ARTS MARKET STUDY
REPORT OF FINDINGS

A REPORT AND RECOMMENDATIONS ON THE SURVEY OF SPACE NEEDS AND PREFERENCES FOR ARTISTS IN ARLINGTON COUNTY

Prepared For: arlington arts

Arlington County, VA // July 2018
ACKNOWLEDGEMENTS:

Artspace would like to thank Arlington Economic Development Director Victor Hoskins, Arlington Cultural Affairs Director Michelle Isabelle-Stark, and Arlington Foundation for Arts + Innovation Board Chair Peter Greenwald, for the opportunity to inform possible new affordable creative space initiative(s) in Arlington. The Arts Market Study process and resulting data would not be possible without the participation of funders and Arlington County stakeholders and partners. A big thank you is also extended to the following community and civic leaders, and public and private entities who played a critical role in the successful implementation of this study.

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Artspace was contracted by the Arlington Foundation for Arts + Innovation Inc. (AFAI) with the support of Arlington Cultural Affairs, a division of Arlington Economic Development (AED) also known as Arlington Arts, to determine if there is sufficient demand to support the development of new affordable space for the creative community and if so, what types of space(s) and amenities are most needed. The quantitative Arts Market Study (AMS) follows the Preliminary Feasibility Study (PFS) conducted in August 2017. The focus of this study is on affordable live/work artist housing and the creative work space needs of artists, while the PFS involved a general feasibility assessment of the potential to develop new affordable, self-sustaining space. The PFS included a two-day visit by Artspace staff, Wendy Holmes, Senior Vice President Consulting and Strategic Partnerships, Stacey Mickelson, Vice President, Consulting and Strategic Partnerships, and Kelley Lindquist, President, Artspace Projects Inc. Artspace conducted a series of focus groups and community meetings in Arlington and wrote an in-depth report of preliminary findings. The PFS is a feasibility assessment of the six key areas Artspace considers essential to successful community-led development. Those include: project concept for a potential new arts facility; the arts market demand for new space; local leadership support; funding and financing opportunities; assessment of potential sites; and, how an arts-centric project could align with broader community goals.

The Arts Market Study goes a step further and involves testing assumptions from the Preliminary Feasibility Study and visit, which centered on a presumed demand for either a commercial, residential, or mixed-use project in four distinct areas of the County. The purpose of the study is to first determine if there is enough demand and interest by the creative sector to warrant new space as projected, second, to inform the conceptualization and design of that space, and third energize the community around advancing the creation of that space. The Arts Market Study process includes: an in-depth data collection survey deployed online; this report of findings; and, the Technical Report Addendum that contains the data and analytics.

THE SURVEYS

After the Preliminary Feasibility Study visit, Artspace worked with Arlington Cultural Affairs to develop a survey that would assess the interest in new, affordable space in Arlington and related space preferences of the local and regional creative sector. The online survey was open for seven weeks March 22nd, 2018 - May 13th, 2018. The Survey of Artists and Creative Individuals allowed respondents to articulate their need for live/work housing and work space, and their preferences for space design features, shared building amenities, and types of shared spaces and/or specialized equipment. Respondents were asked to provide descriptive information including their arts and creative activities, current living and working arrangements, household income and other demographics. Lastly, the survey asked the artists how much one would consider paying for new affordable live/work artist housing and private workspace. For brevity, this survey will be referred to as the “artist survey” in this report.
The Arts Market Study for Arlington quantified the demand for a variety of types of spaces for artists and creatives, with specific questions about respondents’ interest in:

1. Relocating to an affordable artists’ live/work community specifically designed for artists, creative individuals, and their families, referred to as “live/work housing” in this report;

2. Renting private studio or creative work space on an ongoing basis, referred to a “private studio” in this report;

3. Shared creative space and/or specialized equipment that can be accessed on a short-term or occasional basis through a paid membership or alternative rental arrangement. Referred to as “shared creative space” in this report.

4. Shared performing arts spaces and/or specialized equipment geared to performing artists. Access can be on a short-term or occasional basis through a paid membership or alternative rental arrangement. Referred to as “shared performing arts space” in this report.

**INTENDED AUDIENCE**

The results of these surveys will help Artspace, other real estate developers and property owners interested in creative space and artist housing, determine if Arlington is the right market for new space investment. Further, the information contained in this report can be used to advance space planning, financial modeling, and early concept design work.

Advocates of the local arts community and creative economy can use this information to communicate the space needs, cultural asset gaps, and related space-based challenges as described by the creative sector respondents. The data can be translated into a compelling narrative about the who, what, and why behind any future, new space effort.

The design guidelines and location preferences starting on page 25, are included to benefit all developers looking to make space available for artists and creatives. The Technical Report should be reviewed by those embarking on new space initiatives as it contains data critical to fully understanding the market’s needs and preferences for new space.
In order to reach the greatest number of artists, Artspace relies on the expertise of local partners to help promote and spread awareness about the study and related surveys. The Arts Market Survey in Arlington launched at a public event on March 22nd, 2018 at the Arlington Arts Center. Artspace was represented by Teri Deaver, Vice President Consulting & Strategic Partnerships, Stacey Mickelson, Vice President National Advancement & Government Relations and Aneesha Marwah, Manager, Consulting & Strategic Partnerships. There were nearly 50 people present at the launch as well as representatives from partner organizations including the Virginia Commission for the Arts.

Staff at Arlington Cultural Affairs disseminated surveys notifications through the following means:

- Distributed post cards to the following local arts and cultural organizations and local events: The Arts Meet, Arts Meet/Artechouse, Torpedo Factory, MoCo Arts and Humanities, 3700 Arlington Arts Building, Prince George’s DPR, Art Truck Activations, WeWork Crystal City, Arlington Arts Center, Columbia Pike Artist Studios, Full Done, Moving Works Competition, Groovin’ on the Pike, Signature Theater. A total of 1,000 post cards were distributed.
- A total of 86,000 contacts were reached through e-mail blasts. There were four e-blasts in total sent by local partners via their listservs. Those listservs include:
  - Arlington Arts
  - Cynthia Connolly
  - CPRO
  - Ballston BID
  - Crystal City BID
  - Arlington Arts Center
  - Arlington Public Art
  - Torpedo Factory
  - Arlington Economic Update
  - Pink Line Project
  - Columbia Pike Artist Studios
  - Arlington Arts/Artspace List
  - Signature Theatre
  - The survey link was posted through social media accounts of Arlington Cultural Affairs and others including CPRO, Ballston BID, Crystal City BID, Plaza Artist, Torpedo Factory, Pink Line Project, and Washington Performing Arts Twitter.
  - Artspace has two projects in Washington D.C. and also sent the survey link to those residents and friends of Brookland Artspace Lofts and Mount Rainier Artist Lofts and posted on local and national social media accounts.
  - Two blog posts by Arlington Economic Update and Arlington County Engage Page also encouraged readers to take the survey as well as radio station WPFW 89.3 FM.
Weekly survey assistance was provided to Arlington Cultural Affairs by Artspace to help with their outreach efforts, particularly with an eye to encouraging diversity and inclusiveness of all community members and art forms. The survey was open for seven weeks via the Survey Gizmo online platform and closed on May 13, 2018. During that timeframe, there were 379 respondents to the artist survey.

