

Commercial workspace provision for visual artists

- a comparison with the affordable sector

MICHAEL CUBEY February 2006



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CAPITAL STUDIOS is led by Acme Studios on behalf of the affordable artists' studios sector in London. The advocacy programme (July 2005 to June 2006) is co-ordinated by Val Millington.

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Commercial workspace provision for visual artists – a comparison with the affordable studio sector

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Michael Cubey, February 2006

1 Executive summary

1.1 Introduction

Capital Studios is an advocacy programme which aims to raise awareness of artists' workspace as an important element in urban renewal programmes, with a view to creating opportunities for long-term sustainability and growth. Led by Acme Studios on behalf of affordable studio providers in London, the programme builds on a national survey of artists' studio groups and organisations¹ compiled by Acme which, for the first time, provides comprehensive information about affordable studio provision in England and in the capital. Supported by Arts Council England, London, the programme is directed at key bodies: local authorities, development agencies, property developers and housing associations.

This survey has been undertaken as a result of a clearly identified need to quantify the amount to which the affordable studio sector subsidises rents to visual artists in London. In doing so it aims to provide hard evidence that can be used in place of what has to date been very partial, and often anecdotal, information about the extent to which affordable studio sector rents differ from those of what are often claimed to be 'affordable workspaces' from commercial sector agencies.

It puts into direct contrast the level of rental subsidy provided by the affordable studio sector in London, in relation to commercially available studio premises in the capital. It follows on from the extensive national survey undertaken by Acme in September 2004 of affordable artists' studios providers.

This survey also aims to identify briefly the difference between the commercial and affordable sectors in terms of rents and a number of other factors beyond cost, including availability, flexibility of terms and suitability for use by visual artists.

This survey should not be seen as, nor is it intended to be, a comprehensive survey of all commercial studio workspace agencies in the capital. By its nature it is more a snapshot of availability and costs at a particular moment which can be compared on a clear like-by-like basis with the affordable studio sector.

Nor is this intended to be in any way a guide to or rating of the various agencies operating in the commercial workspace sector.

¹ 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005

1.2 The London context

Some 58 per cent of all studio space nationally is to be found in London² and there is high demand for affordable workspaces for artists and creative businesses in the capital and limited supply. Most London based studio providers have large waiting lists of artists seeking suitable space, with 3,553 registered looking for studios space across all of London's affordable studio providers, compared with 4,500 nationally³. 30 per cent of all the United Kingdom's visual artists are based in London⁴.

1.3 Scope

In total, the survey looked at 19 different agencies or organisations, in ten different boroughs, covering 41 buildings and a total of 88 individual studio units, with a total 49,511 square feet of studio space.

The boroughs chosen were those that reflected the concentration of studios in the affordable sector. The agencies included small independent landlords, larger workspace providers, and local authorities. The survey data was collected over a period of three weeks in November 2005.

1.4 Availability

One of the main assumptions made as to the reasons why an artist would look to the commercial sector for studio space is that there is likely to be more availability than in the affordable sector. Most of the studio providers in the affordable sector operate a waiting list or registration list system and there is not usually an option of immediate take-up of space upon registering.

At the time of the survey (November 2005), there were 88 individual studio units available from the 19 agencies contacted. The spread of availability was taken to be from studios currently available in November 2005 to ones becoming available in January 2006.

By comparison the larger providers in the affordable sector had, at the same period, 20 studios available or becoming available by the end of January 2006.⁵ These studios were very much at the higher end of the 'affordable sector' rent level, with rents between £9.00 to £15.00 per square foot per year, with over 60 per cent of these with rents over £12 per square foot.

² 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005.

³ Ibid.

⁴ 'Case for London', London Arts, 2000

⁵ Availability was checked in December 2005 with Acme, ACAVA, ASC, Bow Arts Trust, and SPACE. Acme and Bow Arts Trust were 100 per cent occupied, there were 2 vacant studios at ASC, 5 at ACAVA, and 15 at SPACE.

The survey could not locate any availability at the average affordable rental of £7.49 per square foot.

Although availability existed in the commercial sector, finding the available, suitable premises proved to be less straightforward than in the affordable sector, which by comparison benefits from signposting agencies enabling artists to contact easily the key affordable sector studio providers.

1.5 Suitability

Many surveys of what visual artists need in terms of studio space have shown that across the wide range of differing practices there are some constants, key amongst these are:

- an affordable rent
- self-contained
- flexible lease terms including sharing and sub-letting to allow for the take-up of residencies and shifting patterns of work and income in a visual artist's career
- a large enough space to make, store and show their work, that can be used to make art work, and often to show it (i.e. a space that can be clean *and* dirty)
- flexibility of access (ideally 24 hour access)
- good naturally-lit space; a peaceful and quiet work environment
- security (encompassing physical security of premises and personal safety, as well as security of tenure)
- an environment that is supportive and allows for some informal networking with peers and 'open studio' type initiatives

An in-depth analysis of all these aspects was beyond the survey's scope, but aside from the key area of affordability, the main areas for comparison are:

- the average size of a commercial studio in the survey was 550 square feet, compared to the average studio size in the affordable sector of 308 square feet. 250 to 350 square feet, at an affordable rent, is the most popular and commonly sought size of studio space within the affordable sector.
- the affordable sector's flexible lease terms which allow for residencies and shifting patterns of work and income in a visual artist's career
- a working environment that is supportive and allows for some informal networking with peers and 'open studio' type initiatives

1.6 Lease terms

From Acme's 2004 national survey, 51 per cent of affordable studio provision in London was on monthly licence agreements, 32 per cent on business tenancies. This compares with only 8 per cent of the surveyed commercial sector on monthly licences, with the majority being on two or three year leases (62 per cent), and at least 33 per cent of the surveyed commercial studios having no option to break leases.

Flexible lease terms providing 'easy-in, easy-out' tenure are seen by the affordable sector studio providers to be extremely valuable to visual artists whose needs for studio space will change according to a number of factors including, but not limited to: income changes, type of practice changing, scale of work changing, residencies taking an artist away from the studio for extended periods.

Being tied in to a costly lengthy lease can be at best restrictive to an artist's practice as it changes, at worst it can be financially devastating.

1.7 Additional resources

Access to resources, assistance in developing markets for artwork, peer networks, and continuing professional development are the most frequently cited needs by visual artists, after access to suitable, secure, affordable studio space.

There was no apparent support for either 'open studio' or business support programmes, such as marketing, professional development or mentoring, nor any exhibition space or access to specialised creative equipment at any of the surveyed premises or agencies, either as an inclusive service or at an additional cost.

This compares with Acme's 2004 findings, which showed over 50 per cent of affordable studio providers offering 'open studio' programmes, 37 per cent offering business support and access to exhibition spaces, and 20 per cent offering access to IT or other creative equipment at no extra cost.

1.8 Rents

Taken from the Acme September 2004 national survey of affordable studio providers, the average inclusive rent in London was £7.54 per square foot, which should be taken as a bench mark of affordability across London. In order to make a clear, like-by-like comparison between the commercial and affordable studio sectors, this survey uses the average affordable rent for those ten boroughs included in this survey, which is £7.49 per square foot.

Most studio providers in the affordable sector operate on an 'inclusive' rent basis. This term is normally taken to include any insurance, service charge, business rates or VAT. It does not normally include electricity, which is usually sub-metered per individual studio unit.

This survey looked at rent levels, and also took into account whether there were additional charges, such as service charges, insurance, VAT, and business rates. In the majority of cases the rent was exclusive of service charges, and in nearly all cases exclusive of business rates. In working out a comparable commercial 'inclusive' rent these additional costs have been added in to the total cost per square foot.

Key Findings:

- The average service charge additional to the quoted rent in the commercial sector is £2.19 per square foot.
- The average business rate additional to the quoted rent in the commercial sector is £3.34 per square foot.
- Business rates and service charges combined make a total addition of £5.53 to the stated rent per square foot, or approximately 25 per cent of the total rent per square foot.
- The average commercial workspace rent per square foot across the ten boroughs surveyed is £22.38.

- 54 per cent of surveyed studios had rents per square foot over £20.
- 81 per cent of surveyed studios had rents per square foot over £15.
- 94 per cent of surveyed studios had rents per square foot over £12.
- Using the above figures, one can compare this with the average rent per square foot in the affordable sector of £7.49 for the same boroughs, and see that in the commercial sector, 81 per cent of the rents are more than double that of the affordable sector.
- Looking at the rents in the commercial sector that are under £12.00 per square foot, only 6 per cent of the studio units surveyed fell into this category.

- On a calendar month basis, for a studio of 300 square feet, (the average size of studio in the affordable sector) a visual artist would need to pay an average of £559 per calendar month, or £6,714 per annum if renting in the commercial sector in London.
- This compares to £187.25 per month, or £2,247 per annum for the same sized studio if rented in the affordable sector in London. That is an additional £372 per month that a visual artist would need to pay if renting from the commercial workspace sector.

Summary of key rent comparisons:

- The minimum inclusive rent per square foot surveyed in the commercial sector was £10.36, compared with £1.40 in the affordable studio sector, a difference of £8.96 per square foot, or 740 per cent.
- The maximum inclusive rent per square foot surveyed in the commercial sector was £44.73, compared with £18.86 in the affordable studio sector, a difference of £24.57 per square foot, or 236 per cent.
- The average inclusive rent per square foot surveyed in the commercial sector was £22.38, compared with £7.49 in the affordable sector, a difference of £14.89 per square foot, or 299 per cent.
- The average difference in inclusive rent per square foot across London is 299 per cent between the two sectors.

1.9 Conclusions

The affordable sector's provision of studios to visual artists creates a very significant financial subsidy to the visual arts sector in London, and represents extremely good value for money:

- The value of business rate relief alone represents a subsidy created by the affordable studio sector of between £881,995 and £1,435,864 per annum to the visual arts sector in London.
- Revenue support for the visual arts affordable studio sector (£240,530 per annum) represents between 16.7 per cent to 27.3 per cent of the subsidy created by business rates relief generated by the sector (between £881,995 and £1,435,864 per annum).
- Revenue support for the visual arts affordable studio sector (£240,530) represents just 2.58 per cent of the rental subsidy created at present by the affordable visual arts studio sector in London (£9,311,059 per annum).
- The level of the rental subsidy created at present by the affordable studio sector in London, compared to commercially available premises is £9,311,059 per annum.

This study has shown the considerable financial subsidy the affordable studio sector provides for visual artists in London. There are other, much harder to quantify benefits that the sector contributes to the support of artists that are beyond the scope of this survey, but have considerable impact alongside the key provision of suitable, affordable studio space.⁶ The impact of the affordable studio sector also extends beyond the support of individual artists, through educational, cultural and economic impacts on the local communities in which these buildings are sited.

The affordable studio sector is still vulnerable, and has too often been regarded as a temporary solution to a continuing permanent need of artists in London. Acme's national studio survey reported that 'by the end of 2008, 13 buildings (301 studios) are likely to be vacated, and to the end of 2013 a further four buildings and 130 studios. The total number of building at risk may be larger as those with expectations of renewal before 2008 may be vacated before 2013.'⁷

The value of the sector is now being officially recognised, and it is hoped that the findings of this survey will assist the sector to develop and strengthen, by showing the very real long term economic benefit that the provision of permanent, suitable and affordable studio space for visual artists will make.

