



Artists' Workspace Study

Report and Recommendations
September 2014

MAYOR OF LONDON

Greater London Authority
September 2014

Greater London Authority
City Hall, London SE1 2AA

www.london.gov.uk
enquiries 020 7983 4100
minicom 020 7983 4458

Study and report prepared by

We Made That LLP
30-32 Stamford Road
London N1 4JL

T +44 (0)20 7249 6336
www.wemadethat.co.uk

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Foreword



London is riding high on its creative credentials, with the creative and cultural industries contributing £21bn in London alone. One in six new jobs in London is in the creative industries. In 2013 London was the most visited city in the world with 18 million visitors, and eight out of ten overseas visitors named culture as the key driver for their visit. The Mayor has stated that the arts are part of London's DNA, but what would the arts be without the thousands of artists who live and work here?

For hundreds of years London has been a premier destination for painters, sculptors, dancers, musicians and performers from around the world. The thriving commercial creative sector is underpinned and enriched by these artists. They share ideas and technologies, feed off each other and work together in complex ways. From scenic artists working at the Royal Opera House to designers of floats for the Notting Hill Carnival and sculptors creating major exhibitions for Tate, the artists working in studios sustain a range of ancillary small businesses, including framing, conservation, insurance, shipping, and security -all of which are vital to London and the UK.

With London's population due to reach nearly 10 million in the next decade, affordable workspace has become a key issue, putting particular pressure on creative small businesses, which includes artists. Whether showcasing fashion designers to international audiences, funding new apprenticeships in animation, promoting the capital's design businesses or lobbying for the preservation of creative hubs, the Mayor's office is intervening across the creative industries to ensure that London remains a capital of cultural content.

Directors of our major cultural institutions have voiced concerns about the gradual exodus of artists out of central London and the attractiveness of other global cities that

offer more space at cheaper rents. Many are worried that artists are victims of their own success, moving into affordable areas, contributing to gentrification and then being forced out with rising prices. This study does little to allay these fears, showing that as many as 3500 artists are likely to lose their places of work in the next 5 years - 30% of the current provision.

More worrying than the loss of spaces, though, is the loss of talent. We risk a city filled with wonderful, world renowned institutions and buildings, but no living, breathing artistic community to keep them alive.

The experience of other cultural capitals like New York, Berlin and Montreal indicates that there are some key ways of addressing this problem - tactical interventions including planning protection, direct investment in under-occupied buildings and creative uses of city-owned properties. This report shows the level of ingenuity and commitment of organisations supporting artists' workspace, including workspace providers, Local Authorities and enlightened developers. It highlights the complex and often highly innovative approaches required to make these spaces work. We have an opportunity to build on London's unique strengths as a world leader for culture to find a new sustainable model which allows us to keep artists at its heart.

Artists have been part of London's story for hundreds of years and have made it the thriving, creative, diverse city it is today. With the creative sector's huge contribution to London's economy and global position we simply cannot afford to lose them.

A handwritten signature in black ink, appearing to read 'M. Mirza'.

Munira Mirza
Deputy Mayor for Education and Culture

In London

298

Separate
studio buildings

11,500

People working from
artists' workspaces

3,220

Artists
in premises at risk

£21.4 bn

Contribution of the
creative industries

17%

Premises are owned
by freehold

1 in 6

New jobs are created in
the creative industries

£13.73

Average rent
per sq ft per annum

35,000

Graduates from Art
and Design Colleges
every year

Executive Summary

This Artists' Workspace Study provides a snapshot of affordable studio provision for artists in London in 2014.

Existing Supply – the current state of play

The survey has uncovered that the supply of artists' studio space in London is higher than previously recorded. We recorded 298 separate studio buildings or sites, catering for over 11,500 artists across the capital.

Artists' workspace is a diverse field generally characterised by scarce resources. Studio providers and artists have therefore developed a number of models to ensure that space remains affordable, for example through tenancy, management, premises or facilitation. Many providers have charitable or not-for-profit status and seek external funding in order to support aspects of their work.

Many also provide much more than straightforward space – open access facilities, performance venues, production space, galleries and cafes. Time and again studios and the artists working within them have been found to make valuable contributions to community cohesion, creating vibrant and active places. However, artists are often indirect victims of their own success, and having contributed to positive place making in an area, may find that they are no longer able to afford to remain there once property values begin to rise.

Vulnerability – a precarious situation

The affordable artists' workspace sector as a whole occupies premises with a range of tenures: 51% on rented or otherwise licensed terms. This makes many studios vulnerable to change of use or development should the landowner consider more profitable uses.

Even amongst the 20 largest artists' workspace providers, secure tenure of

premises was an issue, with 35% of their property stock reportedly under threat within the next 10 years. Furthermore, within the next 5 years 28% of artists' studios are under threat as operators do not expect to be able to renew leasehold/ rental agreements to secure their premises, demonstrating the precarious nature of affordable artists' workspace. Increasing land values across London, particularly for residential development, are likely to increase pressure on the sector, as discrepancy between the income potential from artists' workspace and other forms of development becomes larger.

Threats and vulnerability extend beyond property tenure. Artists are among the lowest earners, most making under £10,000 per year from their work¹, so it is crucial to keep the cost of workspace low. Most studio providers operate within a complex web of funding streams as well as public investment ranging from grants to Section 106 allocations in order to maintain low rents.

Affordability – what does it mean?

Affordability is a key deciding factor in the models of artists' workspace provision. It is often prioritised over long term security and quality of space.

The average rent across the main studio providers is £13.73 sq ft per annum, though a significant amount of studio space (19%) is rented at £8 per sq ft. The cost of utilities is an additional costs artists pay beyond the average figure above. These costs vary in relation to condition of building, occupation periods and arts practice. This is significant when looking across the incubator and co-working sector, where comparable rents are often at least £30 sq ft per annum depending on the size and

¹ National median wage for a fine artist in 2010, 'Artist Salary Research', DACS 2010

type of space and the level of support involved². Compounding the challenge of affordable workspace is the overall cost of living which has a significant effect on artists' ability to live and work in London. Some artists' workspace providers do include residential programmes as part of their developments, though such schemes are rare in the capital.

While many artists make their living through a variety of related occupations, it is important to recognise the potential for all artists to fully support themselves through their artistic work. In this sense, artists' workspace should be regarded as part of the wide spectrum of low threshold enterprise space. Creating conditions in which artists can dedicate more time to their artistic career can increase economic success and contribute to London's cultural capital.

Demand – no end in sight

Further research is needed to determine the actual demand for artists' workspace. Studios in our study show very high and continuous occupancy rates, indicating consistent levels of demand. An estimated 3500 artists are on waiting lists. Furthermore, each year 35,000 students graduate from Art & Design Colleges in London³. This, combined with high occupancy rates, gives a picture of sustained pressure on studio and workspace provision. There is no indication that the level of demand has decreased within the last 10 years - our research shows that there are 298 separate studio buildings or sites operating in London.

There is a dynamic relationship between an artist's studio, home and other places of

work that commonly forms a geographical triangle, all impacting on the choices made when seeking a working space. Artists are also reliant on professional networks and dialogue within the creative community, so location can be inextricably linked to career success. Further research is required on occupancy analysis as well as on the type, scale and location of space requirements best suited to artists' needs going forward.

Some of the recommendations made here are linked to the need for more research to give further depth and understanding of current and future provision in London. However, having established the loss of over 3000 places of work in this sector within the next 5 years, immediate intervention is needed.

Affordable artists' workspace is a valuable, yet vulnerable asset in London. This report demonstrates that the sector is largely reliant on providers operating on a not for profit or charitable basis in order to keep rents within reach. Given the ever increasing property values across London, it is clear that the market will not by itself address sustained provision, thus jeopardising this key component of London's cultural and social vibrancy. Many of the organisations which provided information for this study have worked intensively with public sector partners, as well as private developers, to realise their buildings. The importance of public sector involvement in this area cannot be overstated. The key issues arising are how to:

1. Grow

Maintain and grow supply of spaces with a long term view – 3500 spaces in the next five years at a minimum.

2. Strengthen

Reduce vulnerability through changes in planning and rising property values – one

2 'Supporting Places of Work: Incubators, Accelerators and Co-working spaces', URS, 2014
3 pg. 110 'World Cities Cultural Report', Mayor of London, 2010

example might be to work with publicly owned property or land.

3. Influence

Build on existing models of workspace provision to make the case to developers and Local Authorities alike and influence future development.

4. Facilitate

Link appropriate providers with the correct facilities, whether in new developments or existing buildings, to achieve the best value for the wider community. This should be considered alongside potential for complementary local place making.

5. Imagine

Develop a new, imaginative solution for London's particular ecology based on the level of workspace provision needed.

Introduction

Objectives

This Artists' Workspace Study aims to establish an accurate picture of affordable studio provision for artists in London.

The intention is that this will create a list of all London's Artist Studios on the Mayor's 'London.Gov' website that can cohabit with a related study on Incubators, Accelerators and Co-working spaces, in the form of an interactive map. This will give an accurate picture of current supply of low-threshold workspace, thereby helping the Greater London Authority understand future demands around affordable workspace provision.

The ultimate aim is that this evidence - when combined with further research - can be used to better understand the significance of affordable artists' workspace to London's cultural offer, to identify risks to its future provision and to make recommendations to support a vibrant future for London's artist population.

Report Structure

This report is presented in the following sections:

Initial Audit - Given the limited timescales within which this study has been undertaken (March - April 2014), the study began with an exercise to quickly establish an accurate overview of type and location of artists' studios within London.

Detailed Survey - Having gained an overall picture of artists' studio space in London through the Initial Audit, the 20 largest artists' workspace providers were re-approached to provide more detailed quantitative and qualitative information about their premises.

Studio Typologies - From both the Initial Audit and the Detailed Survey, we have been able to identify a number of differing models and features of artists' studio provision. This section summarises key points of each type, which must be understood if suitable recommendations are to be made to support their futures.

Recommendations - Based on the Key Findings, here we recommend steps to extend and continue this study, and potential methods to support London's artists' studio space provision in the future.

Survey Methodology

1. Initial Audit

This initial undertaking was devised to quickly and accurately ascertain an overview of type and location of artists' studio workspace across London. The information collected through this survey was intentionally simple to ensure high provider participation in establishing an overview.

Using an online form and automated spreadsheet populating setup, We Made That, the Greater London Authority, local authorities, artists' workspace providers and occupiers were able to register basic details of artists' studios as part of this audit.

The online form could be used to be further populated directly and independently by providers and the Greater London Authority after the initial round of completed research. This can be used to continue to build a picture of artists' studios across London, where studios are often independent, informal or not part of wider network, and can therefore be difficult to locate.

