

Cultural Spaces Health Check

London's Cultural Spaces: 2018–2022 Key Findings

A woman working in a creative makerspace

Key information

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1. At a Glance

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 report provides an overview of the state of cultural spaces in London nearly 3 years after the onset of the COVID-19 pandemic. It draws on an update of London's Cultural Infrastructure Map and a survey of cultural spaces conducted in summer 2022.

The update of the [Cultural Infrastructure Map](#) and [London Datastore](#) reveals the extent to which new cultural spaces opened and existing cultural spaces closed or moved over the past years. In addition, the survey shows nuanced information about the financial situation of the organisations that provide space for culture in London, uncertainties about their future, issues of tenure security, or the extent to which cultural spaces were able to access financial support during the pandemic.

In some ways, the findings are sombre - there are now fewer cultural spaces in London than there were a few years ago. Diverse-led cultural spaces and spaces that serve London's diverse communities were worst hit. And, the bad news is far from over. Cultural organisations' financial reserves are depleted, and the cost of living

presents a new set of challenges that are no less urgent than the pandemic.

In other ways, the findings provide some encouragement. Many cultural spaces were able to survive the pandemic due to unprecedented public sector support. But the crisis is not over, and the data in this report show that the argument for action is as strong now as it was in the early days of the pandemic.

The evidence and findings from this study support further intervention to keep London at the top of its creative game and ensure there are cultural opportunities in every corner of the capital.

- **2%**

fewer cultural spaces in London now than in 2018

-

- **31%**

spaces face tenure insecurity

-

- **59%**

spaces are in worse financial situation after the pandemic

-

- **5%**

more open workspaces now than in 2018

-

- **3 in 4**

spaces are optimistic about still being open in 5 years

-

- **3 in 4**

spaces accessed COVID-19 funding

-

2. Cultural Spaces Health Check Findings

Methodology

This report and [the more detailed summary data note](#) draw on two primary data sources, a 2022 update of the data that feeds into London's Cultural Infrastructure Map, and a survey of cultural spaces conducted in summer 2022.

Cultural Infrastructure Map and London Datastore update

The data which feeds into London's Cultural Infrastructure Map was researched in spring and summer of 2022. The map shows a wide range of cultural spaces, including artists' studios and other creative workspaces, rehearsal spaces, theatres and other venues, galleries, or libraries. The update included 23 of the map's cultural spaces categories with more than 4,300 data points, and showed how many cultural spaces in London closed, moved or opened since the last data capture (2018 and 2019 for different space categories). The data referenced in this report does not include clubs, music venues, pubs or grassroots music venues. Please see the [London Datastore](#) for information about these types of premises.

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.

Key findings

Changes in London's cultural space provision

Between 2018 and 2022, London lost 2 per cent of its cultural spaces.

Since 2018, 10 per cent of London's cultural spaces closed. New cultural spaces opened in the same period, but the mapping shows there are now 2 per cent fewer cultural spaces in the capital overall. 3 per cent of cultural spaces moved location within London.

There are notable differences between types of cultural space and different cultural sectors. The overall decline was most pronounced in creative manufacturing (-7 per cent) and museums and galleries (-8 per cent), due to a large rate of closure among commercial galleries.

While most sectors saw more spaces closing than opening over the last years, there are now 5 per cent more open workspaces [Reference:1](#) compared to 2018.

Overall, cultural production spaces had a higher turnover rate, while cultural consumption spaces experienced a slightly larger net loss of spaces.

Cultural spaces finances

The pandemic challenged cultural spaces' finances.

59 per cent 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 per cent are in a better financial situation now compared to before the pandemic. 20 per cent of cultural production spaces have reported their financial

situation as significantly worse now than before the pandemic, compared to only 17 per cent of cultural consumption spaces.

Performing arts spaces were particularly affected, and two in three organisations are in a worse financial situation now. A small percentage of organisations report being in a better financial situation than before the start of the pandemic, but the proportion is highest among those that provide open workspace.

Tenure instability

One in three cultural spaces in London faces tenure insecurity.