⁶ These have been only briefly touched on in this survey in section 7, but include informal peer support, access to employment and continuing professional development, exhibition opportunities.

⁷ 'London Digest', from 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005.

2 Introduction – the London context, the need for a survey

2.1 The background and need for a survey

Capital Studios is an advocacy programme which aims to raise awareness of artists' workspace as an important element in urban renewal programmes, with a view to creating opportunities for long-term sustainability and growth. Led by Acme Studios on behalf of affordable studio providers in London, the programme builds on a national survey of artists' studio groups and organisations compiled by Acme which, for the first time, provides comprehensive information about affordable studio provision in England and in the capital. Supported by Arts Council England, London, the programme is directed at key bodies: local authorities, development agencies, property developers and housing associations.

The findings of this study provide important evidence about the cost and availability of commercial studio space in the capital, in support of the advocacy programme.

This survey was commissioned as a result of a clearly identified need to quantify the amount to which the affordable studio provider sector subsidises rents to visual artists in London. In doing so it aims to provide hard evidence that can be used in place of what has been to date very partial, and often anecdotal, information about the extent to which affordable studio sector rents differ from those of what are often claimed to be 'affordable workspaces' 'suitable for artists' from commercial sector agencies.

The survey also aims to identify briefly the difference between the commercial and affordable sectors in terms of rents and a number of other factors beyond cost, including availability, flexibility of terms and suitability for use by visual artists.

It follows on from an extensive national survey undertaken by Acme in September 2004 of affordable artists' studios providers.⁸ That survey examined rental levels, availability and additional levels of support to artists offered by the affordable studio sector. This survey, on a much smaller scale, attempts to put into direct contrast the level of rental subsidy provided by the affordable studio sector in London, in relation to commercially available studio premises in the capital.

It takes as its starting point, that if an artist had to obtain studio space on the open market, what would they get, what would they have to pay and what would the terms and conditions be?

This survey should not be seen as, nor is it intended to be, a comprehensive survey of all commercial studio workspace agencies in the capital. By its nature it is more a snapshot of availability and costs at a particular moment which can be compared on a clear like-by-like

⁸ 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005.

basis with the affordable studio sector. Nor is it intended to be, in any way, a guide to or rating of the various agencies operating in the commercial workspace sector.

The report examines data gathered on the commercial workspace sector and compares this with the affordable studio sector. It covers the availability and ease of finding premises (Section 4), the suitability for use of available premises (Section 5), lease terms, flexibility of letting arrangements (Section 6), other resources and 'added value' support offered (Section 7) and – the key focus of the survey – the difference between the cost of renting studios in the commercial and affordable sectors (Section 8). Finally, the survey draws some conclusions on the subsidy provided by the affordable studio sector to visual artists in London (Section 9).

2.2 The London context

Some 58 per cent of all studio space nationally is to be found in London⁹ and there is high demand for affordable workspaces for artists and creative businesses in the capital and limited supply. Most London based studio providers have large waiting lists of artists seeking suitable space, with 3,553 registered looking for studios space across all of London's affordable studio providers, compared with 4,500 nationally¹⁰. 30 per cent of all the UK's visual artists are based in London¹¹.

London studio organisations (the largest of which are Acme, ACAVA, ASC and SPACE) represent an extraordinarily diverse range of approaches to space provision and are a vital resource, which supports art and artists at the level of production. However, it is also a sector under threat. Rising land values and new development schemes are impacting on the provision of affordable workspace for artists, and the leases of many existing spaces are due to expire over the next ten years.

⁹ 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005.

¹⁰ Ibid.

¹¹ 'Case for London', London Arts, 2000

3 Methodology, scope of survey and definitions

3.1 Methodology

As a potential visual artist tenant, the researcher approached a sample of 10 to 15 commercial workspace providers, and obtained a sample of inclusive rent levels of currently available suitable workspace units suitable for visual artists.

This entailed looking for available units of between 300 and 500 square feet in size, (or nearest available) to enable sensible comparisons to be made with the affordable sector on the most popular sizes desired by artists.

On top of the basic rent, the survey took into account all additional costs such as business rates, any service charges and other landlord or other imposed costs to arrive at an inclusive rent for comparison with the affordable data from Acme's September 2004 National Survey. In addition to rent levels, information was obtained on relevant terms and conditions, including the type of tenancy or lease, the length of tenure, security of tenure, rent review provisions, access hours, any sign-up and legal costs and the amount of deposits required.

The research was primarily desk-based, with information gathered by telephone, email and web search. Some visits were made to individual sites to ascertain suitability of use and to gather the relevant data, where this was not otherwise available.

The data was gathered over a period of three weeks in November 2005. Appendix A lists the agencies included in this survey, and a full breakdown of all data is included in Appendix B. Appendix C gives a breakdown of rents by borough. The full brief for the study is included at Appendix D.

3.2 London boroughs covered

Due to financial and time restraints it was necessary to concentrate survey data on certain London boroughs, and in doing so to concentrate on those boroughs that featured in Acme's national survey as having the main concentrations of affordable studio premises.

The table below shows the location by borough of the 27 London organisations included in the September 2004 survey in terms of the number of buildings, studio units, and net square footage.

Table 3.1 Boroughs covered in Acme 2004 survey of affordable studio providers

London borough	Buildings managed	Studio units	Net square footage
Camden	1	5	1,990
Ealing	4	51	9,244
Greenwich	1	5	1,792
Hackney	19	440	155,954
Hammersmith and Fulham	3	53	14,995
Haringey	2	50	10,221
Hounslow	1	Not given	Not given
Islington	3	84	26,329
Kensington & Chelsea	2	21	5,900
Lambeth	7	179	54,468
Lewisham	5	217	79,680
Merton	2	21	4,756
Newham	1	35	10,025
Southwark	6	120	43,888
Sutton	1	12	2,660
Tower Hamlets	13	435	185,421
Wandsworth	1	104	18,000
Total	72	1,832	625,323

From the Acme September 2004 survey, the London borough of Hackney has the largest number of studio buildings and units (24 per cent of the London total of units), but Tower Hamlets has the largest square footage (30 per cent of the total). The boroughs to the east and south-east of London (Hackney, Greenwich, Lewisham, Newham, Southwark and Tower Hamlets) have 68 per cent of the total number of studio units.

The table below shows the location by borough of the premises included in this survey in terms of the number of agencies, buildings, studio units, and net square footage, and compares it with the September 2004 affordable data.

In this survey ten London boroughs were included which had a high concentration of affordable studio provision identified in the September 2004 survey, and where a reasonable selection of commercial workspace agencies could be identified.

While the national survey showed all known existing provision covered by the affordable sector, this survey, as a snapshot, only looked at premises available to let at the time of survey [November 2005]. Obviously the total amount of commercially available studio workspace premises in the boroughs covered is far greater than the surveyed amount.

Table 3.2 Commercial workspace premises included in this survey, compared with September 2004 survey of affordable premises, by borough

London Borough	Commercial			Affordable		
	No. of premises surveyed	Studio units surveyed	Square feet per borough	No. of premises surveyed	Studio units surveyed	Square feet per borough
Ealing	1	3	1,787	4	51	9,244
Greenwich	1	1	460	1	5	1,792
Hackney	9	11	6,404	19	440	155,954
Haringey	2	2	1,296	2	50	10,221
Kensington & Chelsea	6	19	10,263	2	21	5,900
Lambeth	2	3	2,143	7	179	54,468
Lewisham	4	4	2,341	5	217	79,680
Newham	2	4	2,542	1	35	10,025
Southwark	7	10	6,642	6	120	43,888
Tower Hamlets	7	31	15,633	13	435	185,421
Total (London)	41	88	49,511	60	1,553	556,593

3.2 Agencies and workspace providers surveyed

The survey included a range of different agencies, to give a comprehensive cross section of the main avenues of commercially available studio provision open to a visual artist seeking studio space. These fall into three main groupings:

1. Large, organised providers of commercial workspace and office space, often operating at a national as well as London level, usually managing several sites across the capital.
2. Smaller independent landlords, with the premises often managed through estate agents. These are often 'one-off' or single site premises.
3. Business workspace provision provided by and often managed directly by local authorities and development agencies.

Not every grouping was able to be included in every borough, but of the 19 agencies surveyed this included:

- Three local authorities directly managing workspace provision.
- Six medium to large-scale agencies whose business was specifically commercial workspace provision and management.
- Two regeneration agency developed premises, managed by estate agents.
- One development trust operating a small portfolio of workspace and retail premises.
- Two property development companies with a mix of small stand-alone premises and large-scale workspace sites.
- Five estate agents managing a variety of commercial properties.

A full listing of the individual agencies and providers of workspace included in the survey is given in Appendix A.

3.3 Type of premises surveyed

The survey attempted as far as possible to survey like with like, in order to make clear comparisons between the commercial and affordable sector. Premises surveyed ranged from railway arches, ex-industrial warehouse type premises (including one large complex of studios that used to be managed in the affordable sector), shop basements; new-build workspace clusters, business parks, and Victorian mews workshops. In assessing available studio premises, the survey looked for premises that an individual visual artist would realistically be able to work in.

The target size of premises was between 300 to 700 square feet. The smallest size of studio included was 227 square feet; the largest size included was 1,104 square feet. The average size of studio in the survey was 550 square feet. (Nationally, an average studio in the affordable sector measures 308 square feet¹²).

The survey did not include finished office space accommodation, of which there was a large amount available, as the higher cost of office-type accommodation would obviously distort the survey results, and generally speaking, office-type space is unsuitable for most visual arts practice requirements. Nor did the survey look at larger scale industrial premises of over 1,000 square feet, which, generally speaking, are beyond the budget of most individual visual artists in London, even at an affordable rent. Similarly, un-refurbished premises that might be suitable for conversion to studios were not included, as the scope of this survey was limited to available studio-type premises suitable for an individual visual artist.

¹² 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005.

3.4 Rents: affordable and inclusive

What is an affordable rent?

Taken from the Acme September 2004 national survey of affordable studio providers, the average inclusive rent in London was £7.54 per square foot (against a national average of £5.82). There was obviously a wide range of rent levels across the sector, but the average figure of £7.54 per square foot should be taken as a benchmark of affordability across London.

In order to make a clear like-by-like comparison between the commercial and affordable studio sectors, this survey uses the average affordable rent for those ten boroughs included in the survey, which is £7.49 per square foot.

What is meant by an inclusive rent?

Most studio providers in the affordable sector operate on an 'inclusive' rent basis. This term is normally taken to include any insurance, service charge, business rates or VAT. It does not normally include electricity, which is usually sub-metered per individual studio unit.

This survey looked at rent levels, and also took into account whether there were additional charges, such as service charges, contributions for insurance, whether VAT was to be added to the rent and/or service charge, and whether business rates were included. In the majority of cases the rent was exclusive of service charges, and in nearly all cases exclusive of business rates.

