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RESEARCH & CONSULTING

June 1, 2015

Amy McBride
Tacoma Arts Administrator
City of Tacoma Arts Division
Community and Economic Development Department
747 Market Street #900
Tacoma, WA 98402

Dear Ms. McBride,

Artspace Projects and Swan Research and Consulting are pleased to provide the Report of Findings for the 2015 Tacoma, WA Survey of Artists' and Creative Individuals' Space Needs and Preferences.

The Report of Findings includes two documents and is divided into two sections. The first is the Interpretation and Recommendations Summary prepared by Artspace Projects. It is based on the Technical Report prepared by Swan Research and Consulting and presents Artspace's observations and interpretations of key Technical Report findings as they relate to the creation of space for artists and creatives in Tacoma, WA.

The second is the Technical Report prepared by Swan Research and Consulting. It comprehensively details survey data related to those individuals who expressed an interest in housing and/or various types of creative work and/or other creative business support spaces in Tacoma. Together these documents describe a significant and definitive need for affordable space serving the creative community and may be used to conceptualize and plan future space-based projects and leasing opportunities.

We hope that the information provided will answer the many questions the City of Tacoma, Tacoma property owners, brokers, developers and others have when it comes to building, leasing, planning and implementing space-based initiatives and infrastructure to support artists and the creative economy.

We appreciate the opportunity to have worked with the City of Tacoma on this study, and Artspace Projects welcomes opportunities to assist with moving the vision for new, affordable, creative space forward.

Sincerely,

Artspace Projects, Inc.

Swan Research and Consulting

Tacoma area Artists' and Creative Individuals' Space Needs and Preferences

Report of Findings

Tacoma, WA

June 1, 2015

Prepared by

Artspace Projects and Swan Research and Consulting

for

Funding and Support for the market research report provided by -

JPMORGAN CHASE & CO.

Interpretation and Recommendations Summary

Tacoma, WA

Prepared by:

artspace

Based on the Technical Report of Artists' and Creative Individuals' Space Needs and Preferences prepared by

Swan
RESEARCH & CONSULTING

The space needs and preferences survey made available to individual artists and creatives of all disciplines in Tacoma and the surrounding region uncovered a significant and definitive need for affordable live/work and other space that supports creative work and small creative business activity in Tacoma. All of the supporting and detailed information is provided in the Technical Report. Recommendations and considerations based on findings are explored in the summary below. These documents together offer the City of Tacoma and its property owners and developers information to assist in the conceptualization, design and leasing of new and existing spaces to the benefit of the creative community and in support of Tacoma's creative economy. Space needs identified by this study include but are not limited to live/work, housing-only, shared and private studio and other workspaces, as well as space in which to conduct business including office, commercial and retail options. The support and shared spaces that are needed and preferred by survey respondents complete the picture for new space opportunities in Tacoma.

AFFORDABLE HOUSING FOR THE CREATIVE COMMUNITY

NUMBER OF HOUSING UNITS SUPPORTED:

While the primary focus of the survey was not the creation of a specific affordable live/work artist facility, the findings do point to a strong need for affordable live/work and housing-only options that could be addressed through a series of well designed and conceived projects or through a single large facility designed for the needs of artists and their families. The Technical Report states that 204 survey respondents expressed an interest in relocating to an affordable artists' live/work or housing community in Tacoma. In our experience the number of units that can be supported by the market, as uncovered by a survey of this nature, can be estimated by employing a threefold redundancy, meaning that we recommend identifying at least three interested artists or respondents for each live/work or housing space created within a specific geographic area. This formula takes into account that not every individual interested today will decide to relocate at the time a project is complete and that in some cases, there may be multiple respondents from a single household, when ultimately that household may choose to remain intact upon relocation.

The projects that Artspace develops rely on publicly allocated affordable housing resources such as the Low Income Housing Tax Credit to subsidize rents for low-income artists and their families. When determining how many spaces to build within a project that uses affordable housing funds as a primary funding source, consideration must also be given to the funding program's total household income limits and whether or not the interested artist households will income-qualify. An additional thing to look at when considering the feasibility of using affordable housing funds for the identified artist market include the family/household sizes of interested respondents and how that relates to annually vetted priorities of the funding program and allocating agency. The three-to-one approach employed here does take income qualification into account, so additional consideration on this point should not be necessary in Tacoma. We will discuss respondent's household size/number of bedrooms required as it relates to affordable housing resources and units supported, later in this summary.

The 3:1 formula supports the creation of up to 68 new, affordable live/work or other housing units designed for the needs of artists and creatives in Tacoma.

LOCATION:

We also asked respondents about their preferences for location. Table 13 of the Technical report lays out the responses. These preferences should be considered by developers looking to create new housing opportunities. While artists and their families may relocate to a project in a location that was not their top choice, marketability will in general be far more successful if new space is built in areas of greatest interest. For instance, a project in the North Downtown/Theater District (83% of respondents preferred this area) may support more housing units than the McKinley Hill/East Side neighborhood (28% preferred this area). Marketability will depend on numerous other factors including amenities, design, cost, and competition from other developments if multiple projects are brought on line. Location preference is simply a guide for creating a project or projects that will have the greatest appeal to the largest number of potential residents.

HOUSING UNIT CONFIGURATION:
Bedroom and family/household sizes play a particularly key role when using affordable housing resources to fund a project. State priorities for publicly financed multi-family housing are often focused on large families (three and four bedroom units) and serving those of lowest income. Three bedroom or larger units are typically the most challenging to lease in an affordable artist housing project either due to smaller households and fewer families with children, or due to households comprised of multiple adults and those households being over income (particularly for units set aside for households at 30% of AMI). In Tacoma the majority of interested households do not have children residing within them, but do have two or more adults (see Table 11 of the Technical Report). Additionally the number of bedrooms needed trends toward one and two, with only 16% of households requiring three or more bedrooms (see Table 18 of the Technical Report). This is not unusual for artist communities and does not preclude the use of affordable housing sources. It is however, something that a developer using Low Income Housing Tax Credits or other subsidy programs should consider when building their pro-forma and self-scoring for competitive programs. To help with this, Table 8 of the Technical Report breaks down reported household income by household size and denotes by shaded cells, the number of respondents who would qualify for affordable housing targeted to those at or below 60% AMI. This can give developers more insight when deciding not only the total number of units and ratio of bedroom counts for those units, but what income set-asides might work and for which housing units.

For a conservative approach to market depth as it relates to the ratio of unit types/bedroom counts within a single artist housing project or spread among multiple projects, the three to one approach can again be employed. When Artspace creates a project we begin planning for unit ratio based on market only and this formula, and revise it next to adjust for other factors related to state funding application scoring criteria and design or building constraints. <u>For Tacoma this approach results in approximately: 10 efficiencies, 25 one-bedroom units, 22 two-bedroom units, 8 three-bedroom units and 2 four or larger bedroom units.</u>

HOUSING ARRANGEMENT AND AFFORDABILITY:
Recognizing that not all new housing or live/works spaces to be created in Tacoma will be subsidized multi-family housing, we also asked about preferences for housing arrangements including renting, rent-to-own, condominium purchase and co-housing. More about this can be found in Table 16 of the Technical Report. The strong support for a rental model does bode well for affordable multi-family housing resource funded projects. However we understood when undertaking this study that unique models might also be considered locally, specifically condominium ownership and co-housing space. We are happy to see that there is a market for both of these models in Tacoma. The Technical Report provides detailed information which can be used by the City and developers to refine the vision for new projects for any of these arrangements, including what respondents can pay to purchase or rent live/work or housing-only space (see Table 22 and Tables 20 and 21 of the Technical Report, respectively). What artists say they can afford to pay for space is also broken down by the number of bedrooms they need, which should be helpful as developers model their pro-forma and consider the project design and funding options.

Adding to this potential for unique and diverse project models to be developed in Tacoma is the fact that while 48% of the interested artist respondents would qualify for affordable housing targeted to those making 60% or less of the area median income, there is also an opportunity to

integrate housing for those making up to 120% of the AMI (which could open up additional funding opportunities and serve more artists/creatives) as well as housing that is targeted to those who would not qualify for subsidized housing and can pay market rate rents.

The 2015 HUD published apartment rental rate limits in Pierce County, for those qualifying for affordable housing set aside for households between 30% of AMI and 60% of AMI, have one-bedrooms renting as low as $399 and as high as $798 per month, two-bedrooms ranging between $479 and $958 per month, and three-bedrooms ranging between $553 and $1106. Comparing this to Tables 20 and 21 of the Technical Report which describe how much interested households say they can pay for live/work or housing-only space, we find that many households will be comfortable within the ranges set for affordable housing. Some, who state an ability to pay more than the highest allowable rents under HUD, would find these rents particularly affordable, however it is also likely that some of these artists are among those whose household incomes would put them out of contention for subsidized housing all together.

For those developers considering affordable housing programs to fund artist live/work spaces and for those artists looking at the rental rates set by HUD, it is important to remember that these are maximum limits, and the actual rents charged may be less. Additionally, affordable housing projects offer an allowance for utility costs that further reduce the actual rent paid.

INTEGRATION OF STUDIO AND WORK SPACES:
Another design consideration we queried about is how studio/work space might relate to housing. In an Artspace project we opt to combine work space with living space by making units at least one-hundred and fifty square feet larger than traditional multi-family housing units in the community, by adding amenities and design elements that artists most want, and by keeping floorplans open and flexible and ceilings high. Units are then funded and zoned as residential, but the design allows households to use the space in the way that best fits their needs and lifestyle. Shared-use spaces then address the need for collaborative efforts, rehearsal, performance, exhibitions and so on. This is the most cost effective approach to capital build out and works well with the constraints of affordable housing resources. While this arrangement is appealing to 81% of the interested artists, there are other workspace integration models that will work for many of the artists interested in living space in Tacoma. Table 17 of the Technical Report describes the multiple configurations that would be acceptable to artists including: studio/work space in a separate area of the same building; in a separate, adjacent building; no work space required; and having commercial, retail, storefront and/or office space attached to the living space. If using affordable housing resources to create an artist live/work project we do suggest that developers consider that affordable housing is for housing and housing support space only and precludes commercial businesses being run from the spaces. For example units designed with storefront retail on the first floor and housing above could be a complex undertaking and should be thoroughly and legally vetted before finalizing the funding, legal structure and concept. Since the majority of artists are flexible with how studio/work related space is integrated into their living environment, developers do have a lot of freedom to determine what will work best with their project in terms of building structure, location, funding requirements, targeted rental rates, zoning and so on, while still appealing to many of the artists interested in creative space in Tacoma. We would anticipate an interesting array of artist housing project models being developed in the community.

DESIGN FEATURES AND SHARED SPACES:
Other key things to consider when designing new living space for artists and creatives, whether it is a project with sixty live/work units or a project with ten, are the incorporated design features and the support and shared spaces that are integrated into the project for residents and provided free of charge (or for low fees). These considerations (as well as leasing and management strategies) are what truly set aside an artist live/work or housing-only project from other housing available in a community. A review of Tables 14 and 15 (preferred design features and preferred shared spaces and amenities, respectively) will help inform development concepts and design. Projects that are conceptualized and designed with at least the most preferred options included will be uniquely marketable and attractive to the interested artists and creatives in Tacoma.

Other ways that these two tables can be used include:

- Guiding new business models. Start-up businesses, nonprofit programs or business expansions could be informed by the quantified market need.
- Developers of mixed-use projects may want to seek out specific businesses and nonprofits to rent space in their artist housing mixed-use facilities.
- Partnerships can be formed with businesses or nonprofits that provide needed space or programs, so that building residents have priority access or reduced rates for use or access.

STUDIO, CREATIVE WORK, PRODUCTION OR FABRICATION SPACE

When calculating the demand for ongoing studio or other types of creative workspace rentals, we use the number of artists interested only in studio or creative workspace and not those who also expressed interest in live/work space. We assume that, given the option, most artists would select live/work or non-residential studio/working space, but not both. We do acknowledge that some artists responding to this survey may have a need for workspace that is not residentially compatible and would opt for both in the end. Others may prefer their housing to be separate for other reasons. However, we prefer a conservative approach when framing opportunities for the City and local developers. With those caveats, we will again use a three to one ratio for the one hundred and one (101) artist respondents who are only interested in the ongoing studio, creative work, production or fabrication space options and not live/work too (see Figure 3 of the Technical Report).

Should new creative live/work projects offering the maximum number of live/work units come on line, we recommend creating no more than 34 additional individual non-residential work spaces in Tacoma.

