ARTSPACE CONSULTING

artspace

ARTS MARKET STUDY

REPORT OF FINDINGS

Photos Courtesy of ShoreLake Arts

AUGUST 2023 // SHORELINE, WASHINGTON

OFFICES: Minneapolis / New York City / Washington D.C.

250 Third Avenue North, Suite 400, Minneapolis MN 55401
P 612.333.9012 F 612.333.9089 ARTSPACE.ORG

ACKNOWLEDGEMENTS

Artspace is grateful to ShoreLake Arts, specifically Quinn Elliott, Tracy Thoreifson, and the entire Arts Market Study Core Group of community volunteers, for their leadership with this project. Success of the Arts Market Study hinged on the commitment and participation of these partners to raise awareness and promote the Creative Space Needs Survey broadly and to welcome all local and regional artists, makers, and creatives into the process.

ARTS MARKET STUDY CORE GROUP:

- Phillip Attipoe // ShoreLake Arts, Board Member
- Quinn Elliott // ShoreLake Arts, Executive Director
- Eric Friedli // ShoreLake Arts, Board Member
- Lorie Hoffman // City of Bellevue, Arts Community Manager
- Jack Malek // Broker, Windermere
- Geoff Ott // London Bridge, Co-owner
- Subhash Ram Prajapati // ShoreLake Arts, Board Member; Ex.Dir., Dabuli; musician
- Tracy Thorleifson // ShoreLake Arts, Co- President, Board of Directors
- Debra Twersky // Arts Administrator, 4Culture (Retired)
- Esther Wu // Executive Director, International Performing Arts, Community Arts Leader
- Crystal YinLing // Theater Puget Sound, Executive Director

FUNDING PROVIDED BY:

ShoreLake Arts (with the help of a generous donor) and The City of Shoreline

TABLE OF CONTENTS

EXECUTIVE SUMMARY

BACKGROUND

In 2021, ShoreLake Arts invited Artspace, a national nonprofit leader in the field of affordable creative space development, to conduct a Preliminary Feasibility Study and evaluate the potential for new long-term, affordable, creative spaces in Shoreline and Lake Forest Park. Participating community and civic leaders shared enthusiasm for a mixed-use affordable artist live/work housing project that would offer ShoreLake Arts an expanded home and create a centralized hub for North King County's creative sector. The study cited rapid area growth, rising property and housing costs, and anticipation of Sound Transit's expansion, among other factors, as an indication of the market potential for such a project and the importance of acting swiftly.

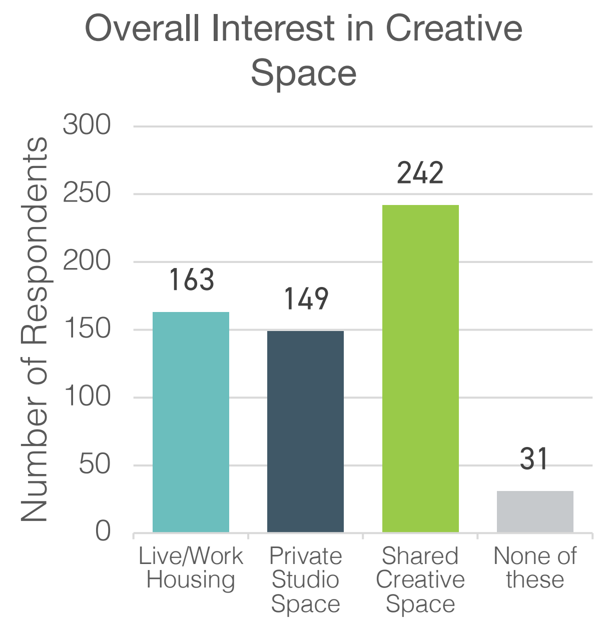
Conducting an Arts Market Study to test the demand for 50+ affordable artist live/work units in Shoreline, among a diversity of North King County and regional creatives, was a recommended next step. ShoreLake Arts, with funding from the City of Shoreline and an anonymous donor, invited Artspace to partner with them to undertake this work. Planning commenced on February 23rd, 2023; the Arts Market Survey itself officially launched online April 27th and closed on June 20th. This report contains the findings from that survey, including estimated demand for artist live/work housing and private studio/creative workspace(s). The types of shared spaces of interest and information helpful to program concept development are also included. Survey methodology and estimated demand is based on Artspace's experience as a developer and expertise in the field, having conducted more than 106 similar studies over the past 20 years to inform our own projects as well as helping others with theirs. More information can be found in the Methodology section of this report. ShoreLake Arts also requested data relevant to their current and potentially expanded programs, and that data is included in the Technical Report. Together, the Summary Report and Technical Report provide the recommendations and data necessary to refine a signature mixed-use project concept and offer supporters an advocacy tool to help grow the support base and attract the funders and partners necessary to advance a project.

SURVEY RESPONDENT PROFILE

SURVEY RESPONDENTS:

There were **395 total survey respondents**, of which a significant number **364 (92%)** indicated an interest in at least one type of affordable creative space (artist live/work housing, private or shared studio/workspace) in Shoreline.

Surveys were completed by a broad group of individuals representing more than 40 creative fields. Most live in King or Snohomish County, with 38% currently and 11% having previously lived in Shoreline. (See page 16 for more location information). Their ages range from over 70 to 20 years or younger. The majority (74%) identify as White (non-Hispanic) and 17% identify as LBGTQIA+. See the Key Findings section of this report (page 16) and the Technical Report (Attachment 1) for more information.



Respondent Race and Ethnicity			City of Shoreline
White (non-Hispanic)	292	74%	*62%*
Asian/Asian American	33	8%	*22%*
Multiracial/Multiethnic	22	6%	*6%*
Hispanic/Latinx/Latino(a)	14	4%	*8%*
Black/African American/Caribbean	16	4%	*6%*
Not Listed	10	3%	*3%*
Indigenous, American Indian, Native Alaskan	7	2%	*.7%*
Northern African/Middle Eastern	1	0%	*N/A*
Pacific Islander, Hawaiian Native, Samoan	0	0%	*.4%*
Total	**395**	**100%**	***104%**

** Source: Esri Community Analyst. City of Shoreline 2021 population by Race/Ethnicity. Persons identifying as Hispanic may be of any race, thus totals result in percentages above 100%*

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting,Drawing,Illustration, Mixed media – **36%**
2. Art Education– **25%**
3. Music – **23%**
4. Crafts / Fine Crafts – **22%**

Note: Respondents could select up to 4 options

CREATIVE SPACE RECOMMENDATIONS

The Arts Market Study reveals strong demand for an affordable mixed-use, artist housing project in Shoreline. Shared Specialized Creative Space was revealed as the respondents' top space of interest and is of interest to the highest percentage of Shoreline resident respondents. Shared space commonly ranks highest of the three types of spaces (housing, studio, and shared) asked about in similar surveys conducted by Artspace. Artist live/work housing demand was also high, just slightly higher than private studio space. A project concept in Shoreline that has live/work housing as a foundational element seems particularly relevant since Artspace frequently finds studio space to notably outrank housing need in suburban communities. Housing would serve current and returning Shoreline artist residents while also attracting new creative talent to the city from the region.

There is more demand for a variety of long-term, private studio spaces (1-year or longer lease) and short-term, shared specialized space than can be reasonably incorporated into a single mixed-use facility, including a ShoreLake Arts operated Art Center on-site. Therefore, **local property owners and developers might consider incorporating private and shared studios and workspace concepts into their existing buildings and new development plans**. Space operators that currently offer studios and shared creative workspace might also plan to expand their programs (or marketing efforts) based on the needs expressed by survey respondents.

With any new creative space planning, attention should be paid to what affordable means to interested members of the creative sector, the size of spaces they need, and what amenities, lease terms, special features, and space configurations they prefer.

The following recommendations are a starting place for planning any of these types of new space initiatives:

ARTIST LIVE/WORK HOUSING AND CREATIVE WORKSPACE RECOMMENDATIONS SUMMARY

- Create up to **60 affordable units of artist live/work housing for households qualifying at or below 60% of Area Median Income (AMI).**
- Add up to **an additional 10 units for those between 60%-80% AMI.**
- Offer a range of affordability options, with **$900-$1,800/mo. prioritized**.
- Prioritize **1- and 2 - bedroom units.**
- Include free shared spaces for residents. Design space to support **studio-arts, teaching/demonstrations, exhibitions, small-scale performance**s, **and rehearsals.**

See pages 17-23 for more information.

- Create up to **32 private studio spaces** in addition to live/work housing.
- Prioritize **small and moderately sized studios** up to **500 SF**. Include a range of sizes. There is small demand for spaces over 1,000 SF.
- **Affordability**: Price most spaces between **$100- $600 gross/mo**. A rule-of-thumb would be $1.00 per square foot/mo., but large spaces will likely need to be under $1.00psf to be considered affordable.
- Design for: **non-industrial studio-arts, exhibitions/presentations, and rehearsals /movement** uses. There is some demand for light-industrial space and classes/workshop uses as well and could also be considered.

