

Data Note

Subject Summary Note
Project London's Cultural Spaces: 2018-2022
Date 13.01.2023

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0.0 Introduction

The events of the past few years had a profound impact on London's cultural landscape. The COVID-19 pandemic and lockdowns, Brexit, supply chain disruptions, inflation, and the cost-of-living crisis put cultural spaces in London under great stress. This data note draws on update of London's Cultural Infrastructure Map and a survey of London's cultural spaces and provides detailed information about the state of cultural infrastructure in London in 2022.

Some of the key findings are:

- There were 2% fewer cultural spaces in London in 2022 compared to 2018
- 3 in 5 spaces are in a worse financial situation now compared to before the pandemic
- 3 in 4 cultural spaces say they are likely or very likely to stay open in 5 years from now

Cultural Infrastructure Map update

London's Cultural Infrastructure Map was updated in spring and summer of 2022. The map of cultural infrastructure shows a wide range of cultural and creative spaces, including, for example, artists' studios and other creative workspaces, rehearsal spaces, theatres and other venues, galleries, or libraries. The update included 23 of the map's cultural infrastructure categories, and more than 4,300 data points.

Cultural Spaces Survey

In addition to the map update, more than 200 cultural spaces and the organisations that run, manage or provide them were surveyed. The sample includes a wide range of spaces and organisations providing for the full range of different cultural and creative activities in the capital.

The update of London's cultural infrastructure map presents an opportunity to monitor how many cultural spaces have closed and opened in London since the last data capture (2018 and 2019 for different cultural infrastructure categories). The data update drew on a review of the original datasets alongside other sources and primary research, and newly identified cultural spaces were coded according to the year of opening. As a result, the update provides a picture of the spaces that have closed, and the new spaces that opened. The time frame between the last data capture and the new data presented here corresponds to a number of

different events that have affected London's cultural landscape, including Brexit, the COVID-19 pandemic, and the onset of the current cost-of-living crisis. As a result, the observed changes can be interpreted as a combination of long-term trends and the impact of recent events.

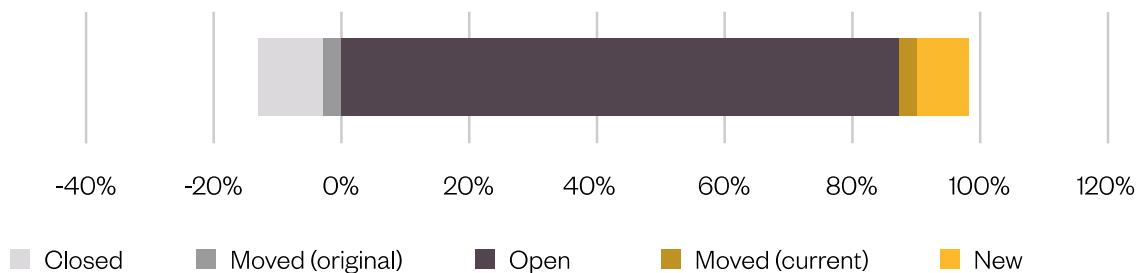
The survey of cultural space providers that accompanied the data update provides further insight into the state of cultural infrastructure, including the financial situation of organisations that provide space for culture in London, uncertainties about the future, issues of tenure security, to what extent they were able to access financial support during the pandemic, as well as the underlying causes. The survey was conducted in June 2022 and given the fast-evolving landscape, some of the findings are already out of date. Even so, the responses clearly indicate that the current cost of living crisis and high energy costs present a challenge of a similar scale to that of the global pandemic for cultural spaces in London. In light of this, the findings presented here offer an evidence base to inform how to best continue supporting culture in London at a time of crisis.

Caveat: The analysis of space closures and openings does not include information about music venues which fell outside of the scope of the study. While music venues share some common threats with other performance venues, they also face distinct pressures. As a result, the figures presented here likely underestimate the rate of closures among cultural consumption spaces.

1.0 Overview

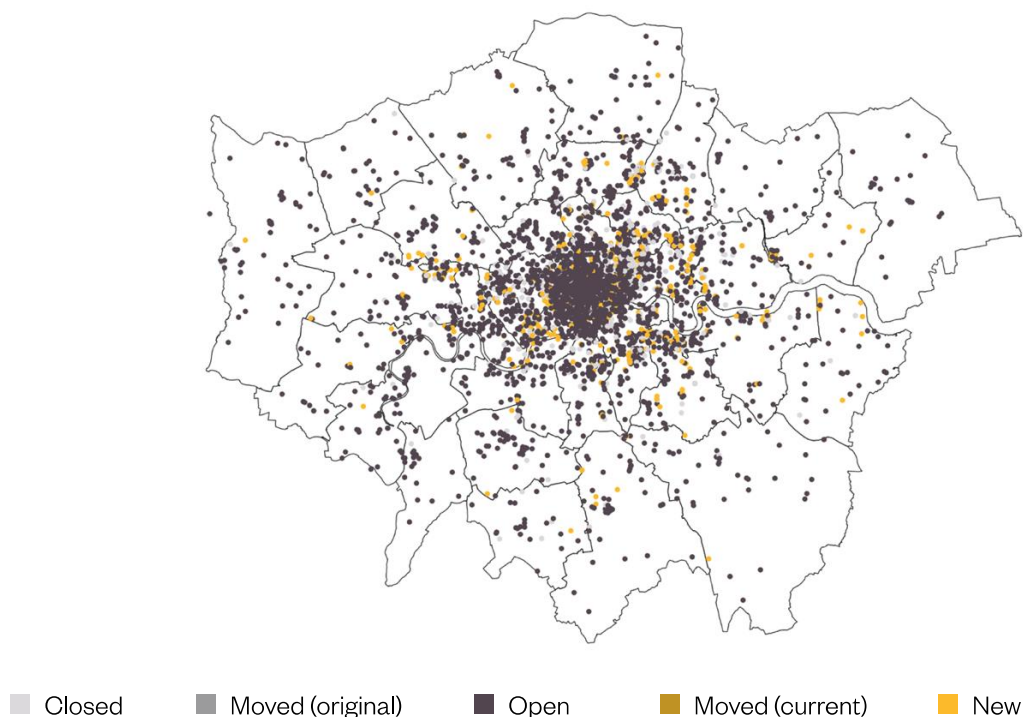
Over the past few years, London lost 2% of cultural spaces. Since the previous data capture in 2018 and 2019, 10% of London’s cultural spaces closed. New cultural spaces opened in the same period, but there are now 2% fewer cultural spaces in the capital overall. 3% of cultural spaces moved location within London. This data note shows how the changes differed between the diverse types of cultural spaces and provides a spatial understanding of where in London spaces closed, where new spaces opened, and how spaces moved.

Cultural space closures and new openings
2018 to 2022



New cultural spaces opened outside of the city centre. Cultural infrastructure is concentrated in the centre of London. However, over the past years, new spaces were more likely to open outside of Central London.

Cultural space closures and new openings
2018 to 2022



The events of the past years had a profound impact on London’s cultural landscape. The COVID-19 pandemic and lockdowns, Brexit, supply chain disruptions and the cost-of-living crisis put cultural spaces in London under a great stress and contributed to many more spaces closing in London over the past years than opening. While these events are not easy to separate from each other, the survey responses offer some valuable insight into how each of them affected London’s cultural spaces.

Brexit

- Cultural organisations in London face major difficulties connected to staff shortages, and some cite Brexit as a significant contribution factor. Staff recruitment and retention issues include technicians, hospitality, and front of house staff, as well as cultural workers with highly specialised skills.
- A number of organisations mention a decrease in international work over the past years as a major concern. This includes fewer international collaborations, significant increase in costs and administrative burden associated with international touring, and fewer international funding opportunities.

‘A lot of EU citizens used to play a pivotal role in our cultural sector. From producers to technicians, it is harder to find staffing — even as a London Living Wage employer.’

‘Brexit reduced funding opportunities, and the financial and administrative requirements to tour work is significantly higher.’

Supply chain disruptions

- Many cultural spaces have been affected by supply chain disruptions, long lead times, and increased costs of materials. In particular, the surveyed organisations have struggled with disruptions in the supply of construction materials, servicing and availability of lighting, sound, IT and other specialised equipment, and the prohibitive costs of international shipping of artworks.