Survey respondents indicated that they heard about the survey through the following means:

- Email invitation – 151 (40%),
- Social media outlet - 123 (33%),
- Friend/colleague/acquaintance – 87 (23%),
- From another web-based source – 21 (5.5%),
- At a public meeting – 15 (4%)

*Respondents may have selected multiple options

The survey respondents are a sample of convenience. While believed to be grossly representative of the target population (artists and other creatives living in/around Arlington) generalization of the findings to these broader populations cannot be conducted. Because of the non-random nature of the sample, the data reported includes only descriptive statistics. The responses included in this report are all completed survey entries barring any apparent erroneous responses which were removed. Due to the nature of data collection, the analysts at Artspace are not able to eliminate the entire possibility of duplicate responses to the artist survey, given the bounds of confidentiality.

Data that is not statistically relevant due to low response numbers are mostly omitted from this report. Small group differences or percentages should be interpreted carefully. Statistical analysis of the Survey Gizmo collected data was conducted via SPSS Statistics software and Excel.

Artspace has conducted over 90 Arts Market Surveys across the country reaching more than 37,000 artists. The experience and lessons learned from surveying artists and creatives around the country plays heavily into the market considerations, assumptions, and recommendations in this report.

ONGOING OUTREACH

Responses to the artist survey are considered representative of a need. Interested respondents may not be the same people who eventually rent space in a future project. Artspace recommends that those planning new space stay in touch with the 280 (74%) respondents who requested further information and/or updates on this project. Ongoing outreach is recommended to keep a diversity of artists engaged in any evolving conversation and future project(s). The confidential contact information for these respondents interested in further contact was provided to Arlington Cultural Affairs by Artspace in a separate attachment.
KEY FINDINGS & RECOMMENDATIONS

The primary focus of this report is on the 332 (88%) of the total 379 survey respondents who indicated an interest in at least one type of space in Arlington.

The following is a breakdown of the types of spaces in which respondents expressed interest. The data suggests a clear need for new space where Arlington's creative sector can live, work, and create.

Note: Respondents could select multiple options
RESPONDENT OVERVIEW

To provide context about who participated in the survey, below is a demographic breakdown of all 379 survey respondents.

Respondent Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 years or younger</td>
<td>0%</td>
</tr>
<tr>
<td>21-30</td>
<td>16%</td>
</tr>
<tr>
<td>31-40</td>
<td>23%</td>
</tr>
<tr>
<td>41-50</td>
<td>20%</td>
</tr>
<tr>
<td>51-60</td>
<td>20%</td>
</tr>
<tr>
<td>61-70</td>
<td>16%</td>
</tr>
<tr>
<td>70 years +</td>
<td>5%</td>
</tr>
</tbody>
</table>

Respondent Race and Ethnicity

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Respondents</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>White/Caucasian</td>
<td>296</td>
<td>78%</td>
</tr>
<tr>
<td>Multiracial/Multiethnic</td>
<td>20</td>
<td>5%</td>
</tr>
<tr>
<td>Black/African American</td>
<td>21</td>
<td>6%</td>
</tr>
<tr>
<td>Hispanic/Latino(a)</td>
<td>15</td>
<td>4%</td>
</tr>
<tr>
<td>Asian</td>
<td>12</td>
<td>3%</td>
</tr>
<tr>
<td>Native American/Alaskan</td>
<td>5</td>
<td>1%</td>
</tr>
<tr>
<td>Not listed</td>
<td>10</td>
<td>3%</td>
</tr>
<tr>
<td>Total</td>
<td>379</td>
<td>100%</td>
</tr>
</tbody>
</table>

Respondent Gender

<table>
<thead>
<tr>
<th>Gender</th>
<th>Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Female</td>
<td>269</td>
</tr>
<tr>
<td>Male</td>
<td>99</td>
</tr>
<tr>
<td>Non-binary</td>
<td>1.1%</td>
</tr>
<tr>
<td>Prefer Not to Answer</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

Respondent Location

- 162 are a current resident of Arlington County, VA
- 72 have been a past resident of Arlington County, VA
- 145 have never been a resident of Arlington County, VA

107 (28%) Do not have the space they need for their art or creative work
RECOMMENDATIONS

The Arts Market Study revealed a need for a variety of affordable spaces serving artists and creatives in Arlington. New live/work housing, private studios/creative work spaces, shared creative spaces, and shared performing arts spaces for individuals are all supported to some degree by the survey data. In particular, the market strongly supports an affordable mixed-use project concept that emphasizes live/work housing as the primary space program.

Based on the results of the Arts Market Survey discussed in this report. Artspace recommends advancing a mixed-use facility with both residential and commercial space that can be adapted for a variety of creative space uses. The data supports the following creative space types and amounts in Arlington:

- **Up to 62 units of affordable artist housing**
  - Virginia Square was most frequently selected as a location artists would consider for their live/work space. However, the respondent data also supports new live/work housing in the Columbia Pike, Crystal City or Four Mile Run Valley neighborhoods.

- **Up to 19 new affordable private studio spaces** in addition to live/work housing.
  - Rents for private studio space up to $400/month will serve 75% of interested artists.
  - A variety of sizes of private studio spaces, especially those that are 500 sq. feet or less as this will serve 70% of interested artists. To keep spaces below $1.00 per square foot, and below $400 a month, spaces can be targeted to the 54% of artists who need 350 sq. feet or less.

- **Shared creative space with specialized equipment in or separate from a mixed-use facility**
  - Of the shared creative space, some should be dedicated to performing arts.
  - Commercial space in a mixed-use facility leased to an operator of the preferred shared creative spaces identified in this study.

In an Artspace project, commercial space (including private studios and shared creative space) is made available through long-term leases at affordable rates to organizations and businesses offering programs, shared creative spaces and operations complementary to the project’s vision and the Arts Market Survey identified space needs of artists. To maintain a financially feasible project, commercial space is typically less than 20% of an overall building. Local entrepreneurs, nonprofits and/or creative businesses that currently address or want to address the shared-space needs identified in this study should review Section IV of the Technical Report.

The following key observations are offered based on the data that follows in this report:

- Affordable artist live/work housing will serve artists who currently live in Arlington, but may also attract former residents, as well as draw new residents from the region.
- Affordable artist live/work housing will help retain artists who currently live in Arlington and indicated they have considered leaving.
- Theater artists are highly represented in this study as compared to most similar surveys nationally.
- If studio-only space is created separate from a mixed-use facility, Virginia Square should be explored as a priority consideration. A mixed-use facility with an emphasis on live/work housing will find a strong market in any of the four neighborhoods tested in this study.
Artspace’s recommendations are based on 30+ years of experience in the field of affordable art facility development. There are factors besides market demand that will influence a future project concept and feasibility of new space including: funding opportunities and funder priorities; civic leader priorities; available sites; and new complementary developments that offer desired space.

