolitan Area.

Source: Compiled by BOP/Experian (2008)

Tracking the numbers of small, community festivals is, however, very difficult. Therefore, the number in table 5.5 is provided by Visit London, and refers only to the capital's larger cultural festivals, carnivals, and consumer/industry trade fairs. This pattern and range of large, often well-funded events, mixed with a much larger undergrowth of community and neighbourhood events is likely to be repeated in other cities, such as New York, that are home to a wide range of diverse communities. Thus, even though the figures in table 5.5 do not do justice to the absolute numbers of festivals, they do present a meaningful comparative picture of provision.

The importance of festivals as a cultural form derives in part from the fact that they involve groups and communities – often quite marginalized from other cultural participation – not only as attendees, but also as performers and organisers. Notting Hill is a famed example in this respect. But other events, such as the Baishakhi Mela or the Latin American Carnaval Del Pueblo in south London, also involve hundreds of community groups, many of whom exist largely to create these annual celebrations. Moreover, another driver is the cultural diasporas whose home is London; these festivals and carnivals are an international business with expertise and designs flowing between carnivals across the world.

Cultural diversity

Another factor that adds to the cultural vitality of a city is obviously the diversity of

Box5.2: The cultural infrastructure of London's diverse communities

Collecting data on the arts and cultural organisations that support and promote London's diverse communities is difficult. The best available data unearthed through the research is that complied by 'Global London', a website dedicated to 'almost everything ethnic and cultural within the multilingual capital'. The site is produced in co-operation with: the Corporation of London, SOAS Language Centre, London First Centre and University of Westminster. Although the site does encompass details of 140 organisations covering 39 different ethnic, linguistic, nationality and faith groups, it is clear that this is by no means exhaustive. For instance, the list is missing Talawa, one of Britain's foremost black-led theatre companies, and besides individual examples of organisations, it does not cover many important community centres that operate as cultural venues, such as Halkevi, a Turkish and Kurdish Community Centre in Stoke Newington.

By ethnic, linguistic, nationality	No.	% of all	By ethnic, linguistic, nationality	No.	% of all	By ethnic, linguistic, nationality	No.	% of all
African	2	3.9%	Caribbean	2	3.9%	Japanese	3	5.9%
Afro	1	2.0%	Celtic	1	2.0%	Jewish	7	13.7%
American	1	2.0%	Christian	1	2.0%	Latin American	2	3.9%
Arab	2	3.9%	Eastern	1	2.0%	London	1	2.0%
Argentinian	1	2.0%	English	10	19.6%	Polish	2	3.9%
Asian	17	33.3%	European	6	11.8%	Portugese	1	2.0%
Balinesian	1	2.0%	Greek	1	2.0%	Romani	2	3.9%
Basque	1	2.0%	Indian	7	13.7%	Russian	6	11.8%
Bengali	2	3.9%	Indonesian	1	2.0%	Scottish	3	5.9%
Black	9	17.6%	Iranian	2	3.9%	Spanish	2	3.9%
Brazilian	2	3.9%	Irish	2	3.9%	Sufi	1	2.0%
British	11	21.6%	Islamic	19	37.3%	Welsh	2	3.9%
Buddhist	1	2.0%	Italian	4	7.8%	Total		

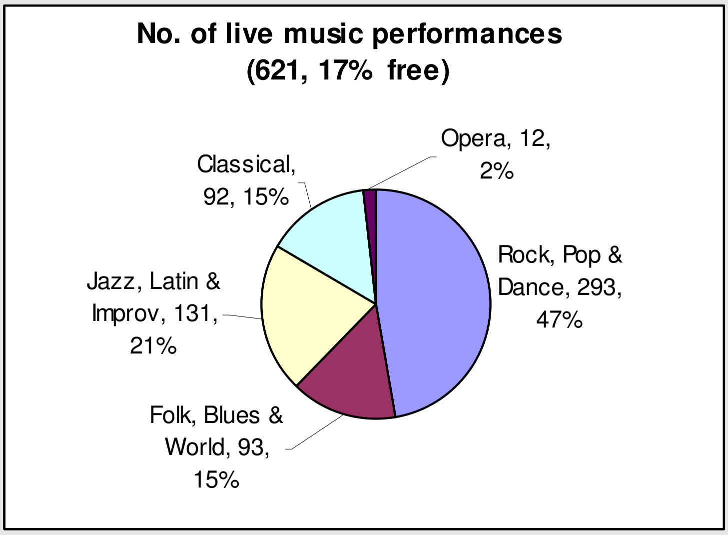
Source: Global London www.global-london.com/arts.htm (2008)

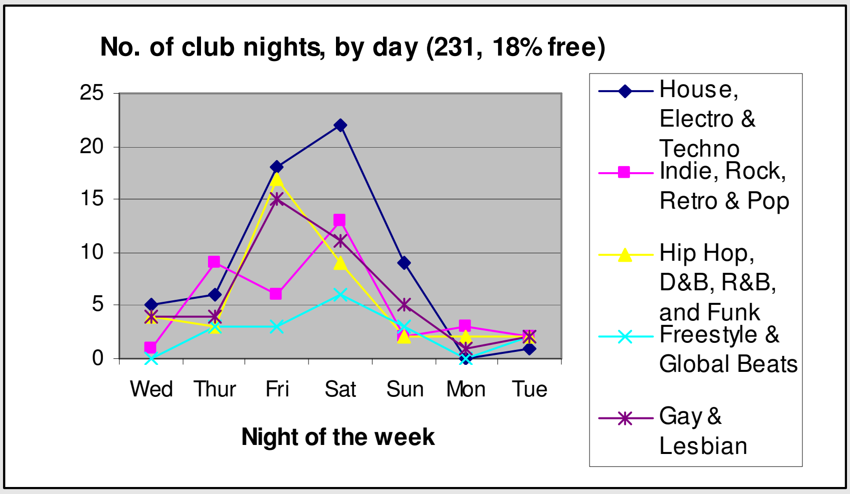
the population. As reported above, London is an amazingly diverse city whose residents that speak over 300 languages[32]. Additionally, it is also home to a large, temporary and diverse population of students. For instance, there were 85,718 international students studying at London's 41 HEIs in 2005-6, 22% of all HE students in the city (the highest proportion across all the cities). Only approximately 30% of these students were from the EU, the rest are drawn from a long and diverse list of countries. This figure does not include a further 19,000 US students that take a part of their academic year in London, through study abroad programmes. Even New York, that has the same advantage of the English language as London, struggles to match this output; one that adds immeasurably to the vitality and ongoing forging of links and networks between London and the rest of the world.

[32] Baker and Eversley (2000).

Box 5.3. A week in the cultural life of London

An analysis of the figures for one week's *Time Out* listings magazine[33], gives an insight into the array of cultural provision that London offers. One can choose from 111 different plays, 190 different exhibitions, 157 different comedy events, 293 rock or pop performances, or 195 club nights in the course of a single week. What is also striking is the amount of cultural provision provided free of charge – not just publicly subsidised but also commercially sponsored – there are free club nights, cabaret performances, classical music concerts and photography exhibitions, as well as a variety of cross-subsidised cultural offerings, mixing exhibitions and events with eating or drinking, shopping or travelling on the Underground.





Source: Time Out/BOP and Experian (2008).

[The above is part of Box 5.3]

The research has attempted to measure how these different linguistic, ethnic, faith and national groups are represented within the cultural infrastructure of London and the other cities. While it has been possible to gather data on a large number of cultural organisations and venues that are dedicated to representing, supporting, promoting

[33] Time Out, 17th-23rd October 2007.

and producing the culture of London's diverse communities (see Box 5.2), it has not been possible for the other cities.

While a large number of cultures, faith and nationalities are clearly represented within London's cultural infrastructure, arguably the city still lacks diverse cultural institutions of the stature of, for instance, New York's Schomburg Center and Library for Research in Black Culture or the Studio Museum in Harlem.