Specialised technical equipment has long delays, for both repairs and upgrades. This leaves us without critical infrastructure and loses us business.

‘We are now losing money on some jobs, as we have quoted for them, and then the prices of materials has massively changed.’

COVID-19 pandemic

- The impact of the COVID-19 pandemic and restrictions was felt nearly universally by cultural and creative spaces in London. Many spaces where culture is experienced had to completely close for periods of time and some have struggled to attract audiences once re-opened.
- Most spaces where culture is produced were either directly affected by the pandemic or felt the knock-on effect of the closure of cultural consumption spaces. However, a minority of spaces including some artists’ workspaces experienced constant demand from space users and stayed open throughout the pandemic.
- The survey responses suggest that organisations catering for more vulnerable populations were, like the people they serve, disproportionately affected by the pandemic. In addition, the pandemic also exposed the extent to which many artists and creative workers rely on complex professional situations that might have prevented them from benefiting from COVID-19 relief schemes.

‘Our programme was vastly reduced and we have found it difficult to persuade audiences and collaborators to return to our activities.’

‘Lost bookings, lost clients, lost revenues. We now have to rebuild from the ground up’

High energy prices and the cost-of-living crisis

- The cost-of-living crisis and high energy prices are an immediate, fundamental threat to many cultural spaces in London, and very few surveyed organisations have not mentioned this as a major concern. Some organisations see the increasing costs and unaffordability of living in London as even more worrying than the COVID-19 pandemic.
- Organisations are forced to pass the high energy prices and operating costs onto the end users. Because of the high costs, some organisations also had to reduce community outreach programmes or their work in local communities.
- Around 1 in 4 surveyed organisations recently experienced artists and creative or cultural workers leaving London or changing careers because of the high prices. Alongside the high cost of living in London, the cost of space is an important part of the conundrum artists and creative or cultural workers navigate.
- Audiences are as impacted as artists and creative workers, and many people think twice before they buy tickets to see a show or go to gallery.

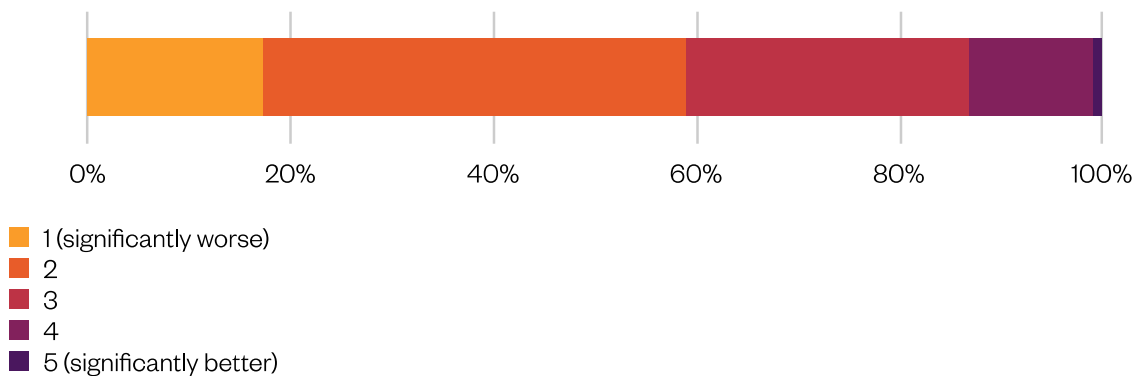
'Our gas and electricity estimated costs for the year have increased by over 100%.'

'We have had to put studio rents up to help meet rising costs.'

The pandemic challenged cultural spaces' finances. 59% of the organisations that provide London's cultural spaces are in a worse or significantly worse financial situation now compared to before the pandemic, and only 13% are in a better financial situation now compared to before the pandemic.

What is the financial situation of your organisation now, compared to before the pandemic?

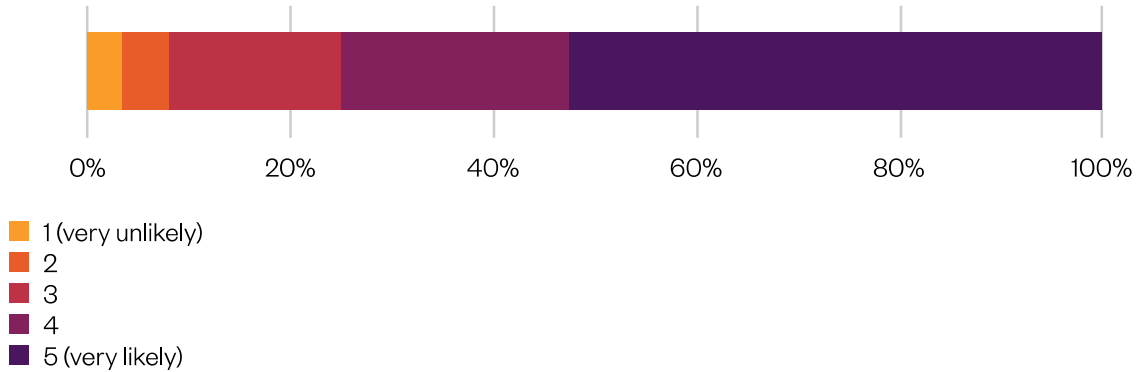
June 2022 (N = 139)



In June 2022, most organisation that run London's cultural spaces were optimistic about still being able to do so in 5 years from now. 3 in 4 organisations say that it is likely or very likely that they will be able to continue providing cultural space in London in 5 years from now. However, nearly 8% say that it is unlikely or very unlikely.

How likely is it that your organisation will still be operating in London in 5 years from now?

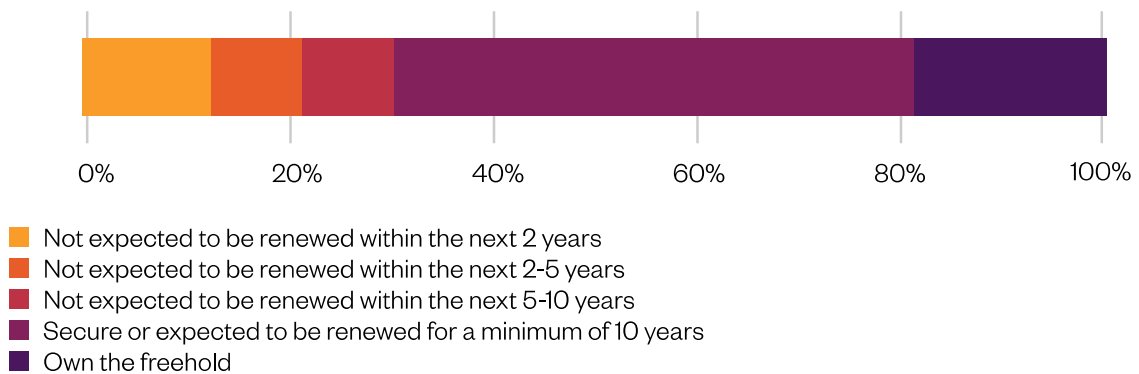
June 2022 (N = 139)



1 in 3 cultural spaces in London faces tenure insecurity. In 21% of cultural spaces, the organisation that runs them expects to not be able to renew their tenure agreement within the next 5 years. In additional 9% of spaces, the organisation that runs them expects to not be able to renew their tenure agreement within the next 5-10 years. Just over half of cultural spaces have a secure tenure agreement in place, and 19% of spaces are owned by the organisation that runs them.

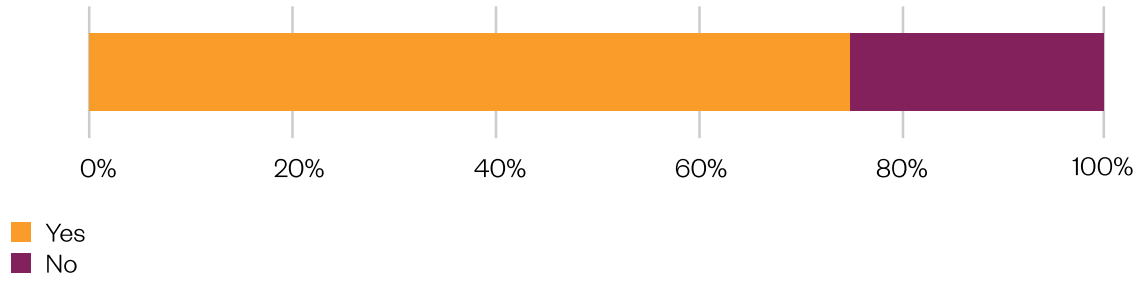
What is the nature of your tenure, and do you expect to be able to renew your tenure agreement?