Survey respondents could select multiple types of spaces that they would be interested in renting or relocating to and duplication of interest is possible. For example, an artist may want both live/work housing and private studio space, however that artist may or may not intend to rent both at the same time. Artspace’s overall recommendations are conservative to consider the possible impact of overlapping space interests.
ARTIST SURVEY INTEREST IN:
LIVE/WORK HOUSING

The information on the following pages is solely about the 187 artists interested in live/work housing in Arlington.

187 (49%)
OF THE 379 RESPONDENTS ARE INTERESTED IN LIVE/WORK HOUSING

55 (29%)
ARE ONLY INTERESTED IN LIVE/WORK HOUSING AND NO OTHER SPACE

1.85 OF THE 379 RESPONDENTS ARE INTERESTED IN LIVE/WORK HOUSING

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT
(Respondents could choose up to 4)
1. Theater Arts - 39%
2. Arts education/instruction - 29%
3. Painting/drawing - 26%
4. Arts Admin/Advocacy - 23%
5. Music - 20%
6. Writing/Literary Arts - 18%

HOUSEHOLD COMPOSITION
• One-person – 78 (42%)
• Two-person – 84 (45%)
• Three-person – 14 (7%)
• Four or more – 11 (6%)
• Children (under 18) – 31 (17%)

HOUSEHOLD INCOME (FOR THOSE INTERESTED IN AFFORDABLE HOUSING)
• 85 HOUSEHOLDS EARN 60% OR LESS OF AREA MEDIAN INCOME (45%)
• 90 HOUSEHOLDS EARN MORE THAN 60% OF AREA MEDIAN INCOME (48%)

52% OF INTERESTED ARTISTS ARE 21-40 YEARS OLD

HIGHEST LEVEL OF EDUCATION
• High School Grad/GED (2%)
• Some College/Associates (11%)
• Bachelor’s Degree (36%)
• Some post-grad (17%)
• Post-grad degree (35%)

CURRENT SITUATION
• 117 – 63% Do not have work space they use only for art/creative work
• 110 – 59% Currently rent/lease their living space

RESPONDENT LOCATION

<table>
<thead>
<tr>
<th>Location</th>
<th>Never lived in Arlington</th>
<th>Previously lived in Arlington</th>
<th>Currently live in Arlington</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 20 40 60 80 100</td>
<td>92</td>
<td>35</td>
<td>60</td>
</tr>
</tbody>
</table>
WHAT IS LIVE/WORK HOUSING?

Artspace defines live/work housing as residential space where artists are able to live and create in the same space. Artspace’s affordable live/work artist housing units meet standard residential codes and are somewhat larger (150 to 200 square feet) than a typical dwelling unit. The units include artist-friendly design features such as durable surfaces, large windows, high ceilings, and wide doorways. Other variations of this type of space include work/live Space, in which land use regulations allow primarily commercial/industrial uses with a small percentage of living space; and, housing-only space that may come with access to shared creative spaces located in the same or an adjacent building.

FINANCING FOR AFFORDABILITY

To keep live/work housing attainable, the Artspace financing model combines public and private funding to ensure long-term, self-sustaining, affordable housing. A primary funding tool is the Federal Low-Income Housing Tax Credit (LIHTC) program which drives private equity investment to capitalize projects. Two types of allocations a 4% credit and 9% credit differ in that the 4% credit drives less private equity and results in a larger funding gap. The 4% program imposes fewer constraints on the project concept and while project threshold criteria must be met, it is a non-competitive funding source. The 4% program offers less opportunity for deep rental subsidy and aligns with Arts Markets that can sustain higher rents targeted to households earning 50% to 60% of AMI and in large (50 or more unit) multi-family developments.

The U.S Department of Housing and Urban Development (HUD) imposes annual household income limits and sets maximum rents in projects awarded tax credits from either program. These rent limits are accompanied by a HUD-determined “utility allowance” that further lowers base rents in order to keep overall housing costs affordable for low-income households. These limits change annually. The 2018 HUD published maximum household income for those earning 60% or less of the Area Median Income (AMI) and corresponding rents for the Washington DC-Arlington-Alexandria DC-MD-VA HUD Metro Area are in the following table. The rents and income limits set by HUD reflect the trends in the whole Metro Area. Rents are expressed by month and incomes are annual.

<table>
<thead>
<tr>
<th>Household Size</th>
<th>Income Max (30% - 60% AMI)</th>
<th>Bedrooms</th>
<th>Max Rent (30% - 60% AMI)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$24,630 - $49,260</td>
<td>Efficiency</td>
<td>$615 - $1,231</td>
</tr>
<tr>
<td>2</td>
<td>$28,140 - $56,280</td>
<td>1-bedroom</td>
<td>$659 - $1,319</td>
</tr>
<tr>
<td>3</td>
<td>$31,650 - $63,300</td>
<td>2-bedroom</td>
<td>$791 - $1,582</td>
</tr>
<tr>
<td>4</td>
<td>$23,160 - $70,320</td>
<td>3-bedroom</td>
<td>$914 - $1,828</td>
</tr>
</tbody>
</table>

Source: Novogradac; Novoco.com, 2018

85 (45%) of artists interested in live/work housing in Arlington would income qualify at 60% or below AMI per HUD guidelines. 31 (17%) report incomes that fall at 30% or below AMI and would qualify for the more deeply subsidized units made possible using the 9% LIHTC model. The percentage of interested...
income qualifying artist households, is slightly lower than recent similar surveys conducted in other cities across the nation. The high Median Household Income for the DC Metro Area in which Arlington falls and the high cost of housing may correlate to the percent of higher income respondents. With 85 interested artists self-identified as income qualifying, a LIHTC funding approach is still supported by the market.

**RENTAL AFFORDABILITY**

To qualify to live in live/work housing, artists do not need to derive the majority of their income from their art or creative pursuit. In fact, in Arlington, 101 (54%) of those interested in live/work housing earn 25% or less of their income from their art/creative work. Many artists balance their creative work with other non-creative type jobs to earn a living. From the self-reported income data in the survey, 45% would qualify for affordable live/work housing based on their household incomes being 60% of AMI or lower. A step further, Artspace asked artists what the maximum amount is they would consider paying monthly for live/work space. This is to understand how developers should model their rent structure; how many households consider the 2017 HUD maximum rental guidelines to be affordable; and, how many would qualify for that rent based on their household size.

If using affordable housing resources like LIHTC, there are restrictions on household size relative to the number of bedrooms in a unit. For example, a one-person household may not be allowed to rent a three-bedroom unit. The rental rates set by HUD vary according to bedroom count and household income.