In 21 per cent of cultural spaces, the organisation that runs them expects to not be able to renew their tenure agreement within the next five years. In an additional nine per cent 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 less than one in five spaces own their premises.

Stability of tenure varies greatly between sectors. Museums and galleries are most likely to own the freehold on their premises (34 per cent), and performing arts have a high proportion of spaces with secure leases (56 per cent). Generally, cultural consumption spaces are more likely to enjoy secure tenure.

On the contrary, creative manufacturing and open workspaces are the sectors with the highest proportions of uncertainty in terms of lease, with respectively 47 per cent and 41 per cent of sites not expecting to be able to renew their tenure agreement within the next 10 years. Only 9.2 per cent of open workspaces own the freehold on their premises.

Financial support COVID-19 Pandemic

Three in four organisations received additional financial support during the COVID-19 pandemic, but only one in four received any discount on rent.

Sources of financial support varied, and some organisations were able to access more than one pandemic-related funding programme. The most common sources included the Culture Recovery Fund, Coronavirus Job Retention Scheme, ACE Emergency Response Fund, Heritage Emergency Fund, local authority administered government grants, business rates relief, and the Bounce Back Loan Scheme. For many organisations, these programmes were vital during lockdowns.

However, the majority of organisations did not receive any rent discount, and of those that did, many only received a limited rent discount for a short period of time. A smaller number of organisation received substantial rent discounts.

Future stability

Most of London's cultural spaces are optimistic about still being open in five years from now.

75 per cent of organisations say that it is likely or very likely that they will be able to continue providing cultural space in London in five years from now.

However, nearly eight per cent say that it is unlikely or very unlikely. In addition, organisations that are led by people who identify as members of an ethnic minority feel considerably less certain about the future - only 68

per cent of such organisations say that it is likely or very likely that they will be able to continue providing cultural space in London in five years from now.

3. Spatial Trends

Cultural spaces are concentrated in the centre of London. However, over the past years, many spaces in Central London closed and new spaces were more likely to open outside of the city centre

Space openings and closures

The area of London with the most pronounced net loss of cultural spaces is Old Street and Shoreditch. Overall, many of the areas that experienced net loss of cultural spaces are located in Central London.

The areas that have seen net gain of cultural spaces are scattered outside of the city centre and include Old Kent Road, Stratford, Barking, Wood Green or Park Royal.

Other areas of London experienced relatively low net change in the number of cultural spaces, but very high churn (many spaces closing as well as new spaces opening). Among these areas are Tottenham, Westminster, and parts of Hackney.

Planning policy boundaries

While Central London experienced the most significant net change in cultural spaces, cultural spaces closed and new spaces opened all over London.

Some cultural spaces are located in more than one planning policy boundary.

High streets, opportunity areas (OAs) and town centres have a high cultural space count, in part because they are very large geographies. There are 1,085 cultural spaces on high streets[Reference:2](#), 942 in OAs, and 938 in town centres[Reference:3](#). On the contrary, Locally Significant Industrial Sites (LSIS) cover a small area of London and have low cultural space count – 140 spaces.

A net loss of cultural spaces is a shared feature of all observed policy boundaries with the exception of designated LSIS which have seen a nearly 20 per cent net increase in cultural space count due to the opening of new open access workspaces.

Designated Strategic Industrial Land (SIL) areas and OAs experienced high churn, with less than four in five spaces open in 2018 still open in 2022. On the contrary, high streets and town centres have seen a higher proportion of spaces open in 2018 still open in 2022.

OAs and areas that fall outside of the selected designations experienced the highest net decrease in cultural space count.

4. Brexit, COVID-19 and Cost of Living

Brexit, COVID-19, and inflation have had profound and lasting impact on London's cultural spaces. The cost of living crisis is a major, immediate and pervasive threat to London's cultural life.

COVID-19 pandemic

The impact of the COVID-19 pandemic and restrictions was felt nearly universally by cultural 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 - Outer London producing house

Lost bookings, lost clients, lost revenues. We now have to rebuild from the ground up - Outer London venue and workspace

We had a touring company that we have had to disband due to COVID-19 and Brexit - Renowned London based dance company

The pandemic brought some new opportunities too. We expanded into providing successful online workshops which broadened our audience and our artist and volunteer team - Outdoors arts organisation

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 - South London arts centre

Brexit reduced funding opportunities, and the financial and administrative requirements to tour work is significantly higher- East London arts organisation

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.