See page 24-29 for more information.

For **shared specialized creative spaces**, data supports a first phase of concept planning and financial testing of the following space program types as a priority:

- Teaching/Workshops (general use)
- Rehearsal (dance, theater, music)
- Exhibition or presentation (e.g., gallery, screenings, installations)
- Non-industrial, general-use studios

Shared spaces for exhibitions/presentations and flexible, informal **performance space for at least 50 audience members** is also of interest by many and should be considered. **Shoreline resident respondents have a higher interest in shared, creative space** by percentage than they have an interest in live/work housing or private studio space, underscoring its importance.

See page 30-34 for more information.

INTRODUCTION

BACKGROUND

The Arts Market Study builds upon the Preliminary Feasibility Study (PFS) conducted for ShoreLake Arts by Artspace in 2021. The PFS findings supported taking next steps toward a mixed-use, affordable live/work housing facility that would provide a home for ShoreLake Arts and offer new workspace for North King County's under-served creative sector. It was recommended that one of those steps be the Arts Market Study to quantify demand and space preferences among a broader regional group of individual artists. This would test the assumption that a mixed-use, affordable, artist housing development of 50+ live/work dwelling units plus private and shared creative workspaces would have sufficient demand and be a good fit for Shoreline. In this proposed project concept, ShoreLake Arts would be the facility's anchor nonprofit, effectively operating an Arts Center and ideally offering some of the non-residential workspaces needed by area artists, in addition to expanding its own operations and programming.


PRELIMINARY FEASIBILITY REPORT
Shoreline & Lake Forest Park, WA | November 2021
Photo Credit: Artspace
ARTSPACE CONSULTING
SHORELAKE ARTS
Prepared at the request of ShoreLake Arts

An online survey for individuals was launched on April 27, 2023, with survey promotion led by ShoreLake Arts and a Core Group of community volunteers. The objectives of the survey and resulting data were to:

- Reveal how a new facility and new space in Shoreline might best **serve the needs of the local creative sector.**
- **Inform ShoreLake Arts'** new space vision and concept plan.
- **Encourage** other **new creative space** developments in Shoreline.
- Offer useful data for **space advocacy efforts and exciting prospective funders and partners.**
- **Identify potential future residents, renters, and users of new space.**

This Report of Findings includes data-driven recommendations for new spaces, best practices in creative space design, a summary of key data points as well as information about the survey promotion efforts and the survey's research methodology. The deeper dive Technical Report contains a fuller picture of the data in one easy to read document and is an essential resource to those developing new space.

ARTSPACE AS CONSULTANT AND DEVELOPER

With more than 50 facilities in its portfolio, Artspace is the nation's leading nonprofit developer and owner/operator of affordable space for artists and creatives. Its consulting division advances its own projects and assists others with theirs by assessing project concept feasibility and creative sector space needs and estimating market demand for those spaces. The work of Artspace Consulting is informed by the practical expertise earned over 40+ years. Artspace owns and operates the projects it develops, delivering on community goals for long-term affordable creative spaces; primarily live/work housing, work-only/studio spaces, and commercial space leased affordably to local creative businesses and arts/cultural nonprofits. Its feasibility and market study methodologies were developed to service the advancement of financially self-sustaining projects that respond to a local need and community goals. More information about Artspace can be found at Artspace.org and more information about survey methodology can be found on page 12.

THE SURVEY OF INDIVIDUAL ARTISTS

There were **395 total respondents** to the Arts Market Study, Creative Space Survey, of which a significant number **364 (92%)** indicated an interest in at least one type of affordable creative space in Shoreline.

The survey specifically asked about respondents' interest in the following space options, if available and affordable to them in Shoreline:

1. Live/Work housing (relocate to space designed for artists and their families to live and work), referred to as "**live/work housing**" in this report.

2. Private studio or creative workspace (1-year lease minimum), referred to as "**private studio**" in this report.

3. Shared, specialized creative space (accessible through a paid membership or short-term rental). Referred to as "**shared creative space**" in this report.

In addition to space interest, respondents were asked a series of questions about their:

- Art/Creative/Cultural work
- Current creative workspace & housing situations
- Preferences for their space(s) of interest
- Demographic information
- Ideas for the proposed project, including ShoreLake Arts' Arts Center space

The responses to these inquiries informed the recommendations in this Report of Findings which contains truncated data charts. The full data is detailed in the Technical Report.

HOW TO USE THIS REPORT

THE INTENDED AUDIENCE

The recommendations and accompanying data are designed to help ShoreLake Arts refine its **vision** for a **creative space facility in Shoreline, grow its support base, and attract the funders and partners necessary to advance a project.** The information is also intended for independent use by **real estate developers**, **property owners**, **and entrepreneurs** who are interested in developing or operating creative space and/or artist housing and want to better understand the market, including what individual artists need and can afford to pay for new space. The design guidelines (pages 34-38) and the Technical Report Attachment will be particularly useful for early conceptual planning work and financial modeling of new space concepts.

Advocates for the local arts community in **Shoreline** can use this information as evidence of the demand and ability of individuals to pay for new space that meets their unique needs. This, in turn, can help local leaders in Shoreline confidently invest in and move space-related projects and programs forward.

SURVEY METHODOLOGY

The Creative Space Survey was built and responses were collected using the Alchemer online platform. It was open online for approximately 9 weeks (April 22 through June 20, 2023) and accessible through a dedicated webpage, **ShorelineArtistSpace.org**, that also contained background information about the proposed space initiative and survey instructions. A soft launch began with limited distribution on April 22nd, followed by full promotion beginning on April 27th.

Artspace relies on local partners to promote the survey and to encourage robust participation by a diverse and representative group of regional creatives. Artspace provided weekly response counts and aggregated demographic data to aid promotion strategy, particularly to reach underrepresented artists. It also notified artists on waitlists within its regional portfolio of projects. The survey promotion campaign was led by ShoreLake Arts and the Market Study Core Group of volunteers who used a variety of strategies, including distributing printed assets, sending emails, and sharing on social media. They leaned on their networks to help spread the word, excite local creatives about the idea of new space, and impress upon them the importance of taking the survey. The survey was extended for two weeks from its original closing date to take advantage of community events and reach more creatives.

The 395 survey respondents indicated that they heard about the survey through the following means:
Note: Respondents may have selected multiple options

The emphasis on personal invitation rather than social media is notable. Frequently, social media garners the most response to similar surveys conducted in large metro regions.

- Email invitation – 184 (44%)
- Friend/Colleague – 86 (21%)
- Social media – 69 (17%)
- In-person meeting/event – 29 (7%)
- Poster or flyer – 22 (5%)
- Other, please specify – 12 (3%)
- A website – 10 (2%)
- Virtual meeting/event – 4 (1%)
- Postcard/Mailer – 1 (0%)
- News media – 0 (0%)

Following is a sampling of the broad local and regional outreach and promotional efforts conducted by ShoreLake Arts and the Core Group.

- **Traditional Media Coverage**
  - Press release in English sent to ShoreLake Arts' press list and board and staff.
  - Press release in Spanish sent to Spanish-language media outlets.
- **Social Media/Online Presence**
  - Posts to the Facebook and Instagram accounts of ShoreLake Arts, Core Group members, and other supporters, as well as relevant Facebook groups
  - Nextdoor posts
  - ShoreLake Art's website
  - City of Shoreline Public Art and main social media accounts
- **Public Event Booth/Table Presence**
  - Shoreline's Juneteenth event
  - Pride at the Shoreline Farmer's Market
  - Glimpse of China
  - SIFF at Shoreline Community College
  - Shoreline Short Short Film Festival
- **In Person Outreach**
  - Local and regional businesses, including Shoreline and Lake Forest Park Farmers Markets (makers/crafters), Schack Artists Garage Sale, Folklife, Edmonds Studio Tour, and Seattle Chinese Arts Group
- **Print Collateral Drops**
  - 120 locations in Shoreline, Lake Forest Park, North Seattle, Edmonds, Mountlake Terrace, and Kenmore.
- **Email and Phone Outreach**
  - Core Group members reached out to their personal and professional networks, contacting individual artists and community leaders about the survey.
  - Additional artists contacted directly included participants in the Preliminary Feasibility Study focus groups, 4-Culture's rotating artists, Dia LatinX art show artists, King County food truck operators, Sorticulture, and ShoreLake Arts' contact list.
  - Local and regional organizations and civic bodies were asked to share with their networks including King County Council, United Indians of All Tribes, Washington State Arts Commissions, Shoreline and Lake Forest Park City Councils, Historical Society, Cascadia, 4-Culture, Robert Lang Studios, Spartan Recreation Center, Red Sky Gallery, Seattle Office of Arts & Culture, Seattle Shakespeare, Bookit, Folklife, and North Seattle Community College Continuing Education.