DESIGN FEATURES AND SHARED SPACES:
We highly recommend that building owners and developers seeking to make their non-residential studio, creative work, production or fabrication space rentals as marketable as possible, integrate design features and shared spaces and amenities that appeal to the greatest numbers of artist respondents. The Technical Report gives a full picture of the types of shared spaces and amenities (Table 29) and features (Table 28) preferred by artists interested in ongoing studio and other creative workspace rentals (whether also interested in living space or not). When

considering which amenities and design features to include as an enhancement to work-only spaces and projects, we recommend looking at the "All Interested" group's responses for guidance, rather than the "Creative Space Only" interest group.
Shared spaces and amenities should be available for free or at an affordable/competitive rate. Alternatives to providing shared spaces and amenities within a project include: locating new space near these types of shared spaces and amenities if already offered independently in the community; developing partnerships with those who offer shared spaces and amenities so that artists renting workspace (or live/work) may access these third party offered spaces and amenities (perhaps at a discounted rate if there is a fee for use); and/or renting space within the project to commercial and/or nonprofit tenants that can provide these types of spaces and programs to studio/workspace renters.

Tables 28 and 29 of the Technical Report describe other types of spaces that may not be among the most preferred, but are still appealing to many artists. Some of these less preferred options could be commercial enterprises on their own. We suggest that those considering new Tacoma-based businesses and models that support the creative community, look at the list of shared spaces and amenities for brainstorming and concept refinement purposes.

LOCATION:
Location can be a key to the success of a development or a commercial business, but it can also be difficult to find the balance of the right space at the right price in the right neighborhood. When artists need affordable space, but prefer it in high rent areas it may not be financially feasible for property owners/developers to provide the space. However, if visibility is important to an artist's success because as a small business they rely on being in high traffic areas, then the off-the-beaten path, lower rent areas may not be sufficient. In general, Table 27 shows that the interested artists/creatives are amenable to a variety of locations, even though some locations like the North Downtown/Theatre District may be more preferred. As with the living space, while location is an important factor to be considered, providing affordable and adequate space with appropriate amenities and features is likely to attract even some of those for whom the location is not their most preferred.

STUDIO AND WORKSPACE SIZE, RENTAL RATES AND LEASE TERMS:
Table 30 of the Technical Report describes the artists' requirements for ongoing studio/creative workspace square footage which can be compared to what artists are able to pay for that space (Table 31) if rented separately from housing. Half (50%) of the artists need small or modestly sized spaces of up to 350 square feet (25% need less than 200 sf) and it is clear that affordability is important to these artists, as many (47%) could only pay up to $250 a month for their space (not relative to size) and 23% could only pay up to $150 a month. Even while these are very low rents, some artists do describe an ability to pay higher rents, enabling a developer of new studio and workspaces to include a variety of size and cost options.

For a comparison to what artists are currently paying for studio and creative workspace, see Table 26 in the Technical Report. Current rates paid are similar to what artists say they can pay for new space. It is important to note that artists who have studio and creative work space outside of their homes may be looking for cheaper space than they currently have, space that better meets their needs and preferences, or space that is within a larger creative community. It is important to keep these factors in mind when making new space available or marketing space to creatives in Tacoma.

Setting aside for the moment the creation of studio and other creative workspace, many of these artists who are also interested in relocation would find their nominal creative workspace square footage needs well satisfied by a live/work project with integrated working space. A well-designed live/work unit could satisfy the working space needs of many artists, while minimizing their space costs overall.

If studio spaces are created and rented separately from housing, a mix of small and mid-sized spaces would be marketable, but the emphasis should be on spaces that are 500 square feet or less (this size will serve 62% of all the interested artists).

If spaces larger than 500 square feet or more expensive than $250 per month are offered for rent, we recommend pre-leasing these spaces, whether leased to single artists or artists who intend to share space. With 20% of the All-Interested artists needing between 501 and 800 square feet and 12% needing 801 square feet or more (see Table 30), there is a much smaller market for these larger spaces, and artists may or may not be able to pay commensurately on a per square foot cost basis and therefore the space may not be sustainable (depending on the owners operating costs and net income goals).

Additionally, interested artists are cautious with rental terms, with most preferring leases of one year or less (see Table 32). While artists may want flexible lease terms for many different reasons, it can make it more difficult for developers and property owners to capitalize improvements and make the investment in new space. Targeting new space to appeal to the greatest number of artists is the best way to ensure long-term stability and sustainability.

COMMERCIAL, RETAIL, OR STOREFRONT SPACE RENTAL

One hundred nineteen (119) artist/creatives expressed an interest in renting commercial, retail or storefront space in Tacoma (see Figure 4 of the Technical Report). Only 13% of these interested artists/creatives currently rent this type of space representing to us a relatively untapped market and an opportunity for developers and building owners to build for and market spaces to creative entrepreneurs (see Table 35 of the Technical Report). Additionally, new space will serve primarily Tacoma based artists/creatives potentially making outreach easier while helping to support existing creative workers (see Table 33).

LOCATION AND SPACE PREFERENCES:

As with other types of creative and living spaces described above, the respondents interested specifically in commercial, retail or storefront space options, would be satisfied in a variety of locations (see Table 37 of the Technical Report). However, two of their most preferred features (Table 38 of the Technical Report) point to a clear interest in locations that have "active pedestrian" activity and that are in "close proximity to other creative businesses". These preferences are reasonable for the type of uses these spaces would support, and are likely linked to the viability of the businesses the respondents would like to operate from new space. They also narrow down the options for appropriate locations within the neighborhoods of interest to active and pedestrian friendly streets. The preference for "close proximity to other creative businesses" also indicates to us an opportunity to create a single development that caters to multiple creative businesses either as a one hundred percent commercial venture or as a mixed-

use artist-housing project. It is also an opportunity for property owners to market existing spaces to these interested artists and creatives, in areas where like-minded enterprises are beginning to, or have already clustered.

The types of shared spaces and amenities that would be most attractive to this subset are similar to the preferences of those interested in other types of spaces discussed earlier (see Table 39 of th Technical Report). As with previous recommendations, high priority shared spaces and amenities should be considered for integration and/or made accessible through program partnerships and/or by close proximity to the commercial, retail and storefront spaces offered. The high preference for "Storefront/ Retail (for pop-ups or cooperatively run spaces, etc.)", indicates to us that some of those respondents interested in renting commercial, retail or storefront space, may be satisfied by a shared-use or short-term option like that offered through Spaceworks Tacoma. There may also be an opportunity for a group of artist entrepreneurs to partner and rent a commercial space in a cooperatively run venture.

COMMERCIAL SPACE SIZE, RENTAL RATES AND LEASE TERMS:

Twenty-nine percent (29%) of the interested respondents require 350 square feet or less of commercial, retail or storefront space (see Table 40 of the Technical Report). This type of space could be well satisfied in a cooperative style, multi-vendor enterprise (under a master lease) or through small kiosk style commercial spaces leased directly by a commercial developer or property owner. Making a number of small spaces available to the creative community in a single building or project, could also satisfy the expressed preference for being located near other creative businesses and such a project in itself could become a destination oriented shopping experience that catalyzes additional pedestrian activity. The data also supports more traditional commercial, retail and storefronts spaces of larger sizes and even some that could anchor a small mixed-use or commercial project.

What the interested respondents can pay on a monthly basis for new commercial, retail or storefront space is located in Table 41 of the Technical Report. In general the spectrum is broad with most (60%) able to pay over $500 a month. As would be expected the respondents interested in commercial, retail or storefront space are generally interested in longer leases than those interested in studio, creative work, fabrication or production space, with more preferring one year or longer term leases than the work space oriented sub-group (see Table 32 of the Technical Report). The information in these two tables, along with other data in the section beginning on Page 28 of the Technical Report should assist property owners in better understanding the needs of, and developing lease terms acceptable to, those in the creative sector. Developers looking to create new space should also find this information sufficient for creating pro-formas and refining project concepts that will address the commercial, retail and storefront needs of creative businesses in Tacoma.

OFFICE SPACE

Demand for office space in Tacoma is strong, with 81 of the survey respondents expressing interest in renting private creative office space on an ongoing basis and 134 indicating interest in buying a membership in a co-working space (43 of these respondents expressed interest in both types of space but likely would choose one type of space or the other, but not both). The Technical Report divides office space into two primary types, private office and co-working. This

distinction and the preference data (Tables 43-54 of the Technical Report) should help property owners and developers conceptualize, plan and effectively market new space to the creative sector, recognizing of course that private office space could be modeled either as independently leased space or as private space within an incubator setting or co-working model.

The Technical Report reveals this group as not being exclusively interested in office space. The large majority are also interested in some other type of space. Additionally, we find among the top preferred features for private office space (see Table 47 of the Technical Report), a desire to be located in "close proximity to other creative businesses (same building or block)". Together these indicate to us again, that a mixed-use project model supporting multiple creative uses (live/work, work-only, commercial and office) would be highly marketable in Tacoma.

Additionally the data underscores for us the market capacity for expanding existing co-working models that serve artists and creatives and/or creating new businesses of this nature in Tacoma. A co-working model that provides memberships and leases for drop-in/occasional use, as well as private longer term use, and that additionally offers at least some of the top preferred amenities and features like Internet access, informal networking space, and a business center (see Tables 47 and 48 and Table 54 of the Technical Report) should find a strong client base. There are even models nationally that converge "maker spaces" with co-working businesses that could be a good fit for Tacoma. By introducing some of the work, teaching and shared gallery/exhibition spaces of interest to respondents into an office oriented co-working/incubator model, an even greater market base would be served. By using the data in Tables 49-54 of the Technical Report (including square footage needs, rental rates and lease terms), a basic business plan for either a co-working venture or a hybrid model could be developed. This is another option for local entrepreneurs to consider in addition to offering more traditional office space rentals and incubator models in existing projects and new developments.

OCCASIONAL SPACE NEEDS

Information about occasional space rental needs can be found beginning on page 45 of the Technical Report. While this type of space is more difficult to build a project or space model around, it is useful to know the need exists. Some of the ways these types of space needs could be met include:

- Allowing renters to sublease their space for occasional use by other creatives.
- Incorporating flexible space into a project and making the space available on an hourly, daily, weekly or other basis. A flexible, rentable space could be used for things like: general-purpose studio work, teaching, meet-ups/networking events, exhibitions and pop-up installations or retail.
- Developing or expanding a co-working or makerspace model to appeal to a variety of users on a membership or other short-term basis.
- Artists and/or creative businesses forming a coalition, nonprofit or other formal structure to lease and build-out and equip unique space to meet the needs of a particular sector of the creative community (e.g. theater space, printmaking facility etc.)
- Existing nonprofits and businesses that offer preferred spaces/equipment could make their spaces and equipment available for use for a fee.

- If not already in existence in Tacoma, creating a Spacefinder (http://www.spacefinderla.org) service in which available, underutilized and alternative spaces can be advertised to those looking for short-term space for rehearsing, meeting, teaching, holding events etc., could help interested artists and creatives find space, and help existing businesses capitalize on underutilized real estate.

OTHER CONSIDERATIONS AND THOUGHTS

- Most of the interested artists and creatives currently reside in Tacoma or have lived there before. New spaces that meet their needs will truly serve the local community, and encourage those who have left, to return. Live/work and artist housing along with studio, creative work, fabrication and production space opportunities will draw the greatest number of new residents/workers to Tacoma who have never lived there before, than any of the other space types explored in this study.
- There are many respondents who are interested in receiving information about space opportunities or being put on lists for programs and activities that will support their space needs. We highly recommend that those who provided contact information be kept up to date on the space initiatives they are interested in. There is even an opportunity to put a call out to artists when new space is being planned in order to gather more information about potential renters' needs or interests and to take the next step in designing or leasing the space(s).
- Tables 10 and 25 of the Technical Report describe current studio, creative work, production and fabrication space arrangements for those interested in housing and those interested in creative-workspaces. The vast majority of both interest groups have space they use in their homes or they do not have the space they need for their creative work/business. This indicates to us that this is a significantly untapped market for developers and property owners creating or leasing space in Tacoma.
- Table 12 of the Technical Report describes the current housing arrangement for those interested in artist live/work or other types of artist housing. Only 22% currently own their homes. Overall we would anticipate that the interest group has great flexibility to make a move to a new living arrangement that meets their needs.
- Live/work and other housing developments for artists and creatives should accommodate adjacent parking (see Table 19 of the Technical Report).