The initial audit form is available to view and access here:

<https://docs.google.com/forms/d/1y6KYk5DezulOqEazvUTefHc3NnNcJGkK0iyGPu1V73o/edit>

2. Detailed Survey

This portion of the study adds depth to the gathered directory from the Initial Audit. A detailed follow-up focused on the 20 'top tier' artists' workspace providers in terms of number of artists' studio workspaces. The questionnaire was tailored to the findings of the initial audit and was also consistent with elements of the recent Incubators, Accelerators & Co-working Spaces study.

Using the contact details submitted in the initial stage, the 20 largest providers were approached by phone and followed up by email. A further online form was provided and details were gathered under the following headings:

1. Studio provider profile
2. Basic information about the premises
3. Artists' rent and waiting lists
4. Profile of occupants
5. Facilities, provision and management

The online form was also provided to smaller artists' workspace providers who opted-in to participating in the detail survey. The same questionnaire was used, but was not followed-up by phone.

The detailed survey form is available to view and access here:

<https://docs.google.com/forms/d/1HrTrBymmdpax0mBsbFHiMA3NLSI59cVrQkTxBSO6q8/viewform>

Key Definitions and Parameters

Defining 'Artists'

The purpose of this study is to gain a wide-ranging understanding of the kinds of spaces that it is possible for artists to work in. The driver is to understand pressures on artists' workspace and the gap in affordability between market values and viable rent levels in spaces for making art.

The emphasis in this study is on the fine artist whose visual output and medium 'involves the production of original works of research, exploration or artistic expression, either one-of-a-kind or in a limited number of copies, conveyed through painting, sculpture, the print arts, drawing, illustration, photography, textile arts, installations, performance, digital arts, interactive arts, sound art, video art, interdisciplinary arts or any other form of expression of a similar nature.'¹

We understand there are crossovers between fine artists and craft disciplines and there are 'a multitude of different cultural workers who play an essential role in the chain of artistic creation but are not specifically designated as artists.'²

Given the necessity to understand the viability of a spectrum of artistic practices in London, artistic practices in this context are 'not driven by commercial gain (although they are by no means prohibited from having this). The approach to the production of art is driven by the artist, not the client.'³

We recognise that there will inevitably be

a range of activities taking place in studio spaces within this variegated sector. Even amongst top tier artists' workspace providers, there are varying attitudes towards fine art practice and wider creative design and craft practices being undertaken in affordable workspace. For the purposes of this study, we have therefore primarily discriminated on the basis of affordability, rather than activity. As such, spaces included in this survey, may not be predominantly occupied by artists, provided that they meet the criteria below.

Affordable artists' workspace

We are particularly interested in understanding differing models of providing affordable artists' space. We recognise that the opportunities and challenges in supporting all kinds of creative space is not a one-size-fits-all equation, but for the purposes of this study some parameters have been defined to ensure robust recommendations can emerge from the survey.

Therefore, the following parameters must be met for inclusion in this particular study:

- Premises/ Organisation must provide for a minimum of at least five artists' studios or support five artists (even if other workspace or living provision is included in the building).
- The studio workspace cannot be subsidised/ affiliated with education institution for the sole use of graduates or students. It must be available to access on the open market, although some selection criteria may apply.

1 pg. 7 'Montreal Metropole Culturelle Report on Artists' Studios', by the Task Force on Artist Studios, October 2012

2 pg. 8 'Montreal Metropole Culturelle Report on Artists' Studios', by the Task Force on Artist Studios, October 2012

3 pg. 9 'Research and viability study of affordable and managed workspaces supporting artistic practices in East London', by Renaisi for LLDC, February 2014



1. Initial Audit

Summary of outcomes

Audit Responses

This Initial Audit revealed the extent of artists' workspace provision in London as being far higher than previously recorded (112 studio buildings estimated in 2010¹, and 72 studio buildings estimated in 2004²). However, there is a need for some caution to be exercised when comparing these studies as they have used differing parameters for inclusion of studios.

- This audit has identified 298 separate studio space sites/ buildings in London.
- 76 organisations responded to the audit. They provide 219 studio space sites/buildings, encompassing more than 6070 studio spaces.
- The audit directly identified studio provision for at least 8600 artists. It can be expected that this figure is below the actual number of artists 'profiled' (at approximately 11,500).
- The 20 largest artists' workspace providers manage premises manage 129 separate studio space sites/ buildings between them. These account for 60% of provided artists' studios and artists in London.
- We have 'profiled' a further 79 studio space sites/ buildings in London through our research. We have not been able to procure data from these for the purposes of this audit beyond post codes.
- We recognise that the amorphous and changeable nature of how artists' workspace is provided means that this audit is not exhaustive, and that other studios will exist beyond those identified.

1 pg1, 2010 NFASP survey results, Key findings and conclusions

2 pg7, LONDON DIGEST: A survey of artists' studio groups & organisations in London, Acme, 2004

Organisation type

The Audit shows that provision of affordable artists space is primarily met by charitable or not-for-profit organisations.

- More than 82% of artists' workspace providers explicitly aim to supply affordable space, or provision through charitable or not-for-profit endeavours.
- Only 5 organisations class themselves as a 'Commercial workspace providers or Developers'. The term 'entrepreneurial' would better articulate the approach these organisations take in providing affordable artists' workspace.
- A fair characterisation of the lower 40% of provision would typically be insecure short term tenancy, single building operators.

Premises tenure

Lack of security in premises tenure is a common feature in the sector, although this may be directly related to its affordability.

- 51% of artists' workspace organisations are operating from rented, or otherwise licensed, space and therefore lack long term security.
- 17% are owned under freehold.

Average studio rent

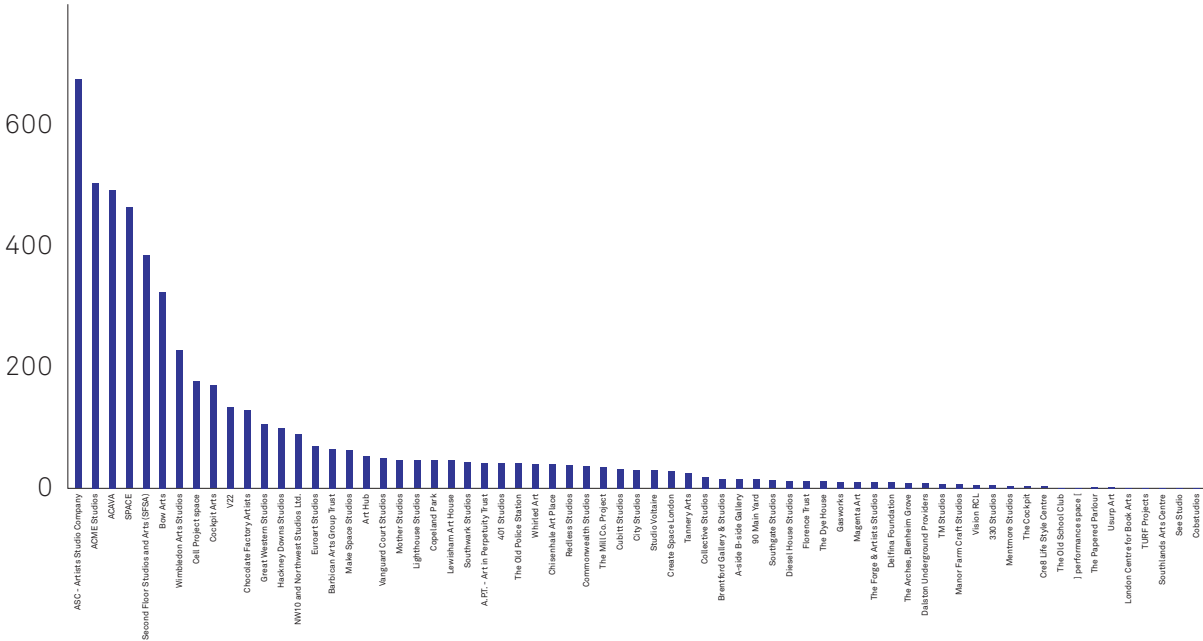
There is a trend towards increasing rental values in comparison with previous studies.

- In 2004 the average studio rent was £7.54 per sq. ft per annum, in 2010 this average was identified as £9.72. Adjusted for inflation, this would equate to £10.10 per sq. ft per annum in 2014 terms.
- This audit has found that more than half (56%) now have average studio rent of more than £11 per sq. ft per annum.