<table>
<thead>
<tr>
<th>Max monthly rent</th>
<th>One</th>
<th>Two</th>
<th>Three</th>
<th>Four or more</th>
<th>#</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>$400</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>3</td>
<td>5</td>
<td>3%</td>
</tr>
<tr>
<td>$500 - $600</td>
<td>2</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>11</td>
<td>6%</td>
</tr>
<tr>
<td>$700 - $800</td>
<td>12</td>
<td>2</td>
<td>3</td>
<td>5</td>
<td>22</td>
<td>12%</td>
</tr>
<tr>
<td>$900 - $1,000</td>
<td>13</td>
<td>9</td>
<td>6</td>
<td>3</td>
<td>31</td>
<td>17%</td>
</tr>
<tr>
<td>$1,100 - $1,200</td>
<td>12</td>
<td>8</td>
<td>2</td>
<td>0</td>
<td>22</td>
<td>12%</td>
</tr>
<tr>
<td>$1,300 - $1,500</td>
<td>16</td>
<td>15</td>
<td>4</td>
<td>0</td>
<td>35</td>
<td>19%</td>
</tr>
<tr>
<td>Over $1,500</td>
<td>17</td>
<td>26</td>
<td>10</td>
<td>8</td>
<td>61</td>
<td>33%</td>
</tr>
<tr>
<td>Total</td>
<td>73</td>
<td>67</td>
<td>27</td>
<td>20</td>
<td>187</td>
<td>100%</td>
</tr>
<tr>
<td>Total for 60% of AMI Rents (shaded area)</td>
<td>33</td>
<td>41</td>
<td>10</td>
<td>8</td>
<td>92</td>
<td>49%</td>
</tr>
</tbody>
</table>

*Shaded area represents maximum respondents would consider paying relative to household size and to 2018 rent guidelines for 60% AMI*

The monthly rental rates and Area Median Income is notably high in this Metro Area compared to other regions nationally, and correspondingly these responses indicate a sizeable need for affordably priced live/work housing. **92 (49%) of respondents indicated the maximum they would consider paying for**
live/work housing is at or below the maximum rents that can be charged per HUD guidelines (relative to household size) for affordable housing in the Washington-Arlington-Alexandria Metro Area.

Furthermore, 64% of the survey respondents interested in live/work housing indicated that they currently pay $1,201 or more a month in housing costs regardless of household size. This is higher than the maximum many would consider paying in the future and indicates that affordable units would be a welcome addition to the expensive Arlington real estate market and also in line with the 2018 HUD guidelines for 60% or below AMI units.

RECOMMENDATIONS FOR LIVE/WORK HOUSING

Artspace recommends building up to 62 live/work housing units total in Arlington. This is a conservative estimate using 3:1 redundancy which accounts for the many factors that influence the overall indicated market need as well as Artspace’s national experience as a developer of live/work housing. The factors that can influence need include:

- Income Qualification: The number of interested artists who would income qualify at or below 60% of AMI
- Duplication: Interested households in which more than one artist responded to the survey
- Student Interest: Interested artists who are currently full-time students, and whose household incomes/compositions are likely to change post-graduation
- Relocation: Only 32% of respondents currently live in Arlington, may overstate the willingness to relocate
- Project location: The neighborhood location and preferences
- Overstatement of Interest: While not quantifiable, changes in lifestyle and interest may happen between now and a project being built.

The end development and design decisions for new space may impact marketability and the effect of any adverse decisions are not considered in this calculation. New space should be leased affordably and preferred features and shared spaces (as identified on the following page) accommodated to the extent feasible.

If new artist housing is created outside of the top four preferred locations (listed below), the total count of new space should be lowered accordingly.

3:1 REDUNDANCY

Given the variety of factors that influence the stated need by respondents, Artspace uses the triple redundancy method to account for the factors mentioned on the previous page. The threshold for market support for a live/work housing project requires a minimum 3:1 redundancy, meaning at least 3 interested artists/creatives should be identified for every 1 live/work housing space created.

\[
\frac{187}{3} = 62
\]
The table below indicates how some of the 3:1 redundancy influencing factors calculate into the total live/work housing market need in Arlington.

<table>
<thead>
<tr>
<th>Arlington – Live/Work Housing Market</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Factor</strong></td>
</tr>
<tr>
<td>Total Interested Artists</td>
</tr>
<tr>
<td>Income Qualify – 60% AMI</td>
</tr>
<tr>
<td>Households with more than 1 interested Responder</td>
</tr>
<tr>
<td>Minimum Potential Duplicates (19/2)</td>
</tr>
<tr>
<td>Current Full-Time Students</td>
</tr>
<tr>
<td>Interest in living in Virginia Square</td>
</tr>
<tr>
<td>Interest in living in Columbia Pike</td>
</tr>
<tr>
<td>Interest in living in Crystal City</td>
</tr>
<tr>
<td>Interest in living in Four Mile Run Valley</td>
</tr>
<tr>
<td>Currently live in Arlington</td>
</tr>
</tbody>
</table>

| Estimated Market for a LIHTC project | *62 units |

*Market need is only one consideration when developing a project concept. A development team may choose to increase or decrease a final unit count after a review of all project feasibility factors, including financing method and the related LIHTC Qualified Allocation Plan (QAP), if applicable.

UNIT MIX

The number of bedrooms needed by respondents interested in live/work housing in Arlington, trends toward one- and two-bedroom units. Using the triple redundancy method, Artspace suggests the following unit breakdown to begin concept planning.

<table>
<thead>
<tr>
<th>Arlington - Suggested Unit Mix</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Number of Bedrooms</strong></td>
</tr>
<tr>
<td>Efficiency/Studio Units</td>
</tr>
<tr>
<td>One-Bedrooms</td>
</tr>
<tr>
<td>Two-Bedrooms</td>
</tr>
<tr>
<td>Three-Bedrooms</td>
</tr>
<tr>
<td>4+ Bedrooms</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
</tr>
</tbody>
</table>

When determining the unit mix in a project concept the market study findings are important, but there are other factors to consider including: what the site/building can accommodate; funder priorities; HUD requirements for maximum household size per bedroom count; and, the operating budget/project pro-forma.
UNIT SIZES AND FEATURES

The survey did not ask for preferred housing square footage, but space needs can be estimated (for planning purposes) by ensuring that the workspace size preferences of those interested in private studio space can be accommodated in the live/work housing unit. 70% of those interested in private studio space are also interested in housing (detailed on the following pages) and the majority would be served by 350 square feet or less of studio space.

Alternatively, live/work housing can be modeled after Artspace’s live/work housing units which are generally about 150-200 SF larger than traditional affordable housing and have flexible floor plans to accommodate for workspace. Average Artspace unit sizes are:

- **Average efficiency/studio**: 700 sq. ft. – 800 sq. ft.
- **Average 1BR**: 800 sq. ft. – 1000 sq. ft.
- **Average 2BR**: 1100 sq. ft. – 1200 sq. ft.
- **Average 3BR**: 1400 sq. ft. – 1600 sq. ft.