CONCLUSION

Tacoma is rich with artists and creatives that require significant and varied space to support their living, working, creating and business needs. The findings described in this report may be used by the City of Tacoma, developers, property owners, brokers and others to conceptualize, design, plan, and fund new space as well as, design, market, price and lease existing spaces to a significantly untapped market. If new and existing spaces newly marketed to artists and creatives address the needs and preferences expressed by respondents, the new space and newly advertised space should be highly marketable. Introducing creative business models, including for example:

co-working, mixed-use projects and those that combine higher paying tenants with lower paying tenants as a way to subsidize creative and placemaking activity, into the Tacoma real estate market, is one way to well position developments and leasing efforts for long-term sustainability and success. We do want to underscore that long-term affordability will be important for many, while others may be able to step up rental payments in tandem with market changes over time. If Tacoma's vision to support its creative community and creative economy through space-based initiatives becomes as successful in implementation as we believe it could be, then some protections against the adverse effects of gentrification should be built into the broader initiatives and individual projects now. The best result in the long run for the City and its developers, land owners, artists, residents and businesses of all types, will be long-term sustainability, not just in terms of budgets and financial return, but the sustainability of its creative, unique and entrepreneurial community and character. Continuing to cultivate and preserve these assets is essential to the future growth of Tacoma and the continued attraction of residents, businesses and other creatives to the city.

Survey of Artists' and Creative Individuals' Space Needs and Preferences

TACOMA, WA
JUNE 2015

Technical Report

Prepared by Swan Research and Consulting for —

artspace

Tacoma Arts Commission

The Greater Tacoma Community Foundation

Funding and support provided by –

JPMorgan Chase & Co.

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Introduction

The City of Tacoma and the Greater Tacoma Community Foundation partnered with Artspace Projects, the nation's leading non-profit real estate developer for the arts, to conduct a study of the space needs and preferences of artists and creatively engaged individuals living and working in Tacoma and the surrounding region. The aim of the study was to assist the City of Tacoma, local property owners, and developers in advancing projects and providing living, working, and other unique spaces for artists and creative individuals of all disciplines in Tacoma. This study is part of a second phase of work, the first of which was conducted in 2013 when Artspace was engaged to assess the potential for the development of new arts/creative spaces in Tacoma.

Data for the study was collected through a survey of artists and creative individuals located in Tacoma and the surrounding area. Individuals representing a wide range of arts, cultural and creative industries were invited to participate. Specific information regarding the survey methodology is provided in Appendix A.

Artspace Projects, Inc. and Swan Research and Consulting designed the survey with the following objectives:

- *Quantify* the demand in Tacoma for:
    - Live/work spaces and housing for artists, creatives, and their families
    - Studio, creative work, production, or fabrication spaces that artists or creative individuals may rent on an ongoing basis
    - Commercial, retail, or storefront spaces for creative individuals and businesses to rent on an ongoing basis
    - Private creative office spaces for artists and creative individuals to rent on an ongoing basis
    - Co-working spaces in which artists or creative individuals could purchase a membership
    - Studio, creative work, production, fabrication, commercial, retail, private office, or storefront space that could be rented on an occasional basis.

- *Inform* development decisions and ensure that new space meets the needs of the creative community by articulating specific design elements, locations of interest, types and size of spaces, and building features that artists and creative individuals prefer or require.

- *Describe* the artists and creatively involved individuals; their arts and creative activities, current living and working arrangements, and their ability to pay for new live/work and housing space and rental of creative space.

This report is a summary of the data obtained from those who completed the survey, particularly those artists and creative individuals who indicated a potential interest in live/work and/or housing space and/or studio and other creative work space. Current residence data for these interested survey respondents is located in Appendix B.

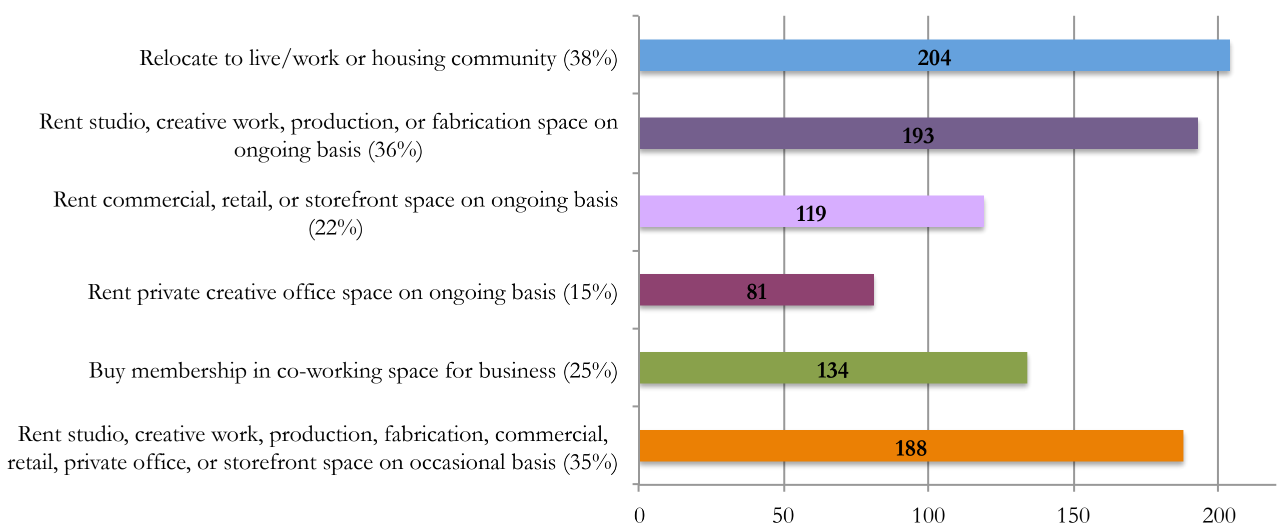
Executive Summary

541 respondents completed the Tacoma Survey of Artists' and Creative Individual's Space Needs and Preferences. The respondents were asked six key questions:

- *Would you relocate to a live/work or housing community for artists, creatives, and their families in the city of Tacoma, WA?*
- *Would you rent studio, creative work, production, or fabrication space for artists and creatives on an ongoing basis in Tacoma?*
- *Would you rent commercial, retail, or storefront space for a creative work/business, on an ongoing basis, in Tacoma?*
- *Would you rent private creative office space on an ongoing basis in Tacoma?*
- *Would you buy a membership in a co-working space in Tacoma?*
- *Would you rent studio, creative work, production, fabrication, commercial, retail, private office, or storefront space on an occasional basis in Tacoma?*

The largest number of respondents (204; 38%) indicated interest in relocating to a live/work or housing community for artists in Tacoma (Figure 2). One hundred ninety-three (193; 36%) are interested in renting studio, creative work, production, or fabrication space on an ongoing basis and 35% are interested in renting some type of space on an occasional basis in Tacoma. Survey respondents could select one or more types of space. As a result, there is overlap between these groups; key points regarding overlap are noted in this report.

Figure 1: Interest in All Types of Space



Key Findings:

- The majority of artists interested in new space currently live in the city of Tacoma or have resided there in the past. However, relatively more individuals interested in live/work or a housing community have not lived in Tacoma in the past (21%), suggesting that a unique artist's community may draw individuals and families to the city for this opportunity.

- For those interested in live/work or housing, ongoing studio, creative work, production or fabrication space, and occasional rental space, arts activities that are highly represented include painting/drawing, mixed media, photography, arts education/instruction, and writing/literary arts.

- Most of the artists or creative individuals interested in some type of space currently use space in their home, or do not have the space they need for their arts activities.

- The most desirable Tacoma neighborhoods for those interested in ongoing space are the North Downtown/Theater District, the Old Brewery District, the Dome District, and the Hilltop area.

- When asked about the types of spaces and amenities that would be shared with others, community space for informal networking/gathering, gallery exhibition space, general purpose studio space, storefront/retail space, a business center, classrooms/teaching space, and printmaking facilities were identified as most preferred by artists and creatives interested in all types of space.

- The features of greatest interest to those interested in any type of space include natural light and Internet access. Those interested in live/work space and ongoing rental of studio, creative work, production, or fabrication space also desire slop sinks and high ceilings. Not surprisingly, those interested in commercial, retail, or storefront space, and those interested in private office space desire close proximity to other creative businesses.

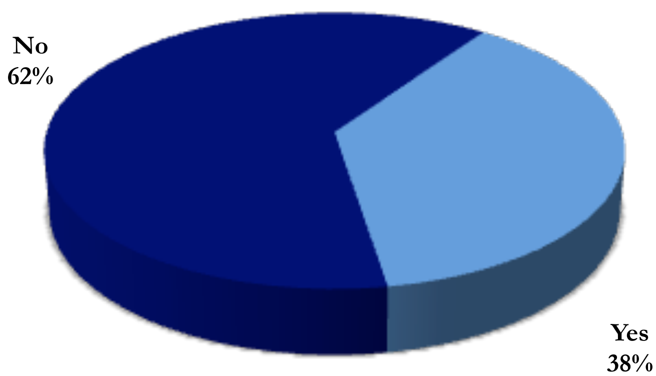
- For those interested in relocating to a live/work or housing community, 85% or more would choose renting or renting to purchase, while 60% would purchase a condominium, and 51% would rent a small co-housing unit (200-300 sq. ft.). Most (over three-quarters) would be flexible in the way their work space was integrated with or separate from their living space.

Summary of Survey Results – Artist Space Needs and Preferences

RELOCATION TO A LIVE/WORK OR HOUSING COMMUNITY: INTERESTED ARTISTS

Two hundred four (204) of the survey respondents (38%) expressed an interest in relocating to a live/work or housing community for artists, creatives and their families in Tacoma (Figure 2).

Figure 2: Would you relocate to a live/work or housing community for artists, creatives, and their families in Tacoma?



Over half (57%) currently reside in Tacoma, and 21% have lived there previously (Table 1). Twenty two percent have never resided in Tacoma (Detailed current residence data is provided in Appendix B).

Table 1: Tacoma Residence

Ever Lived in Tacoma?	"yes" responses #	"yes" responses %
I currently live in Tacoma	117	57.4
No	44	21.6
Yes, but not currently	43	21.1
Total	204	*100.1

**Does not equal 100.0% due to rounding*

The interested artists participate in a wide range of arts, cultural and creative industries (Table 2). The most common are painting/drawing, photography, writing/literary arts, and mixed media.

Table 2: Arts, Cultural and Creative Industries

Arts, Cultural and Creative Industries *	"yes" responses #	"yes" responses %	total responses #	total responses %
Painting/Drawing	76	37.3	162	29.9
Photography	53	26.0	121	22.4
Writing/Literary arts	50	24.5	107	19.8
Mixed media	45	22.1	112	20.7
Arts education/instruction	38	18.6	108	20.0
Graphic arts/design	36	17.6	88	16.3
Crafts/Fine crafts	34	16.7	109	20.1
Art gallery/Exhibition space/Curatorial	33	16.2	83	15.3
Music (vocal/instrumental/recording/composition)	33	16.2	84	15.5
Digital arts (computer/multimedia/new media, etc.)	32	15.7	74	13.7
Book arts/illustration	26	12.7	63	11.6
Printmaking	26	12.7	41	7.6
Performance art	24	11.8	50	9.2
Arts administration/Arts advocacy	23	11.3	52	9.6
Film/Video/Television/Digital/Web-based entertainment production	23	11.3	52	9.6
Theater arts (acting, directing, production, etc.)	21	10.3	53	9.8
Installation art	20	9.8	47	8.7
Sculpture	20	9.8	51	9.4
Fiber/Textile arts/Fashion/Costume design	18	8.8	47	8.7
Murals/Street art	17	8.3	33	6.1
Architecture/Landscape architecture	14	6.9	35	6.5
Ceramics	14	6.9	30	5.5
Healing arts/Art therapies	14	6.9	29	5.4
Metalworking/Metalsmithing	12	5.9	21	3.9
Culinary arts	10	4.9	25	4.6
Folk and traditional art	10	4.9	18	3.3
Glass	10	4.9	25	4.6
Woodworking	10	4.9	33	6.1
Dance/Choreography	9	4.4	24	4.4
Jewelry design/fabrication	9	4.4	43	7.9
Art/Music therapy	7	3.4	19	3.5
Interior design	6	2.9	23	4.3
Comedy (stand-up, sketch, improv)	4	2.0	9	1.7
Other	12	5.9	33	6.1

**Respondents may have selected multiple industries*

Sixty-one percent (61%) of the interested artists are female (Table 3).

Table 3: Gender

Gender	"yes" responses #	"yes" responses %	total responses #	total responses %
Male	72	35.3	193	35.7
Female	124	60.8	329	60.8
Transgender/Transsexual/Genderqueer	4	2.0	6	1.1
Prefer not to answer	4	2.0	13	2.4
Total	204	*100.1	541	100.0

**Does not equal 100.0% due to rounding*

Twenty percent (20%) of the interested artists are 30 years of age or younger (Table 4). Forty- nine percent (49%) are between the ages of 31 and 50, and 31% are over 50.