CREATIVE SPACE SURVEY
shorelineartistspace.org

Exploring affordable housing and workspace for creatives in Shoreline

Take the Survey

SURVEY DISCLAIMER

The survey respondents are a “sample of convenience,” a non-probability sampling method. While believed to be grossly representative of the target population (artists, makers, and other creatives living in/around Shoreline), generalization of the findings to these broader populations cannot be made. It is not anticipated that the respondents who express interest in space will necessarily be the same creatives who would rent new space if available.

The respondents are demonstrative for a need in a healthy, stable, creative market, and data is considered relevant for up to five years. Because of the non-random nature of the sample the data reported includes only descriptive statistics. The total responses included in this report are all completed survey entries, and do not include any apparent erroneous or duplicate responses, which were removed. Due to the nature of data collection and the bounds of confidentiality, the analysts at Artspace cannot eliminate the possibility of duplicate survey responses.

Artspace received reports about difficulties a statistically insignificant number of people had taking the survey. Alchemer’s technical support team investigated reported issues thoroughly. Based on significant survey testing it is not believed any problems were the result of an Alchemer technical issue. Given the nature of online survey systems occasional technical issues may prevent respondents from taking or completing surveys.

Data that is not statistically relevant due to low response numbers are omitted from this report. Small group differences or percentages should be interpreted carefully by readers of this report. Statistical analysis of the data was conducted via SPSS Statistics software and Microsoft Excel. Verbatim and supplemental materials, including contact information provided by respondents for the purpose of receiving information they requested, have been provided to ShoreLake Arts.

ARTSPACE DEMAND INTERPRETATION DISCLAIMER

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 the feasibility of new space. Marketability of new space is contingent upon the delivery of a product appropriate to the identified needs and preferences of the arts market.

Survey respondents could select multiple types of spaces they were interested in, and duplication of interest is possible. However, Artspace's overall recommendations are conservative to account for artists potentially overestimating their capacity to pay for the spaces in which they express interest. When determining demand, we consider the priorities of respondents who expressed interest in multiple types of space; for example, artist housing AND private studio space or private studio AND shared creative space. We asked whether they would prefer one type of space over another or if they preferred to lease multiple space types at one time. Artists may also have indicated a willingness to share private studio space, thereby potentially reducing demand. Artspace conducted a similar survey for Bellevue in 2021. Only 12 (3%) of Shoreline survey respondents said they had previously expressed interest in artist housing or workspace(s) in Bellevue. This is not considered significant enough to impact the estimated demand for space in Shoreline.

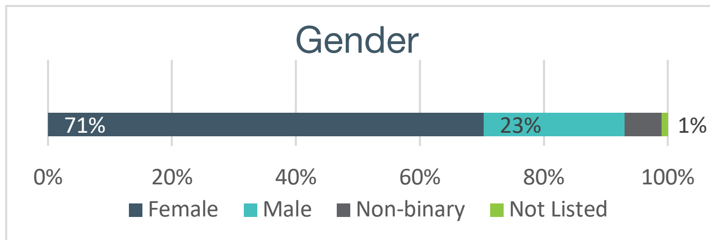
The successful development and operation of specialized, non-residential shared creative space relies upon local entrepreneurs, non-profits, municipalities, and/or creative businesses who can operate new spaces sustainably. Rarely is the developer also the programmer. Those who wish to offer the types of specialized creative spaces and uses that are of interest to respondents should review Section IV of the Technical Report for more information about the unique space needs identified in this study.

Artspace has conducted over 95 Arts Market Surveys across the country, reaching more than 42,000 artists. The experience and lessons learned from surveying artists and creatives around the country play heavily into the market considerations, assumptions, and recommendations in this report.

The primary focus of this report is on the **364 (92%) individual survey respondents who indicated an interest in at least one type of affordable, creative space in Shoreline, WA.** They are frequently referred to as "artists" in this report. They mostly own their housing; earn some income from their art/creative work; live in the region; are female-identifying; white (non-Hispanic); age diverse; and currently have space at home for creative work or they rent space separate from their housing.

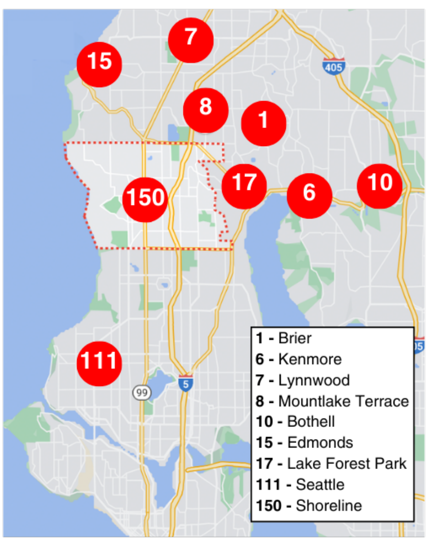
WHO ARE THE 364 RESPONDENTS?

SELF-IDENTIFY AS:



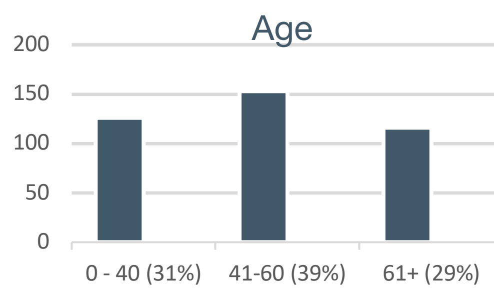
LOCAL & REGIONAL RESIDENTS

NUMBER OF RESPONDENTS BY CITY



218 (55%) Own their homes

292 (74%) White (non-Hispanic)
33 (8%) Asian/Asian American
22 (6%) Multiracial/Multiethnic



CURRENT SPACE SITUATION

- 55% Own their living space.
- 14% Rent/own studio/workspace.
- 49% Creative workspace is in their home.
- 32% Don't have the creative space they need.

(Data is sourced from separate survey questions and does not total 100%)

CURRENT INCOME FROM CREATIVE WORK

- 32% earn **NONE**
- 26% earn **up to 10%**
- 18% earn **76-100%**

(Data is a selective summary of key statistic. Refer to the Technical Report/Attachment I for the full charts and data)

ARTIST INTEREST IN:

HOUSING

The information on the following pages is solely about the **163 respondents** interested in live/work housing in Shoreline.

Compared to respondents not interested in live/work housing**,** individuals in this subgroup are younger, more diverse (ethnic, LGBTQIA+, and gender identity), and fewer live in Shoreline (while still living in the region). More earn some income from their creative work, rent their housing, and say they do not have the space they need for their creative work.

163 (41%) ARE INTERESTED IN LIVE/WORK HOUSING

65 (16%) ARE ONLY INTERESTED IN LIVE/WORK HOUSING

Definition: Artist Housing

In the Artspace "live/work" model, residential space has a flexible floorplan with wide open areas and private rooms to accommodate living, creative work, and families. Spaces may be larger with higher ceilings than a typical dwelling unit. Durable surfaces support a variety of artistic mediums, and artist-friendly design, amenities, and management policies set projects apart from other workforce housing. Shared, flexible-use creative spaces are included for free use by residents for exhibitions, collaborations, rehearsals, music practice, etc.

45% ARE 40 YEARS OR YOUNGER

39% ARE OVER 50 YEARS OF AGE

66 (40%) DON'T HAVE THE CREATIVE SPACE THEY NEED

DEMOGRAPHICS

40 (25%) LGBTQIA+
21 (13%) require accessibility adaptations to their housing
108 (66%) White (non-Hispanic)
16 (10%) Multiracial/Multiethnic

HOUSING TENURE

- **116 (71%)** Currently rent/lease their living space, compared to 40% of total survey respondents
- **39 (24%)** Own their home
- **8 (5%)** Neither rent nor own

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing/Illustration/Mixed media –35%
2. Music – 26%
3. Art Education or instruction – 22%
4. Writing & Literary arts – 21%

(Note: Respondents could select up to 4 options)

HOUSEHOLD COMPOSITION

- One-person – 60 (37%)
- Two-person – 48 (29%)
- Three-person – 22 (13%)
- Four or more – 33 (20%)
- Have children (under 18) – 43 (26%)

FINANCING FOR AFFORDABLILTY

Artist housing is developed using financing models that serve specific project concepts and goals of the developer. ShoreLake Arts expressed interest in a project concept that aligns with the Artspace approach and therefore the survey was designed to understand whether a multi-family, workforce housing financing model is appropriate to the market. To keep housing affordable and financially self-sustaining, Artspace secures public and private resources. A primary public funding tool is the Federal Low-Income Housing Tax Credit (LIHTC) program, which drives private equity investment to capitalize projects. The U.S. Department of Housing and Urban Development (HUD) regulates this program. It uses the local median income as a reference point for setting annual income limits for households and determining the maximum monthly rents that can be charged. HUD also sets "utility allowances" that effectively reduce rents further and ensure that residents don't pay more for their housing than they can reasonably afford. These limits change annually. The 2023 HUD published maximum household income for those earning 60% or less of the Area Median Income (AMI) in King County, and the corresponding rental rates are in the following table. Some funding programs allow a maximum of 80% AMI. Those limits are also included. Rents are expressed by month, while income maximums are annual.