In working out a comparable, commercial 'inclusive' rent these additional costs have been added in to the total cost per square foot.

Some agencies were able to provide comprehensive figures including the additional costs of service charges and in some cases business rates. Where agencies were unable to provide rates figures these were obtained from the Valuation Agency website, based on the most current 2005 rating for the premises.

4 Availability

One of the main assumptions made as to the reasons why an artist would look to the commercial sector for studio space is that there is likely to be more availability than in the affordable sector. Most of the studio providers in the affordable sector operate a waiting list or registration list system and there is not usually an option of immediate take-up of space upon registering. At the time of the survey (November 2005), there were 88 individual studio units available from the 19 agencies contacted. The spread of availability was taken to be from studios currently available in November 2005 to ones becoming available in January 2006.

By way of comparison a snapshot of the larger providers in the affordable sector had at the same period 20 studios available, or becoming available, by the end of January 2006.¹³ It should be noted that the studios available were very much at the higher end of the 'affordable sector' rent level, with rents between £9.00 and £15.00 per square foot, with over 60 per cent of these with rents over £12 per square foot. In addition to these spaces there were some sublet or shared spaces available, for periods of up to 6 months. The survey could not locate any availability at the average affordable rental of £7.49 per square foot.

Although availability certainly existed in the commercial sector, finding the available suitable premises proved to be less straightforward than in the affordable sector.

In London, a visual artist seeking studio space might realistically start with a web search to find providers or agencies offering space. Various searches on Google such as: 'visual artist studio space London', 'studio work space London', and indeed 'commercial premises for artists', all point first to the affordable sector.

Widening the search to look for 'work space London' starts to include the biggest of the organisations included in this survey, but still points more to the affordable sector and signposting agencies set up to assist visual artists in the capital.¹⁴ In addition, the websites of local authorities such as Lambeth and Southwark point artists to the main affordable sector studio providers. Signposting agencies in London such as Artquest and CIDA, and the national signposting service an.co.uk, make it very easy for a visual artist to find providers of suitable studio space within the affordable sector.

¹³ Availability was checked in December 2005 with Acme, ACAVA, ASC, Bow Arts Trust, and SPACE. Acme and Bow Arts Trust were 100 per cent occupied, there were two vacant studios at ASC, five at ACAVA, and 15 at SPACE.

¹⁴ Artquest, CIDA, Arts Council England, SPACE, Acme, ASC, an.co.uk are some of the main first results for a web search for 'studio space visual artist London'.

Once the search widens to the commercial sector, although there are various signposting agencies set up to assist small businesses in this search¹⁵, the 'fit' of the premises found is not so close to the needs of the visual artist, with an abundance of office space and larger industrial units to sift through before locating individual workspaces of 300 to 700 square feet.

Although some of the commercial signposting property sites recognise 'studio' as a category, it still is generally taken to mean more office-type premises than a studio-workspace as understood by the visual arts sector.

4.1 Comparisons with the affordable studio sector

It is true to say that from the results of this snapshot survey, there is, broadly speaking, a greater degree of available studio workspace to let in the commercial sector than in the affordable sector.

If affordability was not an issue, a visual artist could reasonably expect to find some sort of studio workspace suitable for a visual arts practice in one of the ten London boroughs surveyed here, without the need to pre-register on a waiting list. Having said that, there is still quite a limited amount of suitable workspace available even within the commercial sector, and during the 'snapshot' period of three weeks, a number of the workspace units initially researched had been let.

By comparison, most of the larger affordable studio providers in the capital had none, or one to two studios available or coming available, to those artists pre-registered on their waiting lists. There were two exceptions to this, but in both cases these providers were offering studios at the highest end of the affordable sector rental level, and one can reasonably assume that this is the main reason for the lack of take-up of these studios.

¹⁵ Some of the commercial signposting agencies used included:

South London Business: <http://properties.southlondonbusiness.co.uk/>, Commercial Property Register: <http://www.compropregister.co.uk/>, Gateway to London: <http://www.gtlon.co.uk/>, egpropertylink: <http://www.egpropertylink.com/>

5 Suitability for use

The term 'visual artist' encompasses a very wide range of disciplines and studio practices and, consequently, there is a wide range of differing practical requirements according to individual practice when an artist is looking for suitable studio space.

It is widely recognised that visual artists have for many years sustained their primary practice through a 'portfolio career' of related practices, from teaching to web design and a host of activities in between. The artist's studio is the base for all these activities, and while it may be possible to pursue some practices in a shared desk-based environment, most visual arts practices still require the flexible open-ended approach that only a reasonably sized studio can offer.

Many surveys conducted by studio providers in the affordable sector of what visual artists need in terms of studio space, have shown that across the wide range of practices there are some constants:

- an affordable rent
- self-contained
- security (encompassing physical security of premises and personal safety, as well as security of tenure)
- a large enough space to make, store and show their work
- a physical space that can be used to *make* art work, and often to show it (i.e. a space that can be clean *and* dirty)
- flexibility of access (ideally 24 hour access to allow for balancing outside income generating activities that may prevent accessing the studio during a normal 9 to 5 day)
- good naturally-lit space; a peaceful and quiet work environment
- an environment that is supportive and allows for some informal networking with peers and 'open studio' type initiatives
- flexible lease terms including sharing and sub-letting to allow for residencies and shifting patterns of work and income in a visual artist's career
- additional access to resources and business support, and exhibition opportunities.

Office-type environments, as well as carrying significant and unnecessary additional cost overheads, are generally unsuitable for visual artists' practice due to restricted access hours, restricted physical access for large work, low ceiling height, poor ventilation, and user clauses, which may prevent a range of normal visual arts studio practices (i.e. painting, sculpture) being carried out (due to incompatibility of these practices with a more 'finished' office space).

At the other end of the scale, larger industrial units are often unsuitable, not only because the size of premises over 1,000 square foot is, in London, beyond the reach of most visual artists' incomes, but also because the range of industrial businesses located adjacent will often be very noisy or dirty trades that can impact on an artist's ability to work effectively.

Where visual artists differ from the wider creative industries under whose umbrella they are frequently gathered, is the need for a studio space, on average, of at least 300 square feet. This considerably affects cost to the visual artist, compared to the jeweller or graphic designer who may be able to pursue their practice in a space of 150 square feet or less, or in a more 'desk-based' environment, more easily found among the commercially available premises.

5.1 Comparisons with the affordable studio sector

It is difficult to make hard and fast comparisons on suitability from the scope of this survey, which due to time constraints primarily looked at the issue of affordability. Issues such as security, tenure, and good natural light differ from building to building and from agency to agency, which is also the case in the affordable sector.

Aside from affordability, which will be looked at in the next section, the main comparison is the affordable sector's flexible lease terms to allow for residencies and shifting patterns of work and income in a visual artist's career. Lease arrangements will be looked at in more detail in section 7, but generally speaking, it would be fair to say that there is far greater flexibility geared towards visual artists' needs in the affordable sector.

The other main comparisons are a working environment that is supportive and allows for some informal networking with peers, 'open studio' type initiatives, and access to other resources and support. Given that studio provision by the affordable sector has mainly come from a background of being established by artists for artists, it comes as little surprise that, by and large, a supportive environment might reasonably be found within that sector. A building that houses mainly visual artists will allow for greater peer support and opportunities for joint initiatives such as 'open studios', than a building with a mix of diverse and unrelated business practices, especially if the nature of other practices makes it hard to attract visitors. To quantify this benefit would require another study however. The issue of access to other resources and support will be looked at in section 8.

6 Lease terms, flexibility and clarity of information

In addition to availability and suitability of studio space, rental levels and other costs, the survey looked at the type of letting arrangements that a visual artist would need to enter into in the commercial workspace sector, how flexible these terms were in meeting a visual artist's needs, and the clarity of the information given out by the surveyed agencies.

6.1 Leases

The lease terms available from those agencies surveyed ranged from monthly licences or tenancies-at-will arrangements, to full-repairing leases. This broke down as follows:

Table 6.1 Breakdown of commercial lease types amongst surveyed agencies.

Lease term	Percentage	Number of studios	Number of studios with option to break	
Monthly tenancy/licence	8%	7	7	8%
One year lease	7%	6	0	0%
Two year lease	31%	27	27	31%
Three year lease	31%	27	5	6%
Five year lease	13%	12	10	12%
Not stated	10%	9	-	
Total	100%	88	49	57%

The most common arrangement among those agencies surveyed is a two or three year lease, followed by a five year lease, with a monthly licence or tenancy being offered by seven of the surveyed agencies.

6.1.1 Leases – comparisons with the affordable studio sector

From Acme's 2004 national survey, 51 per cent of affordable studio provision in London was on monthly licence agreements, 32 per cent on business tenancies. This compares with only 8 per cent of the surveyed commercial sector on monthly licences, with the majority being on two or three year leases (62 per cent), and at least 33 per cent of the surveyed commercial studios having no option to break leases.

As well as imposing longer term restriction on visual artists, the signing of a lease, as opposed to a simpler licence or monthly tenancy, brings added legal costs at the point of signing the contract, which several of the commercial agencies surveyed added in as an identified cost of between £200 to £350 to the tenant.

Flexible lease terms providing 'easy-in, easy-out' tenure are seen by the affordable sector studio providers to be extremely valuable to visual artists whose needs for studio space will change according to a number of factors including, but not limited to: income changes, type of practice changing, scale of work changing, residencies taking artists away from their studios for extended periods. Being tied in to a costly, lengthy lease can be at best restrictive to an artist's studio practice as it changes, at worst it can be financially devastating.

6.2 Sub-letting, sharing

In the majority of cases there was flexibility shown towards the ability of tenants to informally share their studio premises with others, as long as the responsibility for rent and other aspects of the lease was clearly that of the original tenant. There did not in any cases appear to be available to visual artists the more formalised sub-letting arrangements that are common practice among the larger established affordable sector studio providers.

Sub-letting arrangements benefit the existing, or more permanent studio holder, by allowing for 'rent holidays' whether as a result of income need or absence from studio through external residencies or similar, and also provide access to studio space for artists whose need may not be permanent.

The need for flexible lease arrangements and sub-letting should not be seen to mean that most visual artists only need or want access to temporary studio space – for most, security of tenure is a paramount concern, but this needs to go hand-in-hand with an understanding of, and sympathy for, the changing nature of individual visual artists' practices and incomes.

6.3 Deposits

In most cases a deposit was required at the point of signing a letting arrangement, whether this was a short monthly licence or a longer term lease arrangement. This ranged from one month's rent up to six months' rent held as deposit, with the most common amount being three months' deposit (63 per cent, or 56 of the 88 individual studio units surveyed). This compares to, most commonly, one month's or in some instances two months' deposit in the affordable sector.

While this may not seem a significant difference, for many visual artists the increased cost of the rental and the greater deposit combined is a substantial initial hurdle to overcome when attempting to set up or relocate to a new studio space.

6.4 Clarity of terms

It is difficult to state with certainty the clarity of information given regarding full lease and financial terms. To be fair, some agencies would only issue this at or near the point of signing a letting contract, which this survey did not cover.