Key output indicators that one would ideally want to analyse to establish the degree of cultural diversity and vitality of a culture would include, for instance, more data on its characteristics, such as its ethnic, linguistic, or genre background. Unfortunately, it is very difficult to obtain consistent and comparable data on these attributes, though box 5.2 does present breakdowns for music and clubbing in London in terms of genre.

It was also possible to obtain data on the number of international newspapers across the public library service. As table 5.4 shows perhaps unsurprisingly, it is in the two most diverse and cosmopolitan of the cities that the most diverse library output is found. London and New York's public libraries services offer 39 and 49 different international newspapers respectively.

5.7 Summary

As noted in the introduction to this section, the interplay of old and new cultures are often the site of invention and creativity. More perhaps by luck than design, London has a rapid turnover of activities and venues and a mix of old, established performance space and new and innovative ones. As always, a critical mass effects matters: in such cities one may find an audience for almost anything. A vibrant city needs old and new, established and traditional, and, it needs audiences who will try out things, develop feedback and critique. This leads to true artistic development. Moreover, the co-existence of the established and traditional, cheek-by-jowl with the new and experimental, itself creates an addition cultural frisson that has the power to attract audiences to particular events, or to the city in general.

This supply section also highlights one of the major difficulties in conducting a study of this kind. Much of the most important data, of the type that enables a real assessment of the character and nature of cultural production – such as its genre, language-origin or quality/innovativeness – is either not available or available only for commercial purposes. It is difficult, therefore, to build-up a detailed and long term picture of London's cultural output, and importantly, how this is changing over time. But some of the data that is available – such as the data on theatrical and musical performances, on cultural and international students – demonstrates again that London's mix of traditional and youth cultures is a vital element of its vibrancy – contributing to its ability to attract tourists, visitors and students from across the world. But it also shows some of the disparities that exist within London in terms of the uneven distribution of cultural production and sites for consumption – which is the subject of the next section.

6 Demand: Consumption

6.1 Introduction

The wider national and international trends for increasing consumption of culture and recreation outlined in Section 3 is a boon for London. These trends are magnified in the capital and other world cities. Londoners have higher disposable income than elsewhere in the UK, and the city's population is also more educated, more diverse and younger. These socio-demographics combine to create a critical mass of demanding consumers – relatively rich in cultural as well as economic capital, and with generally more time to devote to these activities (as they are commonly have few dependants at this life stage) –which drives innovation in cultural production. This final section measures the consumption of cultural products and services through sales data, visitor numbers, time use, and participation rates.

6.2 Context: participation

In addition to rising levels of expenditure devoted to leisure and culture, the amount of time that people spend engaged in these activities has risen substantially over the last thirty years. In fact, in the UK and most other developed or emerging countries, national surveys of time use show that engaging with audio-visual media (watching TV/videos/DVD, listening to radio and music) is the activity that takes up the largest share of people's time outside of sleeping and working. In the UK, this means that, on average, people aged 16 and over spent 157 minutes per day consuming audio-visual media in 2005.

As table 6.1 demonstrates, people in each of the cities[34] spend much of their free time engaging with audio-visual media – and largely at home, or else while travelling (in the case of radio and music). While the figures for London and New York are broadly comparable, differences do exist in relation to the Asian cities included in the research, which registered both the highest and lowest numbers of minutes per day. The distinction between the Western and Asian cities is also noticeable with regard to the time spent reading per day. The average figures for the number of minutes per day spent reading for both Tokyo and Shanghai are more than twice the numbers for Paris, London and New York.

Perhaps surprisingly given, in particular, Japanese society's generally enthusiastic adoption of technology, the trends for the average time spent online per user per month are reversed. According to the 2007 Comscore World Metrix Study of internet usage – from which the statistics in this section are drawn – people in Tokyo, together with Shanghai, spend the least amount of time per month online (19 hours). Londoners spent the longest online per month, both as measured across the five cities, but also, as the UK regulator Ofcom reported, when benchmarked across all the other countries included in the Comscore study.

[34] Participation data is more regularly collected by national statistical agencies than many other indicators on the cultural sector, but it seldom offers sub-national level data. Most of the data in table 6.1 therefore relates to national figures. The precise geography of each indicator is given in the notes to the table.

Table 6.1 Time use and participation rates in selected cultural activities in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Average minutes per day spent engaging with AV media (e.g. TV, radio and music) – (1)	157	141	N/A	175	137
Average time per day spent reading (minutes) (2)	24	20	23	48	53
Average time spent online per month per user (hours) (3)	34	31	26	19	19
Percentage of working age population who have visited a gallery or museum at least once in the past year (4)	42%	42%	39%	N/A	28%

(1) - Figures quoted for London are for Great Britain, and for the USA for New York

(2) – All figures for the cities are national figures for Great Britain, USA, France, China and Japan

(3) – All figures for the cities are national figures for Great Britain, USA, France, China and Japan

(4) – Figure for Paris is a national figures for France

Source: BOP/Experian (2008)

Despite spending the bulk of their time sleeping, working and consuming audio-visual media products, the residents of the five cities do find time to get out and attend and participate in other forms of culture. However, as table 6.2 shows, even in London and New York – the leading cities on this measure – the numbers of people that visit a museum or gallery even once a year are still some way below 50% of the adult working age population. And if the pattern is the same in the other cities, visiting a gallery or museum once a year is actually one of the more regularly attended cultural activities (see Box 6.1 'Taking Part in Culture').

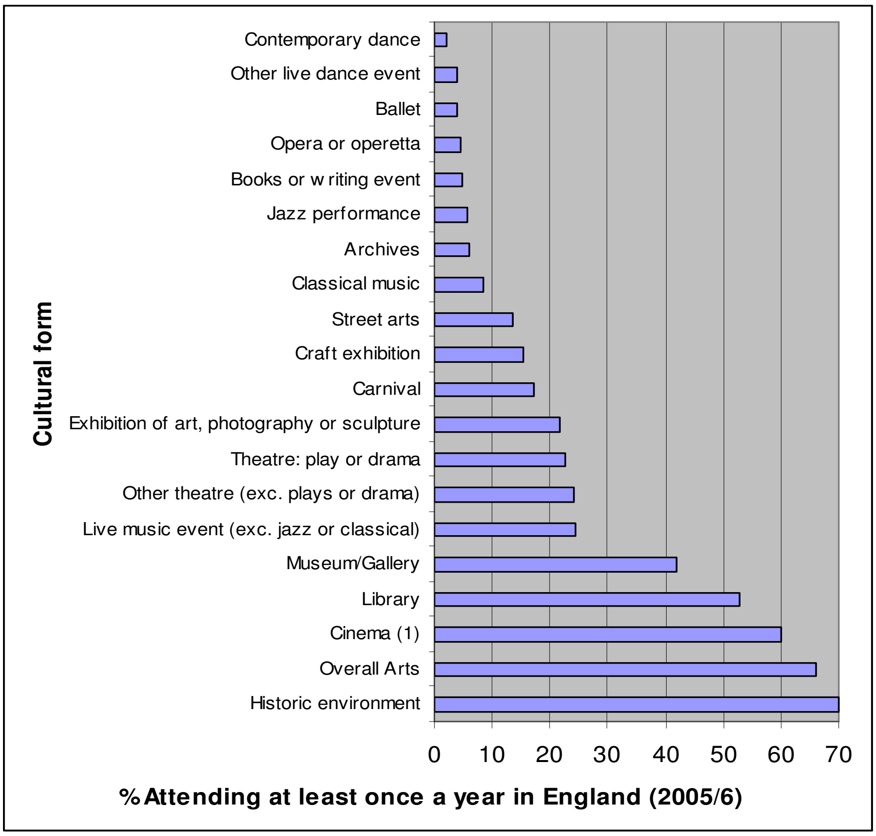
Box 6.1. Taking Part in Culture

The DCMS Taking Part Survey collects data about engagement in culture, leisure and sport. It is based on over 28,000 face-to-face interviews with adults aged 16+ in England. The headline indicator that is reported is the percentage of adults aged 16+ that have attended a particular form of cultural provision at least once within the last year. This is presented in chart 6.1

Even though this indicator sets the bar quite low as a measure of engagement, the proportion of adults that do attend at least once a year, is still under 25% for all but four individual cultural activities: historic environment, cinema, libraries, and museums/galleries. Further, engagement falls rapidly once the frequency of attendance is increased: while 42% of the adult population in England attended a museum or gallery at least once in the last year, only 8% of this number attended once a month or more.