Table 4: Age

Age	"yes" responses #	"yes" responses %	total responses #	total responses %
20 years and younger	1	0.5	9	1.7
21 – 30 years	39	19.1	78	14.4
31 – 40 years	52	25.5	149	27.5
41 – 50 years	48	23.5	109	20.1
51 – 60 years	47	23.0	125	23.1
61 – 70 years	17	8.3	59	10.9
Over 70 years	0	0.0	12	2.2
Total	204	*99.9	541	*99.9

**Does not equal 100.0% due to rounding*

The majority of the interested artists (78%) are White/Caucasian. Ten percent (10%) describe themselves as multiracial/multiethnic, and 6% are Black/African American (Table 5).

Table 5: Ethnicity

Ethnicity	"yes" responses #	"yes" responses %	total responses #	total responses %
Native American/American Indian	1	0.5	6	1.1
Black/African American	12	5.9	19	3.5
Hispanic/Latino	3	1.5	13	2.4
Asian/Pacific Islander	4	2.0	14	2.6
White/Caucasian	160	78.4	441	81.5
Multiracial/Multiethnic	21	10.3	40	7.4
Something else (please specify)	3	1.5	8	1.5
Total	204	*100.1	541	100.0

Two-thirds of the interested artists (67%) have at least a Bachelor's degree, and 29% of these respondents have obtained a post-graduate degree (Table 6). Thirty-one percent (31%) of the interested artists have completed some college course work or obtained a 2-year degree.

Table 6: Education

Highest Level of Education	"yes" responses #	"yes" responses %	total responses #	total responses %
Some high school course work	0	0.0	3	0.6
High School/GED	5	2.5	19	3.5
Some college course work or 2-year degree	63	30.9	149	27.5
Bachelor's degree	77	37.7	178	32.9
Some post-graduate work	20	9.8	49	9.1
Post-graduate degree	39	19.1	143	26.4
Total	204	100.0	541	100.0

A small number of the interested artists (7%) are currently full-time students (Table 7).

Table 7: Student Status

Full-time Student	"yes" responses #	"yes" responses %	total responses #	total responses %
Yes	15	7.4	38	7.0
No	189	92.6	503	93.0
Total	204	100.0	541	100.0

Table 8 contains information regarding the annual household incomes of the interested artists by household size. The shaded area denotes the number of interested artists who fall at or below sixty percent of the median income for the region encompassing the city of Tacoma. Forty-eight percent (48%) of the interested artists report annual household incomes that fall at or below 60% of the area median income for household size (HUD FY2015: Pierce County (Tacoma, WA HUD Metro FMR Area). Approximately one-quarter (24%) of the interested artists have household incomes of $20,000 or less per year. Seventeen percent (17%) have annual household incomes greater than $75,000.

Table 8: Income by Household Size (# of Interested Artists)*

	Household Size					
Annual Household Income	1	2	3	4	5 or more	Total
Under $10,000	8	3	0	3	0	14
$10,000 - $15,000	8	8	1	3	0	20
$15,001 - $20,000	9	3	0	3	0	15
$20,001 - $25,000	11	9	3	1	0	24
$25,001 - $30,000	5	5	1	4	0	15
$30,001 - $35,000	5	7	1	0	0	13
$35,001 - $40,000	1	7	1	1	0	10
$40,001 - $45,000	4	5	3	0	0	12
$45,001 - $50,000	0	4	4	1	1	10
$50,001 - $55,000	0	4	1	0	0	5
$55,001 - $60,000	0	2	2	2	3	9
$60,001 - $65,000	1	3	1	0	0	5
$65,001 - $75,000	3	3	1	1	1	9
$75,001 - $85,000	2	4	3	1	1	11
$85,001 - $100,000	0	5	2	1	0	8
Over $100,000	0	9	4	1	1	15
Prefer Not to Answer	6	3	0	0	0	9
Total	63	84	28	22	7	204

**Shaded area denotes incomes at or below 60% of the regional median income. The FY2015 median income for a household of 4 is $71,000*

Half of the interested artists currently earn less than ten percent of their income from their art or creative work (Table 9). Twenty-three percent (23%) earn more than half of their income from their art or creative work.

Table 9: Percentage of Income from Art or Creative Work

	"yes" responses		total responses	
% of Income from Art/Creative Work	#	%	#	%
Less than 10%	101	49.5	320	59.1
10% - 25%	40	19.6	75	13.9
26% - 50%	17	8.3	37	6.8
51% - 75%	13	6.4	29	5.4
76% - 100%	33	16.2	80	14.8
Total	204	100.0	541	100.0

The artists were asked about their current studio or creative work space arrangement (Table 10). The majority of the interested artists (58%) use space within their home for their art or creative work/business, and many (41%) indicated they do not have the space they need for their art or creative work/business. Ten percent (10%) rent or own studio or other creative work, production or fabrication space outside their home on an ongoing basis.

Table 10: Current Studio or Creative Work Space Arrangement

	"yes" responses	
Work Space Arrangements*	**#**	**%**
Have space within home used for art or creative work/business	118	57.8
Don't have space needed for art or creative work/business	83	40.7
Rent or own studio or other creative work, production or fabrication space outside home on ongoing basis	21	10.3
Creative work space is provided free of charge	18	8.8
Rent commercial, retail, office or storefront space outside home on ongoing basis	6	2.9
Creative work/business does not require designated space	6	2.9
None	5	2.5

**Respondents may have selected multiple arrangements*

The artists were also asked to respond to questions regarding their current living arrangements.

Thirty five percent (35%) of the interested artists do not live with other adults (Table 11). The majority (82%) do not have children residing with them in their home.

Table 11: Current Household Composition

	"yes" responses	
Number of Adults	**#**	**%**
One - I am the only adult	72	35.3
Two	101	49.5
Three or more	31	15.2
Number of Children (under 18)	**#**	**%**
None	167	81.9
One	18	8.8
Two	12	5.9
Three or more	7	3.4
Total	204	100.0

Most of the interested artists (65%) currently rent or lease their living space, while 22% own their residence (Table 12). A small minority (13%) do not rent/lease or own the space in which they live (may live with others, reside at a college or university, etc.).

Table 12: Current Home Rental/Lease vs. Ownership

	"yes" responses	
Rent/Lease vs. Own	**#**	**%**
Rent/Lease	133	65.2
Own	45	22.1
Do not rent/lease or own	26	12.7
Total	204	100.0

Relocation to a Live/Work or Housing Community: Needs and Preferences for Live and Work Space

The data provided in this section summarizes the interested artists' responses to questions regarding their preferences and needs for ***new*** live/work or housing space.

When asked about preferred neighborhoods for relocation to a live/work or housing community (Table 13), the large majority (83%) selected the North Downtown/Theater District, and over half were interested in the Old Brewery District (63%) and the Dome District (52%).

Table 13: Preferred Tacoma Neighborhoods

Neighborhoods*	"yes" responses	
	#	%
North Downtown/Theater District	169	82.8
Old Brewery District	129	63.2
Dome District	105	51.5
Hilltop	98	48.0
Lincoln District	60	29.4
McKinley Hill/East Side	58	28.4
South Tacoma	58	28.4
Other	29	14.2

**Respondents may have selected multiple neighborhoods*

The interested artists were asked to select, from a list provided, up to five design features that are most important for their studio or creative work space. The features selected most often are natural light, Internet access, a slop sink, high ceilings, a nearby bus route, common area security, and additional storage (Table 14). (Note: Thirty-four of the interested artists (17%) selected the option "direct street access for retail sales" and may have also expressed more formal interest in this type of space when asked later in the survey whether they were interested in renting commercial, retail, or storefront space for a creative work/business on an ongoing basis in Tacoma).

Table 14: Preferred Studio/Creative Work Space Features

Important Features*	"yes" responses #	"yes" responses %
Natural light	131	64.2
Internet access (high speed/high bandwidth for large files/graphics)	118	57.8
Slop sink in or near my workspace	64	31.4
High ceilings (over 10 feet)	61	29.9
On bus route	54	26.5
Building common area security (secured entrance, cameras, etc.)	52	25.5
Additional storage	49	24.0
Raw special/minimal build out for messy arts/production	42	20.6
Air conditioning/Climate control	41	20.1
Soundproofing	41	20.1
Direct street access for retail sales	34	16.7
Assembly-use code compliant (for music, theatre, exhibitions, etc.)	29	14.2
Oversized doors/Freight elevator	29	14.2
Special ventilation	22	10.8
Special electrical wiring	18	8.8
Loading dock	14	6.9
Wheelchair accessibility/ADA compliant	14	6.9
Plumbing/Special plumbing	13	6.4
High-load bearing floors	6	2.9
Floor drains	5	2.5
Sprung floors	5	2.5
Other	17	8.3
None of these are important	1	0.5

**Respondents may have selected multiple features*

The interested artists were also asked to identify their top five choices with respect to the types of space and amenities they would consider sharing with other artists (Table 15). Gallery/exhibition space was identified as desirable by 41% of the interested artists. Other preferred spaces and amenities include general-purpose studio space, community space for informal networking/ gathering, and storefront/retail space. (Note: the respondents who selected storefront/retail space may have also expressed more formal interest in renting Commercial, Retail or Storefront space which is presented in a separate section below).

Table 15: Preferred Shared Spaces and Amenities

Type of Space/Amenities*	"yes" responses #	%
Gallery/Exhibition space	84	41.2
General purpose studio space	70	34.3
Community space for informal networking/gathering	69	33.8
Storefront/Retail space (for pop-ups or cooperatively run space, etc.)	64	31.4
Classrooms/Teaching space	55	27.0
Printmaking facilities	53	26.0
Business center (including copier, fax machine, postage meter, etc.)	51	25.0
Paint room	38	18.6
Ceramics studio/Kiln	33	16.2
Recording studio	32	15.7
Woodworking shop	29	14.2
Rehearsal space (theater, performance art, etc.)	28	13.7
Outdoor work area	24	11.8
Theater/Performance space (black box, flexible space)	23	11.3
Traditional or digital dark room	23	11.3
Metalworking/Metalsmithing studio	22	10.8
Film/Video screening room	21	10.3
Makerspace/Hackerspace	21	10.3
Professional kitchen (catering, teaching, product development, etc.)	20	9.8
Sound proof practice rooms	19	9.3
Scene/Prop/Costume shop	18	8.8
Theater/Performance space (formal seating/permanent stage)	16	7.8
Dance studio/rehearsal space	15	7.4
Fine metals/Jewelry making studio	11	5.4
Glass hot shop	8	3.9
Other	17	8.3
None of the above	3	1.5

**Respondents may have selected multiple types of space/amenities*

When asked about their preferences regarding ownership or rental arrangements, most (90%) of the interested artists indicated they would accept a traditional rental arrangement, and 85% indicated they would be interested in renting space with the option to buy it later (Table 16). Many (60%) of the interested artists would be interested in owning a condominium, and 51% would rent a small co-housing unit.

Table 16: Live/Work Ownership and Rental Arrangements

	"yes" responses	
Rental/Ownership Arrangements*	**#**	**%**
Renting your space	183	89.7
Renting your space with option to buy	173	84.8
Owning a condominium	122	59.8
Renting a co-housing unit (200-300 sq. ft.)	104	51.0

**Respondents may have selected multiple arrangements*

When asked about their preferences for the integration of their living and working spaces, almost all of the interested artists (97%) would accept an arrangement where their studio/work space is in a separate area of the building in which they live (Table 17). Over eighty percent, however, would accept an arrangement where their studio/work space is in a separate, adjacent building (88%) or where their work space is integrated in their living space (81%). Thirty five percent (35%) would prefer a housing only option.

Table 17: Living Space & Work Space Integration

	"yes" responses	
Living and Work Space Arrangements*	**#**	**%**
Studio/work in separate area of same building	198	97.1
Studio/work space in a separate, adjacent, building	179	87.7
Studio/work space integrated in living space	166	81.4
Commercial, retail, storefront, and/or office space attached to living space	152	74.5
Housing only, no other space required	71	34.8

**Respondents may have selected multiple arrangements*

Seventy percent (70%) of the interested artists would require one or two-bedroom units and 16% require 3 bedrooms or more (Table 18).

Table 18: Bedrooms Needed x Household Size

# of Bedrooms Required	-------------------Size of Household--------------				Total	
	One	Two	Three	4 or more	#	%
None (Studio/Efficiency)	16	8	4	2	30	14.7
One	42	26	1	6	75	36.8
Two	4	43	15	5	67	32.8
Three	0	7	8	10	25	12.3
Four or more	1	0	0	6	7	3.4
Total	63	84	28	29	204	100.0

The majority of the interested artists (89%) require at least one parking space adjacent to their residence (Table 19). Twenty-eight percent (28%) of the interested artists need two or more spaces for parking.