June 2022 (N=164)



3 in 4 organisations received additional financial support during the pandemic. The sources of financial support varied between organisations, and many were able to access more than one emergency funding scheme. The most common sources included the Culture Recovery Fund, Coronavirus Job Retention Scheme, ACE Emergency Response Fund, Heritage Emergency Fund, government grants distributed by local authorities, business rates relief, and the Bounce Back Loan Scheme. Many organisations said that these sources of financial help were vital for their survival during lockdowns.

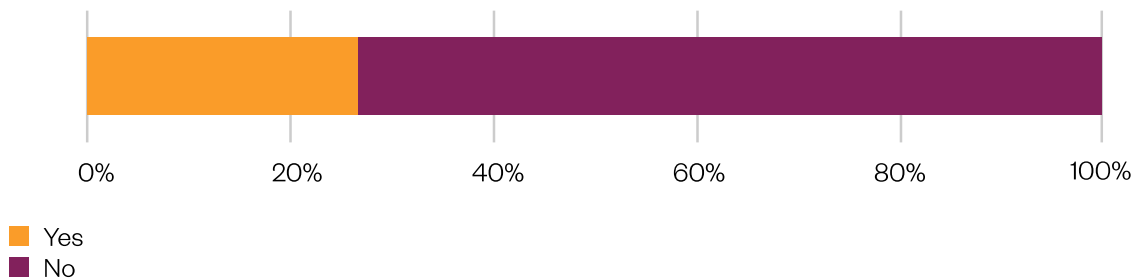
During the pandemic, has your organisation been able to access any additional financial support?
June 2022 (N=139)



1 in 4 organisations received a discount on rent at some point during the pandemic. The majority of organisations did not receive any rent discount, and many only received a limited rent discount for a short period of time. However, a smaller number of organisations received a substantial rent discount and this was a significant help during the pandemic.

Has your organisation received a discount on rent at any time during the pandemic?

June 2022 (N=139)



Accessing support during the pandemic

The data collected through the survey of cultural spaces indicates that larger and more experienced organisations were more likely to be able to access some of the financial support schemes during the pandemic. On the contrary, many smaller organisations with less capacity and experience in applying for funding found it difficult to access emergency financial support.

Several surveyed organisations played an important role in helping artist tenants and other users of their space to access financial support, both in the form of supporting users in applying for funding, and in raising and distribution additional funds. Many cultural spaces also offered discounts to their users and tenants.

Several organisations mentioned a more understanding approach from public sector landlords, including local councils and housing associations, who were more likely to support cultural spaces through rent discounts compared to private landlords.

‘We had substantial rent support from TfL and two of our private landlords, and various government grants relating to our leisure industry status. We would not have recovered without these; they have been fundamental to preventing us going under.’

‘We have actually found the climate more difficult since the pandemic as the large grants are harder to get again and we are going from small grant to small grant again whereby it is very hard to develop project ideas.’

Culture at Risk Business Support Fund

In April 2020 the Mayor of London launched the £2.3m Culture at Risk Business Support fund to support culture and creative industries at risk due to the impact of COVID-19. The fund was designed to help grassroots music and LGBTQ+ venues, creative workspaces and independent cinemas by boosting existing industry support and hardship funds. The fund provided £450,000 to the Music Venue Trust to support up to 147 grassroots music venues and £225,000 to support up to 56 LGBTQ+ venues in partnership with the LGBTQ+ Venues Forum. £1.5m was administered by the Creative Land Trust to support thousands of tenants across 200 artist studios workspaces and £150,000 to the BFI to help up to 25 of London’s independent cinemas. The beneficiaries were those most at risk of falling into administration and unable to

benefit from Government schemes. The financial support included rent subsidies, meeting the cost of utilities and service charges and other targeted financial support to protect cultural spaces across London.

Community Spaces at Risk Fund

The Community Spaces at Risk Fund was the Mayor of London's £750,000 fund to protect grassroots cultural centres, social clubs, youth, education and other spaces that were critical for supporting vulnerable groups during the pandemic. Many of these community hubs deliver a range of activities to tackle isolation, support mental health and resilience and provide essential local services, but they are under financial pressure when they are needed most.

Delivered in partnership with Locality, the fund provided one-to-one specialist business support and strategic grants across two funding waves (up to £10,000 and up to £25,000 respectively) to help local community organisations protect at-risk spaces. The programme ran between November 2020 to August 2021 and supported 101 cases.

2.0 Cultural Production and Consumption

Cultural infrastructure is the spaces where culture is experienced and where culture is produced. While cultural production and cultural consumption are closely connected and many spaces in London support both functions, the collected data shows some differentiated impacts of Brexit, COVID-19 pandemic, and the cost-of-living crisis.

Cultural Consumption Infrastructure

Places where culture is experienced, participated in, showcased, exhibited, or sold. This includes, for example, theatres and dance performance venues, museums and galleries, music venues, LGBTQ+ venues, nightclubs, cinemas, or libraries.

Cultural Production Infrastructure

Places where creative work is made, usually by artists, performers, makers, manufacturers, or digital processes. This includes, for example, creative workspaces, performing arts rehearsal spaces, music recording studios, industrial and light industrial units used by creative and cultural businesses, or film and television studios.

Both cultural consumption and cultural production spaces were affected by the events of the last years, and there are 3% fewer cultural consumption spaces and 3% fewer cultural production spaces in London now compared to before the pandemic. However, cultural consumption spaces have shown greater stability than cultural production spaces in terms of the overall proportion of space closures and space openings.

Caveat: The analysis of space closures and openings does not include information about music venues which fell outside of the scope of the study. While music venues share some common threats with other performance venues, they also face distinct pressures. As a result, the figures presented here likely underestimate the rate of closures among cultural consumption spaces.

The survey data shows that cultural production spaces are more likely to worry about their prospects of still being open in 5 years from now, and that cultural production spaces face a greater insecurity of tenure – more than 1 in 3 cultural production spaces in London do not expect to be able to renew their lease within the next 10 years. On the other hand, the data also indicates that cultural production spaces were more likely to have accessed new and additional sources of financial support during the pandemic, or a rent discount.

The survey data also shows that:

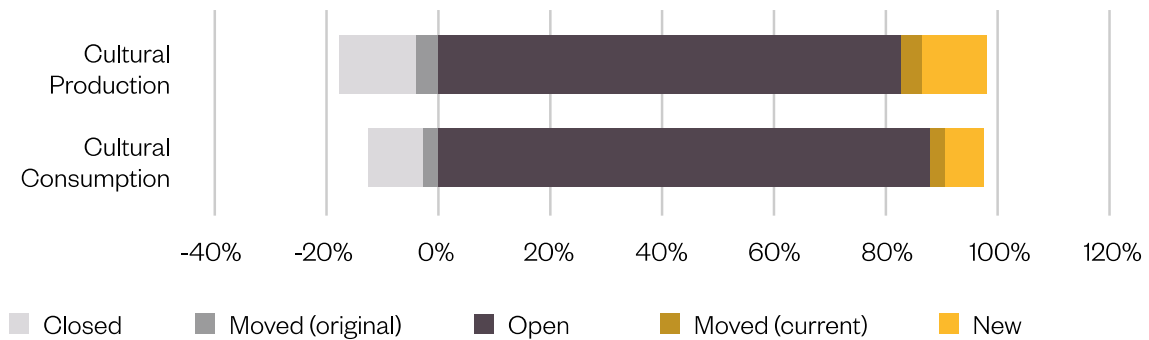
- Cultural production spaces were more likely to have experienced quick recovery from the pandemic while many cultural consumption spaces have struggled to attract their audiences since the easing of the pandemic restrictions. Cultural consumption spaces also report a drastic shift in booking patterns, with increase in cancellations and last-minute bookings which complicate event planning
- Both cultural consumption and cultural production spaces struggle to attract and retain workers, but this has been felt especially by cultural consumption spaces. Some organisations cite Brexit as a significant contributing factor to the worker shortage which includes technicians (cultural production and consumption), those with highly specialised skills (cultural production), and hospitality and front of house staff (cultural consumption).