The range and quality of information given out at an initial enquiry stage varied widely from agency to agency, from extremely helpful and clear full financial and lease information, to very vague and conflicting information on both rental costs and terms of lease. The scope of this survey does not allow for any meaningful comparisons to be drawn across the commercial sector and affordable sector as a whole in this regard.

6.5 Inclusive terms

This is a major factor. Having a truly all-inclusive rent that also includes subsidised business rate relief is of enormous benefit to visual artists. The concluding section will look at the level of financial subsidy provided by business rate relief.

Operating on a not-for-profit basis also means that any service charges are kept to the minimum wherever possible. Not having to even think about rates, or service charges, is of great benefit too, as it means for the visual artist taking on a new studio that there is absolute clarity about what they will be paying every month, and there will not be a nasty surprise in six to 18 months of an unexpected rates demand.

Although a number of commercial agencies were very clear and helpful about what the additional rates and other costs would be, less than 10 per cent had fully inclusive rents, and the onus would be on the artist renting to ensure that their individual rates liabilities were met.

A visual artist moving from the affordable to the commercial sector would need to know these additional charges in order to work out the true total cost of their studio, as in most cases this information is not fully provided unless explicitly requested.

7 Additional resources – added value

Although peripheral to the main body of this survey, it is worth examining if the commercial workspace sector offers visual artists additional resources or added benefits. This might be in terms of access to business support, shared office facilities (i.e. photocopiers, fax, broadband), a location that would offer possibilities for greater participation or audiences for 'open studio' type events.

Four of the 19 agencies surveyed included this as part of their marketing. This included CCTV security, some access to office facilities such as fax and photocopier, and in two instances high speed broadband capabilities in the studio, if required.

Additional resources that would particularly support visual artists, such as exhibition space, specialised business support, access to technical resources such as new media or other equipment, 'open studio' type marketing activities or active networking and peer support did not appear to be in evidence at any of the surveyed agencies or premises.

7.1 Additional resources/added value - comparisons with the affordable studio sector

Acme's 2004 survey identified additional facilities or opportunities in addition to studio space, and whether these were included in the rent charged, or available at an additional cost. The table below shows the range of resources and facilities offered:

Table 7.1 Other resources to visual artists provided in the affordable sector

Facilities or opportunities	Not provided	Inclusive	Exclusive
Access to creative equipment e.g. darkroom, firing kiln, etc.	59%	19%	22%
Gallery, exhibition, performance space	41%	37%	22%
Business support programmes e.g. mentoring, marketing etc.	44%	37%	19%
Administrative support	41%	48%	11%
Access to the internet	48%	30%	22%
Telephone	41%	19%	41%
IT equipment	52%	22%	26%
Open studios	26%	56%	18%
Living accommodation	81%	0%	19%

By comparison, of the 19 commercial workspace providers surveyed, 22 per cent stated that there would be access to office facilities. This referred to access to fax and photocopier. Broadband internet was available in a number of premises, at a cost, as were individual telephone lines (as indeed is the case in the affordable sector) at cost.

There was no apparent support for either 'open studio' or business support programmes, such as marketing, professional development or mentoring, nor any exhibition space or access to specialised creative equipment at any of the surveyed premises or agencies.

Access to resources, assistance in developing markets for artwork, peer networks, and continuing professional development are the most frequently cited needs by visual artists, after access to suitable affordable studio space.

Even if these resources and opportunities are offered at an additional cost, the ability to access them in a supportive studio environment with informal networking opportunities with peers is clearly of enormous added benefit to the visual arts sector.¹⁶

¹⁶ For a range of views on what artist and others in the sector view as the importance and changing requirements of a visual artists studio refer to a-n's 'Future Forecast – Future SPACE' 2005.

8 Costs – rents, rates and service charges

8.1 Commercial sector rents per square foot

Rental figures were collected on a studio by studio basis. These were most often in the form of a monthly or annual rental figure, which was then broken down into a rent per square foot, in order to be able to compare data with the affordable sector.

In addition, other costs not included in the stated rent were collated. This included service charges, which were most often quoted as an annual figure, which was then translated to a per square foot amount and VAT, which if charged, was added to the quoted rent and to the service charge where applicable. Lastly, business rates per square foot were taken into account. The final cost per square foot is taken to be the inclusive rent, which is used to compare with the affordable sector.

As the table below shows, at the average point, rates and service charges combined make a total addition of £5.53 to the stated rent per square foot, or approximately 25 per cent of the total rent per square foot.

Table 8.1 Breakdown of average commercial rent per square foot including service charges and rates

Average rent per square foot, exclusive of rates, service charges, but including VAT	£16.85
Average rent per square foot, fully inclusive of rates, service charges, and VAT	£22.38
Average service charge additional to stated rent in commercial sector	£2.19
Average rates per square foot additional to stated rent in commercial sector	£3.34

Although some of the commercial workspace providers were very clear about these additional costs, a visual artist moving from the affordable sector to the commercial sector, where fully inclusive rents are the standard rather than the exception, could well find the need to carefully calculate on a monthly basis the additional service charge and rates liabilities problematic.

As Acme's national survey has highlighted, the issue of VAT is also problematic because very few visual artists qualify for VAT registration and would not be entitled to reclaim this additional cost.

8.2 Breakdown of data by London boroughs

As might be expected, some London boroughs are more expensive for commercially available studio space than others. The survey analysed rents on a borough-by-borough basis:

- The highest of the surveyed average rents per borough is in Kensington and Chelsea, at £44.43, which also has the highest business rates of those boroughs surveyed.
- The lowest average rent is in Southwark at £10.36.
- The cheapest average rates were in Lambeth.
- The average London rent of the ten boroughs surveyed is £22.38.

The table below shows inclusive minimum, maximum and average rents per borough. For the purpose of later comparisons, in general only the average rent will be used.

Table 8.2 Comparison of average commercial studio rents per square foot by London borough

London boroughs commercial sector	Minimum rent per borough	Maximum rent per borough	Average rent per borough
Ealing	£25.51	£27.28	£26.18
Greenwich	£15.01	£15.01	£15.01
Hackney	£14.73	£25.55	£18.10
Haringey	£14.64	£21.85	£17.68
Kensington & Chelsea	£21.44	£44.43	£33.10
Lambeth	£14.80	£24.00	£16.27
Lewisham	£11.16	£15.39	£13.40
Newham	£12.34	£26.25	£19.43
Southwark	£10.36	£26.38	£16.08
Tower Hamlets	£13.05	£31.63	£22.62
London averages			£22.38

8.3 Rents: comparisons with the affordable studio sector

Drawing on the information gathered in this 'snapshot' survey and Acme's much more comprehensive 2004 National Survey, comparisons can be made between the different rent levels in the affordable studio sector and the commercial workspace sector in London.

Accepting the cautionary note that this is a 'snapshot' and not a comprehensive survey of the entire commercial workspace sector in London, and that a 14 month period separates Acme's affordable sector data from the data gathered here, there is clearly a huge difference in the level of rent charged between the two sectors, as shown in the table below.

Table 8.3 Comparing the affordable and commercial sector on rent, by borough

	Commercial sector	Affordable sector		
London boroughs	Average rent per borough per square foot	Average rent per borough per square foot.	Difference in rent per square foot.	Difference in rent in percentages
Ealing	£26.18	£10.40	£15.78	252%
Greenwich	£15.01	£6.50	£8.51	231%
Hackney	£18.10	£7.78	£10.32	233%
Haringey	£17.68	£9.58	£8.10	185%
Kensington & Chelsea	£33.10	£10.39	£22.71	319%
Lambeth	£16.27	£9.36	£6.91	174%
Lewisham	£13.40	£7.49	£5.91	179%
Newham	£19.43	£6.00	£13.43	324%
Southwark	£16.08	£6.84	£9.24	235%
Tower Hamlets	£22.62	£6.58	£16.04	344%
London averages	22.38	£7.49	£14.89	299%

On an average basis across all boroughs surveyed, there is a 299 per cent difference in rents between the commercial and affordable sectors. For a full breakdown comparison, borough by borough, of minimum, maximum and average rents between the affordable and commercial sectors refer to Appendix C.

Looking at the rent per square foot as seen across the entire number of studios surveyed, another similar contrast emerges, as the table below shows:

Table 8.4 Breakdown of number of studios in the commercial sector by the level of rent per square foot (out of a total of 88 individual studio units surveyed)

Rent per square foot	Above £20	Below £20	Above £15	Below £15	Above £12	Below £12
Number of individual studios	48	40	71	17	83	5
As a percentage	54%	46%	81%	19%	94%	6%

Using the above figures, one can compare this with the average rent in the affordable sector of £7.49 for the same boroughs, and see that in the commercial sector, 81 per cent of the rents are more than double that of the affordable sector. Looking at the rents in the commercial sector that are under £12.00 per square foot, only 6 per cent of the studio units surveyed fell into this category.

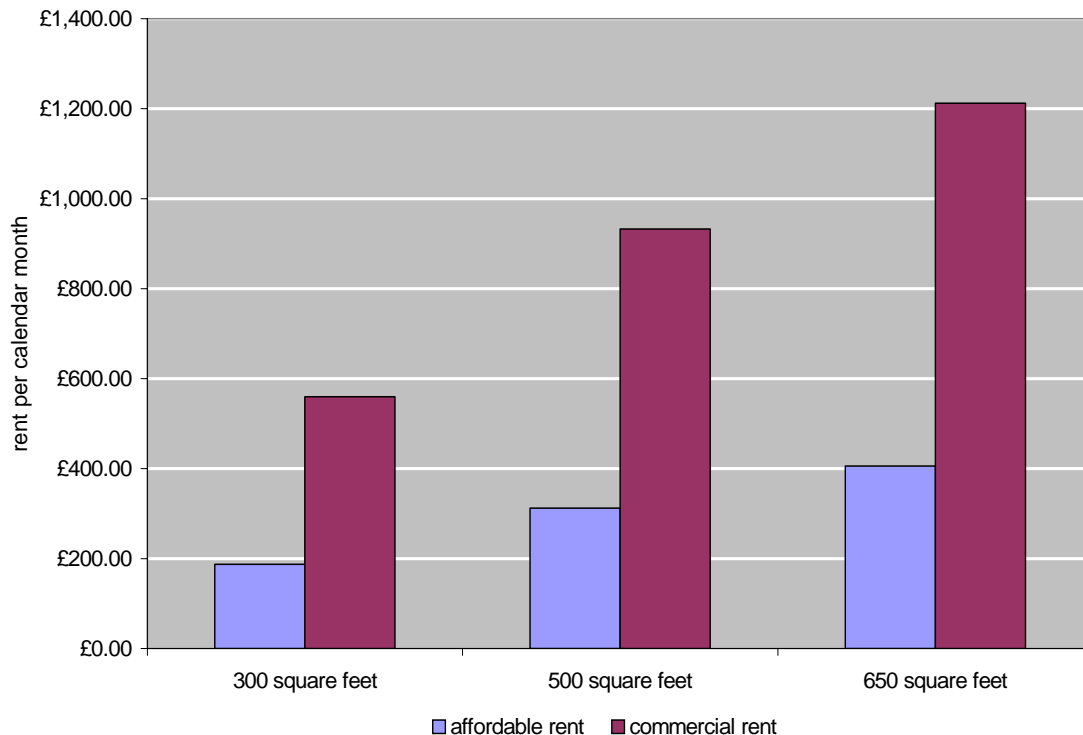
8.4 Commercial compared with affordable sector rents per calendar month

To translate the rent per square foot into actual rent payable by a visual artist renting space on a per calendar month basis, for a studio of 300 square feet¹⁷, a visual artist would need to pay an average of £559 per calendar month, or £6,714 per annum if renting in the commercial sector in London.