Table 19: Parking Spaces

Number of Parking Spaces Needed	"yes" responses"	
	#	%
None	23	11.3
One	124	60.8
Two	51	25.0
Three or more	6	2.9
Total	204	100.0

Table 20 contains information regarding the maximum amount the interested artists could pay monthly in combined housing and work space costs by size of space needed (number of bedrooms required). The table includes all respondents who expressed interest in renting space and/or renting space with the option to buy it later (198). These respondents may have also expressed interest in purchasing a condominium and/or renting co-housing space. Approximately half of these respondents (51%) could afford $800 or less per month for combined live/work space, and one third could pay $900 to $1,200 per month.

Table 20: Affordable Housing and Work Space Costs

	----------------Number of Bedrooms Needed----------------					Total	
Combined Live/Work Space Maximum Monthly Amount (excluding utilities)	**None (Studio/ Efficiency)**	**One**	**Two**	**Three**	**4 or more**	**#**	**%**
$400	3	3	4	0	1	11	5.6
$500 - $600	12	18	2	3	1	36	18.2
$700 - $800	6	23	20	5	0	54	27.3
$900 - $1,000	4	18	14	4	1	41	20.7
$1,100 - $1,200	0	6	12	5	1	24	12.1
$1,300 - $1,500	2	3	11	1	0	17	8.6
Over $1,500	2	2	3	5	3	15	7.6
Total	29	73	66	23	7	198	*100.1

Does not equal 100.0% due to rounding.

As noted above (Table 17), the interested artists were asked about their preferences for the integration of their living and working spaces, and were then asked what they would be willing to pay for that space. All of the respondents who expressed an interest in housing-only space (71) also expressed interest in some type of combined live/work space. For those artists interested in housing-only space, over half (54%) could afford $800 or less per month (Table 21) and thirty-four percent (34%) could afford between $800 and $1,200 monthly. Because these respondents expressed interest in both housing-only space and combined live/work, space, the data below reflect the amounts they can afford to pay for both types of space.

Table 21: Affordable Housing Costs – Housing Only

Housing Only Maximum Monthly Amount (excluding utilities)	**----------------Number of Bedrooms Needed------------------**					**Total**	
	None (Studio/ Efficiency)	**One**	**Two**	**Three**	**4 or more**	**#**	**%**
$400	1	1	1	0	0	3	4.2
$500 - $600	4	5	0	1	0	10	14.1
$700 - $800	3	9	12	1	0	25	35.2
$900 - $1,000	0	7	5	2	0	14	19.7
$1,100 - $1,200	0	1	6	3	0	10	14.1
$1,300 - $1,500	1	1	3	1	0	6	8.5
Over $1,500	0	1	0	1	1	3	4.2
Total	9	25	27	9	1	71	100.0

The interested artists who expressed interest in owning a condominium (122) were asked how much they could afford to purchase a condominium. Table 22 contains information regarding the maximum amount they could pay by size of space needed (number of bedrooms required). Many (61%) could afford $150,000 to $200,000 for a condominium purchase, while one-quarter could pay between $200,000 and $250,000.

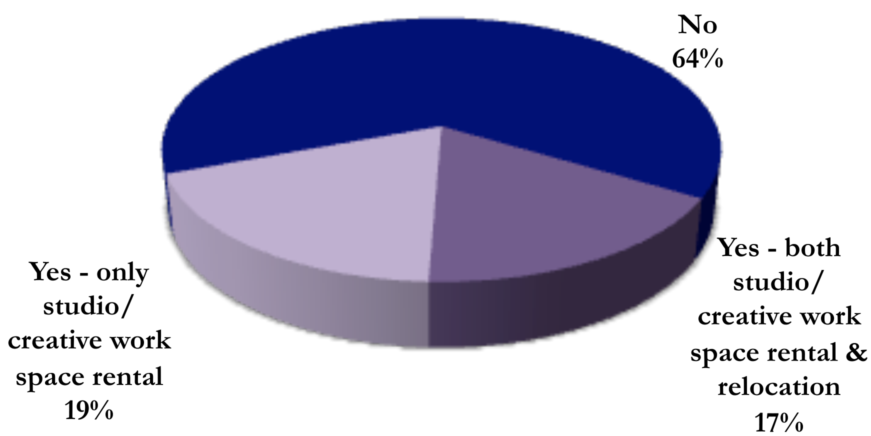
Table 22: Affordable Purchase Costs: Condominium

Maximum amount for condominium purchase	----------------Number of Bedrooms Needed----------------					Total	
	None (Studio/ Efficiency)	One	Two	Three	4 or more	#	%
$150,000 - $200,000	10	32	23	8	1	74	60.7
$201,000 - $250,000	0	7	13	8	2	30	24.6
$251,000 - $300,000	2	0	4	2	0	8	6.6
$301,000 - $350,000	1	0	2	1	2	6	4.9
$351,000 - $400,000	0	0	0	1	0	1	0.8
$451,000 - $500,000	0	0	1	0	0	1	0.8
More than $500,000	0	0	0	1	1	2	1.6
Total	13	39	43	21	6	122	100.0

ONGOING STUDIO, CREATIVE WORK, PRODUCTION OR FABRICATION SPACE RENTAL

One hundred ninety-three (193) of the survey respondents (36%) indicated an interest in renting studio, creative work, production, or fabrication space on an ongoing basis in Tacoma (Figure 3). Of the artists interested in ongoing studio, creative work, production or fabrication space rental, 101 were ***only*** interested in renting studio, creative work, production or fabrication space, while 92 were interested in ***both*** studio, creative work, production or fabrication space rental and potential live/work space. (For the 92 artists interested in both relocation to live/work space and ongoing studio, creative work, production or fabrication space rental, it is reasonable to assume they would choose ***either*** studio, creative work, production or fabrication space rental ***or*** live/work space, but not both.)

Figure 3: Would you rent studio, creative work, production or fabrication space for artists and creatives on an ongoing basis in Tacoma?



The following tables provide information for all artists who indicated an interest in renting studio, creative work, production or fabrication space on an ongoing basis (193) as well as for the subset of artists interested ***only*** in ongoing studio, creative work, production or fabrication space rental (101). The data for those artists interested only in studio, creative work, production, or fabrication space rental are highlighted in these tables.

Approximately two-thirds (68%) of the artists interested in renting studio, creative work, production or fabrication space on an ongoing basis currently reside in Tacoma and an additional 19% have lived in the city in the past (Table 23).

Table 23: Tacoma Residence

Ever Lived in Tacoma?	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
	#	%	#	%
I currently live in Tacoma	78	77.2	132	68.4
Yes, but not currently	14	13.9	36	18.7
No	9	8.9	25	13.0
Total	101	100.0	193	*100.1

**Does not equal 100.0% due to rounding.*

The most common arts, cultural and creative industries of those interested in renting ongoing studio, creative work, production or fabrication space are painting/drawing, mixed media, and photography (Table 24).

Table 24: Arts, Cultural and Creative Industries

Arts, Cultural and Creative Industries*	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
	#	%	#	%
Painting/Drawing	37	36.6	72	37.3
Mixed media	32	31.7	60	31.1
Photography	25	24.8	48	24.9
Writing/Literary arts	17	16.8	42	21.8
Graphic arts/design	18	17.8	41	21.2
Arts education/instruction	16	15.8	39	20.2
Crafts/Fine crafts	20	19.8	37	19.2
Book arts/illustration	20	19.8	32	16.6
Digital arts (computer/multimedia/new media, etc.)	17	16.8	32	16.6
Art gallery/Exhibition space/Curatorial	12	11.9	30	15.5
Music (vocal/instrumental/recording/composition)	17	16.8	29	15.0
Installation art	9	8.9	20	10.4
Performance art	9	8.9	20	10.4
Printmaking	7	6.9	19	9.8
Fiber/Textile arts/Fashion/Costume design	11	10.9	18	9.3
Film/Video/Television/Digital/Web-based entertainment production	10	9.9	18	9.3
Sculpture	9	8.9	18	9.3
Arts administration/Arts advocacy	5	5.0	17	8.8

Arts, Cultural and Creative Industries*	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
	#	%	#	%
Ceramics	9	8.9	17	8.8
Theater arts (acting, directing, production, etc.)	9	8.9	16	8.3
Murals/Street art	5	5.0	14	7.3
Jewelry design/fabrication	10	9.9	13	6.7
Woodworking	7	6.9	12	6.2
Architecture/Landscape architecture	4	4.0	11	5.7
Healing arts/Art therapies	3	3.0	9	4.7
Art/Music therapy	4	4.0	7	3.6
Dance/Choreography	2	2.0	7	3.6
Metalworking/Metalsmithing	1	1.0	7	3.6
Folk and traditional art	3	3.0	6	3.1
Interior design	3	3.0	6	3.1
Culinary arts	2	2.0	5	2.6
Glass	3	3.0	5	2.6
Comedy (stand-up, sketch, improv)	1	1.0	4	2.1
Other	2	2.0	7	3.6

**Respondents may have selected multiple industries*

Sixty-one percent (61%) of the artists interested in ongoing studio, creative work, production or fabrication space use space within their home for their art or creative work/business, while 35% report that they do not have the space they need for their art or creative work/business (Table 25). Eighteen percent (18%) rent or own studio or other creative work, production or fabrication space outside their home on an ongoing basis.

Table 25: Current Studio/Creative Work Space Arrangement

Studio/Creative Work Space Arrangements	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
	#	%	#	%
Have space within home used for art or creative work/business	69	68.3	117	60.6
Don't have space needed for art or creative work/business	26	25.7	67	34.7
Rent or own studio or other creative work, production or fabrication space outside home on ongoing basis	19	18.8	34	17.6
Creative work space is provided free of charge	7	6.9	13	6.7
Creative work/business does not require designated space	2	2.0	3	1.6
None of the above	0	0.0	4	2.1

The interested artists who indicated that they currently rent or own studio, creative work, production or fabrication space outside their home were asked what they pay for that space. Forty-four percent (44%) pay $51 - $200 per month, while one-third pay over $400 each month for their creative work space (Table 26).

Table 26: Current Studio/Creative Work Space Cost

	Creative Space Only (19) "yes" responses		All Interested in Creative Space (34) "yes" responses	
Monthly Studio/Creative Work Space Cost	**#**	**%**	**#**	**%**
$0	0	0.0	0	0.0
$1 - $50	1	5.3	1	2.9
$51 - $100	3	15.8	6	17.6
$101 - $150	2	10.5	7	20.6
$151 - $200	2	10.5	2	5.9
$201 - $300	0	0.0	3	8.8
$301 - $400	4	21.1	4	11.8
$401 - $500	1	5.3	3	8.8
$501 - $750	3	15.8	3	8.8
More than $750	3	15.8	5	14.7
Total	19	*100.1	34	*99.9

**Does not equal 100.0% due to rounding*

Ongoing Studio, Creative Work, Production or Fabrication Space Rental: Needs and Preferences

The survey respondents who expressed interest in renting studio, creative work, production or fabrication space were asked which Tacoma neighborhoods they prefer for new space (Table 27). Approximately three-quarters (77%) prefer the North Downtown/Theater District, while over half are interested in the Old Brewery District (62%) or the Dome District (53%).

Table 27: Preferred Tacoma Neighborhoods for Ongoing Studio/Creative Space

	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
Neighborhoods*	#	%	#	%
North Downtown/Theater District	77	76.2	149	77.2
Old Brewery District	58	57.4	120	62.2
Dome District	48	47.5	102	52.8
Hilltop	48	47.5	92	47.7
McKinley Hill/East Side	21	20.8	48	24.9
Lincoln District	17	16.8	45	23.3
South Tacoma	17	16.8	41	21.2
Other	28	27.7	45	23.3

**Respondents may have selected multiple neighborhoods*

The interested artists were asked to identify up to five features most desirable to them in a new studio, creative work, production, or fabrication space. The most popular were natural light, Internet access, a slop sink, and high ceilings (Table 28). (Note: Thirty-eight of the interested artists (20%) selected the option "direct street access for retail sales" and may have also expressed more formal interest in this type of space when asked later in the survey whether they were interested in renting commercial, retail, or storefront space for a creative work/business on an ongoing basis in Tacoma.