Cost of materials for bronze casting has nearly doubled. Cost of energy nearly doubled - West London metal casting workshop

We are now losing money on some jobs, as we have quoted for them, and then the prices of materials has massively changed - South London theatre prop making company

Specialised technical equipment has long delays, for both repairs and upgrades. This leaves us without critical infrastructure and loses us business - Drama school with rehearsal spaces

High prices and cost of living

The cost of living crisis and high energy prices are an immediate, fundamental threat to many cultural spaces in London, and most surveyed organisations 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 one in four 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 per cent - Central London venue and arts charity

We provide London Living Wage as a minimum. Even so, we have lost staff and artist residents recently who have moved out of London due to the very high cost of living - South London arts and performance venue

Artists are leaving London or abandoning creative practices due to the cost of living in London and fewer opportunities - East London art gallery

We have had to put studio rents up to help meet rising costs - North London artist co-operative

As a theatre venue we have a high electricity consumption, so increase in energy prices directly impacts our ability to light/ stage/deliver shows - East London pub theatre

Unequal impacts

London's diverse communities were disproportionately affected by COVID-19, and so were the spaces led by or serving minority ethnic, LGBTQ+, or lower income communities.

The cost of living crisis further exacerbates these inequalities as both artists and audiences struggle to live in London, let alone spend on culture.

The survey of cultural spaces offers sobering insights. Spaces led by people who identify as LGBTQ+ or members of an ethnic minority are disproportionately more likely to be in worse financial situation now compared to before the pandemic, and only 39% of minority ethnic led organisations feel confident that they will keep operating in London in 5 years from now.

Diverse led spaces

For the purpose of this study, diverse led spaces and organisations were defined as those where 51 per cent or more of the organisation's leadership identify as women, disabled, LGBTQ+, ethnic minority, or sharing other protected characteristics.

Financial situation

Of all surveyed spaces, 59 per cent report being in a worse financial situation now compared to before the pandemic. This proportion is considerably higher among minority ethnic (71 per cent) and LGBTQ+ (69 per cent) led spaces, and lower among spaces that identify as neither minority ethnic nor LGBTQ+ led (52 per cent).

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 per cent of minority ethnic led organisation say they are very likely to be still operating in London in 5 years from now. Among organisations that are neither minority ethnic nor LGBTQ+ led, this proportion is 57 per cent (18 percentage-point difference).

Support during the pandemic

The survey indicates that larger and more experienced organisations were more likely to access financial support during the pandemic. Smaller organisations with less capacity and experience in applying for funding found it difficult to access emergency financial support.

There are also differences between the surveyed diverse led and other organisations. While 75 per cent of all spaces received pandemic-related financial support, the percentage was slightly lower among minority ethnic led

spaces (71 per cent) and women led spaces (72 per cent).

In addition, only 23 per cent of minority ethnic led spaces received any discount on rent, compared to 27 per cent organisations overall. However, the proportion of organisations that received a rent discount was higher among women led spaces (31 per cent).

People are more vocal in their appreciation of our ‘Pay What You Can’ ticket scheme. We also noticed that people are spending less in the bar which affects our finances - Diverse-led South London arts centre

As a result of the pandemic, we have to dedicate more time and resources to supporting the communities we work with. Our workload has hugely increased, but our funding has not - Diverse-led North London arts charity

It is taking a long time for people to have the confidence to return to our centre, many are still shielding and some of our members have passed away - Diverse led East London arts space

5. London Datastore

To access more detailed information about how London’s cultural landscape changed between 2018 and 2023 and the impact of Brexit, COVID-19 and the cost of living crisis, please visit [the Cultural Infrastructure data page on London Datastore](#).

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References

- [Reference:1](#) Open workspaces are 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.
- [Reference:2](#) Greater London Authority definition
- [Reference:3](#) London Plan definition