Distribution by Provider

Number of studios

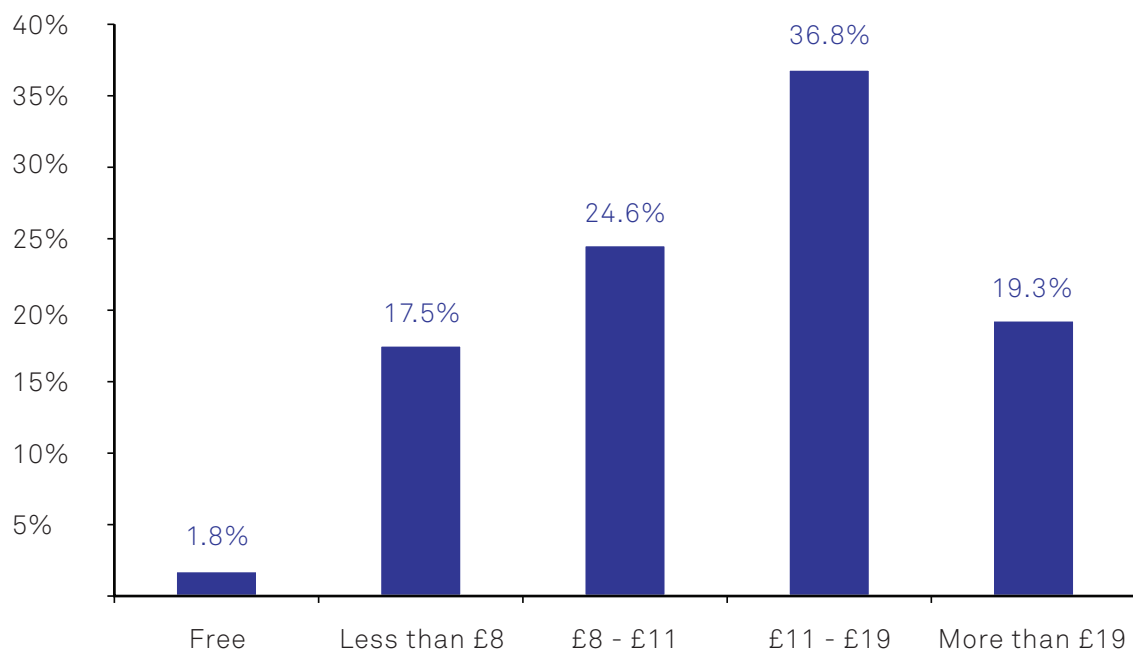
All respondents to survey



Average Studio Rents

Arranged by £ per sq ft per annum

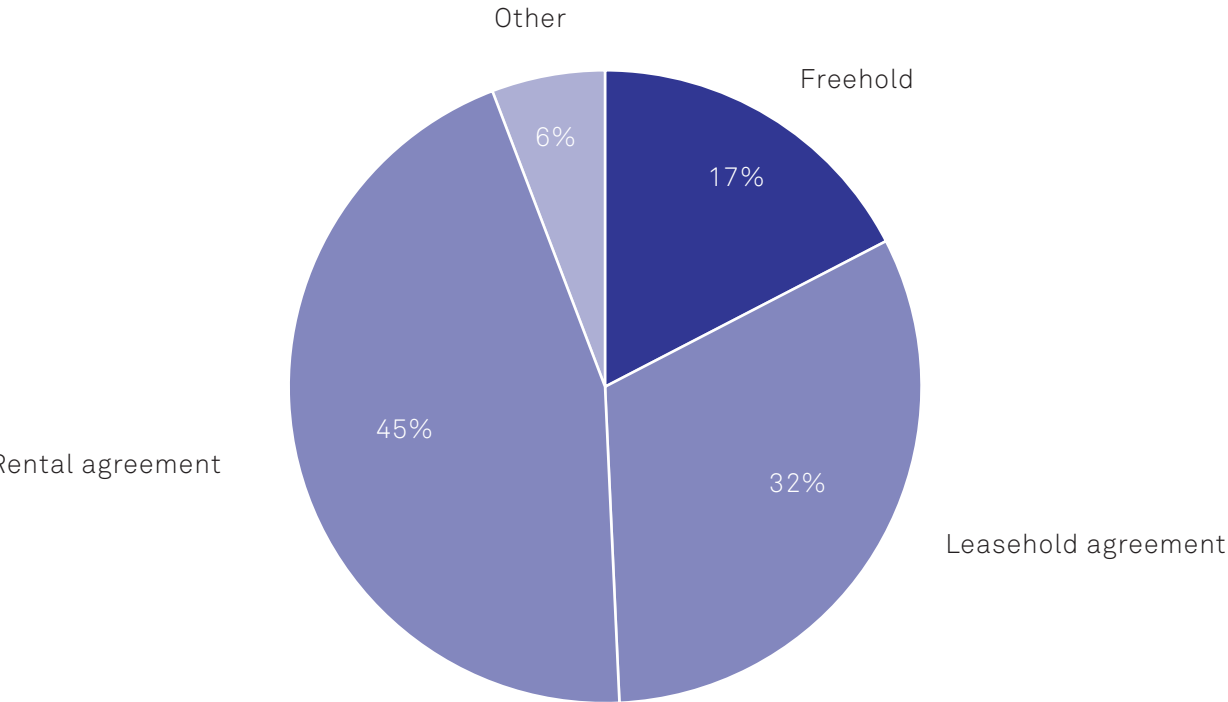
Respondents from Part 1 Audit
(note detailed analysis later in this report)



Premises Tenure

% type by organisation's main portfolio

Respondents from Part 1 Audit



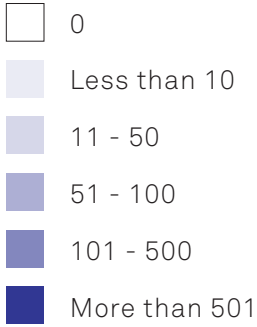
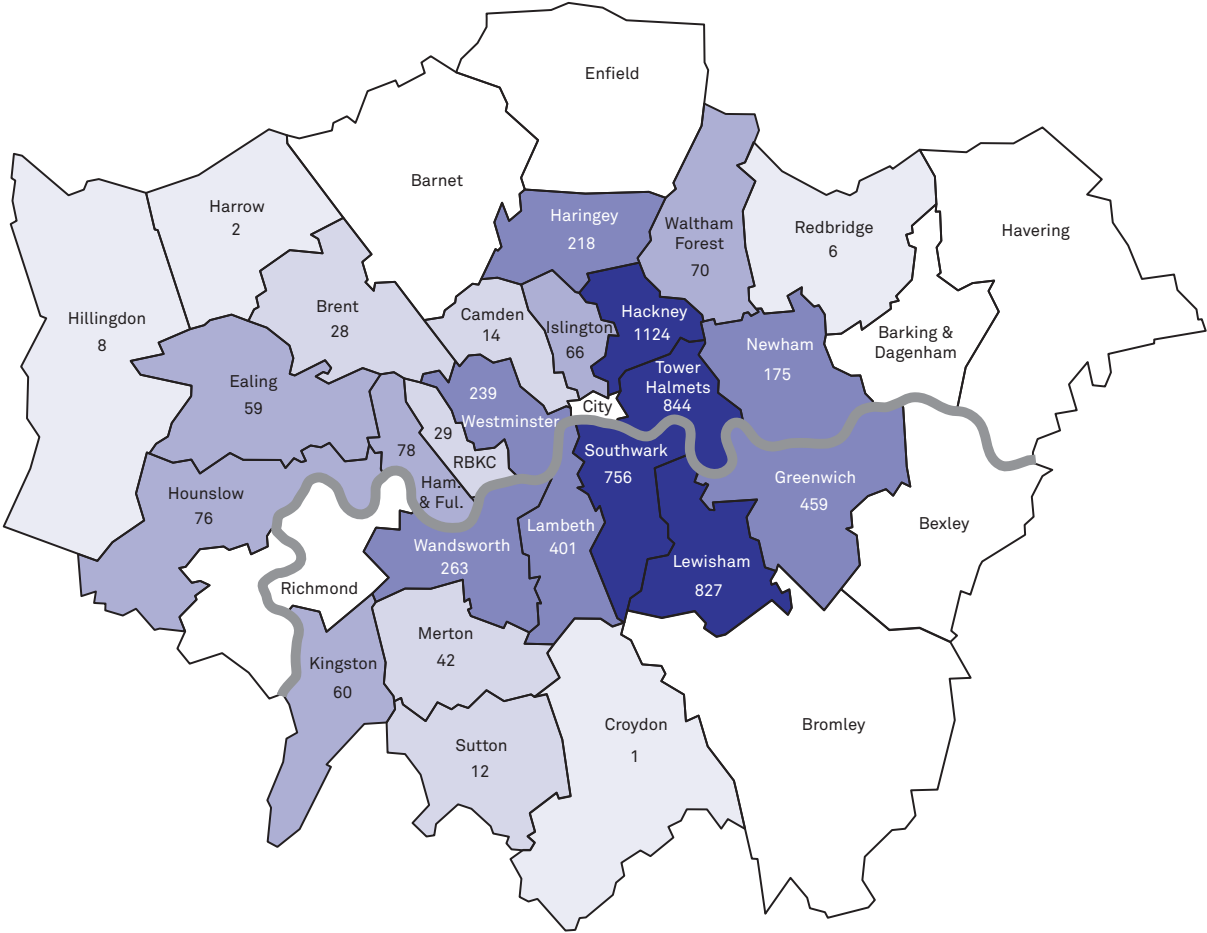
Explanatory note:
Respondents were requested to select to the above terms of premises tenure. This study interprets these as 'Freehold'; ownership of the property, 'Leasehold agreement'; where the provider has a business tenancy for a fixed-term (e.g. 10 or 25 years) and where

rent is paid and it may or may not be that at the end of term the tenancy can be renewed, 'Rental agreement'; where short-term or informal agreements, which are essentially insecure, and where notice may be given at any time.

Geographic Distribution

By number of studios

All respondents



Artists' workspaces overview



ACME Matchmakers Wharf, Hackney
Studios 49 Artists 57



A.P.T - Art in Perpetuity Trust, Lewisham
Studios 42 Artists 43



Studio Voltaire, Lambeth
Studios 30 Artists 63



A.P.T - Art in Perpetuity Trust, Lewisham
Studios 42 Artists 43



Hackney Downs Studios, Hackney
Studios 100 Artists 300



Bow Arts SE1 Studios, Southwark
Studios 110 Artists 140



Brentford Gallery & Studios, Hounslow
Studios 16 Artists 18



Euroart Studios, Haringey
Studios 70 Artists 80



Brentford Gallery & Studios, Hounslow
Studios 16 Artists 18



Make Space Studios, Lambeth
Studios 64 Artists 95



Chisenhale Art Place, Tower Hamlets
Studios 40 Artists 40



Make Space Studios, Lambeth
Studios 64 Artists 95



Redlees Studios, Hounslow
Studios 38 Artists 38



Second Floor Studios & Arts 2, Greenwich
Studios 390 Artists 400



Redlees Studios, Hounslow
Studios 38 Artists 38



330 Studios, Southwark
Studios 6 Artists 6



Southwark Studios, Southwark
Studios 43 Artists 50



Southwark Studios, Southwark
Studios 43 Artists 50



The Old Police Station, Lewisham
Studios 41 Artists 50



The Old School Club, Wandsworth
Studios 1 Artists 8



V22 Axion House, Lewisham
Studios 62 Artists Unspecified



Gasworks, Lambeth
Studios 11 Artists 12



V22 Drummond Road, Southwark
Studios 20 Artists 25



Gasworks, Lambeth
Studios 11 Artists 12



401 Studios, Lambeth
Studios 42 Artists 46



401 Studios, Lambeth
Studios 42 Artists 46



90 Main Yard, Hackney
Studios 15 Artists 23



ASC Artists Studio Company, Southwark
Studios 120 Artists Unknown



ASC Artists Studio Company
Studios 700 Artists 950



ACAVA Blechynden Street Studios,
Kensington and Chelsea
Studios 20 Artists 24



ACAVA Blechynden Street Studios,
Studios 20 Artists 24



Artistic Spaces Ltd Unit 10, Lewisham
Studios 100 Artists 5



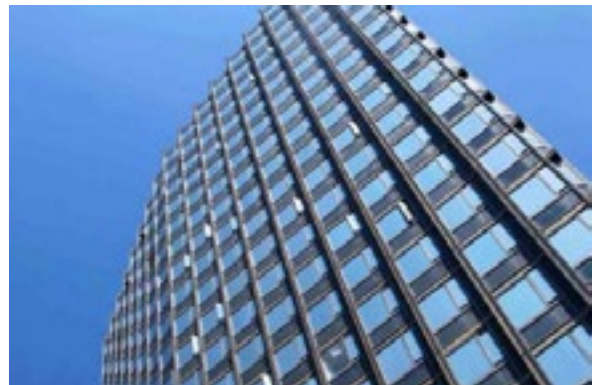
Cockpit Arts, Camden
Studios 170 Artists 170