Table 28: Preferred Ongoing Studio/Creative Work Space Features

Important Features*	Creative Space Only "yes" responses #	Creative Space Only "yes" responses %	All Interested in Creative Space "yes" responses #	All Interested in Creative Space "yes" responses %
Natural light	60	59.4	117	60.6
Internet access (high speed/high bandwidth for large files/graphics)	53	52.5	110	57.0
Slop sink in or near my workspace	33	32.7	67	34.7
High ceilings (over 10 feet)	27	26.7	59	30.6
Air conditioning/Climate control	33	32.7	53	27.5
Building common area security (secured entrance, cameras, etc.)	23	22.8	49	25.4
Additional storage	27	26.7	48	24.9
On bus route	15	14.9	42	21.8
Direct street access for retail sales	23	22.8	38	19.7
Raw special/minimal build out for messy arts/production	19	18.8	38	19.7
Oversized doors/Freight elevator	13	12.9	27	14.0
Soundproofing	11	10.9	27	14.0
Special ventilation	16	15.8	26	13.5
Assembly-use code compliant (for music, theatre, exhibitions, events, etc.)	9	8.9	24	12.4
Special electrical wiring	6	5.9	17	8.8
Plumbing/Special plumbing	9	8.9	16	8.3
Loading dock	8	7.9	15	7.8
Wheelchair accessibility/ADA compliant	5	5.0	10	5.2
Floor drains	5	5.0	7	3.6
High-load bearing floors	1	1.0	5	2.6
Sprung floors	1	1.0	3	1.6
Other	6	5.9	17	8.8
None of these are important	2	2.0	2	1.0

**Respondents may have selected multiple features*

The interested artists were also asked to identify up to five types of space or amenities they would be most interested in sharing (Table 29). The most preferred types of space and amenities include gallery/exhibition space, general-purpose studio space, storefront/retail space, community space for informal networking/gathering, and classrooms/teaching space. (Note: the respondents who selected storefront/retail space may have also expressed more formal interest in Commercial, Retail or Storefront space rental, which is presented in a separate section below.).

Table 29: Preferred Shared Spaces and Amenities for Ongoing Studio/Creative Space Rental

Type of Space/Amenities*	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
	#	%	#	%
Gallery/Exhibition space	44	43.6	91	47.2
General purpose studio space	41	40.6	77	39.9
Storefront/Retail space (for pop-ups or cooperatively run space, etc.)	34	33.7	70	36.3
Community space for informal networking/gathering	30	29.7	60	31.1
Classrooms/Teaching space	34	33.7	59	30.6
Printmaking facilities	25	24.8	50	25.9
Paint room	19	18.8	40	20.7
Business center (including copier, fax machine, postage meter, etc.)	19	18.8	39	20.2
Ceramics studio/Kiln	20	19.8	37	19.2
Recording studio	15	14.9	28	14.5
Theater/Performance space (black box, flexible space)	15	14.9	25	13.0
Woodworking shop	11	10.9	24	12.4
Rehearsal space (theater, performance art, etc.)	7	6.9	20	10.4
Film/Video screening room	12	11.9	18	9.3
Outdoor work area	7	6.9	18	9.3
Traditional or digital dark room	7	6.9	16	8.3
Fine metals/Jewelry making studio	9	8.9	15	7.8
Makerspace/Hackerspace	6	5.9	15	7.8
Professional kitchen (catering, teaching, product development, etc.)	7	6.9	15	7.8
Scene/Prop/Costume shop	6	5.9	15	7.8
Sound proof practice rooms	8	7.9	15	7.8
Metalworking/Metalsmithing studio	4	4.0	14	7.3
Dance studio/rehearsal space	2	2.0	11	5.7
Theater/Performance space (formal seating/permanent stage)	3	3.0	9	4.7
Glass hot shop	5	5.0	7	3.6
Other	6	5.9	13	6.7
None	0	0.0	1	0.5

**Respondents may have selected multiple types of space/amenities*

Half of the artists interested in renting studio, creative work, production or fabrication space on an ongoing basis need studio/work spaces of 350 square feet or less, while 38% want larger spaces of 351 – 1,000 square feet (Table 30).

Table 30: Space Requirements for Ongoing Studio/Creative Work Space

Minimum Square Footage	Creative Space Only "yes" responses		All Interested in Creative Space "yes" responses	
	#	%	#	%
None (my work requires no studio space)	0	0.0	0	0.0
Under 200 sq. feet	27	26.7	48	24.9
200 - 350 sq. feet	24	23.8	48	24.9
351 - 500 sq. feet	12	11.9	24	12.4
501 - 650 sq. feet	8	7.9	23	11.9
651 - 800 sq. feet	9	8.9	16	8.3
801 - 1,000 sq. feet	6	5.9	10	5.2
1,001 - 1,500 sq. feet	4	4.0	6	3.1
1,501 - 2,000 sq. feet	2	2.0	3	1.6
More than 2,000 sq. feet	3	3.0	4	2.1
Don't know	6	5.9	11	5.7
None (my work space requires no ongoing studio space)	0	0.0	0	0.0
Total	101	100.0	193	*100.1

**Does not equal 100.0% due to rounding*

Forty–seven percent (47%) of the artists interested in renting studio, creative work, production or fabrication space on an ongoing basis could afford $250 or less per month for that space (paid in addition to costs for housing), while 48% could pay $251 - $750 each month (Table 31).

Table 31: Affordable Ongoing Studio/Creative Work Space Costs

Maximum Monthly Amount for Studio/Work Space (excluding utilities)	Creative Space Only "yes" responses #	%	All Interested in Creative Space "yes" responses #	%
None	0	0.0	0	0.0
$150 or less	26	25.7	45	23.3
$250	24	23.8	45	23.3
$350	19	18.8	39	20.2
$500	19	18.8	33	17.1
$750	9	8.9	21	10.9
More than $750	4	4.0	10	5.2
Total	101	100.0	193	100.0

Approximately one-third would be interested in renting on a month-to-month basis, while 42% would be interested in a lease term of 6 – 12 months (Table 32).

Table 32: Lease Term for Ongoing Studio/Creative Work Space Rental

Preferred Lease Term	Creative Space Only "yes" responses #	%	All Interested in Creative Space "yes" responses #	%
Month-to-month	41	40.6	68	35.2
6 months to 1 year	40	39.6	81	42.0
1 – 2 years	15	14.9	32	16.6
3 – 5 years	4	4.0	9	4.7
6 – 10 years	1	1.0	3	1.6
More than ten years	0	0.0	0	0.0
Total	101	*100.1	193	*100.1

**Does not equal 100.0% due to rounding*

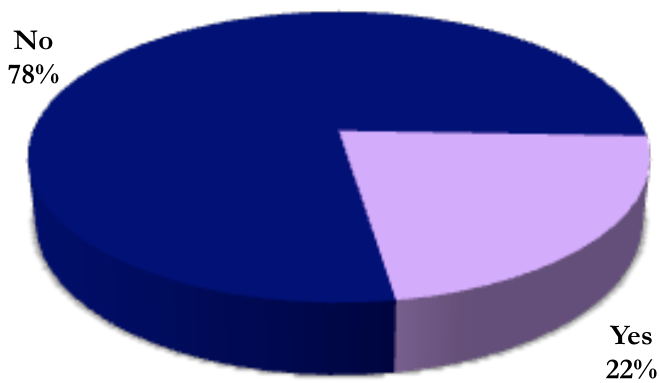
COMMERCIAL, RETAIL, OR STOREFRONT SPACE RENTAL

One hundred nineteen (119) artists (22% of respondents) are interested in renting commercial, retail, or storefront space for a creative work/business on an ongoing basis in Tacoma (Figure 4).

Of these 119 artists:

- 65 are also interested in renting studio, creative work, production or fabrication space on an ongoing basis
- 53 are also interested in relocating to a live/work or housing community for artists, creatives, and their families

Figure 4: Would you rent commercial, retail, or storefront space on an ongoing basis in Tacoma?



The large majority of the artists interested in renting commercial, retail, or storefront space on an ongoing basis currently reside in Tacoma (81%) or have lived there in the past (14%; Table 33).

Table 33: Tacoma Residence

Ever Lived in Tacoma?	"yes" responses #	%
I currently live in Tacoma	96	80.7
Yes, but not currently	17	14.3
No	6	5.0
Total	119	100.0

The most common arts, cultural and creative industries of those interested in renting commercial, retail, or storefront space on an ongoing basis are graphic arts/design, painting/ drawing, photography, art gallery/exhibition space/curatorial, and writing/literary arts (Table 34).

Table 34: Arts, Cultural and Creative Industries

Arts, Cultural and Creative Industries*	"yes" responses #	"yes" responses %
Graphic arts/design	28	23.5
Painting/Drawing	28	23.5
Photography	27	22.7
Art gallery/Exhibition space/Curatorial	26	21.8
Writing/Literary arts	26	21.8
Arts education/instruction	23	19.3
Digital arts (computer/multimedia/new media, etc.)	22	18.5
Mixed media	20	16.8
Music (vocal/instrumental/recording/composition)	19	16.0
Crafts/Fine crafts	17	14.3
Performance art	17	14.3
Arts administration/Arts advocacy	15	12.6
Film/Video/Television/Digital/Web-based entertainment production	15	12.6
Theater arts (acting, directing, production, etc.)	15	12.6
Book arts/illustration	14	11.8
Jewelry design/fabrication	13	10.9
Architecture/Landscape architecture	11	9.2
Installation art	10	8.4
Murals/Street art	10	8.4
Culinary arts	9	7.6
Interior design	9	7.6
Dance/Choreography	8	6.7
Printmaking	8	6.7
Sculpture	8	6.7
Art/Music therapy	7	5.9
Folk and traditional art	7	5.9
Fiber/Textile arts/Fashion/Costume design	6	5.0
Woodworking	6	5.0
Ceramics	5	4.2
Metalworking/Metalsmithing	5	4.2
Healing arts/Art therapies	4	3.4
Comedy (stand-up, sketch, improv)	2	1.7
Glass	2	1.7
Other, please specify	6	5.0

**Respondents may have selected multiple industries*

Only a small minority (13%) currently rent commercial, retail, office, or storefront space outside their home on an ongoing basis (Table 35).

Table 35: Current Space Arrangement

Rent Commercial, Retail, Office, or Storefront Space Outside Home on Ongoing Basis	"yes" responses	
	#	%
No	103	86.6
Yes	16	13.4
Total	119	100.0

Half of those interested in renting commercial, retail, or storefront space are between the ages of 21 and 40, and 37% are 41 – 60 years of age (Table 36).

Table 36: Age

Age	"yes" responses	
	#	%
20 years and younger	2	1.7
21 – 30 years	17	14.3
31 – 40 years	42	35.3
41 – 50 years	24	20.2
51 – 60 years	20	16.8
61 – 70 years	13	10.9
Over 70 years	1	0.8
Total	119	100.0

When asked about preferred neighborhoods for renting commercial, retail, or storefront space approximately three-quarters of the interested artists selected the North Downtown/ Theater District, and over half would find the Old Brewery District (54%) or Dome District (53%) desirable (Table 37).

Table 37: Preferred Tacoma Neighborhoods for Commercial, Retail or Storefront Space

Neighborhoods*	"yes" responses #	"yes" responses %
North Downtown/Theater District	90	75.6
Old Brewery District	64	53.8
Dome District	63	52.9
Hilltop	48	40.3
McKinley Hill/East Side	30	25.2
Lincoln District	26	21.8
South Tacoma	23	19.3
Other	24	20.2

**Respondents may have selected multiple neighborhoods*

The interested artists were asked to identify up to five features most desirable to them in new commercial, retail or storefront space. The most popular were Internet access, natural light, close proximity to other creative businesses, an active pedestrian location and sink/water access (Table 38).

Table 38: Preferred Features for Commercial, Retail or Storefront Space

Important Features*	"yes" responses #	"yes" responses %
Internet access (high speed/high bandwidth for large files/graphics)	71	59.7
Natural light	64	53.8
Close proximity to other creative businesses	60	50.4
Active pedestrian location	55	46.2
Sink/Water access	49	41.2
Adjacent parking lot	40	33.6
Air conditioning/Climate control	34	28.6
In same building as or attached to my living space	32	26.9
Additional storage	27	22.7
Building common area security (secured entrance, cameras, etc.)	22	18.5
Assembly-use code compliant (for music, theatre, exhibitions, events, etc.)	21	17.6
On bus route	19	16.0
Loading dock/Oversized entry or access	14	11.8
Wheelchair accessibility/ADA compliant	14	11.8
Infrastructure to support a commercial kitchen (plumbing/electrical)	11	9.2
Other	3	2.5

**Respondents may have selected multiple features*

The interested artists were also asked to identify up to five types of space or amenities they would be most interested in sharing in a building where they rent commercial, retail or storefront space (Table 39). The most preferred types of space and amenities are storefront/retail space, gallery/exhibition space, community space for informal networking/gathering, a business center, classrooms/teaching space, and general-purpose studio space.