This compares to £187.25 per month, or £2,247 per annum for the same sized studio if rented in the affordable sector in London. That is an additional £372 per month that a visual artist would need to pay if renting from the commercial workspace sector, instead of the affordable sector.

For the average size of studio identified as being available in the commercial sector in this survey, of about 500 square feet, a visual artist would have to pay an additional £620 per month if renting from the commercial workspace sector.

Chart 8.1 Comparison of average commercial and affordable sector studio rents per calendar month



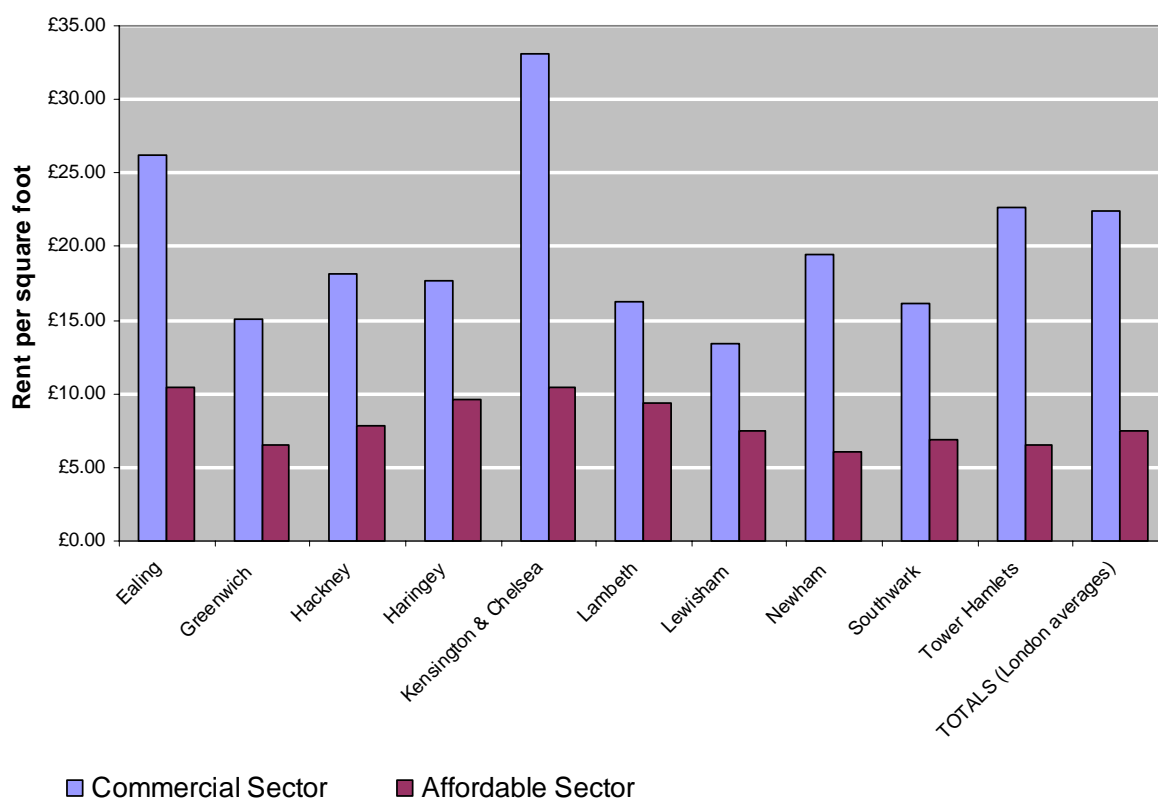
¹⁷ 308 square feet was identified as being the average sized studio in the affordable sector in Acme's 2004 survey. 250 to 350 square feet is the size of studio most commonly sought by visual artists seeking space in the affordable sector; it offers a reasonable working space at a size most can afford.

8.5 Summary of rent comparisons with the affordable studio sector

In summary, comparing the affordable studio sector with the commercial sector on rental costs the following clear findings emerge:

- The minimum inclusive rent per square foot surveyed in the commercial sector was £10.36, compared with £1.40 in the affordable studio sector, a difference of £8.96 per square foot, or 740 per cent.
- The maximum inclusive rent per square foot surveyed in the commercial sector was £44.73, compared with £18.86 in the affordable studio sector, a difference of £24.57 per square foot, or 236 per cent.
- The average inclusive rent per square foot surveyed in the commercial sector was £22.38, compared with £7.49 in the affordable sector, a difference of £14.89 per square foot, or 299 per cent.
- The average difference in inclusive rent per square foot between the affordable and commercial sectors across London is 299 per cent.

Chart 8.2 Comparing the affordable and commercial sector on rent, borough by borough



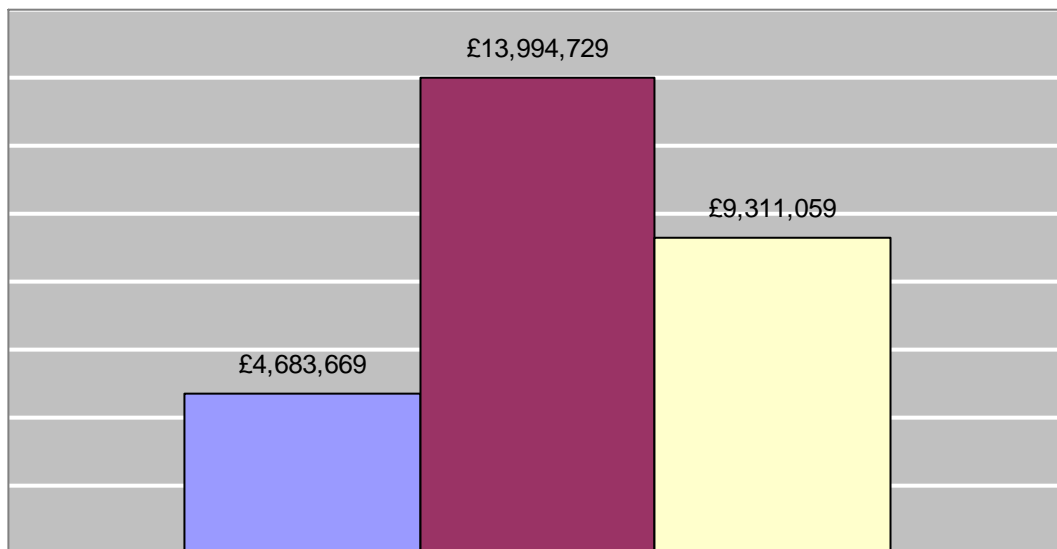
9 Conclusions

9.1 Subsidy to the visual arts sector through affordable rent

If the percentage difference in levels of rental charged between the affordable studio sector and the commercial workspace sector is taken to be 299 per cent, then some conclusions can be made about the level of subsidy that the affordable studio sector provides to visual artists in London:

- Acme's September 2004 National survey identified a total of 625,323 net square footage of studio space in London provided by the affordable studio sector.
- If that were charged out to visual artists at the average London affordable rent of £7.49 per square foot, the total amount charged would be £4,683,669.
- If that were charged out to visual artists at the average London commercial rent of £22.38 per square foot, the total amount charged would be £13,994,728.
- The level of the rental subsidy thus created at present by the affordable studio sector in London, compared to commercially available premises is £9,311,059.

Chart 9.1 Quantifying the rental subsidy to visual artists created by the affordable studio sector in London

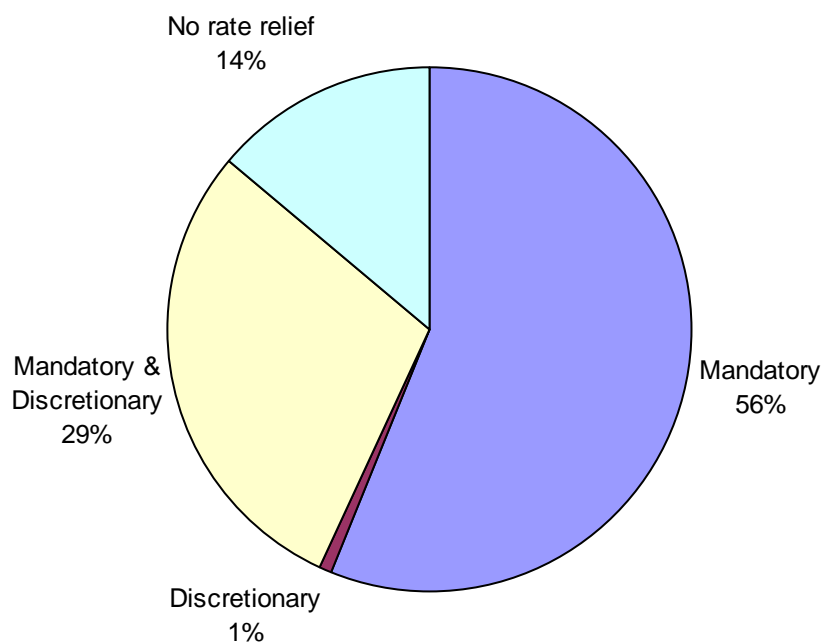


- average total rent per annum in affordable sector charged [to artists]
- average total rent per annum in affordable sector if charged out at commercial average rent
- total rent subsidy per annum created by the affordable studio sector in London

9.2 Subsidy to the visual arts sector through rates relief

The subsidy represented by business rate relief is of significant benefit to the visual arts studio sector. The Acme 2004 survey showed the national extent of rates relief across England:

Chart 9.2 Rates relief in the affordable studio sector across London¹⁸



Using a similar calculation as that used in section 9.1, that there is a total of 625,323 net square footage of studio space in London provided by the affordable studio sector, 86 per cent of that studio space is eligible for mandatory and/or discretionary relief, making 537,777 net square feet eligible for rates relief.

If full business rates were charged out to visual artists in the 537,777 square feet of studio space currently eligible for rates relief in the affordable sector, at the average rate of £3.34 per square foot, the total amount charged would be £1,796,175.

If that were charged out to visual artists at the subsidised mandatory 80% relief rate of £0.67 per square foot, the total amount charged would be only £360,311.