Chocolate Factory Artists, Haringey
Studios 130 Artists 180



Cockpit Arts, Camden
Studios 170 Artists 170



Create Space London, Brent
Studios 28 Artists 30



Create Space London, Brent
Studios 28 Artists 30



Dalston Underground Studios, Hackney
Studios 8 Artists 12



Delfina Foundation, Westminster
Studios 8-10 Artists 8



Florence Trust, Islington
Studios 12 Artists 11



Florence Trust, Islington
Studios 12 Artists 11



Great Western Studios, Westminster
Studios 106 Artists 45 (capacity 300)



Lewisham Arthouse, Lewisham
Studios 46 Artists 52



Lewisham Arthouse, Lewisham
Studios 46 Artists 52



Lighthouse Studios, Hackney
Studios 65 Artists 200



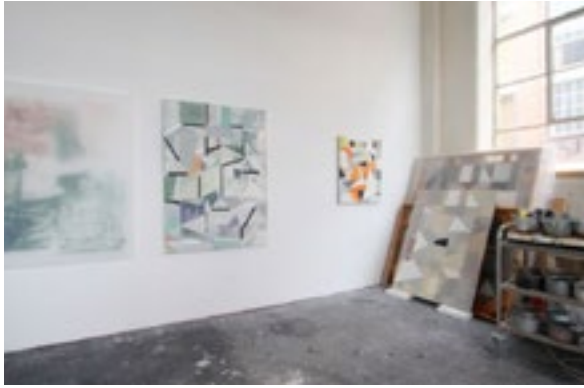
London Centre for Book Arts, Tower Hamlets
Studios 1 Artists 12



Mentmore Studios, Hackney
Studios 4 Artists 47



SPACE Arlington, Islington
Studios 13 Artists 13



Tannery Arts, Southwark
Studios 25 Artists 40



The Papered Parlour, Lambeth
Studios 2 Artists 24



Usurp Art, Harrow
Studios 2 Artists 10



Vision RCL, Redbridge
Studios 6 Artists 9



Wimbledon Art Studios, Wandsworth
Studios 228 Artists 260



2. Detailed Survey

Largest 'top tier' artists' workspace providers

Through the Initial Audit, the 20 largest artists' workspace providers - based on the number of artists' studios under their management within London - were identified to participate in the Detailed Survey.

These *alone* account for 129 individual sites/buildings housing artists' studios, containing 4330 studios and more than 6000 artists, as follows:

- 1. ASC - Artists Studio Company**
12 sites/ buildings
671 studios
- 2. ACME Studios**
14 sites/ buildings
504 studios
- 3. ACAVA**
20 sites/ buildings
491 studios
- 4. [space]**
18 sites/ buildings
468 studios
- 5. Second Floor Studios & Arts (SFSA)**
8 sites/ buildings
390 studios
- 6. Bow Arts Trust**
7 sites/ buildings
320 studios
- 7. Wimbledon Art Studios**
2 sites/ buildings
228 studios
- 8. Cell Project Space**
7 sites/ buildings
175 studios
- 9. Cockpit Arts**
2 sites/ buildings
170 studios
- 10. V22**
5 sites/ buildings
129 studios
- 11. Chocolate Factory / Collage Arts**
2 sites/ buildings
130 studios
- 12. Great Western Studios**
1 sites/ buildings
106 studios
- 13. Hackney Downs Studio**
4 sites/ buildings
100 studios
- 14. NW10 & Northwest Studios Ltd**
4 sites/ buildings
90 studios
- 15. Vanguard Court Studios**
11 sites/ buildings
50 studios
- 16. Euroart Studios**
1 sites/ buildings
70 studios
- 17. Makespace Studios /Studio 180**
3 sites/ buildings
64 studios
- 18. Barbican Arts Group Trust**
3 sites/ buildings
65 studios
- 19. Art Hub**
3 sites/ buildings
66 studios
- 20. Mother Studios**
2 sites/ buildings
43 studios

Summary of Outcomes

Organisation structure

The 20 largest artists' workspace providers account for the majority of London's artists' studios (58% of total number surveyed).

- The 20 largest artists' workspace providers manage 129 separate studio space sites/ buildings between them, encompassing 4330 studios for at least 6000 artists.
- Of the 20 largest artists' workspace providers, more than half (55%) operate their organisations wholly or partially as a charitable/ not-for-profit enterprise.
- Of the 20 largest artists' workspace providers, those who have a charitable/ not-for-profit remit currently account for 75% of artists' studios on offer by these providers.
- Some organisations structure their operation as a combination of registered charity, limited company and not-for-profit activity to meet demands of specific artists' workspace sites/ buildings.

Type of building occupied

Artists' studios typically occupy existing buildings, rather than purpose built property.

- Occupation of existing buildings is the overwhelming norm, including an ex cash'n'carry, council offices, department store, vicarage as well as ex-industrial buildings.
- Supplying purpose-built provision is an option rarely available to artists' workspace providers, and new or purpose-built artists' workspace amounts to 6% of the overall offer of studios across London.
- Nearly all of the purpose-built artists' workspace is delivered through

mixed use development (inc. student accommodation and residential), but this currently only accounts for 186 artists studios (around 224 artists).

Premises tenure

Larger artists' workspace providers were comparatively less likely to occupy rented premises than the total sample.

- Of the 20 largest artists' workspace providers responders 16 sites/ buildings are owned freehold, which amount to 1175 artists' studios.
- 71 sites/ buildings (2596 studios) are under leasehold agreement and 7 sites/ buildings (208 studios) by rental or license agreement.
- There is a clear preference for freehold or leasehold premises over rental, with 95% of premises tenure being secured, compared with 49% in the Initial Audit sample.

At risk

Despite an apparent preference for higher security tenure, a significant proportion of space managed by these providers is considered under threat within the next 10 years, and the bulk of this threat may be brought to bear in the coming 5 years.

- Within the next 5 years, nearly a third (1101) of artists' studios are under threat as operators do not expect to be able to renew leasehold/ rental agreements to secure their continuance.
- Within the next ten years more than 35% of artists' studios are under threat. Beyond these, those not formally secure are also susceptible to change within the next ten years.

- 30% (1175) of artists' studios are considered by their operators to be secure in the long term.
- Anecdotally, the smaller artists' workspace providers outside the largest 20 are more precariously situated and therefore the level of vulnerability is likely far higher.

Waiting lists

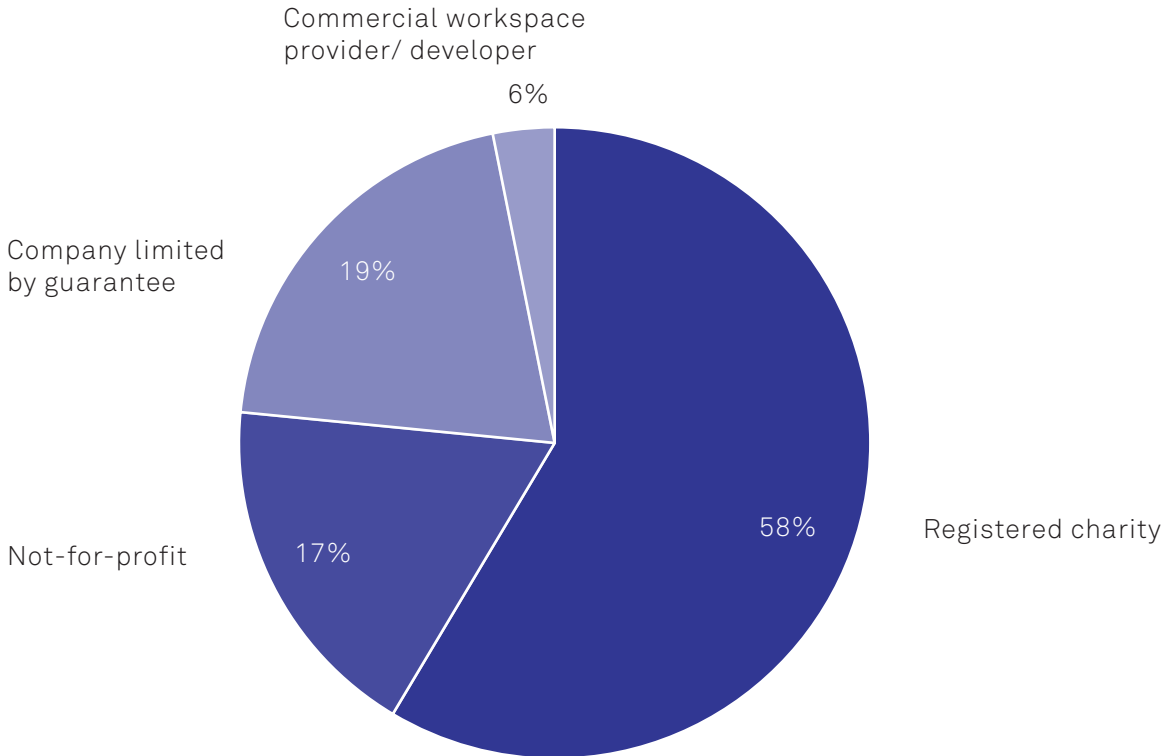
Waiting lists are an unreliable method of quantifying overall demand for affordable artists' workspace. However, they can give an indication of demand levels in certain areas.

- Waiting lists vary greatly, but based on the gathered data it is not uncommon to find waiting lists for specific studio blocks to be in triple or quadruple figures (of course the same applicant may appear on multiple waiting lists).
- As a ratio of number of studios to waiting list numbers, our survey has revealed a range from 160% to 2000% in specific instances.
- Anecdotally, factors in waiting list length relate to location and rent, but also more qualitative considerations.
- Demand levels are significant enough to warrant some providers charging artists to register on waiting lists.