The limited regional breakdowns offered by Taking Part show some differences in attendance patterns for individual domains, but no overall distinctively 'London' trend emerges. Londoners are more likely to attend once a year or more at a museum or gallery (51%, +9 % points) and a library (53%, +5 % points), but less likely (64%, -6 % points) to attend the historic environment. In other domains, such as the arts or archives, attendance patterns as measured using this indicator are the same as in England.

Chart 6.1: time spent on cultural activities



Source: DCMS (2007).
(1) Cinema attendance figure from the UK Film Council (2007) UKFC Statistical Yearbook.

6.3 Consumption

Cultural heritage

Despite the importance of having accurate data on visitor numbers, it is actually hard to come by information for museums and galleries, particularly data that is comparable. In part, this arises through differences in:

- the access and charging policies of institutions
- collections and programming
- institutional background

Firstly, some institutions – as with all museums in England – do not charge admission fees to access their permanent collections, so there is no easily available box office data on which to base figures. Others, of course, do levy admission fees, such as the majority of museums and galleries in all the other comparative cities. Still more have differential charging; access to permanent collections may be free or relatively cheap, with premium charges reserved for temporary exhibitions. Finally in Western countries, the mix of governance arrangements for museums and galleries – national public sector, local municipal public sector, private sector, voluntary and community sector – can mean that it is hard to collectivise and aggregate data collection.

Indeed, such is the scarcity and number of issues that arise in collecting comparative visitor numbers for museums and galleries, that *The Independent* newspaper, in its recent 'World Capitals' Index, dropped the indicator altogether, despite wanting to include it[35]. Certainly, obtaining accurate data on total visitor numbers across the cities has not been possible, except for London. The visitor numbers to the top five most visited institutions in each city has thus been chosen as the best possible proxy for the purposes of comparison.

The aggregate number of visitors to London's museums stood at 39.63m in 2003-04[36]. However, even this figure is only based on data for 141 of London's museums. It is clear from table 6.2 that the majority of these almost 40m visits are to a small number of the larger, predominantly national, museums. In 2005, combined visitor numbers to Tate Modern, the British Museum, National Gallery, National History Museum and the V&A stood at 20.4m. This is commensurate with visitor numbers to the top five most visited museums and galleries in Paris; both cities have visitor numbers far in excess of the figures for the other comparator cities.

Table 6.2 Consumption of cultural heritage in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Total visits to top 5 museums & galleries (millions per year)	20.4	8.3	20.2	N/A	6.7
Visits to top 5 museums and galleries per capita per year	2.7	1.0	1.8	N/A	0.5

Source: Compiled by BOP/Experian (2008)

Again, while the figure for New York may seem surprisingly low, it needs to be remembered that New York – as with Shanghai – does not enjoy the same near monopoly over the national museums and collections that London and Paris do. For instance, New York only has three of the top 10 most visited museums and galleries in the US (the Met, MoMA, the Guggenheim), according to the 2006 Survey of Museum Financial Information conducted by the American Association of Museums (AAM).

However, the real conundrum regarding the visitor figures for museums and galleries is not New York, but Tokyo. The arts trade paper and now website *The Art Newspaper* has been publishing attendance figures for international art exhibitions for the last 11 years, based on recorded daily figures. For the last three years, exhibitions in Tokyo have recorded the highest daily figures. In their 11th Annual Survey that was published in 2007, 6,446 daily visitors were recorded for the exhibition: 'The Price Collection: Jakuchu and the Age of Imagination', at the Tokyo National Museum. The second most visited exhibition was also based in Tokyo. This repeated the 2006 trend in which half of the top 10 most visited exhibitions in the world were based in Japan (three in Tokyo). Key to the success of the Tokyo/Japanese exhibitions has been huge, often newly built exhibitions spaces, combined with few worries about ruining the visitor experience through overcrowding – whereas British museums set strict limits

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[35] *The Independent*'s World Capital Index claims to be 'the most exhaustive comparison ever compiled of the world's great cities', although it appears to be a compilation of the many city indexes and league tables that have sprung up over the last decade (such as the Mercer Consulting World-wide Quality of Life Survey, the Anholt-GMI City Brand Index, the Mastercard Worldwide Centers of Commerce Index, and so on). *The Independent*'s Index, in which London incidentally comes top, employs a somewhat eclectic combination of just 14 indicators, including miles of underground track, number of symphony orchestras, whether a city has held the Olympics, and how many times a city appears in the newspaper's own Travel section. http://news.independent.co.uk/uk/this_britain/article3276224.ece.

[36] The figures are complied from the Museums Association Yearbook. Inclusion in the statistics therefore depends on whether the museum is a member of the Association (though all the major museums are MA members). The data was first published in ALM London's (2004) report, *London's Culture Equation*.

for the maximum number of people that are allowed into exhibitions at any one time[37].

Visitor numbers to Tokyo's museums therefore seem low, given the enthusiasm for large blockbuster exhibitions. Two possible explanations seem likely. Firstly, even the exhibitions that top the lists of total visitor numbers still generally account for less than one million visitors, with most museums attracting far less – between 250,000 and 500,000 visitors[38]. Permanent collections, therefore, seem key to attracting and sustaining a large population of visitors all year round. Relatedly, a number of Tokyo's newer national museums and galleries have instead a much greater emphasis on temporary exhibitions. So, at 14,000 square meters, although Tokyo's new National Art Center has the largest exhibition space of any gallery or museum in Japan, it has no permanent collection at all.

Libraries

Public library figures are, on the other hand, more widely reported than visitor numbers to museums and galleries, though still plagued with difficulties in terms of comparisons. In particular, some countries and cities prefer to report number of visits, while others report number of registered users (though even here there is a distinction between 'active borrowers' versus simply registered users). As the statistics for the five comparative cities are all measuring different elements of the consumption of library services, they have been omitted from the tables, but will be discussed briefly below.

According to the CIPFA (2006) Public Library Statistics, there were 55.5m visits to public libraries in London. However, while this figure would represent 7.4 visits per capita per year if simply divided by population, in reality this large number of visits is actually generated by a much smaller numbers of 'active borrowers' – 1.8m, or approximately one in every four Londoners. This figure also compares unfavourably with the number of library users in New York State (11.9m), although this is a much bigger geographical area, with a population two and a half times the size of Greater London, and no distinction is made between active or dormant users.

Theatre

Looking at the consumption of theatre across the cities, a familiar pattern emerges. London and New York's predominantly commercial theatre scenes are broadly comparable, with a difference of only 100,000 admissions separating them. As noted previously, although London has a slight edge in terms of the number of consumers, these are spread across a greater number of venues. As table 6.3 shows, the total value of theatre admissions, in Purchasing Power Parity (PPP) dollars, gives Broadway the edge when compared with London's theatreland. This is perhaps unsurprising given the lack of public investment in theatre in New York. Ticket receipts therefore play a correspondingly larger role in financing theatre in New York than in the other cities.

Although London appears to generate less revenue from theatre admissions than Tokyo, it should be noted that the figures for Tokyo and Shanghai unavoidably include revenues for admissions to live music events. Even here, when the value of

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[37] For the news story regarding the 2007 list, see: www.theartnewspaper.com/includes/common/print.asp?id=590.