Space openings and closures

Production spaces have encountered a higher turnover rate with proportionately more closures (14% compared to 10% for consumption spaces) but also more openings (12% compared to 7%), while there has been a larger overall net decline of consumption spaces (3% compared to 2% for production spaces).

Cultural space closures and new openings

2018 to 2022

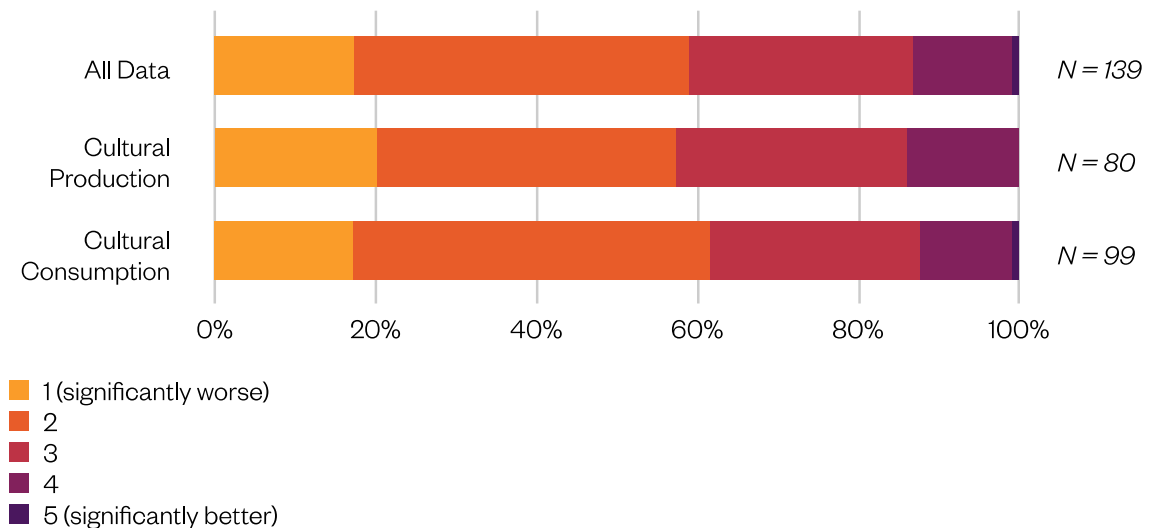


Financial situation

Most cultural spaces have reported that their financial situation is worse than it was before the COVID-19 pandemic. Overall, cultural consumption spaces were slightly more likely to report that their financial situation deteriorated than cultural production spaces. However, cultural production spaces have more often reported that their financial situation is *significantly* worse now compared to before the COVID-19 pandemic.

What is the financial situation of your organisation now, compared to before the pandemic?

June 2022

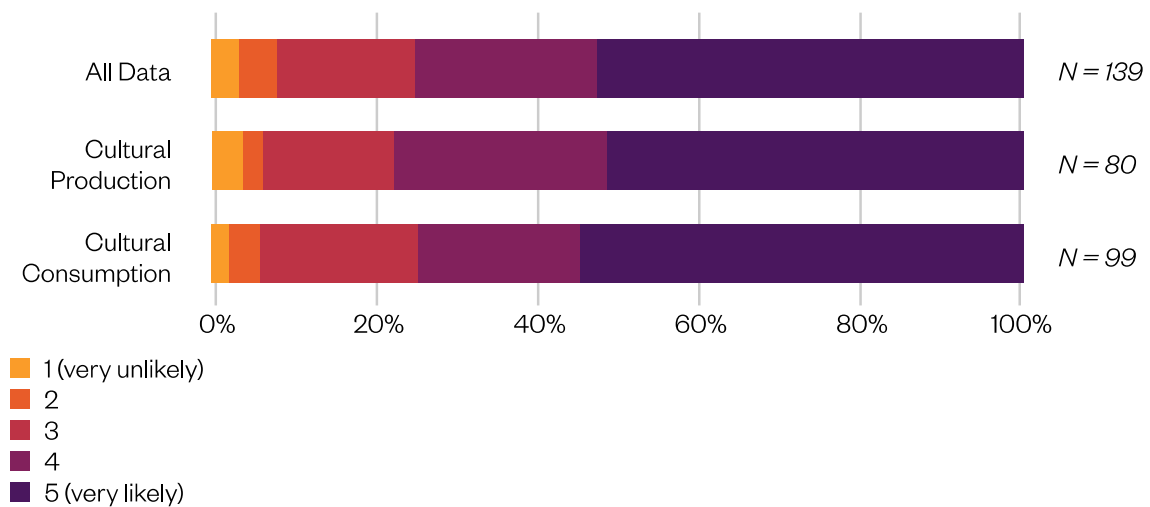


Future prospects

Over half of spaces have reported it was very likely that their organisation would keep operating in London in five years from now. This proportion was slightly higher for cultural consumption spaces than for cultural production spaces (55% vs 51%). Twice as many production spaces also declared it was very unlikely that they would keep operate in London five years from now compared to consumption spaces (4% vs 2%). This suggests that cultural production spaces are overall less certain to be able to keep operating in the capital.

How likely is it that your organisation will still be operating in London in 5 years from now?

June 2022

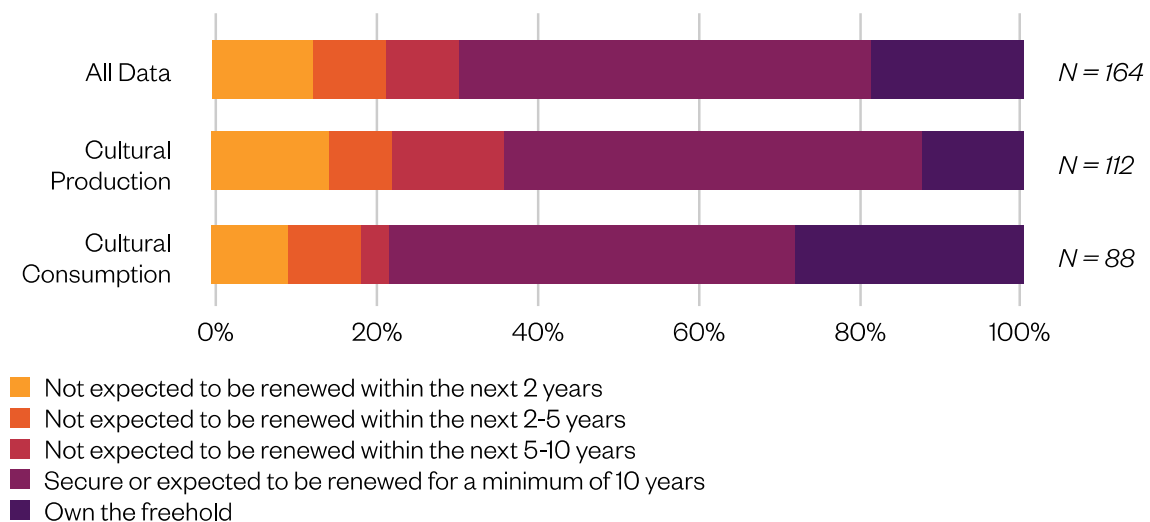


Tenure security

Less than one in five spaces own their premises. This varies substantially between cultural production spaces (13%) compared to cultural consumption spaces, which are more likely to own the freehold (28%). For leaseholders, security of tenure also varies. Cultural production spaces face greater uncertainty, with 36% not expecting to renew their lease within the next 10 years and 14% within the next 2 years. For cultural consumption spaces, these figures amount to 22% and 9% respectively, with 50% of organisations renting on a stable, long-term basis (for 10 years or more).

What is the nature of your tenure, and do you expect to be able to renew your tenure agreement?