Organisation Type

% type by organisation's number of studios

Respondents from the 20 largest artists' workspace providers

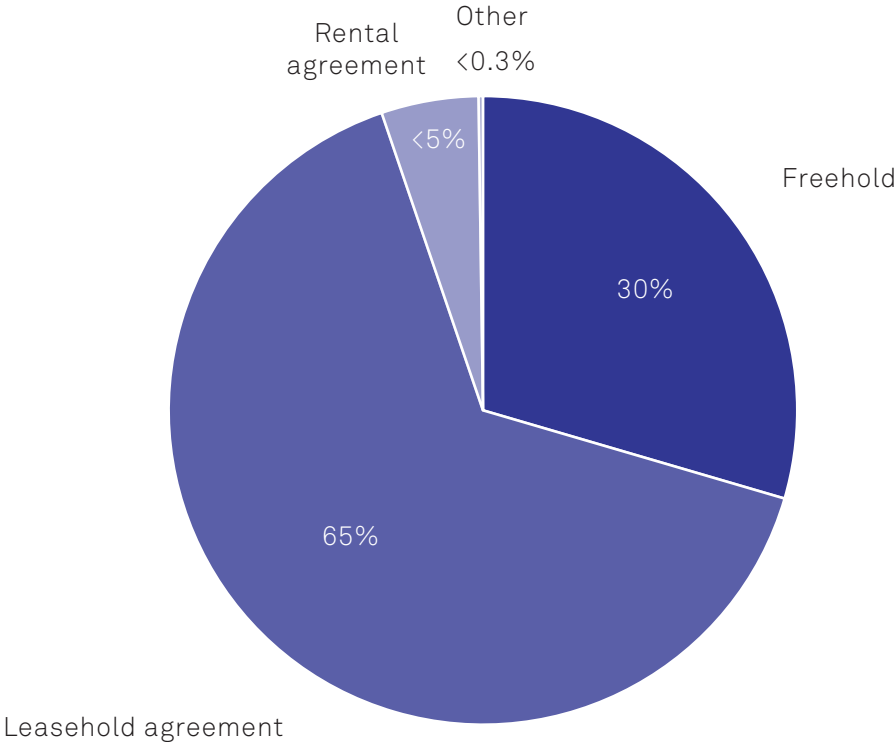


Explanatory note:
Very few organisations class themselves as a 'Commercial workspace providers or Developers'. The term 'entrepreneurial' would better articulate the approach these organisations take in providing affordable artists' workspace.

Premises Tenure

% type by number of studios

Respondents from the 20 largest artists' workspace providers

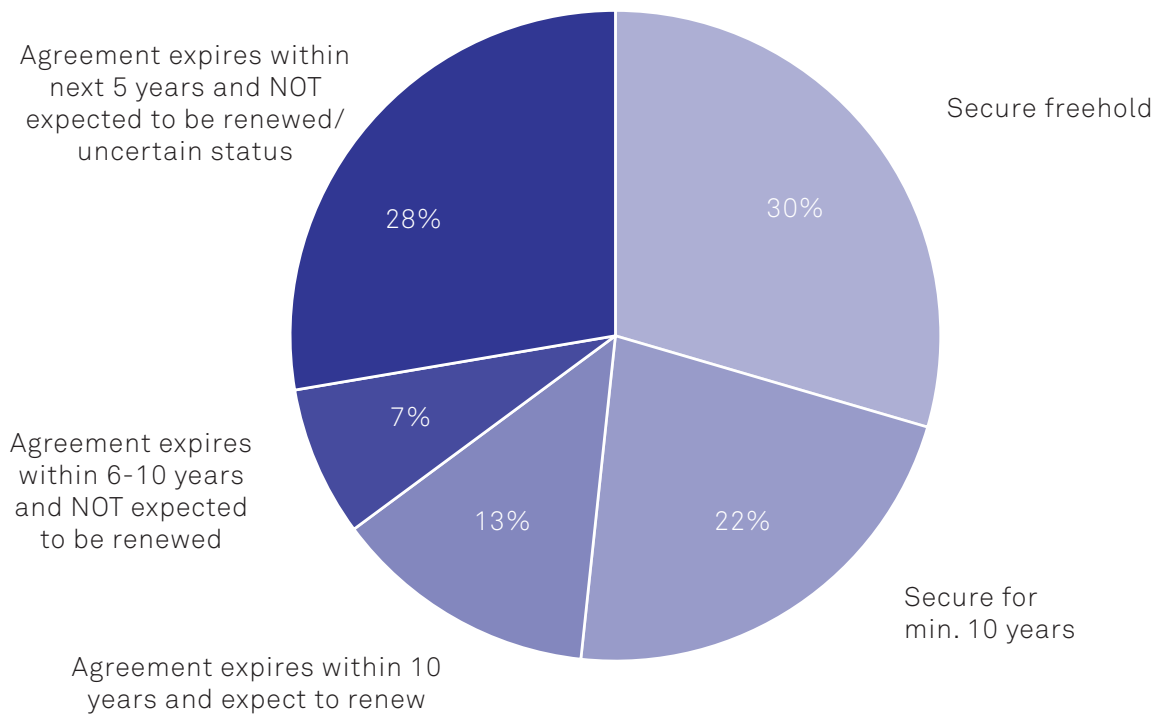


Explanatory note:
Respondents were requested to select to the above terms of premises tenure. This study interprets these as 'Freehold'; ownership of the property, 'Leasehold agreement'; where the provider has a business tenancy for a fixed-term (e.g. 10 or 25 years) and where

rent is paid and it may or may not be that at the end of term the tenancy can be renewed, 'Rental agreement'; where short-term or informal agreements, which are essentially insecure, and where notice may be given at any time.

'At Risk' Studios % type by number of studios

Respondents from the 20 largest artists' workspace providers

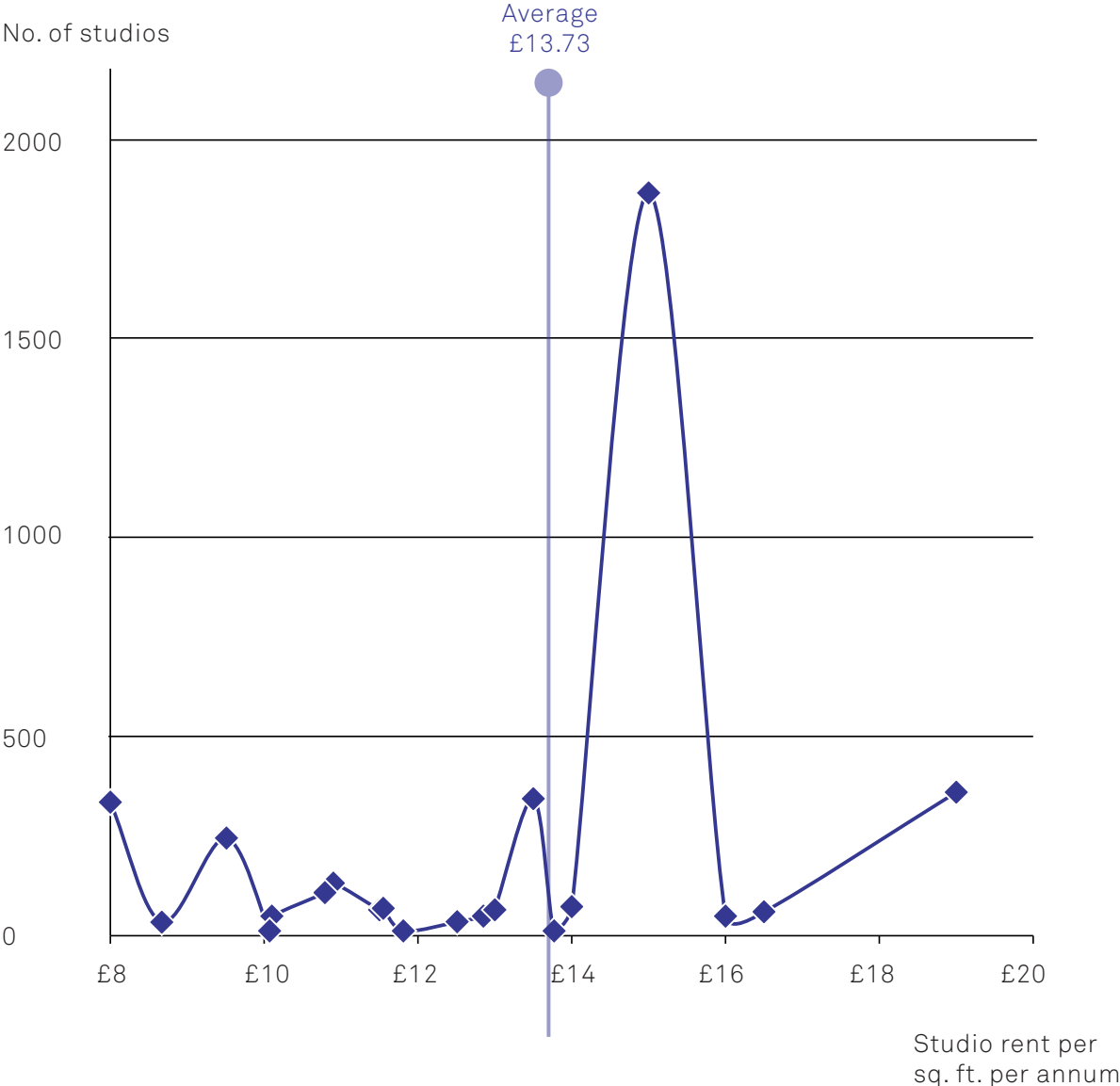


	Freehold	Leasehold Agreement	Rental Agreement	Other
Secure freehold	1175			
Secure for min. 10 years		882	90	
Agreement expires within 10 years and expect to renew		434		
Agreement expires within 6-10 years and NOT expected to be renewed		297		
Agreement expires within next 5 years and NOT expected to be renewed/ uncertain status		983	109	9

Average studio rent

By number of studios

Respondents from the 20 largest artists' workspace providers



The only additional charges artists pay, beyond the figures above, are utilities. These costs vary in relation to condition of building, occupation periods and arts practice.

Studio Typologies

Research and Identification

Through the Initial Audit and Detailed Survey research, we have identified a wide variety of models of provision for affordable artists' workspace. Structures vary on an almost site-by-site basis and in a sector characterised by scarce resources, providers have developed a number of strategies in order to meet demand. It is important to understand these typologies if suitable recommendations are to be made to support affordable artists' workspace in the future.

To accurately reflect the diversity of provision, overleaf we describe a series of studio typologies. These are not intended to be exclusive to one another, and there may be sites which fall under multiple categories. We have focused on highlighting sites with defining features in terms of their provider, tenancy, management, premises or facilitation:

Provider-specific:

Overview of provider types for affordable artists' studio space in London.

Tenancy-specific:

Studios with non-conventional tenancy terms, i.e. not rented space.

Management-specific:

Studios with management structures that support affordability.