2023 HUD Income and Rent Limits for LIHTC Projects in King County

Household Size	Income Max (30% - 60% AMI)	Income Max (80% AMI)		Bedrooms	Max Rent (30% - 60% AMI)	Max Rent (80% AMI)
1	$28,770 - $57,540	$76,720		Efficiency	$719 - $1,438	$1,918
2	$32,880 - $65,760	$87,680		1-bedroom	$770 - $1,541	$2,055
3	$36,990 - $73,980	$98,640		2-bedroom	$924 - $1,849	$2,466
4	$41,100 - $82,200	$109,600		3-bedroom	$1,068 - $2,137	$2,850

Source: Novogradac & Co. Rent and Income Calculator; Novoco.com, 2023
$146,500 – 4 person median household income for King County (source: Novoco/HUD 2023)

According to the reported incomes and household sizes of interested artists, **111 (68%) qualify for housing targeted to households earning 60% or less of AMI**. A much smaller 19% (31) would exceed these limits entirely but qualify for workforce housing

35% of interested artists would qualify at 30% AMI. (See lowest rents and incomes on the previous chart.)

at up to 80% of AMI if funding were identified to make this possible. Another 13% would not qualify under this program.

This data demonstrates that **a live/work project in Shoreline, financed with LIHTC and other affordable and workforce housing sources like those identified in the Preliminary Feasibility Study report, is a reasonable strategy to serve local and regional artists.**

73% of interested artists earn income from art/creative work. **24%** earn more than **50%** of their income from creative pursuits.

Income by Household Size for Respondents interested in live/work housing

Annual Household Income	1	2	3	4 or more	Total	Income Qualify 30% AMI	Income Qualify 60% AMI	Income Qualify 80% AMI
Prefer Not to Answer	3	0	2	2	7	0	0	0
Under $10,000	5	0	1	1	7	7	7	7
$10,000 - $15,000	9	2	0	0	11	11	11	11
$15,001 - $20,000	4	3	3	0	10	10	10	10
$20,001 - $25,000	4	5	2	1	12	12	12	12
$25,001 - $30,000	5	3	1	4	13	13	13	13
$30,001 - $35,000	9	1	1	0	11	2	11	11
$35,001 - $40,000	4	3	0	0	7	0	7	7
$40,001 - $45,000	2	1	0	2	5	2	5	5
$45,001 - $50,000	0	2	0	1	3	0	3	3
$50,001 - $55,000	3	3	1	1	8	0	8	8
$55,001 - $60,000	4	5	0	2	11	0	11	11
$60,001 - $65,000	2	3	2	1	8	0	6	8
$65,001 - $75,000	1	4	4	1	10	0	5	10
$75,001 - $85,000	1	3	1	2	7	0	2	7
$85,001 - $100,000	4	4	0	5	13	0	0	9
$101,000 - over $400,000	0	6	4	10	20	0	0	10
						0	0	0
Total	**60**	**48**	**22**	**33**	**163**	**57**	**111**	**142**
% of respondents who income qualify for 30% AMI								**35%**
% of respondents who income qualify for 60% AMI								**68%**
% of respondents who income qualify for 80% AMI								**87%**

AFFORDABLE RENTAL RATES AND UNIT MIX

Max Amount Willing to Pay for Rent on a Monthly Basis		
Max Monthly Rent	**Total**	
	#	**%**
$400	15	9%
$500 - $600	11	7%
$700 - $800	14	9%
$900-$1,000	23	14%
$1,100 - $1,300	27	17%
$1,400 - $1,500	19	12%
$1,600 - $1,800	23	14%
$1,900 - $2,100	17	10%
Over $2,200	14	9%
Total	189	100%

Respondents were asked the maximum amount they would consider paying monthly for live/work housing. Over one-third (33%) would consider $1,500 or more affordable.

Rents for new live/work housing should be set no higher than what responding artists say they can pay.

This chart suggests that a wide range of rents is appropriate in Shoreline, with demand being greatest for housing that is $900 to $1,800/month. Using the LIHTC program can help to achieve this. Some units in live/work projects should be set aside for households at or below 30% AMI, but most can be in the 50% to 60% range and still align with what respondents say they can pay.

RESPONDENTS' HOUSEHOLD SIZE (x) UNIT MIX

- 96 (58%) 1 - 2 person households need 1 or 2 bedrooms.
- 21 (13%) 3 + person households need 3 or 4 bedrooms.

These new live/work housing units should also primarily be a mix of one- and two-bedroom units. LIHTC (and other affordable housing programs) restrict household size relative to a unit's bedroom count. For example, a one-person household may not be allowed by HUD to rent a three-bedroom unit.

DEMAND FOR LIVE/WORK ARTIST HOUSING

Artspace estimates that **up to 60 housing units is the demand for a 30% - 60% AMI-targeted artist live/work project in Shoreline.** If funding is available to include units for households between 60% - 80% AMI, 10 more units would be reasonable to add. This is a conservative estimate given the large metro area and high cost of housing. If there had been more respondents to the survey, greater demand may have been revealed. Continued outreach is recommended to engage new artists in the discussion about artist housing. This action along with collecting contact information for new artists expressing interest in space will help maintain the relevancy of the demand findings over time and may help demonstrate a larger need than evidenced by the results of this study.

The discount methodology used to calculate estimated demand is described below. It accounts for the many factors that can impact that demand.

Artist Housing Demand in Shoreline				
Factor	**Count**		**Discount Multiplier**	**Discounted Number**
	#	%		
Total Interested Artists	163	100%		
Incomes between 60% - 80% AMI	31	19%	**100**	**31**
Incomes over 80% AMI	14	9%	**100**	**14**
Incomes not reported	7	4%	**1/2**	**4**
Current homeowners	39	24%	**1/2**	**20**
Have never lived in Shoreline	98	60%	**1/4**	**25**
Households with more than one survey respondent ("yes" and "unsure" responses)	57	35%	**1/8**	**7**
Current full-time students	7	4%	**1/4**	**2**
Est. Market Support 30% - 60% AMI	**60 units**			**(103)**
Est. Market Support 60%-80%	**An additional 10 units**			

DISCOUNTS EXPLAINED:

- **Income Qualification:** Sixty-eight percent (68%) of interested respondents reside in households whose income qualifies between 30% and 60% AMI, which is a strong indicator of the need for affordable housing. Incomes provided by respondents are unverified, and future housing applicants would have their income verified. No discount has been assigned to this sub-group. Those that indicate incomes above 60% have not been included in the calculation. If funding sources support up to 80% AMI, there is some limited demand for those spaces, as well.
- **Homeownership:** 39 (24%) currently own their homes. These artists may be less likely to relocate to a rental situation; thus, demand was discounted by 1/2.
- **Relocation:** 60% (98) have never lived in Shoreline. While most do live in the region and are likely familiar with Shoreline, Artspace assumes that respondents

outside of a subject city or region may overstate their interest in relocating and discounted this by 1/4.

- **Duplication:** 31 (19%) indicated someone else in their household was also taking this survey and expressing interest in live/work housing, and 26 (16%) were unsure. There is a strong possibility of double or even triple counted interest if the households intend to stay intact upon relocation. If households are primarily made up of roommates for convenience, it may not. A discount of 1/8 was applied.
- **Student Interest:** 7 (4%) are currently full-time students, and their household incomes and compositions are likely to change post-graduation. With that in mind, demand was reduced by ¼.

OTHER NON-QUANTIFIABLE FACTORS

- **Overstatement of Interest:** Enthusiasm for new space and the project concept may influence an affirmative response but not result in actual relocation or represent true demand.
- **Rental Affordability:** Residents would have to consider LIHTC rents affordable, which is based upon paying up to 30% of one's income in rent annually. For many, this can be seen as a high amount to spend on housing. Housing units must be priced affordably for the market (including utility allowances) regardless of the HUD maximum allowable rents.
- **Drop off:** A development can take years to come together; the identified market demand is generally reliable for up to five years, barring any significant changes to the local creative population or the city/neighborhood.
- **Future Household Composition Changes:** Respondents' household compositions may change during the project development phase, and some respondents may no longer be eligible or interested. However, the survey methodology assumes that respondents are representative of need and interest, rather than being the specific household that would relocate in the future.