The following amenities and features were most requested by respondents interested in live/work housing for their units and building-wide. This and other design considerations are further explained on page 25. This information is important to Artspace for the design and marketability of any future development.

### MOST PREFERRED BUILDING AMENITIES
- Building Wi-Fi (60%)
- Rehearsal Space (43%)
- Gallery/Exhibition space (41%)
- General-use studio/flex-space (39%)
- Additional storage (36%)

### MOST PREFERRED LIVE/WORK UNIT FEATURES
- Internet access (high-speed) (68%)
- Abundant natural light (65%)
- Soundproofing (44%)
- Washer/Dryer hookups in unit (44%)
- High Ceilings over 10 ft (43%)

RETAINING AND ATTRACTING THE CREATIVE SECTOR

Of the 187 respondents who indicated that they would relocate to a live/work housing community, 60 of them currently live in Arlington. **46 (77%)** of those Arlington artists responded that they have considered leaving, and the availability of new space would help retain them. Data collected through the survey supports the creation of new housing and demonstrates that affordable live/work housing would both retain artists in Arlington and encourage artists living in the greater metro area to locate to Arlington given the opportunity of new affordable live/work space.
ARTIST SURVEY INTEREST IN:
PRIVATE STUDIO SPACE
The information on the following pages is solely about the 144 artists interested in leasing private studio space on an ongoing basis.

144 (38%) OF THE 379 RESPONDENTS ARE INTERESTED IN PRIVATE STUDIO SPACE

74 (51%) INTERESTED ONLY IN PRIVATE STUDIO SPACE AND NOT HOUSING

70 (49%) INTERESTED IN BOTH PRIVATE STUDIO SPACE AND HOUSING

OF THE 144, 67 (47%) DO NOT HAVE DEDICATED STUDIO/WORK SPACE

OF THE 144, 52 (36%) HAVE STUDIO/WORK SPACE WITHIN THE HOME

39 (27%) DON'T HAVE THE SPACE THEY NEED FOR THEIR ART/CREATIVE WORK

57 (15%) OF ALL RESPONDENTS CURRENTLY RENT/OWN STUDIO SPACE ON AN ONGOING BASIS

CURRENT RENT FOR PRIVATE STUDIOS
12 pay $1 - $200/month
24 pay $201 - $400/month
21 pay more than $400/month

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT
(Respondents could choose up to 4)
1. Painting and Drawing - 42%
2. Art Gallery/Curatorial - 27%
3. Arts Edu/Instruction - 22%
4. Photography - 22%
5. Mixed Media - 19%
6. Theater Arts - 18%

OF THE 144, 67 (47%) DO NOT HAVE DEDICATED STUDIO/WORK SPACE

MOST REQUESTED PRIVATE STUDIO SIZE*
54% (78) would be served by 350 sq. ft. or less
*A variety of sizes are needed

RESPONDENT LOCATION
66 (46%) of those interested in private studio spaces currently live in Arlington
**WHAT IS PRIVATE STUDIO SPACE?**

Private studio space and creative work space is specifically designed for the creation or practice of art in all its forms (performing, visual, functional, literary, etc.). Private studio space is rented long-term under an annual lease agreement by a single renter who may or may not choose to share space with other artists. From a lessor’s perspective, it is commercial or industrial space that is adaptable to the needs of the artist/creative.

When calculating the demand for private studio space, Artspace looks at the number of respondents interested in both private studio space and live/work housing (144 respondents). And assesses need based on those only interested in private studio space (74 respondents). The assumption is that if an artist resides in a live/work unit then an additional separate private studio space is less likely to be needed.

**RECOMMENDATIONS FOR PRIVATE STUDIO SPACE**

Artspace recommends creating up to 19 private studio spaces, if live/work housing is also built, or up to 36 spaces if it is not. This is a conservative estimate based on a 4:1 redundancy model. There are more variable factors that affect total market need for private studio spaces versus live/work housing units, most importantly necessity, therefore Artspace relies on the 4:1 model for this type of space. These factors include:

- Artists may choose a more cost-effective option, such as:
  - Sharing a studio space with other interested artists
  - Using less space than they initially indicated
  - Renting short-term spaces
- Amenity specific needs
- Location of project/new space
- Income fluctuation leading to shorter tenancy than housing

Respondents to the survey also indicated significant interest in shared short-term studio spaces. 72 expressed interest in studio space (general-purpose, for occasional private use) and 73 in studio space...
(general-purpose, multiple user). If short-term space is created to meet this occasional and shared-use community need, then the number of spaces created for long-term private studio space should be reduced accordingly, and vice-versa.

The value of this recommendation relies on a diverse selection of private studio space options that reflect the sizes, rental costs, amenities, and features preferred by interested artists/creatives.

In either case, Artspace recommends introducing new studio space in phases. Private studio space rental, like commercial space, is subject to greater market fluctuations than housing.

### STUDIO SIZES & RENTAL RATES

Understanding what artists can afford and how much space they need is critical to the marketability and self-sustainability of new space. The following two charts provide a summary of this information.

<table>
<thead>
<tr>
<th>Minimum Square Footage</th>
<th>Count</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 200 sq. feet</td>
<td>27</td>
<td>19%</td>
</tr>
<tr>
<td>200 - 350 sq. feet</td>
<td>51</td>
<td>35%</td>
</tr>
<tr>
<td>351 - 500 sq. feet</td>
<td>23</td>
<td>16%</td>
</tr>
<tr>
<td>501 - 650 sq. feet</td>
<td>13</td>
<td>9%</td>
</tr>
<tr>
<td>651 - 800 sq. feet</td>
<td>14</td>
<td>10%</td>
</tr>
<tr>
<td>801 - 1,000 sq. feet</td>
<td>5</td>
<td>3%</td>
</tr>
<tr>
<td>1,001 - 1,500 sq. feet</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>More than 2,000 sq. feet</td>
<td>1</td>
<td>1%</td>
</tr>
</tbody>
</table>

**What Would Be Affordable Monthly Studio Rents, If Paid In Addition To Housing?**

- Less than $100: 13
- $101 - $200: 25
- $201 - $300: 30
- $301 - $400: 40
- $400+: 36
Based on the data and the summary statistics, a draft program plan for a private studio space development should consider:

- Studio spaces of varying sizes. For example:
  - (7) under 200 square feet
  - (20) 200-500 square feet
  - (8) 500-1,000 square feet
- Rental agreements that do not exceed **$500 per month**, gross rent regardless of space size. With many targeted lower, at least 39% renting at $250 or less.

Incorporating some larger spaces and more expensive spaces is also supported by the market findings, but what artists can pay for space on a square foot basis may not be commensurate. Therefore, Artspace recommends pre-leasing, collecting letters of interest, and/or developing a waiting list for planned private studios larger than 500 square feet.

The following building-wide amenities and studio/work space features were most preferred by respondents interested in private studio space. This and other design considerations are further explained on page 25. This information is important to any developer or operator to consider for the marketability of any future development. If any developer is interested in building studio-only spaces, please refer to Section III of the Technical Report.