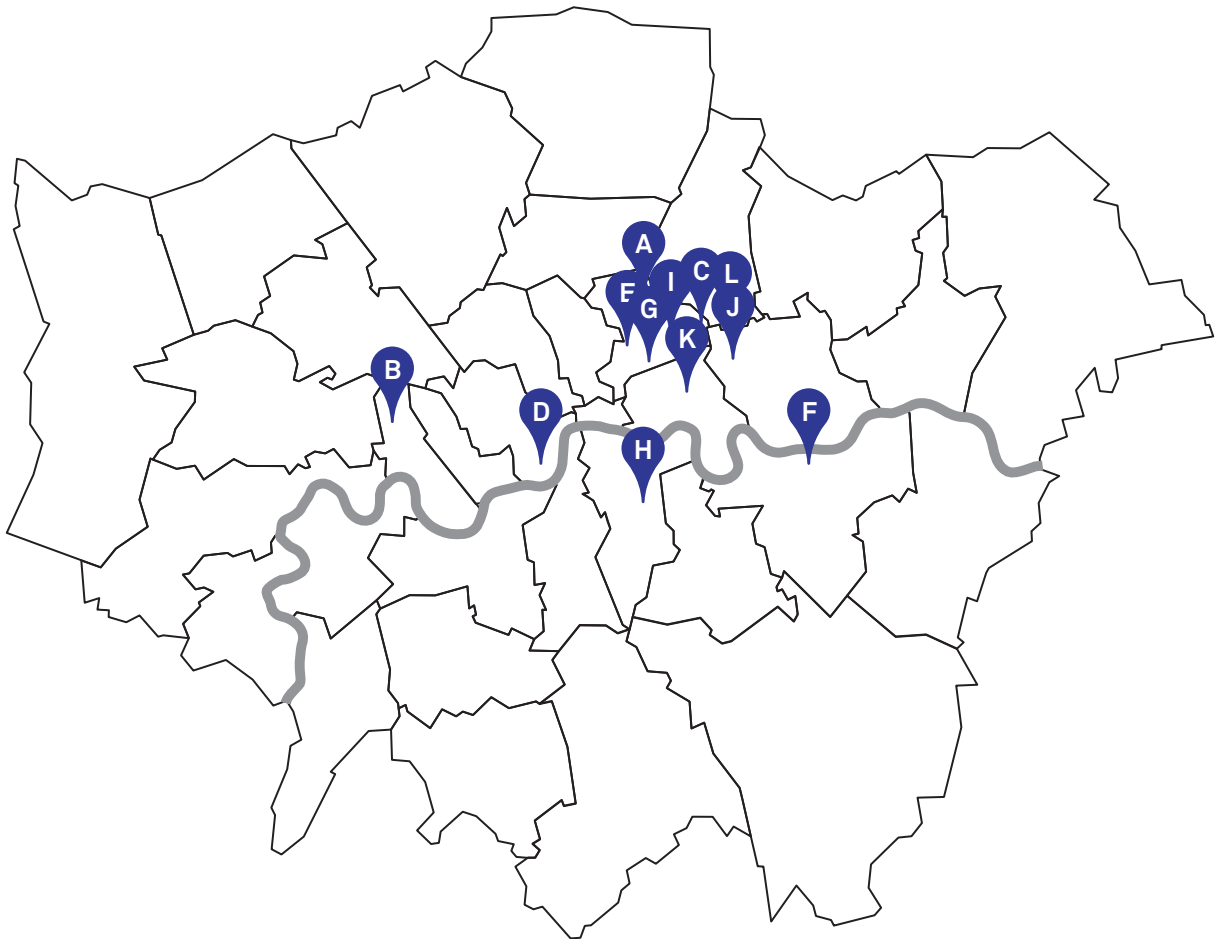
Premises-specific:

Studios with particular spatial characteristics.

Facilitation-specific:

Studios delivered or made available through mechanisms other than conventional property freehold, leasehold or tenancy by a artists' workspace provider.

Typology Example Locations



Provider-specific

- A. Charitable/ non-profit: SPACE
- B. Commercial: NW10 Studios
- C. Self-organised/ artist-led: Mother Studios

Tenancy-specific

- D. Residency space: Delfina Foundation
- E. Temporary occupation: Open School East
- F. Facilities & skills: Thames Barrier Print Studio
- G. Live/ work scheme: Bow Arts/ Poplar HARCA

Management-specific

- H. Voluntary co-op: Lewisham Arthouse

Premises-specific

- I. Cultural benefit and exchange: Chisenhale Art Place
- J. High street peripheries: Stratford Studios

Facilitation-specific

- K. New build planning gain: Matchmakers Wharf
- L. Significant artist support: YBA Studio



Provider-Specific: Charitable/ Non-profit

Affordable artists' workspace, by its definition, is likely to be provided by those who seek to support artists, rather than generate profit. Of the 20 largest artists' workspace providers, 55% operate wholly or partially as charitable or non-profit enterprises, which accounts for 77% of artists' studios on offer from the largest providers.

Example - SPACE

Key Facts

- SPACE is a leading visual arts organization providing workspace, advocacy, artist support and promoting innovation. SPACE is a social enterprise constituted as a company limited by guarantee and a registered charity.
- SPACE, established in 1968, is now the largest provider of studio space in London, occupying 17 sites across 7 boroughs, mainly focused in East London. Buildings include The Triangle, 129-131 Mare Street in London Fields (since 2001), The White Building, White Post Lane in Hackney Wick (since 2012), Martello Road Studios in London Fields (since 1971), Haymerle Road Studios in Peckham (since 2011).
- Occupying 468 studios totalling 246,715 sq ft of creative workspace across 17 sites.
- Supporting over 700 artists and creative businesses in affordable workspace and supporting a further 700 people through specialist creative business advice.
- Team of 20 staff.
- Emphasis on innovative learning and outreach, SPACE engages 15,000 people a year through public programming, from learning and creative programs to exhibitions, skills, resources and business support. A wide range of programs attract diverse audiences, from a weekly free co-working 'Jelly' open to local businesses to creative projects with local schools and employing SPACE artists.

Existing Provision

In 2014, charitable and non-profit providers account for a high proportion of the available artists' workspace in London. The most common type of registered charity providing affordable studio space is an educational charity delivering public benefit through educational activities, rather than provision of affordable space per se. In the future, with particular respect to funding and property climates, this picture may change significantly.

Vulnerability

Property tenure varies greatly between registered charitable or non-profit providers. Some are able to operate from donated properties and are therefore highly secure, whilst others occupy their sites on rented terms and so are vulnerable to lease renegotiation and to rental cost increases. Charitable organisations, including SPACE, may seek additional grant funding beyond rental incomes, and are therefore financially vulnerable to cuts in arts funding from the public sector.

Affordability

The charitable and non-profit status of these providers is directly linked to their ability to offer affordable space to artists. In the case of SPACE, rents vary across sites from £9.40 to £18.95 per sq ft and studios sizes vary from 100 sq ft to 1,400 sq ft. The average inclusive rent across all SPACE buildings is £13 per sq ft per annum, inclusive of rates, there are no service charges, only additional charge is for electricity which is metered per studio.

Demand

As stated above, 77% of artists' workspace offered by top tier providers is operated by either wholly or partially charitable or non-profit organisations. This accounts for a significant proportion of London's overall artists' studio provision, and is therefore a major contributor to satisfying demand. The affordability and quality of the provision is key to the high levels of demand. This is exemplified by SPACE by their long waiting list and high occupancy rate.



Provider-Specific: Commercial

Only 5 organisations in the Initial Audit of 70 respondents classed themselves as 'Commercial workspace providers or Developers'. In the affordable creative workspace sector, even providers who identify themselves as 'commercial' are generally offering property below market rates, and are therefore likely to be supporting artists' as a primary goal rather than being purely profit-seeking.

In simple terms; the reason for operation is not primarily commercial. This is corroborated by the high numbers of charitable or non-profit organisations in the sector. It is also worth noting is that having charity or not-for-profit status is likely to be financially beneficial for providers, and does not exclude viable, entrepreneurial businesses being run under such structures.

Example - NW10 Studios Ltd, Willesden Junction

Key Facts

- Operates 90 studios across 4 buildings in North West London under NW10 Studios Ltd and North West Studios Ltd.
- Established in 2006 by artist, Markus Blattmann.
- Studios sized between 88 and 500 sq ft.
- Spaces rented at more than £19 per sq ft per annum.

Existing Provision

As stated opposite, self-identified 'commercial' providers account for a low proportion of supply.

Vulnerability

Commercial developers may seek to use their properties for profitable ends, dependent on their commitment to supporting artists. Tenants are therefore potentially at risk if the provider feels that other uses, including redevelopment are likely to bring higher returns.

Affordability

Of those artists' workspace providers declaring themselves to be commercial, all were offering space at the higher rental value categories: £11-19 or +£19 per sq ft per annum.

However, to successfully secure tenants commercial providers must be competitive within the wider market. This has the effect of keeping commercial rental rates in line with the upper end of the artists' workspace market. Commercial opportunity is therefore limited by artists' requirement for rents below the general market level and by providers who may be in receipt of subsidy or receive business rates relief. Survey returns reflected this, and some private operators were reluctant to provide commercially sensitive information.

Demand

Although data was not specifically gathered, this study points towards commercial providers charging higher rates for their properties where demand for affordable space outstrips supply.



Provider-Specific: Self-organised/ Artist-led

With property prices in London much higher than the rest of the country and fluctuating tenancy security, some artists choose to take back control by forming their own artist-led studio groups. However, these ventures often have little financial backing and therefore low stability as freehold properties are becoming less affordable and more difficult to find.

Example - Mother Studios

Key Facts

- Mother Studios provides approximately 43 studio spaces in two sites for approximately 60 fine artists, designers and makers.
- Independent, non-profit, artist-run organisation.
- Set up by an individual (Joanna Hughes) and self-financed in 2001. Property redevelopment and rent increases prompted her to set up on her own.
- Since 2004, space has been set aside for the Mother Project and Exhibition Space which is available free and given preference for use to all Mother artists.

Existing Provision

This type of provision is most difficult to establish accurate numbers for due to its self-initiated nature. Although some providers, such as Mother Studios, are part of the 20 Top Tier artists' workspace providers, many are likely to be smaller in scale. Such spaces can operate independently of wider advertising and communication, often relying on social networks to fill vacancies.

Vulnerability

Due to limited resources, such providers are unlikely to own freeholds of their properties. This makes them vulnerable, particularly as they are likely to be initially attracted to areas of lower property values, which may subsequently be subject to redevelopment. Mother Studios tenancy is currently under threat.

Affordability

As artist-led organisations, these providers understand the pressures of affordability and are likely to maintain low rents, for example, between £8-£11 per sq.ft per annum at Mother Studios.

Demand

These sites are set up in direct response to demand rather than being speculative. However, as with overall numbers, it is challenging to establish firm statistics for demand.



Tenancy Specific: Residency space

These are characterised by spaces run by independent bodies which provide studio residencies to support and nurture the professional development of artists. They rely on the patronage and generosity of others, or grant-funded arrangements to continue and flourish. Typically they facilitate the professional development of cultural practitioners through a specific concentrated period of time and may assist in supporting the transition to functioning as a full-time artist.