June 2022

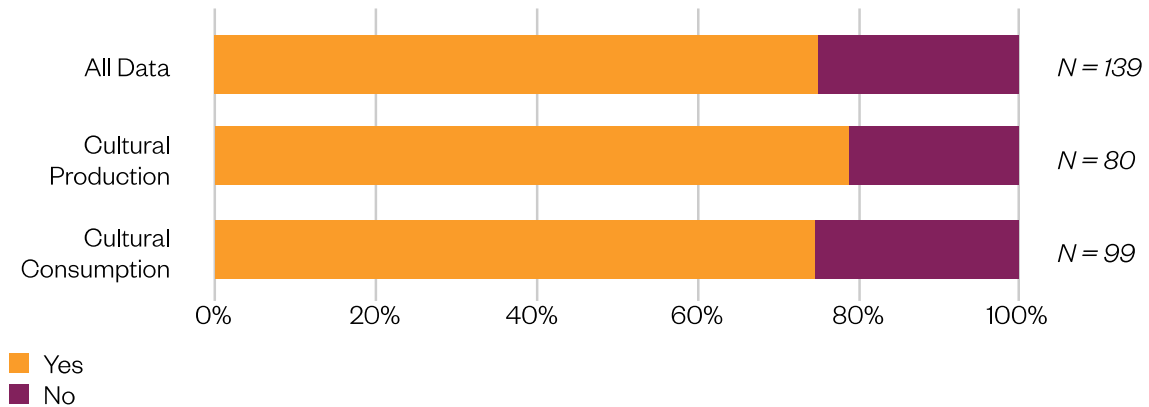


Financial support during the pandemic

75% of organisations received pandemic-related financial support. This figure was slightly higher for cultural production spaces (79%) than for cultural consumption spaces (75%).

During the pandemic, has your organisation been able to access any additional financial support?

June 2022

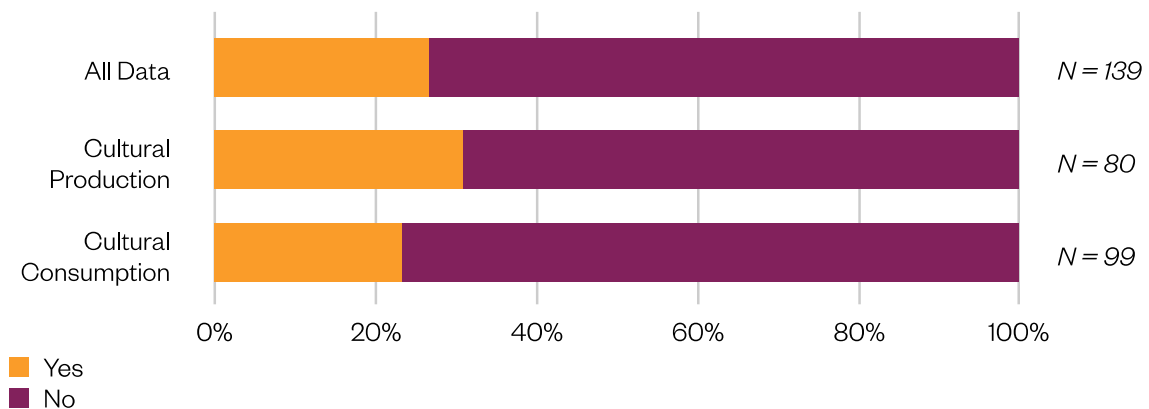


Rent discount during the pandemic

27% of organisations received a rent discount at some point during the pandemic. This figure was slightly higher for cultural production spaces (31%) than for cultural consumption spaces (23%).

Has your organisation received a discount on rent at any time during the pandemic?

June 2022



3.0 Cultural Sectors

Another way of looking at the differentiated impacts of the events of the last years on London's cultural infrastructure is through the lens of different cultural and creative sectors. Drawing on the patterns observed in the data, the majority of spaces were grouped into four groups corresponding to different creative sectors – open artist and creative workspaces; performing arts spaces; museums and galleries; and creative manufacturing spaces. Please note that the survey sample included fewer organisations in the creative manufacturing sector (N=19) than in the other categories.

Open workspace

Managed workspaces that provide studio space, specialist equipment, and/or desk space for a wide range of creatives including visual artists as well as designers or makers. The category includes dedicated artists' workspaces, creative studios, makerspaces with shared specialist equipment, and creative co-working spaces that provide space for users on flexible terms.

Performing arts

Spaces used for dance, theatre, and music across cultural production (rehearsal and recording spaces) and cultural consumption (venues and performance spaces).

Creative manufacturing

Spaces dedicated to creative manufacturing and crafts such as jewellery, fashion, textiles, set design and building, or props and costumes making. While some of these crafts are also catered for by open workspaces, this category includes predominantly independent and sometimes larger creative manufacturing sites.

Museums and galleries

This category includes both public and commercial museums, galleries, and arts centres.

There are clear differences between the four sectors, and while some of these are clearly linked to the COVID-19 pandemic and other events of the last years, others are best explained as a continuation of long-term trends.

The sector most financially hit by the pandemic was performing arts. Performing arts spaces and organisations are most likely to be in a worse financial situation now compared to before the pandemic, and this is even though they were also the most likely to have accessed new and pandemic-related sources of financial support.

By contrast, creative manufacturing experienced the highest overall decline in spaces, and creative manufacturing organisations are the most worried about their ability to still being able to operate in London in 5 years from now. During the pandemic, creative manufacturing organisations were also the most likely to receive a rent discount.

The only sector that saw a net increase in the number of spaces in London is open workspaces. While many open workspaces closed during the pandemic, even greater number of new sites opened since 2018. Many of the new sites were provided by larger creative workspace groups, and these organisations were also among those least affected by the pandemic financially.

The survey data also shows that:

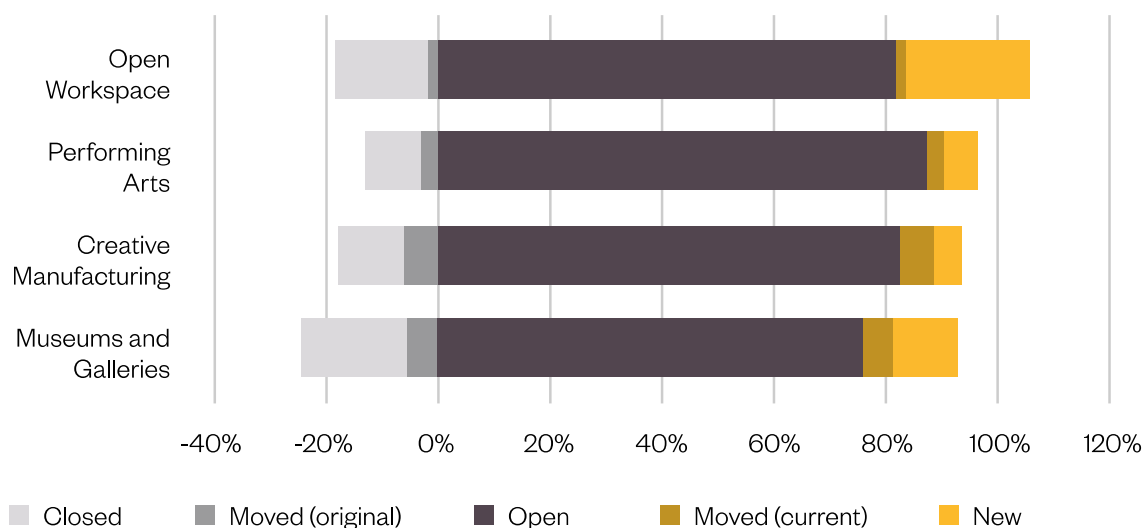
- Most creative open workspace providers saw constant demand throughout the pandemic. Number of providers note that while demand might have decreased for desk space, a wide range of creative activities that require specialist equipment or studio space were not affected by the pandemic-related restrictions.
- At the same time, open workspace providers experience increased demand for flexible and part-time arrangements as well as studio shares, reflecting greater uncertainty and decreased ability to pay from artists and creatives.
- Performing arts spaces and organisations note increasing risk aversity in programming in the aftermath of the pandemic, related to the need to attract audiences and recover finances, as well as greater uncertainty from last-minute bookings and cancellations.

Space openings and closures

Most sectors saw more spaces closing than opening over the last years, but there are now 5% more open workspaces compared to 2018. The overall decline in the number of spaces was most pronounced in creative manufacturing (-7%) and museums and galleries (-8%). While the overall number of open workspaces grew, the sector also experienced a high proportion of space closures, nearly at the rate seen in museums and galleries. As shown in the data for individual cultural infrastructure categories (below), there are some notable differences within the sector groups. Most importantly, the vast majority of churn in the museums and galleries sector can be attributed to commercial galleries.

Caveat: The analysis of space closures and openings does not include information about music venues which fell outside of the scope of the study. While music venues share some common threats to other performance venues, they also face distinct pressures. As a result, the figures presented here likely underestimate the rate of closures among performing arts spaces.