Table 39: Preferred Shared Spaces and Amenities for Commercial, Retail or Storefront Space

Type of Space/Amenities*	"yes" responses #	"yes" responses %
Storefront/Retail space (for pop-ups or cooperatively run space, etc.)	49	41.2
Gallery/Exhibition space	48	40.3
Community space for informal networking/gathering	46	38.7
Business center (including copier, fax machine, postage meter, etc.)	34	28.6
Classrooms/Teaching space	31	26.1
General purpose studio space	31	26.1
Printmaking facilities	25	21.0
Theater/Performance space (black box, flexible space)	19	16.0
Rehearsal space (theater, performance art, etc.)	18	15.1
Paint room	17	14.3
Film/Video screening room	16	13.4
Dance studio/rehearsal space	14	11.8
Makerspace/Hackerspace	14	11.8
Professional kitchen (catering, teaching, product development, etc.)	14	11.8
Woodworking shop	14	11.8
Outdoor work area	13	10.9
Recording studio	13	10.9
Ceramics studio/Kiln	12	10.1
Theater/Performance space (formal seating/permanent stage)	12	10.1
Fine metals/Jewelry making studio	9	7.6
Scene/Prop/Costume shop	9	7.6
Traditional or digital dark room	8	6.7
Metalworking/Metalsmithing studio	6	5.0
Sound proof practice rooms	6	5.0
Glass hot shop	3	2.5
Other	4	3.4
None of the above	4	3.4

**Respondents may have selected multiple types of space/amenities*

Forty-three percent (43%) of the artists interested in renting commercial, retail, or storefront space on an ongoing basis need spaces of 500 square feet or less, while 37% want larger spaces of 501 – 1,000 square feet (Table 40).

Table 40: Space Requirements for Commercial, Retail or Storefront Space

Minimum Square Footage	"yes" responses #	%
Under 200 sq. feet	16	13.4
200 - 350 sq. feet	18	15.1
351 - 500 sq. feet	17	14.3
501 - 650 sq. feet	19	16.0
651 - 800 sq. feet	16	13.4
801 - 1,000 sq. feet	9	7.6
1,001 - 1,500 sq. feet	7	5.9
1,501 - 2,000 sq. feet	3	2.5
More than 2,000 sq. feet	6	5.0
Don't know	8	6.7
Total	119	*99.9

**Does not equal 100.0% due to rounding*

Sixty percent (60%) could pay $500 or more each month for the commercial, retail, or storefront space they rent on an ongoing basis (Table 41). Forty percent (40%) could afford $150 – $350 per month for that space (paid in addition to costs for housing)

Table 41: Affordable Commercial, Retail or Storefront Space Costs

Maximum Monthly Amount for Commercial, Retail or Storefront Space (excluding utilities)	"yes" responses #	%
None	0	0.0
$150 or less	14	11.8
$250	17	14.3
$350	17	14.3
$500	35	29.4
$750	19	16.0
More than $750	17	14.3
Total	119	*100.1

**Does not equal 100.0% due to rounding*

Thirty nine percent (39%) would prefer a 6 – 12 month lease term for their commercial, retail or storefront space, while 27% would prefer a lease term of 1 – 2 years (Table 42). Twenty three percent (23%) would like a month-to-month lease.

Table 42: Preferred Lease Terms for Commercial, Retail or Storefront Space

	"yes" responses	
Lease Term	**#**	**%**
Month-to-month	27	22.7
6 months to 1 year	46	38.7
1 – 2 years	32	26.9
3 – 5 years	10	8.4
6 – 10 years	2	1.7
More than ten years	2	1.7
Total	119	*100.1

**Does not equal 100.0% due to rounding*

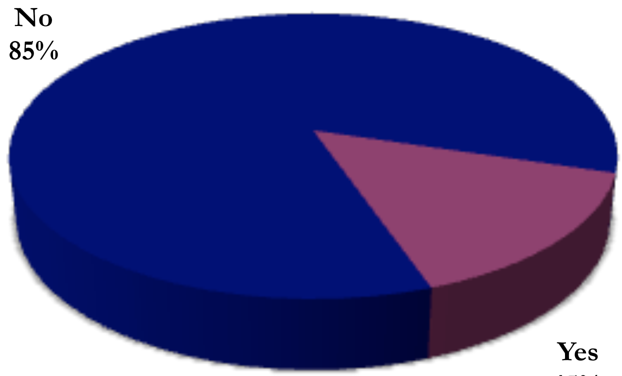
PRIVATE CREATIVE OFFICE SPACE RENTAL

Eighty-one (81) of the survey respondents (15%) indicated an interest in renting private creative office space on an ongoing basis in Tacoma (Figure 5).

Of these 81 respondents:

- Only 5 are only interested in private office space rental and no other type of space ownership or rental in Tacoma.
- 43 are also interested in membership in a co-working space for their business. *(We expect that these 43 respondents would choose one option or the other, but not both)*

Figure 5: Would you rent private creative office space on an ongoing basis in Tacoma?



The majority of the artists interested in renting private office space on an ongoing basis currently reside in Tacoma (73%) or have lived there in the past (19%; Table 43).

Table 43: Tacoma Residence

Ever Lived in Tacoma?	"yes" responses #	%
I currently live in Tacoma	59	72.8
Yes, but not currently	15	18.5
No	7	8.6
Total	81	*99.9

**Does not equal 100.0% due to rounding*

Only a small number (6%) currently rent or own office or commercial, retail or storefront space outside their home on an ongoing basis (Table 44).

Table 44: Current Space Arrangement

Rent or Own Commercial, Retail, Office, or Storefront Outside Home on Ongoing Basis	"yes" responses	
	#	%
No	76	93.8
Yes	5	6.2
Total	81	100.0

Most of the interested artists (80%) are between the ages of 31 and 60 (Table 45). Sixteen percent (16%) are 21 - 30 years of age.

Table 45: Age

Age	"yes" responses	
	#	%
20 years and younger	0	0.0
21 – 30 years	13	16.0
31 – 40 years	31	38.3
41 – 50 years	18	22.2
51 – 60 years	16	19.8
61 – 70 years	3	3.7
Over 70 years	0	0.0
Total	81	100.0

Seventy percent (70%) would be interested in renting private office space on an ongoing basis in the North Downtown/Theater District, 56% in the Old Brewery District, 47% in the Dome District, and 42% in the Hilltop neighborhood of Tacoma (Table 46).

Table 46: Preferred Tacoma Neighborhoods for Private Office Rental

Neighborhoods*	"yes" responses	
	#	%
North Downtown/Theater District	57	70.4
Old Brewery District	45	55.6
Dome District	38	46.9
Hilltop	34	42.0
Lincoln District	16	19.8
McKinley Hill/East Side	15	18.5
South Tacoma	13	16.0
Other	15	18.5

**Respondents may have selected multiple neighborhoods*

The interested artists were asked to identify up to five features most desirable to them in their private office space. The most popular were Internet access, natural light, sink/water access, and close proximity to other creative businesses (Table 47).

Table 47: Preferred Features for Private Office Space

Important Features*	"yes" responses #	"yes" responses %
Internet access (high speed/high bandwidth for large files/graphics)	63	77.8
Natural light	56	69.1
Sink/Water access	39	48.1
Close proximity to other creative businesses (same building or block)	33	40.7
Adjacent parking lot	29	35.8
Building common area security (secured entrance, cameras, etc.)	28	34.6
Additional storage	27	33.3
Air conditioning/Climate control	26	32.1
In same building as or attached to living space	21	25.9
On bus route	13	16.0
Loading dock	4	4.9
Wheelchair accessibility/ADA compliant	4	4.9
Other	9	11.1
None of these are important	1	1.2

**Respondents may have selected multiple features*

The interested artists were also asked to identify up to five types of space or amenities they would be most interested in sharing in the building where they rent private office space (Table 48). The most preferred types of space and amenities are community space for informal networking/gathering, a business center, gallery/exhibition space, general-purpose studio space and classrooms/teaching space.

Table 48: Preferred Shared Spaces and Amenities for Private Office Space

Type of Space/Amenities*	"yes" responses #	"yes" responses %
Community space for informal networking/gathering	34	42.0
Business center (including copier, fax machine, postage meter, etc.)	31	38.3
Gallery/Exhibition space	31	38.3
General purpose studio space	29	35.8
Classrooms/Teaching space	26	32.1
Storefront/Retail space (or pop-ups or cooperatively run space, etc.)	22	27.2
Printmaking facilities	21	25.9
Film/Video screening room	16	19.8
Paint room	14	17.3
Recording studio	14	17.3
Theater/Performance space (black box, flexible space)	13	16.0
Rehearsal space (theater, performance art, etc.)	12	14.8
Ceramics studio/Kiln	11	13.6
Professional kitchen (catering, teaching, product development, etc.)	11	13.6
Traditional or digital dark room	9	11.1
Woodworking shop	9	11.1
Outdoor work area	7	8.6
Dance studio/rehearsal space	6	7.4
Makerspace/Hackerspace	6	7.4
Scene/Prop/Costume shop	6	7.4
Sound proof practice rooms	6	7.4
Theater/Performance space (formal seating/permanent stage)	6	7.4
Fine metals/Jewelry making studio	4	4.9
Metalworking/Metalsmithing studio	2	2.5
Glass hot shop	1	1.2
Other	2	2.5

**Respondents may have selected multiple types of space/amenities*

Approximately half (51%) of the artists interested in renting private office space on an ongoing basis need spaces of 350 square feet or less, while 35% want larger spaces of 351 - 800 square feet (Table 49).

Table 49: Space Requirements for Private Office Space

	"yes" responses	
Minimum Square Footage	**#**	**%**
Under 200 sq. feet	21	25.9
200 - 350 sq. feet	20	24.7
351 - 500 sq. feet	17	21.0
501 - 650 sq. feet	6	7.4
651 - 800 sq. feet	5	6.2
801 - 1,000 sq. feet	4	4.9
1,001 - 1,500 sq. feet	1	1.2
1,501 - 2,000 sq. feet	1	1.2
More than 2,000 sq. feet	1	1.2
Don't know	5	6.2
Total	81	*99.9

**Does not equal 100.0% due to rounding*

The majority of the artists interested in renting private office space (72%) could afford $350 or less per month for that space, while 16% could pay $351 - $500, and 9% could pay $501 - $750 each month (Table 50).

Table 50: Affordable Costs for Private Office Space

Maximum Monthly Amount for Private Office Space (excluding utilities)	"yes" responses #	"yes" responses %
None	1	1.2
$150 or less	20	24.7
$250	17	21.0
$350	21	25.9
$500	13	16.0
$750	7	8.6
More than $750	2	2.5
Total	81	*99.9

**Does not equal 100.0% due to rounding*

Thirty-eight percent (38%) prefer a month-to-month lease for their private office space, 35% would be interested in a term of 6 – 12 months, and 19% would like a 1 – 2 year lease term (Table 51).

Table 51: Preferred Lease Terms for Private Office Space

Lease Term	"yes" responses #	"yes" responses %
Month-to-month	31	38.3
6 months to 1 year	28	34.6
1 – 2 years	15	18.5
3 – 5 years	6	7.4
6 – 10 years	0	0.0
More than ten years	1	1.2
Total	81	100.0

MEMBERSHIP IN CO-WORKING SPACE

One quarter (134) of the survey respondents indicated an interest in buying a membership in a co-working space for their business (Figure 6).

Of these 134 respondents:

- 24 are only interested in membership in a co-working space for their business and not in any other type of space ownership or rental in Tacoma
- 43 indicated they are also interested in renting private creative office space on an ongoing basis. *(We expect that these 43 respondents would choose one option or the other, but not both)*

Figure 6: Would you buy a membership in a co-working space for your business in Tacoma?

Three-quarters of the individuals interested in buying a membership in a co-working space for their business currently reside in Tacoma, and 14% have lived in the city in the past (Table 52).

Table 52: Tacoma Residence

Ever Lived in Tacoma?	"yes" responses #	"yes" responses %
I currently live in Tacoma	101	75.4
Yes, but not currently	19	14.2
No	14	10.4
Total	134	100.0

Over half (57%) of the interested business owners are 31 - 50 years of age, while 18% are 21 - 30 years of age (Table 53).

Table 53: Age

Age	"yes" responses	
	#	%
20 years and younger	1	0.7
21 – 30 years	24	17.9
31 – 40 years	48	35.8
41 – 50 years	29	21.6
51 – 60 years	20	14.9
61 – 70 years	12	9.0
Over 70 years	0	0.0
Total	134	*99.9

**Does not equal 100.0% due to rounding*

The individuals interested in buying a membership in a co-working space for their business were asked to identify up to five types of shared space or amenities that would be most important to them (Table 54). The most preferred types of space and amenities include community space for informal networking/gathering, gallery/exhibition space, general-purpose studio space, storefront/retail space, a business center, classrooms/teaching space, and printmaking facilities.