### MOST PREFERRED BUILDING-WIDE AMENITIES
- Building Wi-Fi (70%)
- Gallery/Exhibition space (59%)
- Utility sink with trap (47%)
- Additional storage (43%)
- Networking/Meeting Space (33%)

### MOST PREFERRED STUDIO SPACE FEATURES
- Natural light (73%)
- Internet access (high-speed) (72%)
- High ceilings, over 10 ft. (53%)
- Special Ventilation (35%)
- Soundproofing (28%)
ARTIST SURVEY INTEREST IN:

SHARED CREATIVE SPACE AND
SHARED PERFORMING ARTS SPACE

162 (43%)

OF THE 379 RESPONDENTS ARE INTERESTED IN ACCESS TO SHARED CREATIVE SPACE

126 (33%)

OF THE 379 RESPONDENTS ARE INTERESTED IN ACCESS TO SHARED PERFORMING ARTS SPACE

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT
(Respondents could choose up to 4)
1. Painting/ Drawing - 33%
2. Arts education/instruction – 23%
3. Art gallery/Exhibition/ Curatorial – 22%
4. Arts admin/advocacy - 19%
5. Writing/Literary arts – 19%

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT
(Respondents could choose up to 4)
1. Theater Arts - 57%
2. Music - 34%
3. Arts Education/instruction – 30%
4. Arts admin/advocacy - 23%
5. Writing/Literary Arts – 22%

RESPONDENT LOCATION
79 (49%) of those interested in shared creative space currently live in Arlington

MOST PREFERRED TYPE OF SPACES/SPECIALIZED EQUIPMENT*
- Gallery/Exhibition Space – 81 (50%)
- Studio Space (gen. purpose, multi-user) – 73 (45%)
- Studio Space (gen. purpose, occasional private use) – 72 (44%)
- Classroom/Teaching Space – 46 (28%)

*Respondents could choose up to five options. These are accessible on a short-term lease basis or paid membership

MOST PREFERRED TYPE OF SHARED PERFORMING ARTS SPACE/EQUIPMENT*
- Rehearsal Space – 74 (59%)
- Theater/Performance (Black box/flexible – 68 (54%)
- Theater/Performance (formal seating/permanent stage) - 50 (40%)
- Dance studio/rehearsal space 36 (29%)
- Sound Proof practice room - 33 (26%)
- Sound Booth – 32 (25%)

*Respondents could choose up to five options. These are accessible on a short-term lease basis or paid membership
WHAT IS SHARED CREATIVE SPACE?

**Shared Creative Space** is space and specialized equipment that may be available for short-term, private rentals (e.g. hourly, daily, weekly, monthly) or accessible to multiple users at the same time through a membership or other rental arrangement. The spaces and associated programming are typically offered to artists through an organization/operator that has leased long-term space from the property owner for that purpose, in many cases from Artspace. **Collaborative** shared spaces may include for example: co-working or makerspaces designed for specific uses such as ceramics, 3D printing, culinary arts, or woodworking. **Private short-term rentals** may include: storage, conference rooms, general use studio, or a screening room. The intent is to offer artists access to space and/or equipment that is too expensive or impractical for individual artists to lease or own outright. Shared creative space can exist in the context of a new multi-use facility, as a stand-alone venture, or as an extension of existing programming.

**With 162 respondents expressing interest, there is moderate interest for shared creative spaces.** While about 40% of these artists also expressed an interest in live/work housing (67 respondents), it is anticipated that the need for most shared spaces will remain constant even if new complementary spaces such as live/work housing or private studios are created. The exception is the overlapping interest in shared, general-purpose studio spaces both for multiple users and for occasional private use. Interest in shared creative space, was highest among artists who currently live in Arlington (49%). New space would likely address a local Arlington creative community need.

RECOMMENDATIONS FOR SHARED CREATIVE SPACE

**Artspace recommends including shared creative space in any new multi-use facility** resulting from this study as well as identifying other opportunities in Arlington to introduce new shared space models.

A multi-use facility with live/work housing and/or private studios as core space types would be enhanced by including gallery/exhibition space that can be rented on a short-term basis as well as shared general-purpose studios that are flexible for either private or multiple users to access on a short-term basis. Any interested developer, including Artspace, would need to find an organization/business or individual who could operate these sorts of spaces with a sustainable business model.

If addressing the shared creative space needs identified in this study, Artspace recommends focusing on just one or a few of the preferred types of spaces/equipment documented. Providing limited types of appropriate spaces/equipment is more valuable than a variety of mediocre ones.

While the priority should be to address the “most preferred” spaces (of interest to at least 25% of the interested respondents) there are other spaces and equipment that have been identified as desirable. For example, a computer center with design software, a printmaking studio, networking/meeting/lounge space, woodworking shop, office equipment access, paint room, digital fabrication and prototyping equipment access, and storage (larger than 100 SF) would be of interest to at least 15% of respondents/25 artists. A full list of space types of interest to respondents can be found in the Technical Report Section IV.
WHAT IS SHARED PERFORMING ARTS SPACE?

Shared Performing Arts Space accommodates the needs of those in the performing arts or other complementary industries. Like shared creative space, the space and specialized equipment may be available for short-term, private rentals (e.g. hourly, daily, weekly, monthly) or accessible to multiple users at the same time through a membership or other rental arrangement. The spaces and associated programming are typically offered by an organization or business that leases commercial space from the property owner, in many cases leased from Artspace. Collaborative shared spaces may include: costume, prop and set design shops, or storage for the same. Private short-term rentals may include: rehearsal or performance space; or sound proof practice or recording studio space. Performing arts space is expensive for artists due in part to the volume of space and the technical equipment required (i.e. sprung dance floors, soundboards). Shared performing arts space can exist in the context of a new multi-use facility, as a stand-alone venture, or as an extension of existing programming.

RECOMMENDATIONS FOR SHARED PERFORMING ARTS SPACE

While the interest in shared performing arts space (126 respondents) is less than that for shared creative spaces overall (162 respondents), the interest relative to the size of the respondents identifying as practicing in the performing arts is still significant. The number of performing artist respondents to the Arlington Artist Survey is also high compared to other similar surveys conducted nationally. For these reasons, it is useful to consider the shared performing arts space and the shared creative space needs independently.

The nature of many types of performing arts spaces is that they are often costly to build and operate while generated income is seldom enough to offset the expense. Users also tend to require the spaces at similar times (evenings and weekends for example) making scheduling difficult and in return creating an inefficient economic model. The more flexible the space and suitable to multiple users the more self-sustaining the spaces become. Introducing complementary, income generating programs and spaces can also help create more successful models.