The design of space and other development decisions (location, amenities, etc.) may impact leasing, and the effect of such decisions is not considered in this calculation. Similarly, communities are not static and infrastructure investment including light rail, incentive programs to attract creatives, changes to the economy or the political landscape are examples of things that may impact the natural growth or decline of the creative sector and artist housing need. The market is only one factor that shapes a project concept. **A project development team may choose to increase or decrease a final unit count after a review of all project feasibility factors.**

PROJECT CONCEPT AND SPACE DESIGN

SHARED SPACE

A future artist live/work housing project should include free, common-use space(s) that serve the unique needs of its creative residents. The adjacent chart summarizes how shared space would be most used by interested respondents. Designing and outfitting flexible-use space(s) for the described uses is recommended. To optimize the income-generating potential of activities like teaching or exhibitions locate space in an area of the building not funded by LIHTC (or other affordable housing sources), which restricts commercial activity. For example, ground floor commercial space rented to a nonprofit like ShoreLake Arts or to a creative business that will operate the space(s) and programs of interest and make them available and affordable to the residents and other artists.

How Shared Space Would Be Most Used

- Studio-art work – **76 (47%)**
- Teaching/Demonstrations – **65 (40%)**
- Exhibitions/Gallery showings – **61 (37%)**

Other design considerations are explored on page 34; including some or all of these into a future development is important to space marketability. More information can be found in the Designing Artist Spaces section of this report (pages 34-38).

ARTIST INTEREST IN:

PRIVATE STUDIO SPACE

The following statistics are about the **149 respondents** interested in private studio or creative workspace (1-year lease minimum).

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149 (38%) ARE INTERESTED IN PRIVATE STUDIO SPACE

66 (44%) INTERESTED IN BOTH PRIVATE STUDIO SPACE & ARTIST HOUSING

79 (20%) INTERESTED IN ONLY PRIVATE STUDIO SPACE & NOT HOUSING TOO

Definition: Private Studio Space
Space designed for the creation or practice of art (e.g., for visual arts, performing arts, or other creative workspace needs). This space is not code-compliant for residential use but may be in a building that includes residential space. Space is rented on a long-term (annual lease) basis.

CURRENT SPACE SITUATION

- **74 (50%)** have studio/workspace within the home.
- **48 (32**%) don't have the space they need.

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing/Illustration/Mixed media – **41%**
2. Music – **23%**
3. Crafts or Fine crafts – **23%**
4. Art education or instruction – **22%**

(Note: Respondents could select up to 4 options)

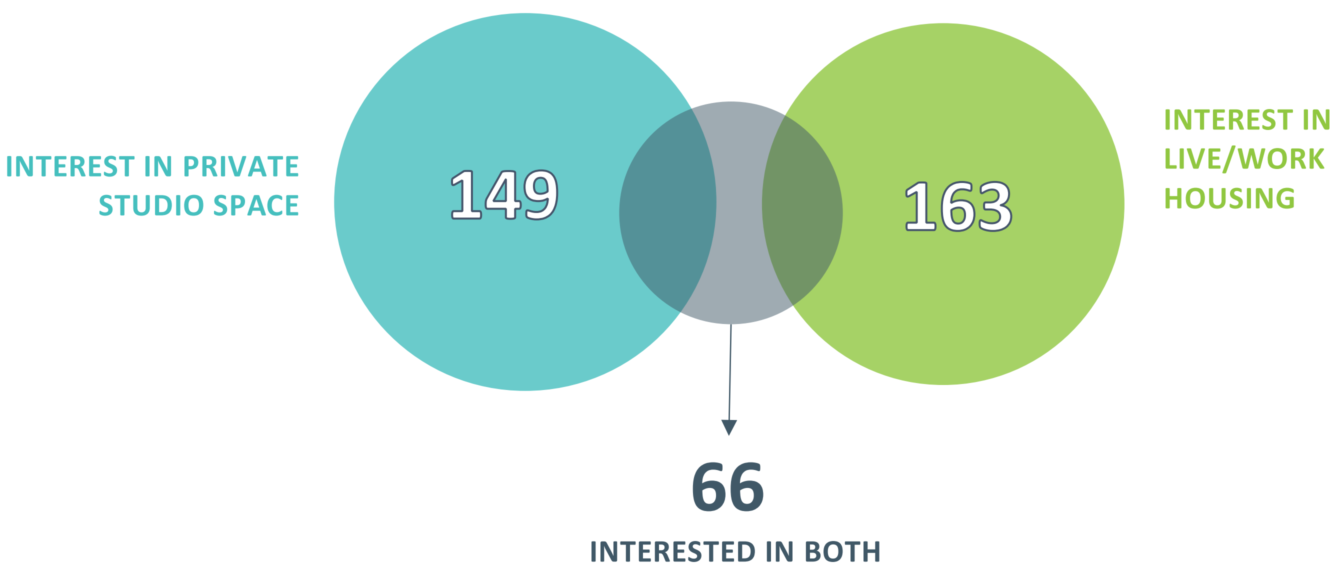
22 (15%) rent or own studio space separate from housing.

16 rent that space on ongoing basis and, 13 pay $301 or significantly more per month. It's a small sample but does offer some insight into the cost of space.

DEMAND FOR PRIVATE STUDIO SPACE

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. This space can be rented by a small creative business or individual artist for the creation or sale of their art or product. This space can be an interior space, a storefront, or located on the upper floor of a building. What is important is that the configuration, design, amenities, attributes, zoning, location, lease term, and cost align with the renter's needs.

When calculating the demand for private studio space, Artspace uses the total number of respondents interested in private studio space (149) and discounts for certain factors, including interest in multiple space types and the likeliness that they will share space with another artist. In Shoreline, 79 (20%) want studio space and not artist housing too, while 66 (44%) want both. 33 (22%) are interested in **only** private studio space and no other type of space.



46 (66%) PREFER TO RENT PRIVATE STUDIO & LIVE/WORK HOUSING AT THE SAME TIME

RECOMMENDATIONS FOR PRIVATE STUDIO SPACE

Artspace estimates that there is **demand for up to 32 private studio spaces.** This is in addition to live/work housing and shared creative space. **For greatest marketability of long-term rentals, spaces must be affordable and respond to the preferences described in this study.** Because 33 creatives want only private studio space and no other type of space, there is a strong opportunity for ShoreLake Arts and other operators to incorporate private studio spaces into their programs.

Private Studio Space Demand for Shoreline				
Factor	**Total Interested Artists Count**		**Discount Multiplier**	**Discount # (Total Interest)**
	#	**%**		
Total Interested Artists	149	100%		
Currently have some type of workspace	101	68%	1/8	13
Have never lived in Shoreline	80	54%	1/3	27
Prefer shared space scenario	8	9%	100	8
Would "definitely" share private studio space	42	28%	3/4	32
Prefer L/W scenario	11	16%	100	11
Unlikely to pay min. $1/SF	52	35%	1/2	26
Est. Market Support	**Up to 32 studio spaces**			(117)

DISCOUNTS EXPLAINED:

- **Sustainable Rental Rates:** Typically, workspace needs to be rented at $1.00/square foot or more to be financially self-sustaining. A majority 97 (65%) of interested respondents indicate an ability to pay $1.00/square foot or more. A discount of ½ is applied to those who cannot.

- **Interest In Both Live/Work Housing and Private Studio Space:** Respondents who are interested in both live/work housing and private studio space were specifically asked whether they would prefer to rent one or the other or both simultaneously. Sixty-six percent (66%) of those 46 respondents said they would prefer to rent live/work housing AND private studio space at the same time. Eleven (16%) indicated they would prefer only to rent live/work housing. Since the Project Concept we are testing includes live/work housing, we have discounted those 11 entirely. Overlapping interest in Shared Creative Space has been discounted likewise.

- **Currently Have Workspace:** While the workspace that some currently have may not be adequate or may be temporary, we assume that simply having access to workspace may lessen the urgency for some to lease new space. It also suggests that since there are other workspace options, if new space does not satisfy an artist's unique needs, it will be less marketable. We have applied a discount of 1/8th.

- **Have Never Lived in Shoreline:** Over half (54%) of the interested artists do not currently or have never lived in Shoreline. While most do live in King or Snohomish Counties, and we assume they are familiar with Shoreline and have accounted for commuting time to new studio space (or are perhaps factoring a household move to Shoreline), there is the chance that the interest is overstated by those outside of the city. A 1/3rd discount is applied.

MARKET VOLATLITY CONSIDERATIONS

Artspace's demand calculation is conservative. It attempts to account for the many factors that can impact an individual's decision to rent long-term private studio space, including fluctuating income and other economic factors that may lead artists to cut costs by sharing workspace or renting space only as needed. Unlike housing, studio space is not essential space. It is a more volatile investment for funders, property owners, and developers. That means it's critical to offer a diverse mix of private studio options and match not only affordability but amenities and space features with the needs and preferences revealed by this survey. The following sections dive more into this. While not a focus of this study, consideration should also be given to the potential market impact of many development decisions including location (for example proximity to light rail and visibility to the public), onsite or nearby parking, and mix of building uses and tenants.

STUDIO SIZES & RENTAL RATES

Understanding what interested respondents can afford to pay monthly and how large a studio they need is critical to marketable and financially self-sustaining space. The following table from the Technical Report provides a summary of this information.