[38] See the visitor number figures for The Art Newspaper's list of Top Exhibitions in 2006 at: www.fluktor.de/study/office/newsletter-mails/200603033.htm

theatre sales is scaled against population, London has the second highest per capita figure at $89 PPP. The real surprise is the figures for Paris, which are very low. Further research would be necessary to understand why this might be, as the figures for Paris were sourced from the Ministère de la Culture et de la Communication, and have been checked again for accuracy.

Table 6.3 Consumption of theatre in the five comparative cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Total admissions at major theatres (million per year)	12.4	12.3	3.4	7.2	N/A
Admissions at major theatres per capita per year	1.6	1.5	0.3	0.4	N/A
Total value of theatre ticket sales at major theatres per year ($m PPP) (1)	668	915	126	26	719
Total value of theatre ticket sales at major theatres per capita per year ($ PPP) (1)	$89.00	$111.40	$13.56	$4.60	$57.20

(1) - Figures for Shanghai and Tokyo include music

Source: Compiled by BOP/Experian (2008)

Live music

There are no comparable figures for the numbers of live music consumers across the cities, nor alas for the value of this potentially vast market. Some figures do exist for London, though they are by now very out of date. In a study published in 2001 in the academic journal *Cultural Trends*, the value of ticket sales for live music was estimated at £381m, already slightly more than the equivalent figure for the recorded music market in London (£345m).[39] As live music has been the major growth area of the music industry over the last five years, it is not unreasonable to suggest that the value of concert ticket sales is now likely to be larger than in 2001 (and not simply due to the effects of inflation).[40]

As for the numbers of consumers, the high number of performances in London attests to the enduring appeal of live music in the capital. While it has not been possible to quantify this audience across the vast range of venues in which live music is performed in London, at the very top end, London is now home to two of the top five most popular music/entertainment venues in the world: the O2 Arena and Wembley Arena. No other city in the world has more than one venue in the top 10. According to concert database Pollstar's annual listings of venue ticket sales, the O2 Arena sold 1.2m tickets in its first six months of opening. Even only half a year of operations was enough to make the O2 the third most popular venue in the world in 2007, approximately 11,000 sales behind Madison Square Gardens and 36,000 behind the Manchester Evening News Arena. In 2008, with a full year of ticket sales, it is widely predicted that the O2 Arena will become the world's most popular live music venue[41].

Audio-visual

[39] Laing, York, and Harding, (2001)

[40] Of course, this is not the case with recorded music, for which total revenues (if not always volume sales) have been in decline in most mature international markets for the last three years, due to competition from digital downloads (both legal and illegal), and lower pricing per unit. The London market figures of £345m in 2002 and £309m in 2007 would seem to bear out this wider trend in the value of recorded music sales.

[41] Wembley Arena sold 901,778 tickets in 2007, placing it fourth on the list. For the breakdown of ticket sales for the top 10 most popular venues in the world, see the Manchester Evening News coverage of the Pollstar figures in 'M.E.N. arena is top', at: www.manchestereveningnews.co.uk/news/s/1030777_men_arena_is_top

Despite having less than half as many cinemas as New York, the total audience for film in London is comparable to that in the Big Apple. In 2006, according to the UK Film Council's Statistical Yearbook, there were 39.8m admissions to cinemas in London – 25% of all admissions at the UK's box office (despite having only 12% of the population). Indeed, when scaled against population, as in table 6.4, this represents 5.3 admissions per capita over the year – more than twice the number for Paris, which is known as a cinephile city – and again, slightly more than in New York.

Although London's Times BFI Film Festival may not have the industry influence of other film festivals, it is clearly a genuinely popular event that once again shows Londoners' appetite for film. However, while admissions at the London Film Festival are greater than in both New York and Paris, Shanghai tops the list with 200,000 admissions to its one and only Film Festival in 2004.

Although the value of cinema admissions in the West End alone are greater than for the whole of Scotland,[42] as with theatre, the total value of consumer demand for film in London fares less well when measured as $PPP. In fact, London is ranked fourth on this measure, which is rare throughout the research[43]. The picture looks different again, however, when viewed as per capita value per year ($PPP). On this measure, Londoners spent $25.35 PPP per person on cinema admission fees in 2006, second only to New York.

Table 6.4 Consumption of audio-visual products and services in the five comparator cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Total cinema admissions (million per year)	39.8	39.7	27.6	11.7	22.1
Cinema admissions per capita per year	5.3	4.8	2.4	0.6	1.8
Number of admissions at main film festival ('000)	115	75	70	200	N/A
Total value of cinema ticket sales per year (£m PPP) (1)	190	260	201	27	274
Total value of cinema ticket sales per capita per year ($ PPP) (1)	$25.35	$31.66	$17.64	$1.51	$21.77
Total value of computer and video games sales per year ($m PPP) (2)	533	578	N/A	N/A	767
Total value of all music CD sales per year ($m PPP) (3)	515	715	223	27	392
Total value of all music CD sales per capita per year ($ PPP)	$68.61	$38.02	$19.60	$1.51	$31.16

(1) Figures for London, New York and Shanghai are derived values estimated from national data

(2) Figure for New York is for the New York Met Area, estimated from national data; Tokyo figure estimated from national data

(3) Music figures for New York are for the New York Met Area, estimated from national data; Paris and Tokyo figures estimated from national data

Source: Compiled by BOP/Experian (2008)

Although computer and video games have been a fixture in many of our lives for four decades now, they are often ignored as part of our *cultural* environment. Nowhere is the error of this judgement more evident than in Japan. Fittingly, the value of consumer sales of computer and video games in Tokyo ($767m PPP), eclipses the comparative market value in both New York and London. Nevertheless, the 14.9m

[42] London Assembly (2003).

[43] The absolute value of cinema admissions in London will be greater than given in these figures. This is because, in order to establish meaningful comparisons, the estimation of the value that each city accounts for of all cinema admissions in the five countries, has been calculated on the basis of the proportion of national income that each city generates. For London, this is 15%, but the actual proportion of UK ticket sales that London accounts for is likely to be closer to the 25% reported by Film London. However, as the actual values for the share of ticket sales is not known for the other cities, the share of national income has been used as a common methodology, on the understanding that this is equally as likely to under estimate the figures for New York and Shanghai as it is for London.

computer and video games sold in London in 2006 generated sales value of £319.8m, or 23% of the UK market[44].

This domestic trend of London being home to more intensive consumers of audio-visual products and services than in the rest of the UK is repeated once again in relation to recorded music. In 2006, 33.7m albums and 2.9m singles were bought in London, accounting for 22% and 21% of respective sales in the UK that year. Translated into monetary values, this adds up to £300.8m and £8.4m, again, 21% of the total market value for albums and singles in the UK in 2006[45]. Although the total market value is less than in New York, when scaled against population, the annual per capita value of consumption of the sales of recorded music in London is $68.61, higher than all the other comparator cities. This mirrors London's predominance in the live music market, as illustrated in section 2.2.

Books and press

Unfortunately, it was not possible to provide comparative statistics on book sales for the comparator cities. Data for these cities related to the output of the publishing industries in the four countries, and not the consumer market. However, Neilsen Bookscan were able to provide key data for the research on London's book market. In 2006, consumers purchased 61.9m books in London, accounting for 28% of the total UK market of 274.8m. Similarly, the value of Londoners' consumption of books in the same year amounted to £507.9m, 30% of the total UK retail book market of £1.7bn. Although London's share of the consumer book market appears to be significantly greater than its share of the cinema, games and recorded music markets, this is due to the fact that the geography used in the Neilsen figures is the London 'ISBA' region. This is roughly commensurate with the London television region and is home to approximately 2.5m more people than Greater London.