The developer of a multi-use project concept should consider including flexible space that can be used for rehearsal space as well as small black box performances, as this would address the two most preferred spaces of the interested respondents. Incorporating soundproof spaces (for practice and recording) should also be a priority consideration. Any program operator interested in offering performing arts space in the context of a multi-use facility or as a stand-alone venture, should review Section IV of the Technical Report as part of the planning process.
DESIGNING ARTIST SPACES

Concept planning for new space involves more than just overall interest in live/work housing, private studio, commercial and shared creative spaces. Location, rental costs, shared amenities, size and design features all impact marketability of new spaces. Regional market conditions, funding strategy, available operators of shared spaces and project budget limitations should also all be considered. The Arlington Arts Market Survey data as well as Artspace’s 30+ years designing projects informs the following design best practices.

DESIGN FEATURES AND AMENITIES

GENERAL GUIDELINES

If spaces and buildings are well designed to incorporate features and amenities that artists prefer, then the artists are better served, and spaces are more leasable. In the design phase, developers should be mindful of the environment preferences of specific types of art, (e.g., lighting, flooring, heating/cooling, ventilation noise, ceiling height, etc.) All artist spaces need safe and secure storage, the ability to easily load and unload projects, materials, and equipment. This means wide hallways (6-foot minimum) and oversized doorways and elevators with 3500 pounds capacity, and perhaps including loading zones, and space for package pick-ups. Certain art materials can be toxic, that adds a level of consideration for trash disposal and utility sink drains. The flooring in all spaces should be highly durable and low-maintenance (e.g., stained/polished concrete, sealed/epoxy coated concrete, ceramic or porcelain tile, or linoleum or wood products, but no carpet.)

LIVE/WORK HOUSING

Overall a live/work housing unit should be designed to maximize flexible space. This infers that kitchens should be open, galley, straight, or “L” shaped layouts with no “islands” and the sink is recommended to be a single, extra deep basin, stainless steel preferred, with no garbage disposal. Ceilings should be a 10-foot minimum to ensure open space. Windows should be large and operable for natural light and fresh air. Communal laundry rooms are a cost-effective approach if funding allows.

COMMUNITY GALLERY & ENTRY LOBBY

When designing also consider that artists should have space for collaboration and community development. Live/work housing space in its general conception provides the opportunity to collaborate and help one another, but all artist spaces should have a space intended to enable collaboration and inspire a sense of community. Commercial and communal space public restrooms should be inclusively designed as at least two gender neutral restrooms and include a diaper changing station in at least one unit.

Artists also enjoy sharing their art, a space with adequate lighting can provide an opportunity for both the public to enjoy art and artists to present and sell/perform their work. Artists should be allowed to hang, paint, display their art in the hallways, if they choose to do so. For gallery spaces, there should be floor outlets approximately every 12 feet. Walls should include a ¼ inch layer of plywood behind the gypsum board to aid in hanging artwork; there should be a minimum of 3 feet height of plywood installed, at 40 inches from the floor, up to 76 inches (and if cost and time allowed, add a foot on each side to accommodate even larger artwork). Walls should be neutral colored and suitable for displaying artwork. Best case
scenario there are two types of lighting in these rooms. First is the general overhead lighting and the second is the directional track lighting for the art work. These track lights need to be installed so as to light work at 45 degrees from the spot where art is traditionally hung. There also needs to be separate light switches for both sets of lights and a hanging system incorporated.

PERFORMING ARTS SPACE

When designing for the needs of performing artists, consideration should be given to sprung flooring for dancers, high ceilings and space that is unencumbered by posts/pillars to accommodate movement. Soundproofing closets or offering shared soundproof spaces for practice or music/voice recording would typically be a welcome amenity and supported by the Arlington Arts Market Study data.

OTHER FEATURES

A property management office should be located on the first floor near the main entrance. The exterior of the building should have low maintenance finishes. Consider providing artist designed bike racks for visitors and bike storage for residents.

Artspace has a plethora of resources on designing artist spaces and is also available to consult with developers looking to create space for artists.

ARLINGTON SPECIFIC DESIGN FEATURES AND AMENITIES

LOCATION

The artists interested in space in Arlington were asked their location preferences from the four neighborhoods discussed during Artspace’s Preliminary Feasibility Visit. This information is useful when exploring sites. To the extent feasible, preferred locations should influence site exploration and selection. Many factors drive site selection including: cost, funder preference, zoning, environmental conditions, the real estate market, ease of acquisition/site ownership, proximity to amenities (e.g., public transportation, grocery, retail, arts), and city planning priorities. It is important to note, that if new space is created in a less preferred location artists may still remain interested especially if the space is priced affordably and offers preferred features and amenities. Many respondents also indicated they had no location preference. The table below shows by percentage which neighborhoods are most preferred by artists interested in live/work housing and private studio space and offers a ranking for each. “1” is the most preferred and “4” the least preferred overall. Respondents were asked to select all neighborhoods they would consider renting in.

<table>
<thead>
<tr>
<th>Neighborhood</th>
<th>Live/Work Housing</th>
<th>Private Studios</th>
<th>RANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Respondents</td>
<td>187</td>
<td>144</td>
<td></td>
</tr>
<tr>
<td>Virginia Square</td>
<td>47%</td>
<td>57%</td>
<td>1</td>
</tr>
<tr>
<td>Columbia Pike</td>
<td>41%</td>
<td>47%</td>
<td>2</td>
</tr>
<tr>
<td>Four Mile Run Valley</td>
<td>40%</td>
<td>42%</td>
<td>3</td>
</tr>
<tr>
<td>Crystal City</td>
<td>40%</td>
<td>33%</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
<td>24%</td>
<td>N/A</td>
</tr>
<tr>
<td>No Preference</td>
<td>29%</td>
<td>22%</td>
<td>N/A</td>
</tr>
</tbody>
</table>
In Arlington, artists are most interested in locating to the Virginia Square neighborhood. This was the top preference for both live/work and private studio space. Columbia Pike, Four Mile Run Valley, and Crystal City are all closely aligned as the second favorite option for any future mixed-use project.

All four of these locations would be appropriate options for a concept that includes live/work housing. Any private studio-only development would best be suited in Virginia Square or along Columbia Pike according to the respondents’ preferences.

TRANSPORTATION AND PARKING
Many of the artists interested in live/work housing stated they would use alternative modes of transportation if available, in effect reducing their reliance on driving. Given the accessibility in the region via Washington D.C.’s Metro system, locating near public transportation is recommended. The interest level is strong enough to plan a multi-modal project with reduced parking options. In fact, 85% of respondents indicated they would use metro/train on a regular basis to reduce their reliance on driving. However, 90% indicated they still need at least one parking space for their household.

![Transportation Preferences Chart]

![Parking Space Needs Chart]
DESIGN CONSIDERATIONS

BUILDING-WIDE AMENITIES

Artspace’s general design guidelines along with information provided by the survey respondents about their preferred amenities, shared space types, and building features are considered during the program and concept development phase of any new space initiative or mixed-use facility. Those spaces and amenities that are preferred by more than one sub-group deserve particular attention as they will serve the greatest number. When funding is limited it is important to make thoughtful decisions about how to best use resources to benefit the most.