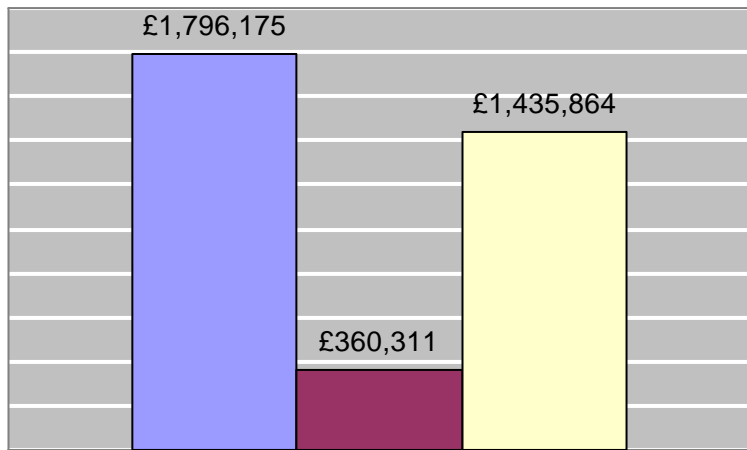
¹⁸ 'London Digest', from 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme Studios, May 2005.

The much higher business rates in Kensington & Chelsea may make this projected subsidy through rates relief higher than it should be across all boroughs. Using a similar calculation as before, but with the lower average business rates of £2.04 per square foot for the East and South East London boroughs, the total amount charged would be £1,097,065.

If that were charged out to visual artists at the subsidised mandatory 80% relief rate of £0.40 per square foot, the total amount charged would only be £215, 110.

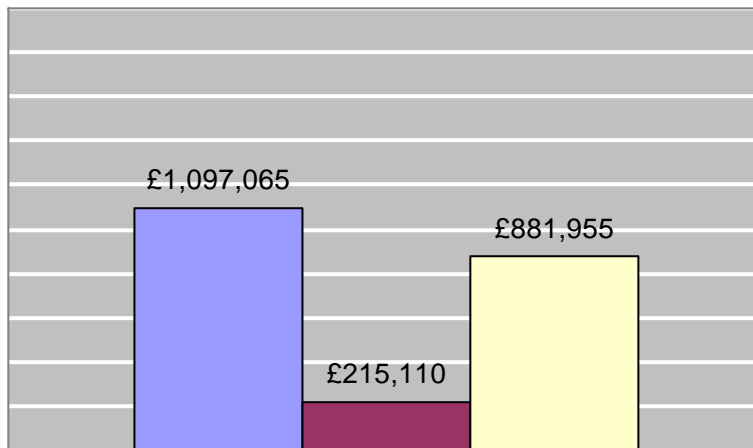
Chart 9.3 Quantifying the subsidy created through business rates relief by the affordable studio sector in London

9.3a Maximum projected rates subsidy



- Projected maximum average total rates per annum in affordable sector if full rates payable
- average rates for eligible percentage of affordable sector after rates relief [80% mandatory]
- Projected maximum total annual subsidy on rates relief provided by the affordable studio sector in London

9.3b Minimum projected rates subsidy



- Projected minimum average total rates per annum in affordable sector if full rates payable
- average rates for eligible percentage of affordable sector after rates relief [80% mandatory]
- Projected minimum total annual subsidy on rates relief provided by the affordable studio sector in London

The value of business rate relief alone therefore represents a subsidy provided through the affordable studio sector of between £881,995 and £1,435,864 per annum to the visual arts sector in London.

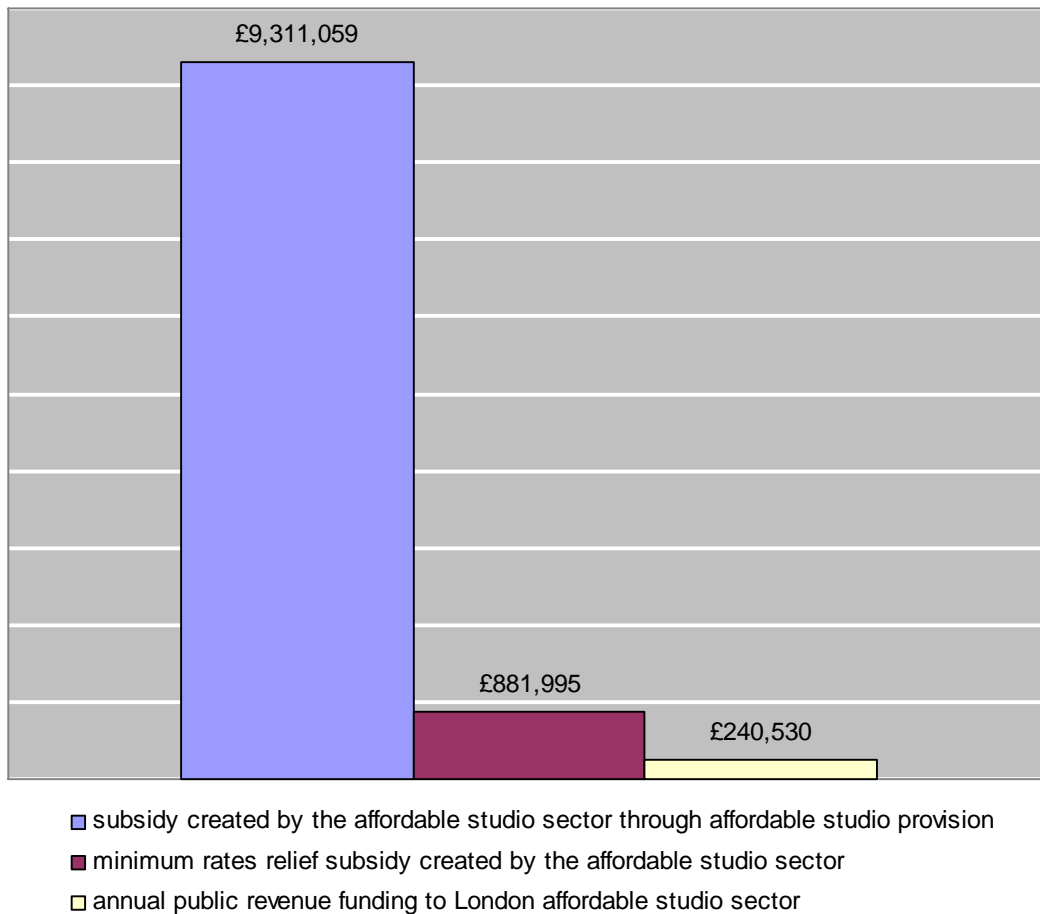
9.3 Revenue support

These figures need to be seen also in the context of the amount of revenue support the affordable studio sector receives, in order to make some assessment on value for money and added value. Taken from funded organisations figures for the 2003/2004 financial year, four London affordable studio organisations, managing 1,208 individual studios received £240,530 of public funding¹⁹.

To put that revenue support in perspective:

- Revenue support for the visual arts affordable studio sector (£240,530 per annum) represents between 16.7 and 27.3 per cent of the subsidy created by business rates relief generated by the sector [between £881,995 to £1,435,864 per annum]
- Revenue support for the visual arts affordable studio sector (£240,530) represents just 2.58 per cent of the rental subsidy created at present by the affordable visual arts studio sector in London (£9,311,059 per annum).

Chart 9.4 Comparing the subsidy created by affordable rentals and rates relief in the affordable studio sector, with the sector’s annual public funding



¹⁹ 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme, May 2005.

9.4 Strengths, impacts and risks

This study has shown the considerable financial subsidy and extremely good value for money the affordable studio sector creates for visual artists in London. There are other, much harder to quantify benefits that the sector contributes to the support of artists which are beyond the scope of this survey, but have considerable impact alongside the key provision of suitable, affordable studio space.²⁰

The impact of the affordable studio sector extends beyond the support of individual artists, through educational, cultural and economic impacts on the local communities in which these buildings are sited.

The affordable studio sector is still vulnerable, and has too often been regarded as a temporary solution to a continuing permanent need of artists in London.

Acme's national studio survey reported that 'by the end of 2008, 13 buildings (301 studios) are likely to be vacated, and to the end of 2013 a further four buildings and 130 studios. The total number of building at risk may be larger as those with expectations of renewal before 2008 may be vacated before 2013.'²¹

The value of the sector is now being officially recognised, and it is hoped that the findings of this survey will assist the sector to develop and strengthen, by showing the very real long term economic benefit the provision of permanent, suitable and affordable studio space for visual artists will make.

²⁰ These have been only briefly touched on in this survey in section 7, but include informal peer support, access to employment and continuing professional development, exhibition opportunities.

²¹ 'London Digest', from 'A Survey of Artists' Studio Groups and Organisations in England', Published by Acme, May 2005.

Appendix 1

Surveyed agencies and providers of commercial workspace.

Agency	Boroughs	Sites	Units	Contact address (head office)	Contact details
Biz space	Lambeth			94-96 Great North Rd London N2 0NL	info@biz-space.co.uk 020 8815 1616
Workspace	Ealing Hackney Haringey Kensington & Chelsea Tower Hamlets	8	27	Magenta House 85 Whitechapel Rd London E1 1DU	info@workspacegroup.co.uk 020 7247 7614
Spacia	Hackney Lewisham Southwark	5	5	1 Eversholt Street London NW1 2DN	enquiries@spacia.co.uk 0800 830 840
Trinity Buoy Wharf Space Management	Tower Hamlets	2	10	Trinity Buoy Wharf 64 Orchard Place London E14 0JW	john.burton@urban-space.co.uk 020 7515 7153
space-live-work.co.uk	Tower Hamlets	2	6	Not available	info@space-live-work.co.uk 020 8985 8333
GLE properties	Greenwich Lewisham Newham	5	7	Homesdale Business Centre 216-218 Homesdale Rd Bromley, Kent BR1 2QZ	diana.g@gle.co.uk 020 8464 1655
Old Truman Breweries	Tower Hamlets	1	1	91 Brick Lane London E1 6QL	estates@trumanbrewery.com 020 7770 6015
Clarke Property Group	Haringey Southwark	2	2	Muswell Hill Broadway London N10 3RS	info@clarkepropertygroup.co.uk 020 8883 9946
Kalmers	Southwark	2	2	Jamaica Wharf 2 Shad Thames Tower Bridge London SE1 2YU	jamesb@kalmers.com 020 7403 0600
Strettons	Hackney Tower Hamlets	2	5	Central House 189-203 Hoe Street London E17 3SZ	ross@strettons.co.uk 020 8520 9911
Shaw and Co	Hackney	2	2	29 Lower Clapton Road London E5 0NS	info@shawco.com 020 8986 7327
Houston Lawrence	Lambeth	1	1	6 Port House Square Rigger Row Plantation Wharf London SW11 3TY	info@houstonlawrence.co.uk 0207 924 4476
Tarn and Tarn	Tower Hamlets	1	1	PMI House 4-10 Artillery Lane London E1 7LS	info@tarn-tarn.co.uk 020 7377 8989

Agency	Boroughs	Sites	Units	Contact address (head office)	Contact details
Glenny	Hackney	1	2	Glenny House 56 Longbridge Rd Barking Essex 1G11 8RW	cknight@gleeny.co.uk 020 8591 6671
Westway Development Trust	Kensington and Chelsea	1	2	1 Thorpe Close London W10 5XL	rharvey@westway.org 020 8962 5724
Leaside Regeneration	Tower Hamlets	1	4	See Strettons [managed by Strettons]	
Property Dept London Borough of Southwark	Southwark	2	5	Chiltern House Portland Street London SE17 2ES	lettings@southwark.gov.uk 020 7525 5526
London Borough of Kensington and Chelsea	Kensington and Chelsea	2	3	The Town Hall Hornton Street London W8 7NX	property@rbkc.gov.uk 020 7361 2860
London Borough of Newham	Newham	1	1	Newham Town Hall Barking Road London E6 2RP	commercial-property@newham.gov.uk 020 8519 3646