Cultural space closures and new openings
2018 to 2022

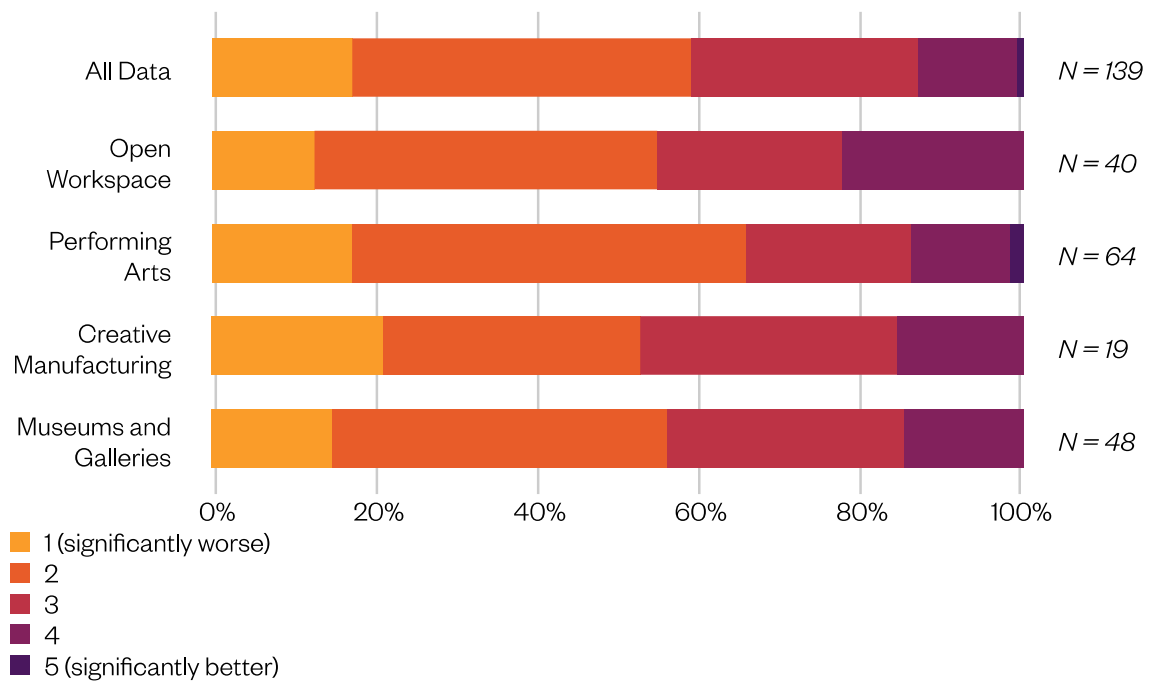


Financial situation

The impact of the pandemic has been severe across all sectors and more than half of organisations in each sector report being in a worse financial situation now than before the start of the pandemic. Performing arts spaces were particularly affected, with 2 in 3 organisations being in a worse financial situation now. Few organisations reporting being in a better financial situation than before the start of the pandemic, but the proportion is highest among organisations that provide open workspace.

What is the financial situation of your organisation now, compared to before the pandemic?

June 2022

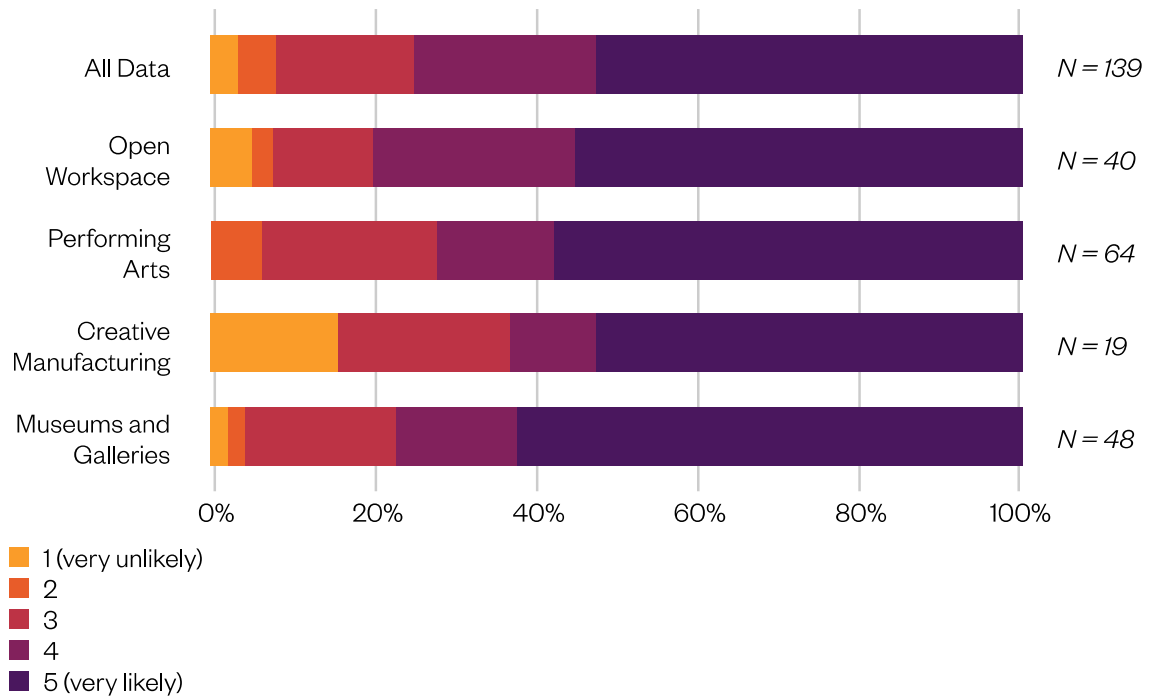


Future prospects

More than half of spaces in each of the sectors think that it is very likely that they will be able to still operate in London in five years. However, some sectors are less certain about their prospects. The survey results look particularly bleak for creative manufacturing organisations, but this is likely partially driven – at least in part – by the small sample size.

How likely is it that your organisation will still be operating in London in 5 years from now?

June 2022

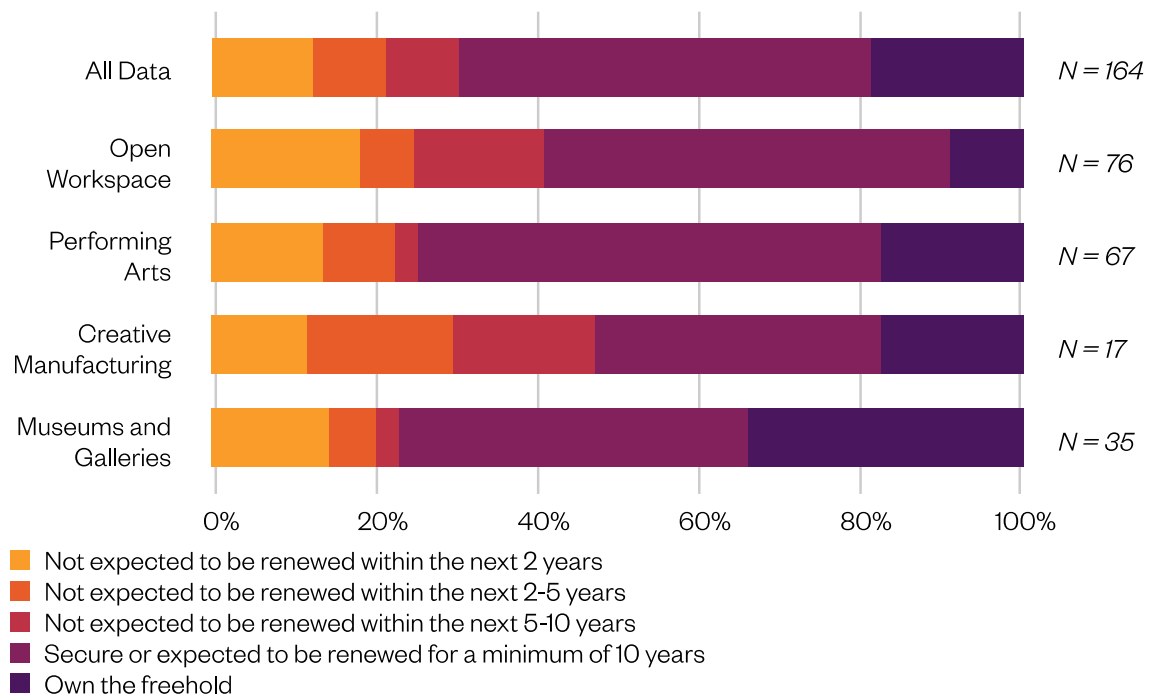


Tenure security

Stability of tenure varies greatly between sectors. Museums and galleries are most likely to own the freehold on their premises (34%), and performing arts have a high proportion of spaces with secure leases (56%). On the contrary, creative manufacturing and open workspaces are the sectors with the highest proportions of uncertainty in terms of lease, with respectively 47% and 41% of sites not expecting to be able to renew their tenure agreement within the next 10 years. Only 9.2% of open workspaces own the freehold on their premises.