Cultural vitality and diversity

Obtaining consumption data on cultural vitality and diversity across the cities proved very difficult. In particular, figures for the numbers of consumers for London's combined 'new leisure/culture infrastructure – bars, cafes and clubs etc. – is very difficult. The only figures that could be found state that in 1997, the average clubbing audience in London over a weekend is approximately 500,000 people[46]. The lack of data of this kind is a particular weakness given its relevance to a wide range of urban policies – transport, planning, licensing, policing, housing – as well as to cultural policy.

Similarly, data on the numbers and market value of many of the cultural products discussed above (e.g. films, music), broken down by, for instance, linguistic origin, would be a useful direct indicator of the cultural diversity of consumption that take places within London. This data is unfortunately not readily available in any of the cities. The indicators used in table 6.5 instead offer other proxies for measuring the cultural vitality and diversity of a city's culture through consumption.

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[44] Figures from Chart-Track, supplied for the research by the Entertainment Retailers Association (ERA).
[45] Music data from The Official UK Charts Company, supplied for the research by the Entertainment Retailers Association (ERA).
[46] Figures quoted from Murray and Bianchini (1997).

Table 6.5 Cultural vitality and diversity consumption indicators for the five comparator cities

Indicator	London	New York	Paris	Shanghai	Tokyo
Estimated attendance at main carnival/festival (million)	2.0	2.5	N/A	0.5	N/A
Estimated attendance at main carnival/festival as % of population	27%	30%	N/A	2%	N/A
Number of international tourists per year (million)	15.6	8.1	9.7	4.3	1.5
Number of tourists per year as % of population	208%	99%	85%	24%	12%

Source: BOP/Experian (2008)

As the section on infrastructure and output above shows, London has a vast array of cultural festivals of all shapes and sizes. Once again, measuring the total attendance at festivals and carnivals, where attendance is largely not ticketed and free, is not easy. In order to derive even some comparisons across the city, the research concentrates on the estimated attendance/participants of the main carnival in each city.

In London, this is of course Notting Hill. In New York it is Macy's Thanksgiving Parade and in Shanghai, the opening of the International Tourism Festival (figures were not obtained for Paris and Tokyo). Though both very different events, Notting Hill and the Thanksgiving Parade attract similarly large numbers of participants (2m and 2.5m respectively).

The last indicator chosen to measure the cultural vitality and diversity of cultural consumption in cities is the number of international tourists that visit the five cities each year. International tourists add to the mix of consumers who judge, sort, filter and reproduce a variety of cultural experiences, ensuring that producers in London are kept alert by a demanding, educated and discerning audience.

As with the numbers of international students that flock to the city, London attracts more international tourists than any of the other cities in the research, and any other city in the world (according to the annual Euromonitor report from which all the city figures are drawn). The 15.6m international tourists that came to London in 2006 is more than twice the number of the city's residents and more than 5m more than visited Paris and New York.[47] This constant throughput and flow of people ensures that London benefits from new ideas from across the globe, but also that new ideas are created and developed here, with both a local and global audience in mind.

[47] It should be stressed that these figures only pertain to international tourists. If the indicator included domestic tourists, New York would eclipse the other cities due to the huge numbers of tourists that visit the city from the rest of the US (36.5m in 2006 according to nycvisit.com, the city's official tourist body).

Appendix A: Technical Appendix

A1 Definition of culture

The definition of culture in this report focuses on four main cultural domains: cultural heritage, visual and performing arts, audio-visual and books and press. In theory, these domains encompass a wide variety of activities, as can be seen in table A1.

Table A1 Cultural domain activities according to the DCMS DET, 2004

Visual and performing arts[48]	Cultural heritage
Fine arts (painting, sculpture) Crafts Art and antiques Architecture Design Designer fashion Theatre Live music Dance Festivals Carnival Circus Puppetry	Museums Libraries Archives Parks and botanical gardens Zoological gardens Historic houses and sites
Audio-visual	**Books and press**
Television and radio Film and video Photography Advertising Recorded Music Interactive digital media (games, web, mobile etc)	Publishing Literature Printing

However, the data presented in this report covers a more limited set of activities than this, due principally to:

- the focus on the consumer/participant's experience of culture across the cities – which means that cultural activities that are principally business-to-business activities, such as architecture and design, are excluded from the research
- the pragmatics of data collection – it is easier to collect data on some activities within these domains than others. For instance, statistics for theatre and film are much more readily available than for puppetry and photography

Therefore the data presented in the report pertains to a more limited set of cultural activities:

- cultural heritage: data mainly relates to museums and libraries; and the natural and built environment
- visual and performing arts: data mainly relates to theatre, live music and visual arts

[48] The two arts domains are separate within the DET but have been dealt with in the report as a combined domain.

- audio visual: data mainly relates to film, recorded music, internet use
- books and press: data mainly relates to books

In addition, further data is presented on two cross cutting issues:

- cultural vitality: informal cultural production and consumption, together with other factors that add to the vibrancy (or 'buzz') of a city as experienced at street level
- cultural diversity: cultural production and consumption by, and for, a diverse range of demographic groups

A2 Variables covered

As noted earlier in the report, the research uses the approach to developing a 'Culture Satellite Account Framework' that is outlined in the 2007 OECD report on the *International Measurement of the Economic and Social Importance of Culture.* Drawing heavily on the Canadian government's pioneering work in this area, the OECD report sets out a Culture Satellite Account Framework that consists of five 'layers'. This research is concerned with some of the variables and indicators that constitute only the first two of these layers: 'Money Flows' and 'Output: Quantity/Volume'. For each layer in the Framework, there are both supply and demand dimensions.

Layer II: Quantity/ Volume	***Supply*** • The supply of *consumer-facing* cultural organisations, businesses and spaces (i.e. the cultural infrastructure of a city) • The volume of output that this cultural infrastructure produces (i.e. the number of shows, exhibitions and so on) ***Demand*** • Quantities of consumers for this output (i.e. number of admissions and visits) • Attendance and participation rates (i.e. how consumption is distributed across a city's population)
Layer I: Money Flows	***Demand*** • Value in consumer demand for culture goods and services

For London, more detailed statistics, relating to the third layer of the OECD Framework – 'Characterisation', e.g. the type of output that is produced – are also presented. This is because understanding a city's culture requires more detailed and subtle indicators for specific cultural markets. It has not been possible within the scope of the research to derive these 'Characterisation' indicators for each of the four comparator cities with any consistency, but it would form a useful area for further research.

A3 Data collection and analysis

Collecting and analysing data on culture across countries is notoriously difficult. This is, for instance, why the OECD report is so important; it represents the first time – outside of individual regional blocs such as the EU – that a common approach has been developed at governmental level for the collation and analysis of cultural statistics.

In addition to the difficulties that arise in analysing culture between countries – that relate principally to differences in definitions of culture, how it is measured (e.g. what constitutes a visit), and when – city-based measurement is also bedevilled by more practical difficulties: data on culture is still often not collected and available at the city level. More fundamentally, for the variables that this report seeks to cover – namely the character of the cultural infrastructure and its output, and the size and value of the associated consumer market – statistics are not routinely available from national statistical agencies. This is due principally to three factors.

- Data on many variables, such as detailed breakdowns of consumer spending on culture or the volume and character of output, are simply not collected by national statistical agencies [49]
- Where data is collected and available through national business surveys, such as the UK's Annual Business Inquiry (ABI), the Standard Industrial Classification (SIC) or International Standard Industrial Classification (ISIC) does not provide sufficient disaggregation to be able to extract data at a level that discretely identifies activities or organisations. For example, bookshops are contained within the SIC/ISIC class 5247 that also includes newsagents and stationery shops (a far larger category than bookshops); museums are combined
- Some cultural activities (output and consumption) take place in many non-cultural venues – for instance live music is regularly performed in bars, clubs, sports stadia, theatre foyers and churches. This can make tracking the sector within hierarchical classification systems such as the SIC/ISIC difficult

The approach taken to handling all these issues in the research is a pragmatic one.