97 respondents out of 149 are willing to pay at least $1.00/SF per month for their private studio space. That amount is shaded in gray in the table below.

The highlighted section in the following chart shows those respondents who are willing to pay at least $1.00/SF per month for their private studio space. For example, there are 17 respondents who want up to 200 SF of space and are willing to pay $100 - $200 per month.

Count of Max/SF to Sq Ft at $1.00/SF or more per month	Under 100 SF	100 - 200 SF	201- 300 SF	301 - 400 SF	401 - 600 SF	601 - 800 SF	801 - 1,000 SF	1,001 - 2,000 SF	Over 2,000 SF	Not Sure	Total	Total at $1.00/SF per month
$1-$99	2	9	0	0	0	0	0	0	0	1	12	2
$100-$200	5	17	8	3	3	0	5	0	0	2	43	22
$201-$300	2	12	3	2	3	0	0	0	0	1	23	17
$301-$400	3	6	6	3	3	0	1	1	0	0	23	18
$401-$600	1	7	2	2	6	2	2	0	0	0	22	18
$601-$800	0	2	3	2	2	0	2	0	0	1	12	9
$801-$1,000	1	2	1	1	2	1	0	2	1	0	11	8
$1,001-$2,000	0	0	0	0	0	0	2	1	0	0	3	3
More than $2,000	0	0	0	0	0	0	0	0	0	0	0	0
Total	**14**	**55**	**23**	**13**	**19**	**3**	**12**	**4**	**1**	**5**	**149**	**97**
Total at $1.00/sf per month	**14**	**46**	**15**	**8**	**10**	**1**	**2**	**1**	**0**		**97**	
%	**100%**	**84%**	**65%**	**62%**	**53%**	**33%**	**17%**	**25%**	**0%**		**65%**	

Based on the data and the summary statistics, a draft program plan for up to **32 private studios** should consider spaces of varying sizes and price points. For example:

- **15 studios up to 200 SF**
- **9 studios 300 – 400 SF**
- **5 studios 600 – 800 SF**
- **3 studios 1000 – 2000 SF**

Rents between $100 and $600 gross per month will be marketable to a majority of interested artists (75%)

MOST REQUESTED PRIVATE STUDIO SIZE*

- 83% (124) would be served by **up to 500 SF**.
- 75% (93) could pay a sustainable rent.
- **52% served by 100-300 SF**

**A variety of sizes are needed.*

Rule of thumb is **$1.00 SF, especially for mid-size spaces** for a financially self-sustaining program. This rate may not be affordable to all artists who need large spaces, however.

When planning studios that are 1,000 square feet or larger, or more than $600/month, Artspace recommends pre-leasing, collecting letters of interest, and/or developing a waiting list before construction.

Most of those who rent studio space separate from housing and want a new studio, currently **pay over $500/mo. for their space.**

**This is a very small subset but offers some sense of the current cost of space.*

STUDIO DESIGN AND FEATURES

Respondents are interested in private studio space for conducting a variety of activities. How space will be used impacts the construction, amenities, features, and even zoning of that space. **Developers interested in building private studios are encouraged to consider how artists intend to use their studios when concept planning.** Most respondents need non-industrial and low-impact workspace, and nearly one-third want it to be accessible to the public for exhibitions and presentations. Some may be interested in light-industrial space for uses not compatible with residential zoning (or that would require specialty construction such as higher fire-rated walls). More information can be found in the Designing Space Best Practices section of this report (pages 34-38).

Private Studio Activities

- Studio-arts, non-industrial – **90 (60%)**
- Exhibiting or presenting – **42 (28%)**
- Rehearsals or movement – **30 (20%)**
- Light industrial – **29 (19%)**
- Classes or Workshops – **29 (19%)**

**Respondents may have selected multiple options.*

ARTIST SURVEY INTEREST IN:

SHARED CREATIVE SPACE

The following statistics are about the **242 respondents** interested in shared, specialized creative spaces accessed through a paid membership or short-term rental. High demand for shared space is a common national Arts Market Study finding.

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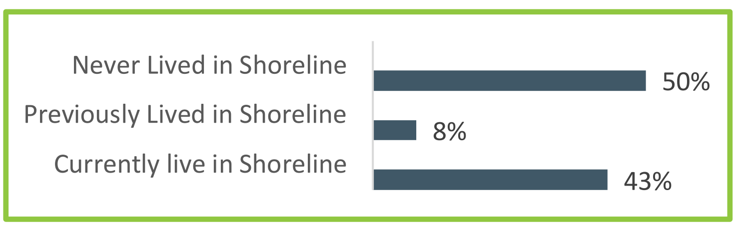
242 (61%) ARE INTERESTED IN SHARED CREATIVE SPACE

122 (31%) ARE ONLY INTERESTED IN SHARED CREATIVE SPACE

Definition: Shared, Specialized Creative Space

Space that may be available through a paid membership (e.g., makerspace or co-working space model) or rented for a fee on an hourly, daily, weekly, or another short-term basis. Space may be available for a single renter's exclusive use during the rental period (e.g., film-screening room or classroom) or shared with others at the same time (e.g., ceramics, jewelry, glass studio or dark room). Some spaces may include equipment (e.g., woodworking tools, 3D printers, computers with design software, kilns, torches for metalworking, etc.) Classes or training may also be incorporated into the overall space program.

RESPONDENT LOCATION (SHARED CREATIVE SPACE)



47% of artists interested in Shared Creative Space who live outside Shoreline, live in **Seattle.**

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

Painting, Drawing, Illustration, Mixed media - **33%**

Art education or instruction – **26%**

Music – **25%**

Crafts or Fine Crafts – **24%**

**Respondents could choose up to 4 options.*

INTEREST IN SHARED CREATIVE SPACE

Shared creative spaces and associated programs found in the market nationally (including within Artspace's projects) are often offered to artists through an operator who has leased space for that purpose. *Collaborative space models* which can serve this need include co-working or makerspaces designed for specific uses such as ceramics, retail, desktop arts, or woodworking. *Private short-term rental* examples include recording, rehearsal or general-use studios, or a classroom. 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 long-term. Shared creative space can exist in the context of a multi-use facility or independently.

With 248 (57%) of total respondents interested, it is the most preferred space type in this survey. Notably, Shoreline resident respondents have a higher interest in shared, creative space by percentage than they have an interest in live/work housing or private studio space. This indicates the importance of creating shared spaces to serve residents. Whether or not demand is sufficient to create new space(s) depends on the future operator's business plan. That plan will account for the level of interest in the space as identified here, the cost of equipment and operations, and what user fees and arrangements the market can bear for unique space. Those who currently operate space that address the needs identified, should to the extent they exist in shoreline, be the first to consider expansion or new marketing efforts to reach the interested artists.

SHARED CREATIVE SPACE NEEDS

Interest in new shared space is as varied as the industries in which the respondents are involved, but there is some correlation between those top-reported industries and the top types of spaces respondents are interested in. **The shared spaces of greatest interest are summarized here, but Section IV of the Technical Report contains the full list and should be reviewed by anyone who wants to create new space.**

MOST PREFERRED TYPE OF SHARED SPACES*

- Teaching or Workshops (general-use) – 90 (37%)
- Rehearsal (dance, theater, music) – 79 (33%)
- Studio (general-use/non-industrial) – 73 (30%)
- Exhibition or Presentation – 65 (27%)
- Performance (informal, flexible) – 59 (24%)

**Respondents could choose multiple options.*

SHARED CREATIVE SPACE PREFERENCES

Additional information was collected about respondent preferences for specific types of shared spaces; multi-use flex space, a general-use non-industrial studio space, light industrial space, and performance space. The data is intended to inform future operating plans for spaces that operators may want to create. More information can be found in the Technical Report (Attachment I).

MULTI-USE FLEX AND PERFORMANCE SPACE

Although this was not among the three top expressed needs, 18% (44) of respondents interested in Shared Creative Space want access to a **multi-use flex space** (defined for respondents as "for events, programming, etc., not specialized space". **The greatest demand is for space with an occupancy of 50 or fewer people.**

Twenty-four percent (24%) want access to flexible **performance space** (defined for respondents as "informal, flexible, no fixed seating"). A space that can accommodate **at least 50 non-fixed seats** has the greatest interest (68%).

Occupancy/Capacity Needs

Multi-use flex space	**50 or fewer people**	**52% (23)**
	51-100	25% (11)
	101-200	16% (7)
Performance space	25 seats	`22% (13)
	50 seats	46% (27)
	150 seats	29% (17)

NON-INDUSTRIAL AND GENERAL-USE SHARED STUDIO SPACE

Those interested in non-industrial, general-use shared studio space (one of the top shared spaces of interest) would find a variety of paid arrangements acceptable. Studios might be private spaces or open spaces serving several users; the survey did not ask specifically. **Unlimited access on a monthly or 6-month membership basis was most preferred.**

Access Arrangements

Studio: General Use	Hourly	48% (35)
	Daily	52% (38)
	Monthly	**67% (49)**
	6-month membership	**67% (49)**
	1 – year membership	56% (41)

LIGHT INDUSTRIAL SPACE

Light industrial space garnered interest from 17% (40) of those interested in shared creative space. A **shared clay/ceramics studio was the top preference** of the three options provided. Other types of specialized uses submitted by respondents can be found in the Technical Report (Attachment I).