What is the nature of your tenure, and do you expect to be able to renew your tenure agreement?

June 2022

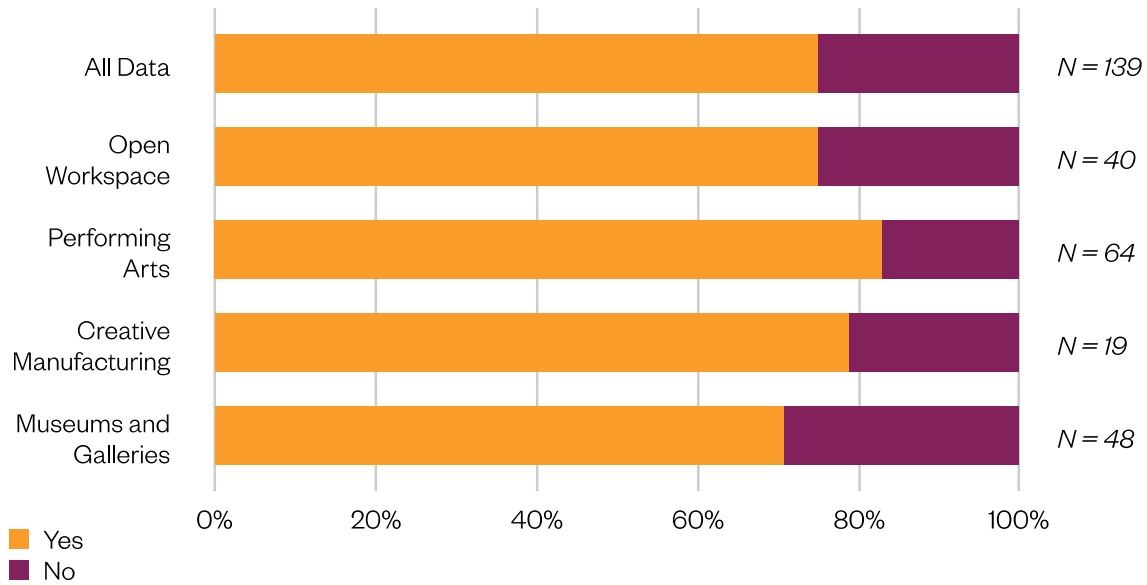


Financial support during the pandemic

75% of all sites have received pandemic-related financial support. The proportion was the lowest for museums and galleries (71%). On the contrary, performing arts spaces were most likely to receive financial support (83%).

During the pandemic, has your organisation been able to access any additional financial support?

June 2022

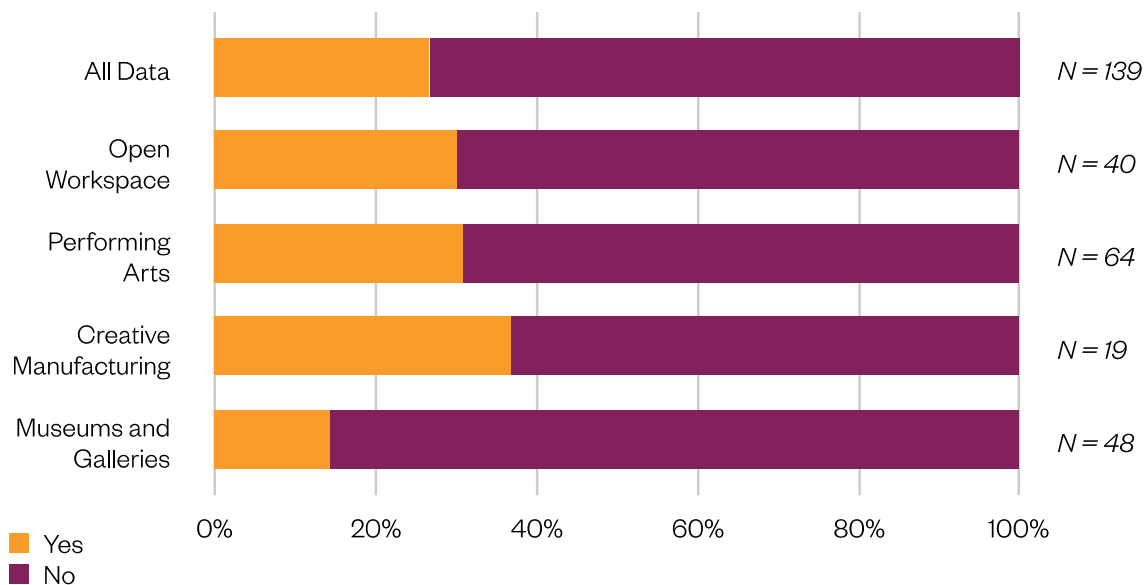


Rent discount during the pandemic

27% of all sites have received pandemic-related rent discount. This was lowest for museums and galleries (15%), and highest for creative manufacturing (37%).

Has your organisation received a discount on rent at any time during the pandemic?

June 2022



4.0 Diverse-led Cultural Infrastructure

The survey offers a valuable insight into the challenges faced by diverse-led cultural spaces in London. The collected data shows that spaces led by people who identify as LGBTQ+ or members of an ethnic minority are disproportionately likely to be in a worse financial situation now compared to before the pandemic, and that minority-ethnic led organisations feel less confidence in their ability to keep operating in London in 5 years from now. The survey also provides some evidence that diverse-led spaces, and minority-ethnic led spaces in particular, were less likely to be able to access additional and pandemic-related sources of financial support or receive a discount on rent.

Diverse-led cultural infrastructure

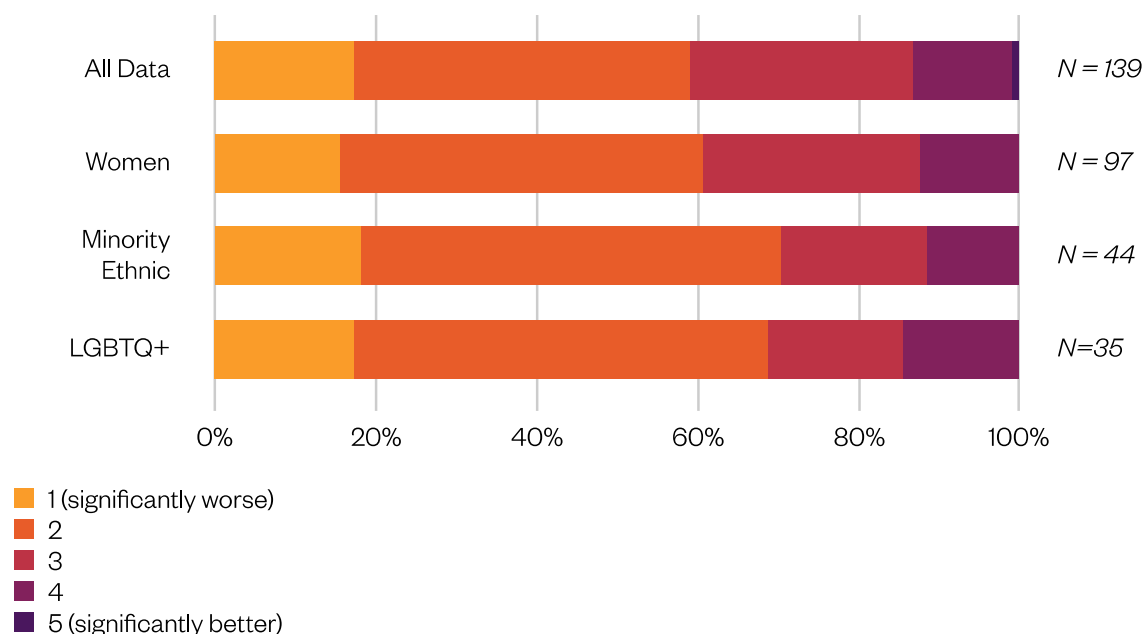
Spaces and organisations where 51% or more of the organisation’s leadership (for example, board and senior management) identify as women, disabled, LGBTQ+, belonging to an ethnic minority, or sharing other protected characteristics. The presented figures are based on the categories where sufficient data is available, and show spaces and organisations led by women and people who identify as LGBTQ+ or belonging to an ethnic minority.