- Where data is available from municipal or national statistical agencies, such as the Shanghai Statistics Bureau, these have been used. However, much of the data is derived from surveys, market intelligence data, and business directories that are not provided by government statistical agencies. Instead, it is sourced from a variety of other state-supported functions (e.g. city governments, tourism departments, film offices, national culture ministries, etc.); commercial data and market intelligence providers (e.g. business directory publishers, market research companies), trade associations and listings magazines. In order to improve the readability of the document, the information on data sources has largely been omitted from the tables contained within the main body of the report. A full listing of the data on indicators for each city is, however, contained in the Technical Appendix, including source references

[49] Lack of national statistical data on the volume and characteristics of output (as opposed to its financial value), is true across service industries in general. Manufacturing, on the other hand, is far better covered through regular surveys such as the EU's 'Prodcom' Survey. The UK's ONS piloted a version of Prodcom for the computer services industry in 2000, called 'Servcom' – but this has never been repeated to-date nor extended to cover any other service activities.

- The most recent available data for each city has been used, but this still means that there are a range of years covered in each of the indicators that are compared. In instances where the time period is critical, such as measuring the adoption of broadband internet across the cities, the lack of a consistent timeframe means that the data is not presented as a true and valid comparison, but discussed more discursively instead. For each of the indicators, data for only one year has been presented as it has not been possible to assemble accurate time series data within the confines of the current research project
- In some of the cases where data is available only at a country level, city-based estimates have been derived. The methodology for this estimation process is outlined in section A4

Finally, despite an intensive research effort, there are still some important indicators that are reported for which data is missing for one or other of the comparator cities. These have been kept to a minimum, with most indicators for which we have only partial comparisons excluded, through a filtering and selection process.

A4 Estimation

In some cases, data presented at city-level has been derived from national data. There have been two approaches to scaling national data down to city-level:

1. 'Non-value' indicators, such as the number of cultural institutions, have been scaled according to the percentage of the national population residing in the city area. For example, if New York accounts for x percent of the total USA population and there are Y cinema screens in the USA, there is assumed to be x(Y) cinema screens in New York

2. 'Value' indicators, such as the total value of music sales, have been scaled according to the percentage of national income that the city accounts for. Firstly, we calculate aggregate city income as the product of average income per capita in the city (cY) multiplied by the city population (cPOP). We then calculate aggregate national income by multiplying average income per capita in the country (nY) by the national population (nPOP). Dividing total city income by total national income produces the city's share of national income: (cY*cPOP)/(nY*nPOP). Finally, this ratio is applied to the national indicator (e.g. value of music sales) to produce the city indicator

'Value' indicators have been presented in Purchasing Power Parity dollars ($PPP). Purchasing power parity takes account of both the nominal exchange rate and the relative prices of goods in different countries. The ratios used to convert local currencies in to $PPP are the latest World Bank (2004) estimates.

In some cases we have also used simpler methods of estimation in order to derive a value, for instance, taking data for one week in a year and multiplying it by 52 to produce an annual figure.

Full data tables are in appendix B.

Appendix B: Data tables with dates and sources

B1 Cultural infrastructure and output

Indicator	City	Figure	Date	Source	Notes
National museums	London	22	2005	DCMS Annual Report	
	New York City	16	2005	Alliance for the Arts	
	Paris	19	2006	Office du Tourisme	
	Shanghai	6	2006	Shanghai Statistical Yearbook 2007	Refers to 'state owned large museums'
	Tokyo	8	2005	Statistical Abstract: Social Education by The Ministry of Education, Culture, Sports, Science and Technology (MEXT)	
Other museums	London	162	2005	MLA London (2007) Facts and Figures/ Association of Independent Museums	
	New York City	85	2007	NY.com	
	Paris	138	2006	Office du Tourisme	
	Shanghai	100	2006	Shanghai Statistical Yearbook 2007	
	Tokyo	71	2005	MEXT	
Public libraries	London	395	2005	MLA London (2007) Facts and Figures	
	New York City	255	2002	2002 Economic Census	
	Inner Paris	303	2001	Eurostat	
	Shanghai	248	2005	Shanghai Yearbook 2006	
	Tokyo	369	2005	MEXT	
No. of public libraries per 100,000 population	London	5	2005	MLA London/Experian	
	New York City	3	2002	Economic Census/Experian	
	Inner Paris	N/A	2001	Eurostat/Experian	
	Shanghai	1	2005	Shanghai Yearbook 2006/Experian	
	Tokyo	3	2005	MEXT/Experian	
No. of book loans by public libraries per year (million)	London	38,410,000	2005/6	CIPFA (2006) Public Library Statistics	
	New York City	14,900,000	2007	The New York Public Library/American Library Association	
	Shanghai	10,869,200	2006	Shanghai Statistical Yearbook 2007	
	Tokyo	84,550,687	2006	Statistical Abstract: Social Education by The Ministry of Education, Culture, Sports, Science and Technology (MEXT)	
No of book loans by public libraries per capita per year	London	5.1	2006	CIPFA Public Library Statistics/Experian	
	New York City	1.8	2007	The New York Public Library/American Library Association/Experian	
	Shanghai	0.6	2006	Shanghai Statistical Yearbook 2007/Experian	
	Tokyo	6.7	2006	MEXT/Experian	
UNESCO World Heritage Sites	London	4	2007	UNESCO	

	New York City	1	2007	UNESCO	
	Paris	2	2007	UNESCO	
	Shanghai	0	2007	UNESCO	
	Tokyo	0	2007	UNESCO	
% of land mass accounted for by green space and water	London	66%	2002	Mayor of London (2002) Connecting with London's nature: The Mayor's Biodiversity Strategy	
	New York City	5.3%	2007	New York City Department of Parks and Recreation	
	Shanghai	36%	2004	Shanghai Culture Yearbook 2005	
	Tokyo	36%	2006	Tokyo Social Trends: The Life of Tokyo Residents in Statistics (2007)	
Major Theatres	London	55	2005	The Society of London Theatre	
	New York	39	2007	The League of American Theatres and Producers	
	Shanghai	19	2006	Shanghai Statistical Yearbook 2007	
No. of theatrical performances at major theatres per year	London	17,285	2006	SOLT Box Office Data Report 2006	
	New York City	12,045	2007	Time Out New York	
	Paris	15,598	2005	Ministère de la culture et de la communuication (2007)	
	Shanghai	3,117	2006	Ministry of Culture	
	Tokyo	8,281	2004	GEIDANKYO	
All theatres (inc Concert Halls)	London	215	2007	Experian National Business Database	
	New York City	111	2007	NY.com	
	Paris	158	2007	Mairie de Paris	
	Shanghai	137	2006	Shanghai Statistical Yearbook 2007	
	Tokyo	132	2004	GEIDANKYO	
Number of music venues	London	400	2007	Visit Britain	
	New York City	151	2007	NY.com	
	Paris	122	2006	Office du Tourisme	
	Shanghai	148	2006	Shanghai Statistical Yearbook 2007	
	Tokyo	132	2004	GEIDANKYO	
Major Concert Halls	London	9	2005	Visit London	
	New York City	12	2007	NY.com	
	Paris	5	2005	Mairie de Paris	
	Shanghai	2	2006	Shanghai Statistical Yearbook 2007	
No. of music performances per year	London	32,292	2007	Time Out London	Scaled up from original weekly figure
	New York City	22,204	2007	Time Out New York	Scaled up from original weekly figure