Specialized Uses

Light Industrial	**Clay/Ceramics**	**38% (23)**
	Jewelry/Silversmithing	23% (14)
	Textiles	15% (9)
	Something Else	25% (15)

While demand for space is strong overall, the level of interest in each type of specialized space varies, and there is some overlap with interest in studio space. 22% (20) of those who also want private studio space would prefer renting private studio space rather than shared space. Most interested respondents do not live in Shoreline (but do live in the region), and how frequently they would access space is unknown. The cost to build, outfit, and operate specialized spaces can be expensive. These are the types of factors that should be considered in a business plan for new shared space(s). More information about best practices for Designing Artist Space can be found on page 34.

RECOMMENDATIONS FOR SHARED CREATIVE SPACE

Including shared creative space in any new mixed-use facility or developing a stand-alone facility for non-residential creative space uses, if otherwise feasible, is supported by the data. A multi-use facility would be enhanced by prioritizing space for **teaching or workshops, rehearsing, general non-industrial studio uses, exhibitions, presentations, and performances.** Offering both short-term private use space(s) **AND** at least one space designed to be shared by multiple users at the same time would be reasonable. **Identifying an operator who could lease commercial space in a new facility and offer the specialty spaces and programs preferred by respondents is recommended,** as this is not the realm of most developers**.** This study was conducted with the idea that ShoreLake Arts would be that entity as it is considering the feasibility of a new home and expanded programming. But the intention of this study is to present the need for new space so that any interested operator may consider how it could fill the market gap.

DESIGNING ARTIST SPACES

Planning for new space requires more than just quantifying market demand. Decisions about location, rental costs and lease terms, shared amenities, size, and design features all impact the marketability of new spaces. Thus, Artspace offers the following design best practices to assist developers of new creative space, informed both by the Shoreline Creative Space Needs Survey data as well as Artspace's 30+ years designing artist projects. These are artist community specific. As revealed in the study artist households come from all walks of life. Ensuring all spaces within a project are safe and accessible and comply with or exceed ADA standards is critical. This includes at a minimum building-wide universal design features and adaptability of individual units.

DESIGN FEATURES AND AMENITIES

GENERAL GUIDELINES

When new creative spaces have the features and amenities that artists prefer, the artists are better served and the demand potential increases. Whether considering live/work artist housing, private studio space, or shared creative space, in the design phase, developers should be mindful of the requirements of different types of art-making (e.g., natural lighting, outlet quantity and location, flooring, firewall separation, heating/cooling, ventilation, noise attenuation, ceiling height, running water/slop sinks, and floor drains, etc.) as well as the cost to build, outfit, and operate. Many artists need safe and secure storage and the ability to load and unload projects, materials, and equipment easily. This means wide hallways (6-foot width minimum), oversized doorways, and elevators with 3,500 pounds capacity. Loading zones and space for package pick-ups and receiving are also useful. Certain art materials can be toxic, impacting design and protocols for waste disposal bins and utility sink drains. Live/work housing and studio surfaces should be highly durable and low maintenance (e.g., stained/polished concrete, sealed/epoxy-coated concrete, ceramic or porcelain tile, linoleum or wood products, and no carpet).

LIVE/WORK HOUSING

Through Artspace's operation of more than 50 live/work housing buildings over the past thirty years, we are well-versed in the needs of artists in their living and working spaces and how to balance that need with low-maintenance, cost-efficient features that allow for sustainably low-rents. Live/work housing units should be designed to maximize flexible, unencumbered space. In addition, the following features are recommended.

IN-UNIT AND SHARED-SPACE FEATURES (LIVE/WORK ONLY)

While some of the below features may be cost-prohibitive, consideration should be given to each. The more preferred features that can be incorporated into the project design, the more usable and marketable the spaces will be to artists and their families.

- **Galley Kitchen -** Kitchens should be open, galley, straight, or "L" shaped layouts with no "islands." The sink should be a single, extra deep basin, stainless steel preferred, with no garbage disposal.
- **Wiring for high-speed internet –** High-speed, high-bandwidth internet is an essential feature for artists. New space should aim to provide the necessary technological infrastructure to support tenants' creative work and lifestyle.
- **Abundant natural light –** Abundant natural light within the live/work space is important to artists. Any new development should optimize natural light sources to aid the creative work of its future residents.
- **Unit soundproofing:** Soundproofing is often a preferred space feature of those interested in live/work housing. While it is cost-prohibitive to soundproof all units, consider sound attenuating design that limits noise between units and from the

outside. Offering a soundproof space for residents for rehearsal and recording purposes could help support the needs of the performing arts community.

- **Washer/Dryer hook-ups in-unit:** While a project may include shared laundry facilities, artists prefer in-unit washer/dryer access; however, if offering this feature, plan for the financial impact of an increase in building water usage.
- **High ceilings:** Ceilings that are at least 10 feet in height are desirable to those interested in live/work housing. High ceilings provide space for tenants to create large-scale artwork, set up necessary equipment, and move, jump, and lift without obstruction.
- **Storefront/Direct Street access for retail sales:** A key to an artist's financial sustainability is access to the public so they can sell, perform, and share their work. Artists sometimes prefer an option that will allow them direct access to the outdoors to admit clients, customers, and other members of the public. Any new project design could consider a few "storefront" options. At the very least, a shared, multi-use space ("community gallery") should be street-visible and provide secure, easy public access for events. Note, however, that LIHTC-financed spaces prohibit commercial activity.
- **Special ventilation:** While specialized ventilation in every space would be cost-prohibitive, design and engineering should consider the toxic nature of many art materials. Consider allocating a shared private studio(s) space within a building with enhanced ventilation for varnishing, spraying, and where the use of toxic substances is safe and permissible.
- **Environment Sustainability:** Projects should incorporate "green" design best practices that meet or exceed jurisdictional requirements. Solar power, gray water systems, green roofs, non-toxic building materials, building reuse, motion light systems, and fitting a building on a site and designing for optimal airflow are all ways that developers can commit to sustainability and the health of residents.

COMMUNITY GALLERY AND MULTI-USE DISPLAY SPACE

Live/work housing, in its general conception, provides residents the opportunity to collaborate, but all artist facilities should have a shared space that enables collaboration and inspires a sense of community. A flexible, multi-use space with adequate lighting can provide an opportunity for the public to enjoy art and for artists to present and sell/perform their work. Artists should be allowed to hang, paint, and display their art in the hallways, too.

Shared multi-use gallery spaces should have floor outlets approximately every 12 feet. Walls should include a ¼-inch layer of plywood behind the gypsum board for hanging artwork; there should be a minimum of 3-foot-high plywood installed, at 40 inches from the floor, up to 76 inches (and if cost and time allow, add a foot on each side to accommodate large artwork). Walls should be a neutral color and suitable for displaying artwork. When possible, include two types of lighting: general overhead lighting and directional track lighting for the artwork. Install track lights to light the area where art is traditionally hung at a 45-degree angle. Also, include separate light switches for both sets of lights and a hanging system.

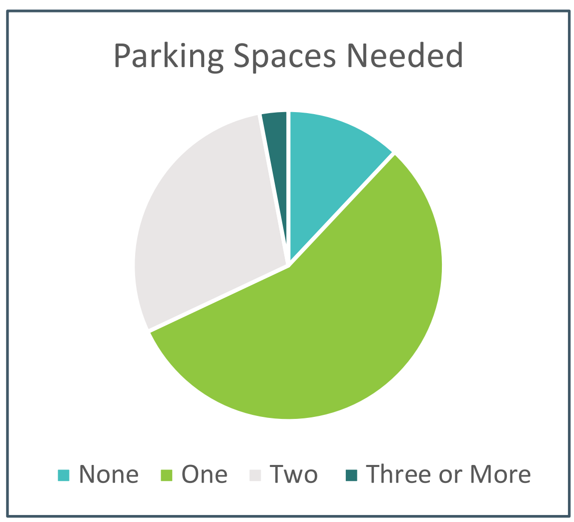
PERFORMING ARTS SPACE

The four critical design elements for performing artists are (1) unencumbered space (i.e., no posts or pillars) (2) high ceilings (3) adequate and performance lighting, and (4) sound quality. Specific uses have different requirements, such as sprung floors for dancers and black-out curtains for performance or projection. These are often public facing spaces with high occupancy and as such will require specialized design elements including a lobby, adequate bathrooms, and ticketing and refreshments areas, etc.

PARKING AND ACCESS

New space will need to meet local jurisdiction parking requirements for planned residential and commercial and specialized uses (e.g., performing arts and other public events). Locating within ¼ mile of light rail or bus is ideal for both residential and commercial uses.