The table below shows the overlapping interest in amenities and short-term spaces among several subgroups of survey respondents. Artspace recommends prioritizing spaces that are of interest to multiple subgroups, can serve multiple uses and/or are the least expensive and complicated to create and operate. Full lists of preferred spaces and amenities are in the Technical Report and should be reviewed by developers of new space. Spaces/Amenities preferred by at least 25% of interested respondents are identified below. Careful consideration should be given to the upfront and operational costs and complexity of incorporating the types of spaces listed in under “costly spaces.” Respondents could choose up to five preferred amenities for inclusion.

<table>
<thead>
<tr>
<th>Building Amenity</th>
<th>Live/Work Housing</th>
<th>Private Studio</th>
<th>Shared Creative Space</th>
<th>Shared Performing Arts Space</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Easy to Incorporate</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building Wi-Fi</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gallery/Exhibition Space</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Classroom/Teaching Space</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>General purpose studio (individual and multi-user)</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Storage</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rehearsal Space</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Community Garden</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustainable Design</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utility Sink with Trap</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Networking/Meeting Lounge</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Costly Spaces</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Theater/Performance Space (black box/flex)</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Theater/Performance Space (formal)</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Dance studio/rehearsal space (with sprung floor)</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Business Center (copier, printer)</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Computers with design software</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Sound proof spaces</td>
<td>X</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Fitness Center</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Not all space types and amenities were an option for each subgroup to select.*
The spaces and amenities that are preferred by at least three interested subgroups include: **gallery/exhibition space, classroom/teaching space, and rehearsal space.** At a minimum, these amenities should be designed into a mixed-use project.

Theater/performance space, a computer center with design software, and a dance studio are examples of spaces that are most likely to be developed and/or operated by a third-party nonprofit or business rather than the building owner or operator of a mixed-use facility.

**IN-UNIT FEATURES**

The top features requested by survey respondents interested in live/work housing and renting private studios on an ongoing basis follow:

**Natural light** – Abundant natural light within the unit was a top feature listed for live/work (65%) and private studios (73%). Any new development should optimize natural light sources for its future tenants.

**Internet access** – High speed, high bandwidth internet for large files/graphics is needed to support the creative work of interested respondents. Artists interested in live/work housing and private studio space selected this as the other top preferred feature (in addition to natural light). Development plan(s) and budget(s) for new space should consider how best to provide the necessary technological infrastructure.

**High ceilings**: Ceilings that are at least 10 feet are desirable for both live/work and private studios. Lower ceilings will impede creative work. Ceilings above 10 feet are a preferred feature for both subsets.

**Soundproofing and Soundproof spaces**: Soundproofing is a preferred space feature of those interested in live/work housing and private studio space, and soundproof practice rooms and a sound booth are preferred shared performing arts space. While it may be cost prohibitive to soundproof an entire housing unit or private studio, consideration could be given to sound attenuating design that limits noise between units. Alternatively, offer soundproof spaces for residents to share in the facility and that could be rented by non-residents.

**Special ventilation**: A number of respondents interested in private studio spaces indicated that special ventilation is a preferred studio feature. While again, it may be cost prohibitive to install special ventilation in every studio unit, design and engineering should take into consideration the toxic nature of many art materials. Perhaps allocating a few studios with enhanced ventilation for varnishing, spraying, and where use of other toxic substances is permitted should be considered.

**Washer/Dryer hook-ups in unit**: While a project may include shared laundry facilities, interested respondents have a preference in addition, for in-unit washer/dryer hook-ups. If offering this feature, consideration should be given to the impact on building water usage.

*Building-wide amenities and unit features considered for new space, should not be limited to the “most preferred”. There are other selections that would still benefit many and may be easy and affordable to include. Artspace recommends that developers of new space review the Technical Report lists to see which of the features/amenities/programs align well with their particular project, space, building or site.*
CONCLUDING REMARKS

FURTHER SURVEY PARTICIPANT ENGAGEMENT

Respondents indicated a strong interest in receiving updates about the project and in volunteering to advance the concept. Contact information for those who requested more information on several different topics is provided separately from this report to Arlington Cultural Affairs. It can take several years to realize new space and keeping interested parties engaged is important. Periodic and important project updates to those 280 (74%) respondents who requested further information is recommended.

This interest group could also be contacted to test project concept and business plan assumptions as they evolve, including fees or membership rates that can be charged for new shared creative spaces and specialized equipment. Early program planning including identifying funding and an operating partner is critical to successfully implementing the mixed-use concept.

It is assumed that survey respondents, while broadly representative of the market, may not be the same individuals that ultimately relocate to housing or rent new space. For this reason, Artspace recommends that an outreach strategy be developed to engage new artists who may not have participated in this survey. This will help ensure the longer-term relevance of these findings and support a successful project lease-up.

DIVERSITY AND INCLUSIVITY

One measure of success of a future project is how inclusive it is and to what extent its residents and tenants reflect the diversity quotient of Arlington and the surrounding area. In spite of best efforts, surveys of this nature are limited in their ability to engage everyone and in return are not truly reflective of the diversity of a region in regard to age, gender, race, income, ethnicity, and even art form.

6% of total survey respondents identified as Black/African American, and 3% as Asian, while according to the US Census, Arlington County has a 9% Black/African American population, and 11% Asian population. 71% of survey respondents were women, when in reality, women make up 50.2% of the population in Arlington County. While direct comparisons cannot be truly made from the broader community to the creative sector and due to the convenience sampling method of this survey, attention should still be paid to engaging diverse populations as well as men during future outreach. In the experience of Artspace, the community’s creative sector is typically as diverse, if not more than the broader population.

In order for a future project to be truly relevant and reflective of the community, Artspace highly recommends that ongoing outreach and the make-up of leadership teams be directed toward achieving that goal. It should be noted that a slightly higher percentage of multiracial/multi-ethnic/black/African-American respondents were interested in live/work housing compared to the overall survey responses. Any outreach on housing should target diverse citizens.
**NEXT STEPS**

There is demonstrated market demand for up to 62 live/work housing units for artists in Arlington. Artspace recommends using this information to advance the development of new creative spaces and in particular a multi-use, creative facility in Arlington. **An initial live/work housing development concept should begin with an assumption of between 40 and 62 units of housing.** The mixed-use concept can be rounded out with no more than 19 private studios (at a variety of sizes and rent targets); and, **commercial space that can be made available for shared creative and performing arts space uses.** In predevelopment this concept can be further refined in the context of financial modeling/pro-forma development, site due diligence and selection, project partner priorities, and philanthropic/gap funding capacity. If the stakeholders in Arlington wish to continue the path to a project developed by Artspace, the next steps are to engage in conversation with the development team, led by Heidi Zimmer, and secure funding for predevelopment.

The Technical Report that follows provides an in-depth breakdown of survey responses and can help drive concept planning regardless of who leads a new space development effort. The data can be shared as evidence of the need for new space and the impact that new space will have on the Arlington community and its creative sector.