Example: Delfina Foundation

Key Facts

- The Delfina Foundation is an independent and not-for-profit foundation with charitable status.
- The Delfina Foundation hosts 30 residencies a year for a maximum 3-month programme. Each season they provide 8 mixed live / work spaces for international artists, curators and writers and the property includes flexible space for living and working.
- In 2007, Delfina established the freehold of two terraced houses SW1E 6DY in central London, Victoria, for use as artists' residency spaces.
- The Foundation is governed by a Board of Trustees and supported by strategic advisors and has links with arts organisations, foundations, institutions and funders. Sponsors, partners and collaborators include Tate, Serpentine, V&A, British Council etc
- Delfina provides a platform to incubate artists' ideas and facilitate artistic exchange by showcasing their work to international peers and the general public through research, networking and public events.

Existing Provision

A number of studio space providers also offer residency programmes: Bow Arts, ACME, SPACE. They can be equally suited to well-funded examples such as the Delfina Foundation as ambitious temporary projects such as Open School East, refer to Studio Typology E.

Vulnerability

Tenancy is secure for the length of the residency. However, in order to maximise the numbers of artists the organisation can benefit, occupancy terms are time-limited and rely on tenancy turnover.

The longer term security of residencies depends upon the occupancy terms of the property and the funding status of the provider. In the case of the Delfina Foundation ownership of the property freehold and access to significant funding through charitable donations or institutions means that its future is secured. Other examples, such as Open School East, are grant-funded, and therefore vulnerable beyond the funding allocation.

Affordability

These spaces are provided at highly affordable rates to the artist tenants, and rely on benefactory behaviour by the providers. Delfina residencies are rent-free, for example. Due to this, providers must seek funding beyond rental incomes, particularly in Central London locations. This may be independent, charitable or grant funding.

Demand

Residencies can attract high numbers of applicants, particularly those that offer additional facilities, living space or travel opportunities. Delfina Foundation residencies can attract hundreds of applicants.



Tenancy Specific: Temporary occupation

Short-term occupation of otherwise redundant or underused sites can provide temporary artist workspace at affordable rates. Short-let spaces may be a product of market forces or sites may be available for 'meanwhile use', pending future redevelopment. These short term schemes can re-activate a site, benefit the local area and may even strengthen links with the neighbourhood directly. Such tenancies can offer benefits to landlords, for whom charitable tenants will reduce business rates liability, and may improve security of otherwise vacant buildings through occupation.

Example - Open School East

Key Facts

- Launched in 2013 and housed in the old Rose Lipman Library, in De Beauvoir Town, Hackney. Its pilot year is commissioned by the Barbican and Create London.
- The programme supports the artistic and professional development of 12 associate artists. Associates are provided with free tuition as well as workspace for the course of 1 academic year.
- Initially funded to run for a year and is working towards becoming a longer-term project.
- There is communal space with studio provision, tuition from international and local practitioners, theorists and curators.
- The school facilitates the sharing of knowledge and skills between artists, local residents, neighbourhood organisations and the broader public, with a commitment to re-activate the former social function of the building.
- The associates take an active role in making the Rose Lipman Building a site for social, intellectual and practical exchanges.

Existing Provision

Through this study, we have become aware of other similar temporary or meanwhile-use schemes, such as Gatehouse Arts, Harlow, run by ACAVA. Some local authorities are also actively encouraging meanwhile uses to address problems of town centre vacancies, for example, the London Borough of Croydon. Due to the temporary nature of these studios, exact numbers are difficult to confirm.

Vulnerability

Such schemes are inherently time-limited. Whilst they can offer affordable workspace, this is at the cost of long term security. However, temporary tenancy can be used as a low-risk means to prove demand for artists' workspace. This may lead to longer term provision being incorporated into development plans, as in Harlow.

Affordability

In compensation for these high-risk tenancies, low or rent free terms are often offered. In the case of Open School East, associates are also asked to contribute towards the project's outreach programme in lieu of rent.

Demand

These tenancies are unlikely to attract established artists or those who require long term security. However, highly affordable terms can make them attractive to young artists, recent graduates or 'hobbyists' for whom price is a deciding factor in securing workspace.



Tenancy Specific: Facilities & skills

There are a number of artists' workspace providers offering open or shared access to studio space, facilities and resources. These support more artists than individual studio space and often cater for a broad range of production methods, although the suitability of such provision will vary from artist to artist. Sometimes these facilities can be rented and used by the public and be a key financial support within a studio's business model.

Example – Thames Barrier Print Studio

Key Facts

- Membership-based fine art print studio founded by Second Floor Studios & Arts (SFSA) as a separate trading arm, Thames Barrier Print Studio Ltd (TBPS) to run/manage print studio provision.
- Extensive facilities available for intaglio, relief printing, screen printing, lithography, letterpress and digital printing.
- SFSA established 17 years ago in Greenwich to tackle the chronic shortage of studio provision in the borough.
- Thames Barrier Print Studio opened in October 2011 represents a major collaboration between a not-for-profit studio provider and a commercial developer (Emafyl Properties).
- Key holder membership allows 24 hour access to experienced printmakers for £80 – 99 per month. Open Access membership also provides technical support - Annual Fee £40-50 and £13 per 3 hour session thereafter (8 sessions run per week). Introductory printmaking courses are also available, and non-members can access the facilities for £55 per day.

Existing Provision

There has been a recent trend towards provision of open access specialist facilities in London. Sites such as the London Centre for Book Arts, Makerversity and Blackhorse Workshop all offer access to shared resources that would be prohibitively expensive for individual practitioners. Such 'collaborative consumption' is becoming increasingly normalised.

Vulnerability

This is likely to be site-specific. In the case of examples such as Thames Barrier Print Studio, high capital costs are likely to mean that longer term security is a requirement for the facility to be viable.

Affordability

By providing artists with access to facilities only, rather than individually designated workspace, providers can increase their audience and therefore offer access at affordable rates. This can be a cost-effective model for artists who may not require separate studio space but still wish to practice, or may be used as an additional resource for artists with space elsewhere.

Such sites provide affordable access to specialist facilities for practitioners for whom purchase would not be possible due to high capital cost,

Demand

As these facilities are accessible to wide audiences demand may be met by fewer sites, open to more people.



Tenancy Specific: Live/ work scheme

In London the high costs of housing makes the financial burden for emerging artists of requiring both living and working space very challenging. This can impact the time artists have available to devote to their creative practice. To secure future artist workspaces that can support artists to live and work in London, more providers are looking to provide both. This social enterprise model supports artists and creative practitioners, and promotes culture within communities in areas that are otherwise unaffordable to live and work in.

Example – Partnership between Bow Arts and Poplar HARCA

Key Facts

- Bow Arts Trust's collaboration with registered social landlord Poplar HARCA (Housing and Regeneration Community Association) is a unique initiative offering artists and creative practitioners access to affordable live/work spaces.
- The scheme over the past 4 years benefited 100 artists in over 70 flats.
- The artists inhabit homes that are awaiting refurbishment or redevelopment. Artists are selected based criteria including their commitment to community engagement as well as their artistic practice.
- The flats are situated in a variety of ex local authority buildings. The sites range from iconic brutalist tower blocks (eg. The Balfour Tower) to smaller low-rise buildings with gardens.
- This 'guardianship' style scheme provides affordable homes at social rent rates for artists at zero cost to the social housing landlord or local authority.
- It creates significant inward social investment directly into the community from the rental income produced.

Existing Provision

The Bow Arts/ Poplar HARCA model is becoming recognised as a viable way forward for social landlords and housing associations to deal with some of the problems encountered in regeneration programmes and hard-to-let properties. These schemes can help maintain community cohesion during regeneration and generate rental income from otherwise unrented properties.

Vulnerability

Under this model, artists agree to vacate properties at the end of a fixed period, thereby allowing the sites to be redeveloped or redecorated. The intention is that alternative spaces can be taken up under similar terms at different locations within the area, maintaining artists' involvement with the local community.

Affordability

Affordable social housing rates are paid by tenants. Two-thirds of rents contribute to the scheme costs and a third to a community arts fund to support local creative initiatives. This model therefore provides both affordable workspace and affordable living space for those involved in the programme, whilst also contributing to wider community benefit.

Demand

Demand for units under this scheme is high. From 25 units available initially, this number rose to 60 by July 2010. In July 2010 over 200 artists had registered their interest in these live/work units. The scheme is part of a 10 year regeneration programme in the Poplar area which runs until 2017.



Management Specific: Voluntary/ Artist-led co-op

These organisations are self-run and studio tenants often become members of a cooperative. Members are required to contribute unpaid working hours to the running of the studios to maintain low cash overheads. This enables low rents to be sustained and fosters a collaborative artist community.

Example - Lewisham Arthouse

Key Facts

- Formed in 1992 in a Grade II listed Carnegie donated ex-library in Deptford.
- The Arthouse provides studios, a gallery (open Wednesday to Sunday 12-6pm), classes, workshops, community activities and events.
- They have 46 studios of varying size, some are self-contained and some are partitioned within a larger space but all benefit from good natural light.
- Members are required to spend at least 25 hours a month making use of their studio.
- Part payment for low cost studio space is required in the form of unpaid work hours (minimum 5hrs). All members must participate in the scheme and commit time each month to running the studios, gallery and other related activities and events.
- A commitment to remain non-profit making is an important part of their ethos and they aim to fulfil Andrew Carnegie's original intention of benefiting the local community and fostering local artist endeavour.
- Courses and workshops include – botanical illustration, ceramics, kiln hire, life drawing monoprinting, mosaic, photography, workshops for kids.
- They offer the Arthouse Graduate Studio Scheme to one applicant for an 8-month residency.

Existing Provision

This model of studio management is most common in artist-led spaces, rather than those provided commercially or charitably. This self-organised nature makes numbers difficult to ascertain, as with Typology C. The primary motivation is to reduce costs for members.

Vulnerability

Long term security of such spaces is independent of their management model. It could be expected that co-operative models are more likely to be vulnerable, with less access to finance. However, in the case of Lewisham Arthouse, the building has been donated to the voluntary led co-operative and is therefore secure.

Affordability

The primary motivation for this type of management is to keep running costs at low levels. Through this model and the nature of their tenancy, Lewisham Arthouse are able to offer studios at £5.20 per sq ft per annum fully inclusive - some of the most affordable space in the UK. However, whilst this model reduces financial outlay, using donated hours can be nonetheless be considered as 'rent'.

Demand

This model is likely to appeal to artists who can accommodate the additional time commitment and responsibility that voluntary management requires, whilst still requiring low cost space as a priority. Such tenants are less likely to be in full time employment alongside their artistic practice for this reason.



Premises Specific: Cultural benefit & exchange

These sites provide a portfolio of activity that may have facilities such as a café, exhibition space, gallery, education space or performance space that are of wider benefit to the local community and public. These resources can help sustain the more vulnerable provision of artist studio spaces and provide a vibrant public platform for the art community. These organisations often focus on the social benefit of the visual arts and aim to generate a sustained impact on the local area, socially engaging with a broader audience.