Respondents interested in live/work housing (163) were asked about the number of parking spaces they would need. 56% (91) of respondents indicated they would need one parking space for their household, and 29% (48) would need two. However, 40% (57) say that if light-rail is within walking distance, their parking needs would be reduced. A transit-oriented site within ¼ mile of a light-rail stop would need less parking space than indicated by respondents.



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. Consider local artist-designed components throughout the interior and exterior of the building. A green space and community garden are always appreciated and support not just healthy eating and living but also culinary artists and herbalists. Public restrooms for commercial and publicly accessible, artist resident communal spaces should be inclusively designed as at least two gender-neutral restrooms and include a diaper changing station in at least one unit. Storage in a shared resident community space should be provided for tables and chairs, and a small prep kitchen will support artist resident events.

FURTHER SURVEY PARTICIPANT ENGAGEMENT

One-hundred sixty-seven **(167), or 42% of respondents, want updates about the project, and 201 (51%) want to be contacted about new live/work housing, studio, or shared creative space opportunities in Shoreline.** Contact information for those who requested more information on several different topics is provided separately from this report to ShoreLake Arts. It can take several years to realize new space, and keeping interested parties engaged is important. Periodic and critical project updates should be provided to those respondents who requested this information.

It is assumed that survey respondents, while broadly representative of the market, are unlikely to be the same individuals who ultimately rent new live/work or studio space. For this reason, Artspace recommends that outreach and diverse artist engagement continue around the topic of space and the proposed project. This will give artists who may not have participated in the Creative Space Survey a voice in the process and a chance to be among those to learn about new space opportunities. Such outreach will also 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 live/work project is how inclusive it is and to what extent its residents reflect the diversity quotient of Shoreline and its Metropolitan Statistical Area (MSA). This begins with survey outreach, but despite best efforts, surveys of this nature are limited in their ability to engage everyone. Consequently, respondents may not fully reflect the diversity of a region regarding age, gender, race, income, ethnicity, and even artistic discipline.

ShoreLake Arts and the Core Group made a concerted effort to engage diverse voices and had some success to build upon in subsequent phases of work. In Artspace's experience, the community's creative sector is typically as diverse, if not more so, than the area's broader population. Ongoing outreach and relationship building among populations who may be less likely to hear about or take an online survey will help advance an arts facility that is home to a diverse population of residents and tenants fully reflective of Shoreline and North King County.

CONCLUSION

There is demonstrated market demand for up to 60 artist live/work housing units in Shoreline that are affordable to households at or below 60% of AMI. The market is slightly greater for mixed-income housing. **There is also demand for up to 32 private studio spaces of varying sizes and rent targets, available under a one-year or longer lease term.** Because non-residential space can be more sensitive to marketplace changes, new studio space might be phased in over time and certainly offer the features, amenities, and affordability required by interested artists**. New shared, specialized spaces should also be introduced into Shoreline** by operators who want to serve the individuals and groups that need the flexibility of short-term or shared space arrangements. **A mixed-use arts facility with ShoreLake Arts as its anchor nonprofit and positioned to offer some of the non-residential spaces needed by the area's creatives is a reasonable project concept to pursue from a market perspective.**

The Technical Report Attachment, upon which this Findings Report is based, provides an in-depth breakdown of survey responses, and offers additional context and data for concept planning new housing, private studios, and shared, specialized space and associated programs. To encourage investment in new space, all this information should be shared with city officials, funders, and other stakeholders who value a sustained and thriving creative sector in Shoreline.

Artspace appreciates the opportunity to complete this Arts Market Study for ShoreLake Arts and commends the Core Group and other community volunteers for their dedication and work to engage the creative sector in this study.

APPENDIX A

Participating Artists and Their Creative Work

The following list contains the handles and websites of artists who participated in the survey and gave permission to publish that information here so that readers may learn more about their creative work. While the primary purpose of this study is to understand creative space needs and preferences, Artspace celebrates the creative people who live and work (or would like to) in the communities we serve. This is one way we help to raise the visibility of the creative community.

Websites	Handles
caroladelmanstudio.com	@cadelkennart
kiamshatemple.com	E. Mandisa Subira Facebook
robinarnitz.com	@robinarnitz
shakesandspeares.com	@shakesandspeares
sites.google.com/view/were-solving-society	@wssprofinqs
modernglaze.com	@modernglaze
makeapothecary.com	@themakeapothecary
RadiantNeon.com	RadiantNeon
dragonflyhealingandwellness.com	@buddalexa
lauradianecameron.com	@lauradianecameron
seagypsyinc.com	@fiercelyfemmes (Instagram)
facebook.com/HappyBodySoaps	@happybodysoaps
Lizcopland.com	@Lizcopland
katedanley.com	@danleykate
myportfolio.com/justiceerikson	@justiceerikson
jenniferewing.org	@jenniferaewing
psychdedeliclens.com	@psychedelic_lens_art
Robot-mom.com	@i.am.robot.mom
ravenmaddesignsshop.com	IG: raven_mad_designs
Tootsiespangles.com	Insta @TheFruitSaladShow
open.spotify.com/artist/5tqfFKBpNYjhYyJdclxjhY?si=Owi9kbLJS_ao8q_gbivhwQ	@ItzBUSKR
jessicajorgensenart.com/	@jessicajorgensenart
puddlesbarkery.com/	@puddlesbarkery
joannleekim.com	@joannleekimart

audioonset.com/	@michaelkleven
amandaknowles.com	@amandaknow
heidiyproductions.com	@heidiy_productions (Instagram)
heatherkropf.com	@kropfcake (Instagram)
bit.ly/kuniholmsverige	@_kuniholm_
maerylanahan.com	@maerylanahan
Jessrenecreative.com	@singing_pots
bethannlawson.com/	@bethannlawson
milesle.com	Insta: @mileslikescats
jameslillyart.com	@james_lilly_art
Mollymclauchlan.com	@mollymclart
Kelseymines@gmail.com	@k__mines
michaelriester.wixsite.com/studio	@michaelriesterartist
nwssa.org	@nwstonestonesculptor
emmajaneroyer.com	@emmaroyer.art
Updating/ extension	DScarestheHawk
aerinsizelove.com	@aerinsart
art-alchemy.com	@sojachristine
BelovedFeralArt @etsy	be_lo_ve_ed
teresastern.com/	@teresasternarts
Elichristopher.com	@wickedkitties
vandenboschstudios.com	@nanotomic
JulietaVitullo.com	@julivitu
melissawadsworth.com	https://www.facebook.com/melissa.wadsworth
PlanetSuzanna.com | RakasaFit.com | BellyDanceOff.com	www.facebook.com/suzanna.davis.71/ | www.instagram.com/planetsuzanna/ | www.youtube.com/user/planets
workofamelia.com	@workofamelia @drummingwithdeafness @cancelaudism
deallenartist.com	
CoronaArtRestoration.com	
adamyaw.com	
cyndithomsen.net	

steveschneiderphoto.com	
barry.roitblat.com	
By requests Designs	
vincentfieldfineart.com	
allthingsartpossible.com	
shrc.neocities.org	
Amandadrewniak.com	
stevenmarkussen.com	
bob74789.wixsite.com/bobbyd	
	@thepainterthepotter
	urbanforest_art
	@artbysuejitsu
	@evilspirals
	@angelakellyart
	@beanzbuilt (insta)
	Design@reneedemartin (Instagram)
	DemARTinDesign-Etsy
	@sarahminceramics @sarahpihahairdesign

APPENDIX B

City Of Shoreline Highlights

The following data summary tells the story of how new space in Shoreline can impact local artist residents and the city's creative sector.

39 (24%) of respondents interested in live/work housing in Shoreline currently live in the city. New space appeals to and would serve residents.

Artist Retention and Return Opportunity with live/work housing

27 (69%)	Shoreline residents have considered leaving the city
25 (93%)	Nearly all who have considered leaving, would "be encouraged" to stay for artist housing.
26 (16%)	no longer live in Shoreline, but would return for artist housing

Growing the Creative Sector with live/work housing

98 (60%)	live elsewhere, but would relocate to Shoreline for artist housing (mostly from Seattle and other King or Snohomish County communities)

Shoreline resident respondents have a higher interest in shared, creative space by percentage than they have an interest in live/work housing or private studio space, underscoring its importance.

Total # of respondents who live in Shoreline. **A strong local survey response**

150 (41%)

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Growing the Creative Sector AND Serving Residents

56 (38%)	live in Shoreline and are interested in renting private studio space
80 (54%)	live elsewhere and would rent private studio space in Shoreline (most currently live in Seattle and other King or Snohomish County communities)
103 (43%)	live in Shoreline and are interested in shared specialized creative space
120 (50%)	live elsewhere and would pay to access shared space in Shoreline (most currently live in Seattle and other King or Snohomish County communities, with 20% residing in Lake Forest Park and Edmonds)