Appendix 2

Survey data

	Postcode	Borough	Size sq. ft.	Size sq. m.	Rent p/sq. ft. (inc VAT)	Rent per month (inc VAT)	Rent per annum (inc VAT)	Service Charge (inc VAT if appl.)	Service Charge per sq. ft. (inc VAT)	Rates per sq. ft.	Total cost per sq. ft. (inc VAT)	TOTAL COST PER ANNUM
1	NW10 6ND	Ealing	716	67	£19.39	£1,156.79	£13,881	£1,522.80	£2.13	£4.00	£25.51	£18,268.25
2	NW10 6ND	Ealing	602	56	£19.98	£1,002.08	£12,025	£1,280.75	£2.13	£4.00	£26.10	£15,713.70
3	NW10 6ND	Ealing	469	44	£21.15	£826.61	£9,919	£997.58	£2.13	£4.00	£27.28	£12,792.93
4	SE7 8NF	Greenwich	460	42.7	£10.58	£405.38	£4,865	£729.68	£1.59	£2.85	£15.01	£6,905.18
5	E8 2EZ	Hackney	614	57	£9.40	£480.97	£5,772	£2.93	£2.93	£2.40	£14.73	£9,044.22
6	E8 2EZ	Hackney	630	58.5	£9.40	£493.50	£5,922	£2.93	£2.93	£2.40	£14.73	£9,279.90
7	E5 0LE	Hackney	422	39.2	£12.32	£433.33	£5,200			£2.50	£14.82	£6,255.00
8	N1 6SH	Hackney	667	74.3	£14.03	£780.00	£9,360		£0.00	£3.00	£17.03	£11,361.00
9	E8 3RL	Hackney	897	83	£13.10	£979.17	£11,750		£0.35	£2.63	£16.08	£14,423.06
10	E8 3PH	Hackney	354	33	£14.94	£440.67	£5,288		£0.35	£2.34	£17.63	£6,240.26
11	E8 4PH	Hackney	507	47	£19.72	£833.33	£10,000	included		£4.00	£23.72	£12,028.00
12	E8 3QE	Hackney	641	60	£12.93	£690.41	£8,285	£2,162.00	£3.37	£2.50	£18.80	£12,049.43
13	E2 8HD	Hackney	699	65	£12.93	£752.88	£9,035	£3,030.69	£4.34	£3.00	£20.26	£14,162.26

	Postcode	Borough	Size sq. ft.	Size sq. m.	Rent p/sq. ft. (inc VAT)	Rent per month (inc VAT)	Rent per annum (inc VAT)	Service Charge (inc VAT if appl.)	Service Charge per sq. ft. (inc VAT)	Rates per sq. ft.	Total cost per sq. ft. (inc VAT)	TOTAL COST PER ANNUM
14	E2 8HD	Hackney	720	67	£12.93	£775.50	£9,306	£3,121.74	£4.34	£3.00	£20.26	£14,587.74
15	E2 8HD	Hackney	253	24	£18.21	£384.03	£4,608	£1,096.94	£4.34	£3.00	£25.55	£6,464.29
16	N22 6XJ	Haringey	546	51	£17.63	£801.94	£9,623	£1,212.60	£2.22	£2.00	£21.85	£11,927.85
17	N15 3BE	Haringey	750	69.7	£12.69	£793.13	£9,518	included		£1.95	£14.64	£10,980.00
18	W10 6BL	Kensington and Chelsea	903	84	£18.21	£1,370.54	£16,446	£5,559.77	£6.16	£6.50	£30.87	£27,875.75
19	W10 6BL	Kensington and Chelsea	550	51	£19.39	£888.59	£10,663	£3,386.35	£6.16	£6.50	£32.04	£17,624.48
20	W10 6BL	Kensington and Chelsea	570	53	£19.39	£920.91	£11,051	£3,509.49	£6.16	£6.50	£32.04	£18,265.37
21	W10 6BL	Kensington and Chelsea	752	70	£19.39	£1,214.95	£14,579	£4,630.06	£6.16	£6.50	£32.04	£24,097.46
22	W10 6BL	Kensington and Chelsea	653	61	£19.39	£1,055.05	£12,661	£4,020.52	£6.16	£6.50	£32.05	£20,925.65
23	W10 6BL	Kensington and Chelsea	529	49	£19.39	£854.71	£10,257	£3,257.05	£6.16	£6.50	£32.05	£16,952.13
24	W10 6BL	Kensington and Chelsea	385	36	£21.15	£678.56	£8,143	£2,370.45	£6.16	£6.50	£33.81	£13,015.70
25	W10 6BL	Kensington and Chelsea	345	32	£24.68	£709.41	£8,513	£2,043.09	£5.92	£6.50	£37.10	£12,798.47
26	W11	Kensington and Chelsea	660	62	£16.67	£916.67	£11,000	included		£4.77	£21.44	£14,148.20
27	W11	Kensington and Chelsea	329	30.6	£16.72	£458.33	£5,500	included		£5.29	£22.01	£7,240.41
28	W14	Kensington and Chelsea	565	52	£26.55	£1,250.00	£15,000	not known		£6.00	£32.55	£18,390.00
29	W10 5QZ	Kensington and Chelsea	643	60	£19.50	£1,044.83	£12,538	£3,199.17	£4.98	£4.13	£28.60	£18,392.76

Capital Studios - London Artists' Studios Development Programme

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30	W10 5QZ	Kensington and Chelsea	596	55	£19.50	£968.50	£11,622	£2,963.35	£4.97	£4.17	£28.64	£17,070.67
31	W10 5BN	Kensington and Chelsea	550	51	£25.85	£1,184.79	£14,218	£3,812.88	£6.93	£6.00	£38.78	£21,330.38
32	W10 5BN	Kensington and Chelsea	714	66	£25.85	£1,538.08	£18,457	£4,774.03	£6.69	£6.00	£38.54	£27,514.93
33	W10 5BN	Kensington and Chelsea	340	32	£28.79	£815.65	£9,788	£2,357.05	£6.93	£6.00	£41.72	£14,184.80
34	W10 5BN	Kensington and Chelsea	492	46	£28.79	£1,180.29	£14,163	£3,288.83	£6.68	£6.00	£41.47	£20,404.28
35	W10 5BN	Kensington and Chelsea	403	37	£28.79	£966.83	£11,602	£2,794.15	£6.93	£6.00	£41.72	£16,814.10
36	W10 5JJ	Kensington and Chelsea	284	26.3	£36.43	£862.06	£10,345			£8.00	£44.43	£12,616.70
37	SW9 8RR	Lambeth	330	30.6	£22.65	£622.75	£7,473	included		£1.35	£24.00	£7,918.50
38	SW9 8RR	Lambeth	765	71	£13.45	£857.75	£10,293	included		£1.35	£14.80	£11,325.75
39	SW8 2RE	Lambeth	1048	98	£14.02	£1,224.00	£14,688			£0.90	£14.92	£15,631.20
40	SE14 6BQ	Lewisham	807	75	£10.58	£711.17	£8,534	£334.88	£0.41	£2.75	£13.74	£11,088.15
41	SE23 1AL	Lewisham	476	44.2	£10.58	£419.48	£5,034	£838.95	£1.76	£3.05	£15.39	£7,324.45
42	SE14 5RW	Lewisham	658	61.1	£10.58	£579.86	£6,958	£601.60	£0.91	£1.42	£12.91	£8,494.31
43	SE8 5JB	Lewisham	400	37	£8.81	£293.75	£3,525		£0.35	£2.00	£11.16	£4,465.00
44	E16 1AF	Newham	923	83.6	£9.99	£768.45	£9,221	included		£2.75	£12.74	£11,759.65
45	E16 1AF	Newham	744	55.9	£23.50	£1,457.00	£17,484	included		£2.75	£26.25	£19,530.00

	Postcode	Borough	Size sq. ft.	Size sq. m.	Rent p/sq. ft. (inc VAT)	Rent per month (inc VAT)	Rent per annum (inc VAT)	Service Charge (inc VAT if appl.)	Service Charge per sq. ft. (inc VAT)	Rates per sq. ft.	Total cost per sq. ft. (inc VAT)	TOTAL COST PER ANNUM
46	E16 1AF	Newham	525	48.7	£23.50	£1,028.13	£12,338	included		£2.75	£26.25	£13,781.25
47	E15 2SP	Newham	350	32.5	£12.34	£360.00	£4,320	included			£12.34	£4,320.00
48	SE1 3EW	Southwark	943	87.6	£11.75	£923.33	£11,080		£1.75	£1.20	£14.70	£13,861.85
49	SE1 3DG	Southwark	492	45.7	£18.00	£738.00	£8,856		£2.50	£1.60	£22.10	£10,873.20
50	SE1	Southwark	650	60.3	£8.23	£445.52	£5,346		£4.59	£3.19	£16.00	£10,402.75
51	SE1	Southwark	575	53.4	£8.23	£394.11	£4,729		£4.52	£2.13	£14.88	£8,554.13
52	SE1	Southwark	410	38	£9.40	£321.17	£3,854		£5.61	£3.44	£18.45	£7,564.40
53	SE17 3LH	Southwark	1000	93	£13.51	£1,126.04	£13,513		£0.61	£2.54	£16.66	£16,662.50
54	SE17 3QA	Southwark	500	46	£14.10	£587.50	£7,050		£0.61	£2.58	£17.29	£8,645.00
55	SE15 2RQ	Southwark	772	67	£8.83	£567.92	£6,815		£0.35	£1.64	£10.82	£8,351.28
56	SE15 2JR	Southwark	850	79	£9.68	£685.42	£8,225		£0.35	£1.79	£11.82	£10,044.00
57	SE1 3PH	Southwark	450	41.8	£18.80	£705.00	£8,460	£634.50	£1.41	£6.17	£26.38	£11,871.00
58	E1	Tower Hamlets	455	42.2	£19.28	£731.00	£8,772	included		£3.50	£22.78	£10,364.50
59	E2 6PY	Tower Hamlets	1104	103	£13.30	£1,223.96	£14,688	£2,594.40	£2.35	£2.45	£18.10	£19,986.70
60	E2 6PY	Tower Hamlets	658	61.1	£19.64	£1,077.08	£12,925			£2.55	£22.19	£14,602.90
61	E2 6PY	Tower Hamlets	650	60.3	£19.88	£1,077.08	£12,925			£2.55	£22.43	£14,582.50