Example - Chisenhale Art Place

Key Facts

- A unique centre for artists, art production, education, performance and exhibition space and provides around 40 studios and a dance space.
- Chisenhale Art Place was born out of the need by artists and dancers to find new secure premises after their eviction in the late 1970s from Butler's Wharf.
- Chisenhale Works was offered by Tower Hamlets Council and they undertook work over a two year period to clean up the building which had been derelict.
- For audiences, Chisenhale Gallery provides an opportunity to experience the process of art, as art is made on site not just collected.
- It is an artist-led organisation and charity where all members must commit to running the space to the public benefit that Chisenhale Art Place offers.
- Member organisations, Chisenhale Dance Space and Chisenhale Gallery are independently managed with their own board of directors which consists of 11 trustees.
- They run a public education and outreach programme that responds to the needs of the local community and wider artistic community.

Existing Provision

The offer of facilities beyond purely studio space, with the specific intention of engaging the wider public can be found across a range of providers, although is less likely to be found on commercial sites. Galleries and cafes can be source of additional income, but are generally motivated by advocacy of the visual arts.

Vulnerability

A broader cultural offer can form part of artists' workspace provision in a range of tenancies: from meanwhile use to permanent occupation, and is therefore not directly linked to vulnerability. However, offering additional facilities and amenities can help to build a more sustainable business model, and may provide evidence of the wider community benefit of artists' workspace beyond paying tenants.

Affordability

Affordability is a direct result of the Local Authority recognising cultural value; subsidy and assistance has contributed to ongoing longevity of this site. Although not directly linked to this supplementary provision, it can provide additional income streams to an organisation to assist with providing affordable studio space. As an artist-led organisation, Chisenhale Art Place maintains low rents of less than £8 per sq.ft per annum.

Demand

The opportunity to be working in a place of creative production benefits both artists and the community around the studio site. Such provision, and the desire to engage with audiences beyond tenants should be seen as a positive attribute of these studios.



Premises Specific: High street peripheries

Studio spaces on the edges of the high-street are taking advantage of underused buildings and shop fronts, opening up the high street to new possibilities of place-making potential. These spaces are lower in value and non-prime, secondary and tertiary non-residential space and give the opportunity of re-animating vacant spaces through creative artistic practice.

Small scale use of high street premises may not be cost effective or viable for larger artists' workspace providers who are likely to prefer larger scale properties, however opportunistic use of such sites may be an option for self-motivated groups.

Example - Stratford Studios, Bow Arts

Key Facts

- 28 studios on Stratford High Street with affordable creative workspace opportunities for over 30 local artists and creative practitioners.
- A partnership deal between Bow Arts and London Borough of Newham.
- The studios are suitable for a wide range of artist practices and creative enterprises.

Existing Provision

The decline of the high street has been much spoken of in recent years. In London, town centre retail space patterns appear to show polarisation towards large shopping destinations in Brent Cross, Stratford, Croydon and White City, with a decline in retail in other smaller centres (Accommodating Growth in High Streets Study, 2014). This restructuring potentially leaves behind vacant property that could be used for artists' workspace, which in turn brings activation and life back to underused sites.

Vulnerability

Such use of space is comparatively opportunistic, taking advantage of current trends in demand. It could therefore be vulnerable if the desirability of high street-adjacent property increases in the future.

Affordability

Use of non-prime town centre space is potentially beneficial to both tenants and landlords, who may benefit from business rates relief if their vacant properties are occupied by charity tenants. By taking advantage of otherwise vacant spaces, affordability should be possible to secure, provided that landlords accept a potential decrease in value. In the case of Stratford Studios, the landlord in the London Borough of Newham.

Demand

Bow Arts report significant demand for Stratford Studios. Demand generally is likely to vary in response to localities, facilities and accessibility.



Facilitation Specific: New build planning gain

The intervention of local authorities and housing associations in new purpose-built developments to provide artists' workspace as part of planning gain negotiations can benefit landlords and artists. In some cases the 'relatively unrentable' space at ground floor can be used by artists at a low rent and this can benefit landlords who reduce their untenanted periods and maintain community cohesion in the long-term.

Example - Matchmakers Wharf, ACME Studios & Telford Homes Plc

Key Facts

- ACME Studios have worked in partnership with Telford Homes at the site of the former Lesley Matchbox Toys Factory in Homerton.
- ACME began in 1972 as Acme Housing Association Limited to provide space for artists who cannot afford to rent space on the open market which fits closely with the aims of registered social landlords who provide affordable housing.
- Matchmakers Wharf is a landmark mixed-use development that incorporates affordable studios into a commercially oriented development, creating a capital return and helping to secure planning consent for Telford.
- Together they have created a mixed-used development of 49 purpose built artists' studios and 209 residential units.
- The purchase was part-funded by Arts Council England's Grants for the arts-capital programme and opened 2 years ago.

Existing Provision

As recorded through the survey, there are currently low numbers of purpose-built studios in London, just 6% of those studios offered by top tier artists' workspace providers. However, as approximately one third of studio space is considered 'under threat' in the next 10 years, this could become an increasingly common method of securing new affordable artists' workspace.

Vulnerability

Tenancy in such schemes is comparatively secure, often being written directly into Section 106 agreements or planning conditions. For example, ACME do not work with landlords who offer less than 20 years leasehold to establish a long term property portfolio.

Affordability

With capital delivery covered by the developer, this method can provide access to affordable space. Furthermore, the difficulties and on-going expenses often associated with 'traditional' studios - such as the poor environmental performance of ageing conversions - can be designed out. Matchmakers Wharf is rented at £12.85 per sq ft per year.

Demand

Delivery of artists' workspace through this mechanism involves high capital outlay on behalf of the developer, therefore demand in any given area should be ascertained prior to implementation.



Facilitation Specific: Significant artist support

London is in a privileged position in that it accommodates many of Britain's most internationally renowned and commercially successful artists. An established, significant artist can support a wider artistic community by employing a team of artist assistants, and may also make affordable workspace available to the younger artist community from which they came.

Example – Young British Artist studio development, in progress

Key Facts

- Commercially and professionally successful artist, currently employing 10 assistants.
- Leasehold premises of studio set for redevelopment. Current planning negotiations are on the basis that the Artist's studio is retained as part of the new proposals.
- Intention is that a 100 year leasehold of the replacement space will be sold to the Artist, with enough space for them to make workspace available to other practitioners at affordable rates.
- Artist's desire to support upcoming artists, using their success to support others.
- Artist not identified due to ongoing negotiations.

Existing Provision

It is difficult to ascertain the numbers of fine arts graduates who take work as artists assistants, and may therefore have access to support such as that described opposite. However, it is fair to say that not only 'household names' are able to employ assistants, and that the number may not be insignificant.

Vulnerability

Being 'under the wing' of a more successful artist may reduce vulnerability, although the example opposite shows that even then properties may be subject to redevelopment.

Affordability

An artist whose ambition is to support younger practitioners and whose income is generated through their art, rather than property, is likely to offer space or use of their facilities for low or no payment.

Demand

As above, many artists do not advertise or make public their use of assistants, it is therefore unknown how many artists may be supported in this way. At its height, it is reported that Damien Hirst's studio employed more than 120 people to produce his work.

Suggestions for Further Research

We make the following recommendations for adding depth and qualitative understanding to the study undertaking.

1. Further assessment of gathered data

The results of the detailed survey should be gathered from the remaining top tier artists' workspace providers who have not yet supplied data. Following this, we recommend further interrogation of the collected information, which is extensive and has not yet been fully analysed due to the incomplete data set and limited time available. This will reveal further details of the current available artists' workspace in London.

2. Case study provider interviews

To gain higher fidelity understanding of models of operation across a range of artists' workspace providers, from charitable organisations to commercial providers and artist-led co-operatives, we recommend a series of case study interviews. This will allow more precise understanding of the financial considerations facing these organisations, more accurate profiling of demand and an overview of industry tactics to deliver affordability.

3. Analysis of 'Affordability Gap'

In a sector that requires space to be made available at rental rates that are often below wider market values, affordable studio providers employ a range of tactics in order to bridge the 'gap' in pricing. Further analysis and quantification is required in order to understand levels of subsidy, discrepancies between cost of premises and rental rates, potential for cross-funding of provision etc. Top tier artists' workspace providers should be encouraged to reveal the cost per sq ft vs

income per sq ft of their studios, and to reveal how any 'gap' is addressed.

4. Photographic survey and spatial illustrations of artists' workspaces

In order to understand the quality of buildings occupied by these uses, as well as what is produced in these spaces, we recommend photographic surveys and spatial illustrations of artists' workspace. Brief interviews would also provide an opportunity to understand affordability from artists' perspectives.

5. Spatial illustrations of neighbourhoods

Artists' workspace can make a considerable positive contribution to placemaking, yet is under threat from increasing property values due to lack of secure premises tenure. We recommend further in depth qualitative documentation of case study examples of the socio-economic impacts of this activity. This may provide an evidence base for affordable artists' workspace.

6. Understanding demand and occupancy

This study has not been able to establish a clear picture of demand for artists' workspace. Waiting lists are an inaccurate measure of demand, and we suggest that occupancy rates may be a better measure for this. Additional focus on understanding and describing where there may be capacity within existing premises may indicate a mismatch between provision and demand.

In addition to occupancy analysis we recommend that a detailed economic assessment of demand is undertaken. Critical to this analysis is to unpack in terms of type, space requirements, costs and location across London.

Recommendations

Beyond further research, this study points to some actions for onwards communication and consolidation of thinking around providing affordable artists' workspace.

1. Incorporation into GIS mapping

Data from the Detailed Survey has been collected in a format that is suitable for incorporation into the developing Incubators, Accelerators and Co-working Space GIS map. This could be a useful opportunity to make the collected information public, and to allow future updates to the picture of artists' workspace across London.

2. Informing decision making

Affordable artists' workspace is a valuable, yet vulnerable asset in London. The aforementioned suggestions for further research should form an evidence base on which the Greater London Authority can make informed decisions about supporting and protecting the future of affordable artists' workspace in the Capital, as a key contributor to its cultural and social vibrancy.

3. Recognise existing successful approaches

Looking across the examples shown in this study and others, there are some existing planning tools which have successfully been used to deliver affordable artists' workspace. These have been successful particularly where workspace providers, Local Authorities and enlightened developers have worked together. This should be encouraged and facilitated.

4. Public sector involvement

Creative consideration should be given to how to best create new artists' workspace in London as well as how

to grow, maintain and strengthen this provision. This level of workspace provision will require imaginative solutions that are particular to London's creative ecology. For example; Artists' Enterprise Zones could involve development of a range of planning and financial measures to be used in certain areas to unlock and accelerate affordable provision. The affordable artists' workspace field is deserving of public sector attention and involvement to ensure its success.



Study and report
prepared by:

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