	Paris	3,612	2005	Ministère de la culture et de la communuication (2007)
	Shanghai	11,736	2006	Ministry of Culture
	Tokyo	7,419	2005	GEIDANKYO
Art galleries – public	London	92	2007	Experian National Business Database
	Paris	59	2007	Mairie de Paris (www.paris.fr/portail/Culture)
	Shanghai	6	2006	Shanghai Statistical Yearbook 2007
	Tokyo	40	2005	Statistical Abstract: Social Education by The Ministry of Education, Culture, Sports, Science and Technology (MEXT)
Specialist cultural HE establishments	London	12	2007	HESA
	New York City	7	2007	NYS Higher Education Services Corporation
	Paris	3	2007	pagesjaunes.fr (Yellow Pages)
	Shanghai	15	2006	China Education Online / Shanghai Morning Post
No. of students of Specialist Arts & Design Institutions	London	50,130	2005/6	HESA
	Paris	1,440	2007	Figures procured from individual institution: Conservatoire National Supérieur d'Art Dramatique, Conservatoire National Supérieur de Musique, Ecole Nationale Supérieure des Arts Décoratifs
	Shanghai	10,000	2007	Shanghai Morning Post
	Tokyo	7,355	2007	Figures sourced from following 12 institutions: Tama Art University; Musashino Art University; Bunka Women's University; Tokyo National University of Fine Arts & Music; Musashino Academia Musicae; Kunitachi College of Music; Toho College of Music; Tokyo Polytechnic University; Tokyo Zokei University; Tokyo College of Music; Sugino Fashion College; Toho Gakuen School of Music.
Cinemas	London	105	2006	UKFC Statistical Yearbook (2006/7)
	New York City	264	2007	Superpages.com
	Paris	88	2007	Mairie de Paris
	Shanghai	49	2006	Shanghai Statistical Yearbook 2007
	Tokyo	105	2004	GEIDANKYO
Cinema Screens	London	516	2006	UKFC Statistical Yearbook (2006/7)
	Paris	376	2006	Mairie de Paris
	Tokyo	211	2004	GEIDANKYO
No of cinema screens per million population	London	70	2006	UKFC Statistical Yearbook (2006/7)/Experian
	Paris	30	2006	Mairie de Paris/Experian
	Tokyo	20	2004	GEIDANKYO/Experian
No. of films given theatrical release in the country in a year	UK and Republic of Ireland	505	2006	UKFC Statistical Yearbook 2006/2007
	USA	607	2006	Motion Pictures Association
	Shanghai	169	2005	Shanghai United Circuit (country's largest cinema exhibitor, 80% market share in Shanghai)

	Japan	821	2006	Motion Picture Producers Association of Japan
Film Festivals	London	62	2005	Film London
	New York City	128	2007	filmfestivals.com
	Paris	43	2007	filmfestivals.com
	Shanghai	1	2006	Shanghai Statistical Yearbook 2007
	Tokyo	27	2007	Yamagata International Documentary Film Festival
Bookshops	London	927	2007	Booksellers Association, Directory of Members 2007/08
	New York City	498	2007	Superpages.com
	Paris	1076	2007	pagesjaunes.fr (Yellow Pages)
	Shanghai	300	2007	www.ddmap.com
Rare & 2nd Hand Bookshops	London	149	2007	Experian National Business Database
	New York	100	2007	Superpages.com
	Shanghai	148	2007	Kongfz.com (the biggest on-line rare and second-hand book market in Shanghai)
Night Clubs, Discos and Dance Halls	London	306	2007	Experian National Business Database
	New York City	279	2007	Superpages.com
	Paris	277	2007	pagesjaunes.fr (Yellow Pages)
Number of bars	London	3,117	2007	Yellow Pages
	New York City	1,800	2007	newyorkontap.com
	Paris	2,618	2007	pagesjaunes.fr (Yellow Pages)
	Shanghai	2,996	2007	www.sh.gov.cn
	Tokyo	9,476	2005	Tokyo Statistical Yearbook 2005: Education and Culture - Place of Amusement
Bars per 1,000 population	London	0.41	2007	Yellow Pages
	New York City	0.22	2007	newyorkontap.com
	Paris	1.22	2007	pagesjaunes.fr (Yellow Pages)
	Shanghai	0.17	2007	www.sh.gov.cn
	Tokyo	0.75	2005	Tokyo Statistical Yearbook 2005: Education and Culture - Place of Amusement
Festivals	London	200	2005	Visit London
	New York City	81	2007	New York Street Fairs.com
	Paris	40	2007	justfrance.org
	Shanghai	22	2007	China Comfort Travel
No. of international newspapers available across public library service	London	39	2006	City of London Libraries: City Business Library
	Paris	49	2007	bpi.fr
	New York City	20	2007	The New York Public Library
	Tokyo	21	2007	The Tokyo Metropolitan Library Homepage
No. of international	London	85,718	2005/6	Oxford Economics (2007) 'The economic

students studying in city				impact of London's international students', report for London Higher
	New York City	64,253	2006	Open Doors Online
	Paris	50,158	2003/4 [50]	Ministère de l'education nationale
	Shanghai	26,190	2005	Shanghai Yearbook 2006
	Tokyo	40,316	2007	Japan Student Services Organization (JASSO)

B2. Consumption and participation

Indicator	City	Figure	Date	Source	Notes
Average minutes per day spent engaging with recorded AV media (TV, radio, music)	London	157	2005	ONS (2006) The Time Use Survey 2005	All city data for this indicator is estimated from national figures
	New York Met	141	2006	American Time Use Survey	
	Shanghai	175	2004	China TV Market Report 2004-2005	TV only
	Tokyo	137	2006	Survey on Time Use and Leisure Activities, Statistics Bureau, MIAC	Includes time reading newspapers or magazines
Average time per day spent reading (minutes)	London	24	2005	ONS (2006) The Time Use Survey 2005	All city data for this indicator is estimated from national figures
	New York Met	20	2006	American Time Use Survey	
fc	Paris	23	2006	Eurostat	
	Shanghai	48	2007	World Association of Newspaper	
	Tokyo	53	2007	Reading Survey 2008 (Forthcoming)	
Average time spent online per month per user (hours)	London	34.4	2007	Comscore World Metrix Study 2007	All city data for this indicator is estimated from national figures
	New York Met	31.4	2007	ibid	
	Paris	26.1	2007	ibid	
	Shanghai	19.3	2007	ibid	
	Tokyo	19.2	2007	ibid	
Museums/Galleries attendance - % working age population attending once a year	London	42	2005/6	DCMS Taking Part Survey 2007	
	New York State	42	1997	1997 Survey of Public Participation in the Arts	
	Paris	39	2005	Ministère de la culture et de la communuication (2007)	Estimated from the national figure
	Tokyo	28	2006	Survey on Time Use and Leisure Activities, Statistics Bureau, MIAC	
No. of visits to Top 5 most visited Museums & galleries	London	20,400,000	2005	DCMS Annual Report 2006	

[50] Although figures for international students were available for the later date of 2004 – 49,000 – the earlier figure was chosen as data on total students numbers was not available for 2004. The date discrepancy also does not seem too damaging given there was no increase (rather a small decrease) between 2002/03 and 2003/04.