Financial situation

Diverse-led cultural spaces have been disproportionately affected by the pandemic. While 59% of organisations report being in a worse financial situation now compared to before the pandemic, among minority ethnic and LGBTQ+ led spaces these proportions are 71% and 69% respectively.

What is the financial situation of your organisation now, compared to before the pandemic?

June 2022

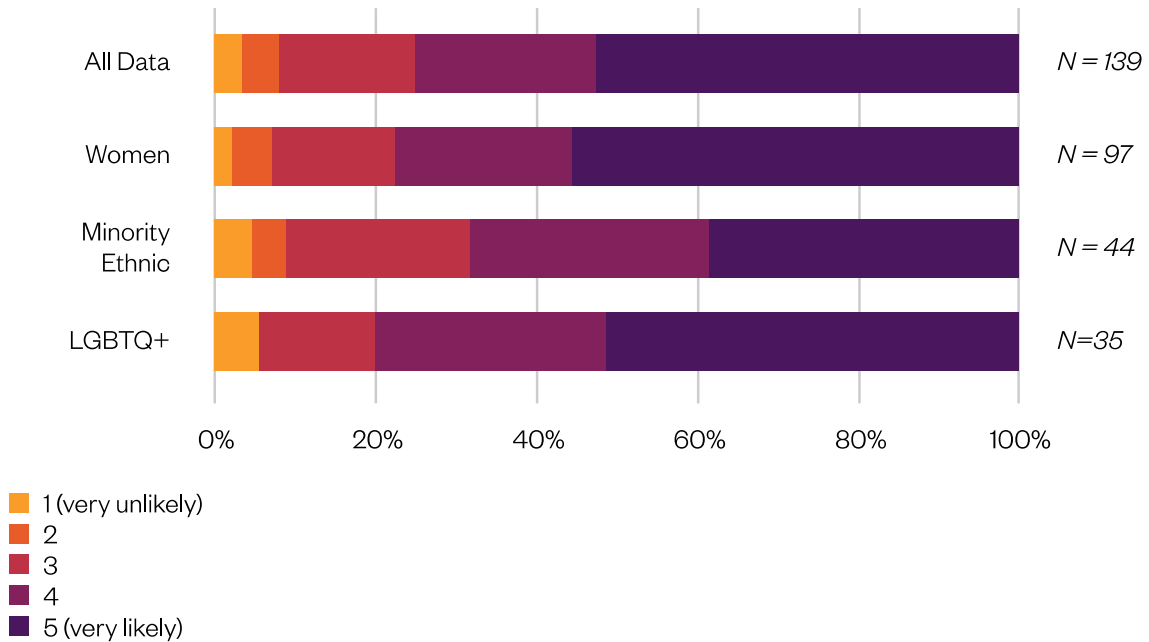


Future prospects

While most spaces overall expect to be operating from London in 5 years, this proportion is considerably lower for some diverse-led organisations. In particular, only 39% of minority ethnic led organisation say they are very likely to be still operating in London in 5 years from now.

How likely is it that your organisation will still be operating in London in 5 years from now?

June 2022

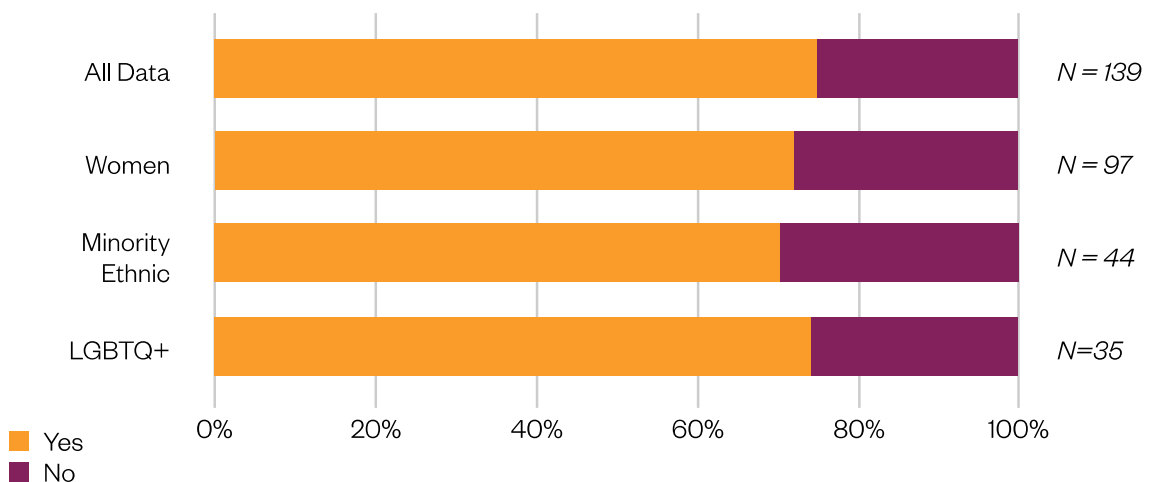


Financial support during the pandemic

75% of all spaces received pandemic-related financial support. Among diverse-led spaces, this was slightly lower for minority ethnic led spaces (71%), compared to 72% for women led spaces and 74% for LGBTQ+ led spaces.

During the pandemic, has your organisation been able to access any additional financial support?

June 2022

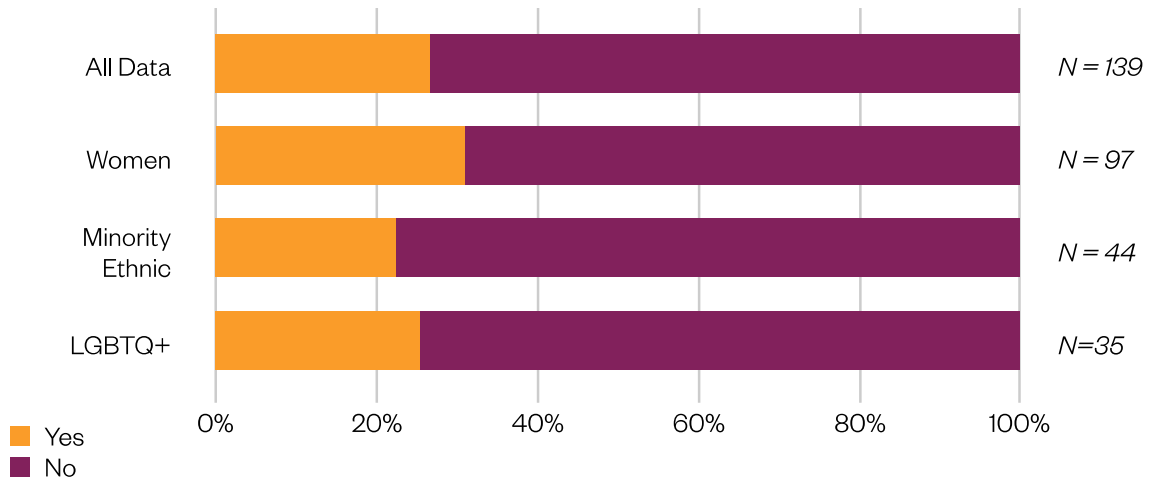


Rent discount during the pandemic

27% of all sites have received pandemic-related rent discount. This was slightly lower for minority ethnic led spaces (23%), and slightly higher for women led spaces (31%).

Has your organisation received a discount on rent at any time during the pandemic?

June 2022



Data for individual Cultural Infrastructure Map categories

The Cultural Infrastructure Map classifies cultural spaces in number of different categories – for example, Makerspaces, Theatres, Dance rehearsal spaces, or Museums and public galleries. This summary note shows aggregated data across multiple categories. To view the mapping update data for a specific Cultural Infrastructure Map category, please see a corresponding data note.