Table 54: Preferred Shared Spaces and Amenities for Co-Working Space

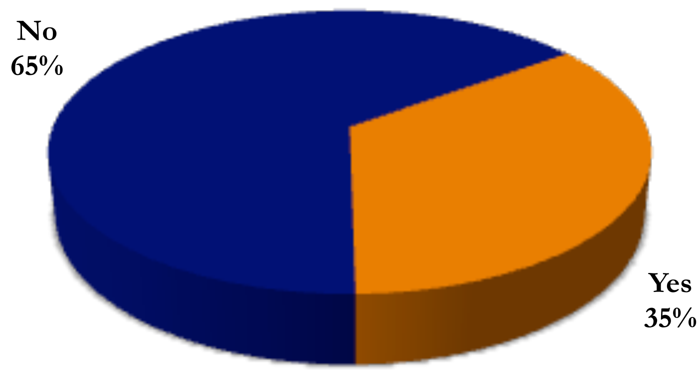
Type of Space/Amenities*	"yes" responses #	"yes" responses %
Community space for informal networking/gathering	50	37.3
Gallery/Exhibition space	46	34.3
General purpose studio space	39	29.1
Storefront/Retail space (for pop-ups or cooperatively run space, etc.)	39	29.1
Business center (including copier, fax machine, postage meter, etc.)	38	28.4
Classrooms/Teaching space	35	26.1
Printmaking facilities	32	23.9
Ceramics studio/Kiln	22	16.4
Recording studio	20	14.9
Film/Video screening room	17	12.7
Paint room	17	12.7
Professional kitchen (catering, teaching, product development, etc.)	17	12.7
Rehearsal space (theater, performance art, etc.)	17	12.7
Woodworking shop	17	12.7
Fine metals/Jewelry making studio	16	11.9
Makerspace/Hackerspace	16	11.9
Outdoor work area	16	11.9
Theater/Performance space (black box, flexible space)	16	11.9
Metalworking/Metalsmithing studio	13	9.7
Traditional or digital dark room	13	9.7
Scene/Prop/Costume shop	10	7.5
Theater/Performance space (formal seating/permanent stage)	10	7.5
Dance studio/rehearsal space	9	6.7
Sound proof practice rooms	7	5.2
Glass hot shop	3	2.2
Other	9	6.7
None of the above	1	0.7

**Respondents may have selected multiple types of space/amenities*

Occasional Studio, Creative Work, Production, Fabrication, Commercial, Retail, Private office, or Storefront Space Rental

One hundred eighty-eight (188) of the survey respondents (35%) indicated an interest in renting studio, creative work, production, fabrication, commercial, retail, private office or storefront space on ***an occasional basis*** in Tacoma (Figure 7).

Figure 7: Would you rent studio, creative work, production, fabrication, commercial, retail, private office, or storefront space on an occasional basis in Tacoma?



Of these 188 respondents:

- 50 are only interested in renting space on an occasional basis and not in other types of space ownership or rental
- 69 are also interested in relocation to a live/work or housing community for artists, creative, and their families
- 89 are also interested in renting studio, creative work, production or fabrication space on an ongoing basis
- 57 are also interested in renting commercial, retail or storefront space for a creative work/business on an ongoing basis
- 45 are also interested in renting private creative office space on an ongoing basis
- 71 are also interested in buying a membership in a co-working space for their business

(For those artists interested in occasional space rental, it is reasonable to assume that they may choose occasional space rental ***as well as*** relocation to live/work or housing space and/or another ongoing space arrangement in Tacoma).

Approximately two-thirds (68%) of the artists interested in occasional space rental currently reside in Tacoma, and 16% have lived there in the past. Sixteen percent (16%) have never resided in the city (Table 55).

Table 55: Tacoma Residence

Ever Lived in Tacoma?	"yes" responses #	%
I currently live in Tacoma	128	68.1
No	30	16.0
Yes, but not currently	30	16.0
Total	188	*100.1

**Does not equal 100.0% due to rounding*

The most common arts, cultural and creative industries of those interested in occasional studio space rental are mixed media, photography, arts education/instruction, painting/drawing and writing/literary arts (Table 56).

Table 56: Arts, Cultural and Creative Industries

Arts, Cultural and Creative Industries*	"yes" responses #	%
Mixed media	48	25.5
Photography	48	25.5
Arts education/instruction	43	22.9
Painting/Drawing	43	22.9
Writing/Literary arts	43	22.9
Crafts/Fine crafts	41	21.8
Music (vocal/instrumental/recording/composition)	41	21.8
Graphic arts/design	29	15.4
Art gallery/Exhibition space/Curatorial	27	14.4
Digital arts (computer/multimedia/new media, etc.)	26	13.8
Theater arts (acting, directing, production, etc.)	25	13.3
Book arts/illustration	22	11.7
Film/Video/Television/Digital/Web-based entertainment production	22	11.7
Installation art	21	11.2
Arts administration/Arts advocacy	20	10.6
Performance art	20	10.6
Fiber/Textile arts/Fashion/Costume design	19	10.1
Sculpture	16	8.5

Arts, Cultural and Creative Industries*	"yes" responses #	%
Jewelry design/fabrication	14	7.4
Architecture/Landscape architecture	13	6.9
Dance/Choreography	12	6.4
Printmaking	12	6.4
Woodworking	11	5.9
Murals/Street art	10	5.3
Art/Music therapy	8	4.3
Interior design	8	4.3
Metalworking/Metalsmithing	8	4.3
Folk and traditional art	7	3.7
Healing arts/Art therapies	7	3.7
Glass	6	3.2
Ceramics	5	2.7
Culinary arts	5	2.7
Comedy (stand-up, sketch, improv)	2	1.1
Other	9	4.8

**Respondents may have selected multiple industries*

Those interested in occasional space rental were also asked to identify up to five types of space or amenities they would be most interested in sharing (Table 57). The most preferred types of space and amenities include gallery/exhibition space, general-purpose studio space, community space for informal networking/gathering, and storefront/retail space.

Table 57: Preferred Shared Spaces and Amenities for Occasional Studio Space Rental

Type of Space/Amenities*	"yes" responses	
	#	%
Gallery/Exhibition space	69	36.7
General purpose studio space	66	35.1
Community space for informal networking/gathering	61	32.4
Storefront/Retail space (for pop-ups or cooperatively run space, etc.)	57	30.3
Classrooms/Teaching space	45	23.9
Business center (including copier, fax machine, postage meter, etc.)	43	22.9
Printmaking facilities	42	22.3
Theater/Performance space (black box, flexible space)	36	19.1
Paint room	33	17.6
Recording studio	31	16.5
Rehearsal space (theater, performance art, etc.)	29	15.4
Ceramics studio/Kiln	28	14.9
Film/Video screening room	23	12.2
Traditional or digital dark room	22	11.7
Theater/Performance space (formal seating/permanent stage)	21	11.2
Woodworking shop	21	11.2
Metalworking/Metalsmithing studio	19	10.1
Outdoor work area	19	10.1
Scene/Prop/Costume shop	19	10.1
Dance studio/rehearsal space	17	9.0
Professional kitchen (catering, teaching, product development, etc.)	17	9.0
Sound proof practice rooms	17	9.0
Makerspace/Hackerspace	15	8.0
Fine metals/Jewelry making studio	12	6.4
Glass hot shop	3	1.6
Other	6	3.2
None	2	1.1

**Respondents may have selected multiple types of space/amenities*

INTEREST IN ADDITIONAL CONTACT OR PARTICIPATION

At the end of the survey, respondents were asked if they were interested in being contacted or wanted to be involved in the study and proposed project. The survey respondents could sign up for additional contact regardless of their interest in relocation to or rental of space in Tacoma.

Of the survey respondents (541):

- 60% (322) would be interested in receiving information about future housing and live/work opportunities for the creative community in Tacoma
- 69% (374) would like to receive information about future studio, creative work, production or fabrication rental space in Tacoma
- 57% (309) are interested in receiving information about future commercial, retail, office or storefront rental space for creative businesses in Tacoma
- 64% (345) would like to be placed on the Spaceworks email list
- 58% (312) are interested in attending future meetings or networking events designed to assist with space needs

Appendix A: Survey Methodology

Artspace Projects, Inc. and Swan Research and Consulting, in collaboration with the City of Tacoma and the Greater Tacoma Community Foundation, designed the survey used in this study. The survey addressed four areas of interest including 1) current living and creative working information, 2) preferences for new living, working, creating, producing, fabricating, selling, displaying, performing, and other creative business space options, 3) demographic information, and 4) the respondent's personal interest in relocation to a live/work or housing community for artists, or rental of various types of creative work space on an ongoing or occasional basis in the city of Tacoma. This study is part of a second phase of work, the first of which was in 2013 when Artspace was invited to assess the potential for the development of creative spaces in Tacoma.

Funding for the study was provided by JP Morgan Chase.

The project partners, with the assistance of Spaceworks, identified potential survey respondents through their affiliation with arts organizations and cultural activities in the city of Tacoma and the local area. In December 2014, artists and creatively involved individuals living and working in Tacoma and the surrounding region were invited to participate in a survey and provided with a link to access the survey online. Potential survey respondents were notified via email blasts (including the Tacomaart Listserv, the Artist Trust, and the Tacoma Arts Listserv), e-newsletters, and social media, including a Facebook page and Twitter feed developed specifically for the initiative. Approximately 700 postcards were hand distributed and placed throughout the community. Information regarding the survey was disseminated at a public launch event, at art and relevant creative industry events, and through local print media (including the Post Defiance).

The survey was available for 9 ½ weeks via the Internet, utilizing the Survey Gizmo survey application. Five hundred forty-one (541) individuals completed the Survey of Artists' and Creative Individuals' Space Needs and Preferences. The level of response obtained in the survey is consistent with similar studies of this kind involving narrow content and longer length.

The survey's respondents are a sample of convenience. While believed to be grossly representative of the target population (artists and other creatively involved individuals living and working in the city of Tacoma and the surrounding region), generalization of the findings to this broader population cannot be conducted. Because of the non-random nature of the sample, the data reported include only descriptive statistics. Substantial differences in numbers and percentages are deemed meaningful, as are patterns in the data. As with any measurement tool, some error is inherent; small group differences or percentages should be interpreted carefully.

Appendix B: Current Residence – Interested Artists

Artists Interested in Relocation to Live/Work Space

Interested Artists Currently Residing in the Tacoma Area

Zip Code(s)	#	%	City
98405	34	16.7	Tacoma
98406	18	8.8	Tacoma
98402	15	7.4	Tacoma
98403	11	5.4	Tacoma
98418	7	3.4	Tacoma
98466	6	2.9	Tacoma
98404	5	2.5	Tacoma
98407	5	2.5	Tacoma
98408	5	2.5	Tacoma
98409	4	2.0	Tacoma
98498	4	2.0	Lakewood
98467	3	1.5	University Place
98421	2	1.0	Tacoma
98443	2	1.0	Tacoma
98499	2	1.0	Lakewood
98416	1	0.5	Tacoma
98422	1	0.5	Tacoma
98424	1	0.5	Tacoma
98446	1	0.5	Tacoma
Total	**127**	**62.6**	

Interested Artists Currently Residing in Other Cities in Pierce County

Zip Code(s)	#	%	City
98371/98374	4	2.0	Puyallup
98332/98335	3	1.5	Gig Harbor
98387	3	1.5	Spanaway
98390	2	1.0	Sumner
Various*	5	2.5	Various*
Total	**17**	**8.5**	

**Zip codes with only one interested artist*

Interested Artists Currently Residing in King County

Zip Code(s)	#	%	City
98144	6	2.9	Seattle
98107	4	2.0	Seattle
98122	3	1.5	Seattle
98102	2	1.0	Seattle
98103	2	1.0	Seattle
98126	2	1.0	Seattle
98146	2	1.0	Seattle
Various*	10	4.9	Seattle
98045	2	1.0	North Bend
Various*	6	2.9	Various*
Total	**39**	**19.2**	

**Zip codes and cities with only one interested artist*

Interested Artists Currently Residing in Other Washington Counties

Zip Code(s)	#	%	City
98502/98512/98513	5	2.5	Olympia
98201	1	0.5	Everett
98226	1	0.5	Bellingham
98325	1	0.5	Chimacum
98550	1	0.5	Hoquiam
98584	1	0.5	Shelton
Total	**10**	**4.9**	

Interested Artists Currently Residing in Other States

Cities	#	%	State
Ashland/Portland/Seaside	3	1.5	Oregon
Los Angeles/Culver City/Long Beach	3	1.5	California
Various*	5	2.5	Various*
Total	**11**	**5.5**	

**Cities and states with only one interested artist*

Survey Respondents Interested in Relocation to Live/Work Space: Distribution of Current Residence by Zip Code

Size of circle indicates relative frequency of responses by zip code