	NYC	8,300,000	2005	American Association of Museums (2006) 2006 Museum Financial Information	
	Paris	20,200,000	2005	Ministère de la culture et de la communuication (2007)	
	Tokyo	6,714,077	2005	Tokyo Statistical Yearbook (2005)	
No of visits to top 5 museums & galleries per capita	London	2.7	2005	DCMS Annual Report 2006/Experian	
	NYC	1.0	2005	American Association of Museums/Experian	
	Paris	1.8	2005	Ministère de la culture et de la communuication/Experian	
	Tokyo	0.5	2005	Tokyo Statistical Yearbook/Experian	
No. of admissions at major theatres per year	London	12,357,153	2006	SOLT	
	New York City	12,310,000	2006/7	The League of American Theatres and Producers	
	Paris	3,400,000	2005	Ministère de la culture et de la communuication (2007)	
	Shanghai	7,151,000	2006	Shanghai Statistical Yearbook 2007	
No of theatre admissions per capita per year	London	1.6	2006	SOLT/Experian	
	New York City	1.5	2006	The League of American Theatres and Producers/Experian	
	Paris	0.3	2005	Ministère de la culture et de la communuication/Experian	
	Shanghai	0.4	2006	Shanghai Statistical Yearbook 2007/Experian	
Total value of theatre ticket sales at major theatres per year - $m (PPP)	London	$668,004,681	2006	SOLT Box Office Data Report 2006/Experian	
	New York City	$914,999,972	2006	The League of American Theatres and Producers/Experian	
	Paris	$125,550,000	2005	Ministère de la culture et de la communuication/Experian	
	Shanghai	$26,333,333	2006	Individual theatre receipts/Experian	The biggest performing arts company, Shanghai Grand Theater Arts Group, incl. Shanghai Grand Theatre, Shanghai Concert Hall, Shanghai Symphony Orchestra, Shanghai Ballet, Shanghai Traditional Music Orchestra, Shanghai Opera House, Shanghai Culture Square
	Tokyo	$719,275,472	2004	Japan Council of Performers' Organisations/Experian	
Total value of ticket sales at major theatres per capita, per year $ (PPP)	London	$89	2006	SOLT Box Office Data Report 2006/Experian	
	New York City	$111	2006	The League of American Theatres and Producers/Experian	
	Paris	$14	2005	Ministère de la culture et de la communuication (2007)/Experian	

	Shanghai	$5	2006	Individual theatre receipts/Experian	The biggest performing arts company, Shanghai Grand Theater Arts Group, incl. Shanghai Grand Theatre, Shanghai Concert Hall, Shanghai Symphony Orchestra, Shanghai Ballet, Shanghai Traditional Music Orchestra, Shanghai Opera House, Shanghai Culture Square
	Tokyo	$57	2004	Japan Council of Performers' Organisations/Experian	
No. of cinema admissions per year	London	39,800,000	2006	UKFC Statistical Yearbook 2006/2007	
	New York City	39,702,600	2006	Motion Picture Association	Estimated from the national figure
	Paris	27,600,000	2005	Ministère de la culture et de la communuication (2007)	
	Shanghai	11,730,000	2006	Shanghai Statistical Yearbook 2007	
	Tokyo	22,110,783	2004	GEIDANKYO	
No of cinema admissions per capita per year	London	5.3	2006	UKFC Statistical Yearbook (2006/2007)/Experian	
	New York City	4.8	2006	Motion Picture Association/Experian	
	Paris	2.4	2005	Ministère de la culture et de la communuication/Experian	
	Shanghai	0.6	2006	Shanghai Statistical Yearbook 2007/Experian	
	Tokyo	1.8	2004	Nihon Geino Jitsuenka Dantai Kyogikai (2007) *Structural Changes of the Performing Art: The Lights and Shadows of the Past Decade*/Experian	
No. of admissions at main Film Festival	London	114,910	2007	Times BFI London Film Festival	
	New York City	75,000	2007	New York Film Festival	
	Paris	70,000	2007	Mairie de Paris	
	Shanghai	200,000	2004	Yahoo	
Total value of cinema ticket sales per year - $ (PPP)	London	$190,473,687	2006	UK Film Council (2007) Statistical Yearbook/Experian	Estimated from the national figure
	New York City	$260,052,030	2006	Motion Picture Association/Experian	Estimated from the national figure
	Paris	$201,111,111	2005	Ministère de la culture et de la communuication (2007)/Experian	
	Shanghai	$27,326,728	2005	China's Cultural Industry Development in 2006/Experian	Estimated from the national figure
	Tokyo	$273,833,962	2004	Japan Council of Performers' Organisations/Experian	
Total value of cinema ticket sales per capita - $ (PPP)	London	$25	2006	UK Film Council (2007) Statistical Yearbook/Experian	Estimated from the national figure
	New York City	$32	2006	Motion Picture Association/Experian	Estimated from the national figure
	Paris	$18	2005	Ministère de la culture et de la communuication (2007)/Experian	
	Shanghai	$2	2005	China's Cultural Industry	Estimated from the national figure

	Tokyo	$22	2004	Development in 2006/Experian Japan Council of Performers' Organisations/Experian	
Total value of computer and video games sales per year - $ (PPP)	London	$533,033,333	2006	Chart-Track/Experian	
	New York Met	$577,782,099	2006	Entertainment Software Association/Experian	Estimated from the national figure
	Tokyo	$766,807,141	2006	Computer Entertainment Supplier's Association/Experian	Estimated from the national figure
Total value of all music CD sales - $ (PPP)	London	$515,417,528	2006	The Official UK Charts Company/Experian	
	New York Met	$715,434,781	2006	Recording Industry Association of America/Experian	Estimated from the national figure
	Paris	$223,452,181	2005	Ministère de la culture et de la communuication (2007)/Experian	Estimated from the national figure
	Shanghai	$27,394,263	2006	Shanghai Statistical Yearbook 2007/Experian	
	Tokyo	$391,840,496	2006	Recording Industry Association of Japan/Experian	Estimated from the national figure
Total value of all music CD sales per capita per year- $ (PPP)	London	$68.61	2006	The Official UK Charts Company/Experian	
	New York Met	$38.02	2006	Recording Industry Association of America/Experian	Estimated from the national figure
	Paris	$19.60	2005	Ministère de la culture et de la communuication (2007)/Experian	Estimated from the national figure
	Shanghai	$1.51	2006	Shanghai Statistical Yearbook 2007/Experian	
	Tokyo	$31.16	2006	Recording Industry Association of Japan/Experian	Estimated from the national figure
Estimated attendance at main Carnival /Festival	London	2m over the Weekend	2007	Notting Hill Carnival Organisers	
	New York City	2.5 million	2007	Carnival Organisers/Sponsors - Macy's	
	Shanghai	450,000	2006	eastday.com	
Estimated attendance at main carnival/festival as % of city population	London	27%	2007	Notting Hill Carnival/Experian	
	New York City	30%	2007	Macy's/Experian	
	Shanghai	2%	2006	Eastday/Experian	
No. of International Tourists per year	London	15,640,000	2006	Euromonitor (2007) Top 150 City Destinations Ranking	
	New York City	8,140,000	2006	Euromonitor (2007) Top 150 City Destinations Ranking	
	Paris	9,700,000	2006	Euromonitor (2007) Top 150 City Destinations Ranking	

	Shanghai	4,300,000	2006	Euromonitor (2007) Top 150 City Destinations Ranking
	Tokyo	1,470,000	2006	Euromonitor (2007) Top 150 City Destinations Ranking
No of international tourists per year as % of city population	London	208%	2006	Euromonitor/Experian
	New York City	99%	2006	Euromonitor/Experian
	Paris	85%	2006	Euromonitor/Experian
	Shanghai	24%	2006	Euromonitor/Experian
	Tokyo	12%	2006	Euromonitor/Experian

Appendix C: Data references, providers and resources

Transparency is a public duty and an objective of research. In this appendix we seek to provide the reader to all the sources consulted so that they can be verified and in future work, if need be corrected. We have grouped the main data sources by the cities that they cover, with a short section at the beginning dealing with generic data sources that do not correspond to any particular city.

This means that some of the references in the text relate to entries in this appendix and therefore do not appear in the bibliography. This report is available in electronic form and so in case of difficulty, the reader can search the text to find them. The general principle that we have tried to follow is to place references to books, journal and newspaper articles in the bibliography, and references to direct sources of factual information in this section. This principle does not always apply perfectly, for which we apologise.

C1 General

European Creative Industries website: www.european-creative-industries.eu

DCMS (2004) *Evidence Toolkit: Technical Report*.

DCMS (2007) *Creative Industries Statistical Estimates Statistical Bulletin,* London: DCMS. www.culture.gov.uk/NR/rdonlyres/4DE5B8FB-A95F-49B6-9900-3BE475622851/0/CreativeIndustriesEconomicEstimates2007.pdf

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