Capital Studios - London Artists' Studios Development Programme

	Postcode	Borough	Size sq. ft.	Size sq. m.	Rent p/sq. ft. (inc VAT)	Rent per month (inc VAT)	Rent per annum (inc VAT)	Service Charge (inc VAT if appl.)	Service Charge per sq. ft. (inc VAT)	Rates per sq. ft.	Total cost per sq. ft. (inc VAT)	TOTAL COST PER ANNUM
62	E2 6PY	Tower Hamlets	227	21	£23.81	£450.42	£5,405			£2.55	£26.36	£5,983.85
63	E14 6RN	Tower Hamlets	606	56	£19.31	£975.00	£11,700		£2.75	£4.65	£26.71	£16,184.40
64	E14 6RN	Tower Hamlets	301	28	£23.32	£585.00	£7,020		£2.75	£4.65	£30.72	£9,247.40
65	E14 6RN	Tower Hamlets	285	27	£23.72	£563.33	£6,760		£2.75	£4.65	£31.12	£8,869.00
66	E14 6RN	Tower Hamlets	279	26	£24.23	£563.33	£6,760		£2.75	£4.65	£31.63	£8,824.60
67	E1 1EG	Tower Hamlets	500	46.4	£18.33	£763.75	£9,165	£2.23	£2.23	£2.60	£23.16	£11,580.00
68	E14 0JW	Tower Hamlets	330	30.7	£10.55	£290.25	£3,483	included		£2.50	£13.05	£4,308.00
69	E14 0JW	Tower Hamlets	296	27.5	£15.63	£328.00	£4,625	included		£2.50	£18.13	£5,365.00
70	E14 0JW	Tower Hamlets	290	27	£22.02	£532.25	£6,387	included		£2.50	£24.52	£7,112.00
71	E14 0JW	Tower Hamlets	290	27	£24.46	£591.00	£7,092	included		£2.50	£26.96	£7,817.00
72	E14 0JW	Tower Hamlets	446	41	£25.35	£942.33	£11,308	included		£2.50	£27.85	£12,423.00
73	E14 0JW	Tower Hamlets	817	76	£27.37	£1,863.58	£22,363	included		£2.50	£29.87	£24,405.50
74	E14 0JW	Tower Hamlets	446	41	£27.95	£1,038.67	£12,464	included		£2.50	£30.45	£13,579.00
75	E14 0JW	Tower Hamlets	665	62	£33.25	£1,842.42	£22,109	included		£2.50	£35.75	£23,771.50
76	E14 0JW	Tower Hamlets	817	76	£33.26	£2,264.25	£27,171	included		£2.50	£35.76	£29,213.50
77	E14 0JW	Tower Hamlets	234	21.7	£15.06	£250.00	£3,525	included		£2.50	£17.56	£4,110.00

	Postcode	Borough	Size sq. ft.	Size sq. m.	Rent p/sq. ft. (inc VAT)	Rent per month (inc VAT)	Rent per annum (inc VAT)	Service Charge (inc VAT if appl.)	Service Charge per sq. ft. (inc VAT)	Rates per sq. ft.	Total cost per sq. ft. (inc VAT)	TOTAL COST PER ANNUM
78	E2	Tower Hamlets	540	50	£11.75	£528.75	£6,345	£1,992.80	£3.69	£2.75	£18.19	£9,822.80
79	E2	Tower Hamlets	775	72	£10.58	£682.97	£8,196	£1,684.95	£2.17	£2.75	£15.50	£12,011.83
80	E2	Tower Hamlets	530	49	£11.75	£518.96	£6,228	£1,955.20	£3.69	£2.75	£18.19	£9,640.20
81	E2	Tower Hamlets	406	38	£12.93	£437.30	£5,248	£1,498.13	£3.69	£2.75	£19.36	£7,862.18
82	E2	Tower Hamlets	416	39	£12.93	£448.07	£5,377	£1,534.55	£3.69	£2.75	£19.36	£8,055.35
83		Tower Hamlets	900	83.6	£13.00	£975.00	£11,700	£2.00	£2.00	£1.75	£16.75	£15,075.00
84	E1W 3HB	Tower Hamlets	860	79.7	£13.95	£1,000.00	£12,000			£1.70	£15.65	£13,462.00
85	E1W 3HB	Tower Hamlets	550	51	£14.18	£650.00	£7,800			£1.70	£15.88	£8,735.00
86	E1W 3HB	Tower Hamlets	400	37.1	£14.70	£490.00	£5,880			£1.70	£16.40	£6,560.00
87	E1W 3HB	Tower Hamlets	300	27.8	£16.00	£400.00	£4,800			£1.70	£17.70	£5,310.00
88	E1W 3HB	Tower Hamlets	260	24.2	£16.62	£360.00	£4,320			£1.70	£18.32	£4,762.00

Appendix 3 Survey data - summary of rents per square foot in detail by London borough, compared by sector

London Borough		Affordable Rent per sq ft	Commercial Rent per sq ft	difference in £ per sq ft	difference in % terms
Ealing	Average	£10.40	£26.18	£15.78	251.7%
	Maximum	£18.86	£27.28	£8.42	145.2%
	Minimum	£8.68	£25.51	£16.83	293.9%
Greenwich	Average	£6.50	£15.01	£8.51	230.9%
	Maximum	£6.50	£15.01	£8.51	230.9%
	Minimum	£6.50	£15.01	£8.51	230.9%
Hackney	Average	£7.78	£18.10	£10.32	232.6%
	Maximum	£13.50	£25.55	£12.05	189.3%
	Minimum	£4.50	£14.73	£10.23	327.4%
Haringey	Average	£9.58	£17.68	£8.10	184.5%
	Maximum	£9.58	£21.85	£12.27	228.1%
	Minimum	£9.58	£14.64	£5.06	152.8%
Kensington & Chelsea	Average	£10.39	£33.10	£22.71	318.6%
	Maximum	£17.76	£44.43	£26.67	250.2%
	Minimum	£9.85	£21.44	£11.59	217.7%
Lambeth	Average	£9.36	£16.27	£6.91	173.8%
	Maximum	£11.50	£24.00	£12.50	208.7%
	Minimum	£6.00	£14.80	£8.80	246.6%
Lewisham	Average	£7.49	£13.40	£5.91	178.9%
	Maximum	£10.56	£15.39	£4.83	145.7%
	Minimum	£1.89	£11.16	£9.27	590.5%
Newham	Average	£6.00	£19.43	£13.43	323.8%
	Maximum	£6.00	£26.25	£20.25	437.5%
	Minimum	£6.00	£12.34	£6.34	205.6%
Southwark	Average	£6.84	£16.08	£9.24	235.1%
	Maximum	£9.25	£26.38	£17.13	285.2%
	Minimum	£4.30	£10.36	£6.06	241.0%
Tower Hamlets	Average	£6.58	£22.62	£16.04	343.7%
	Maximum	£10.90	£31.63	£20.73	290.2%
	Minimum	£1.40	£13.05	£11.65	932.0%
London average	Average	£7.49	£22.38	£14.89	298.8%
	Maximum	£18.86	£44.43	£25.57	235.6%
	Minimum	£1.40	£10.36	£8.96	740.0%

Appendix 4

Brief for consultant to research the comparative availability, rents and terms and conditions of affordable and commercially available London studios

1 Background

Acme has been asked by Arts Council England, London, to coordinate an advocacy programme on behalf of affordable studio providers in London directed at key bodies: local authorities, development agencies, property developers and housing associations. The programme builds on a national survey of artists' studio groups and organisations completed and published by Acme in May 2005.

The context

Some 58 per cent of all studio space nationally is to be found in London and there is high demand for affordable workspaces for artists and creative businesses in the capital and limited supply. London studio organisations (such as Acme, ACAVA, ASC and SPACE) represent an extraordinarily diverse range of approaches to space provision and are a vital resource which supports art and artists at the level of production. However, it is also a sector under threat. Rising land values and new development schemes are impacting on the provision of affordable workspace for artists, and the leases of many existing spaces are due to expire over the next 10 years.

Alongside the threats, there are significant opportunities for new, and more sustainable, artists' studio spaces in major development areas in London – including the Thames Gateway, Kings Cross and Wembley. Potential sources of finance include planning gain (s106) from new build in these and other areas. New planning legislation and guidance at both the national and regional level is likely to impact on this potential growth.

London Artists' Studios Development Programme

Supported by Arts Council England, the *London Artists' Studios Development Programme* aims to interpret and present information from the national research in a London context, raising awareness of the specific pressures on affordable studio space in the capital, and exploring opportunities for growth.

The target audience for the programme includes:

- local authority lead officers and elected members working in planning, housing, regeneration, economic development and cultural services
- private developers and public sector development agencies involved in new housing, retail and leisure development in London
- regional partners such as the LDA, GLA Architecture and Urbanism Unit, Thames Gateway London partnership

The programme aims to reach this target audience through a combination of printed materials and advocacy events, which will take place between October 2005 and March 2006, in order to:

- raise awareness of artists' workspace development as an important element in urban renewal programmes
- highlight their potential contribution to improving the environment and supporting cohesion and quality of life for local communities (*ref: LDA economic development strategy 'Sustaining Success'*)
- inform the policies and investment priorities of public and private sector partners.

2 The brief

A key aspect of the advocacy work will be to provide evidence of the subsidy that studio providers make to the studios sector as a whole in London. We know from Acme's survey that in London the average inclusive rent for affordable studios space is £7.54 per square foot per annum (September 2004). This provides a benchmark of affordability. However, claims are made about the availability of commercial studio space at 'affordable' levels, but there is little hard evidence that can either support or contradict this assumption.

Acme wishes to commission a brief study that will examine comparable rent levels and terms and conditions offered by affordable studios providers and commercial workspace providers. Put simply, if an artist had to obtain studio space on the open market, what would they get, what would they have to pay and what would the terms and conditions be?

We assume that an artist would look for space on the open market because there is a more plentiful supply than that available from affordable providers. But are there other reasons why open market space may be more advantageous. The study will therefore need to address the issue of supply and report objectively on any positive aspects associated with commercial space.

The information gathered will form part of the *London Artists' Studios Development Programme* and be used as resource material and in presentations.

4 Methodology

It is likely that the study will involve predominantly desk-based research with visits to commercially available studios where necessary to assess their comparability with affordable studios. The consultant will be expected to:

- Consult with Acme on average inclusive rent levels and basic terms and conditions for affordable studios. It will be important to agree a definition of an 'inclusive rent' as a starting point for the research.
- Consult with Acme on potential commercial workspace providers – to include a range of organisational scales - and to agree the geographical areas and locations where comparable space will be examined i.e. where there is an existing high concentration of affordable space.
- As a potential tenant, approach a sample of 10-15 commercial workspace providers, such as Urban Space Management and Workspace, to obtain comparable inclusive rent levels (for example, a commercial space may appear to be offered at £8 per square foot per annum, but there are likely to be additional costs such as business rates, service charges etc.) .
- As above, to obtain information on relevant terms and conditions, such as length of tenure, security of tenure, rent review provisions, access etc.
- Drawing on existing information about London studio rents taken from the National Survey, to quantify the level of subsidy offered to the sector as a whole by London's studio providers.
- To analyse the information and present the comparisons in a report in as clear and concise a manner as possible.

5 Outputs

The consultant will be expected to produce a report which clearly makes the comparison between rents, terms and conditions and availability of affordable studios and space available on the open market. The consultant will produce a draft report and a final report in an electronic version with one hard copy.