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ARTS MARKET STUDY

REPORT OF FINDINGS

Source: Instagram Artspace Tampa Market Survey Campaign

JUNE 2021 // TAMPA, FLORIDA

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TAMPA ARTS MARKET STUDY SUBCOMMITTEE:

- Neil Gobioff, Steering Committee Co-chair // Gobioff Foundation
- Tracy Midulla, Project Manager & Fiscal Sponsor // Tempus Projects
- Jessica Todd, Assistant Project Manager // Tempus Projects
- Debbi Shaffer, Steering Committee Secretary
- Selina Roman, Core Group Member
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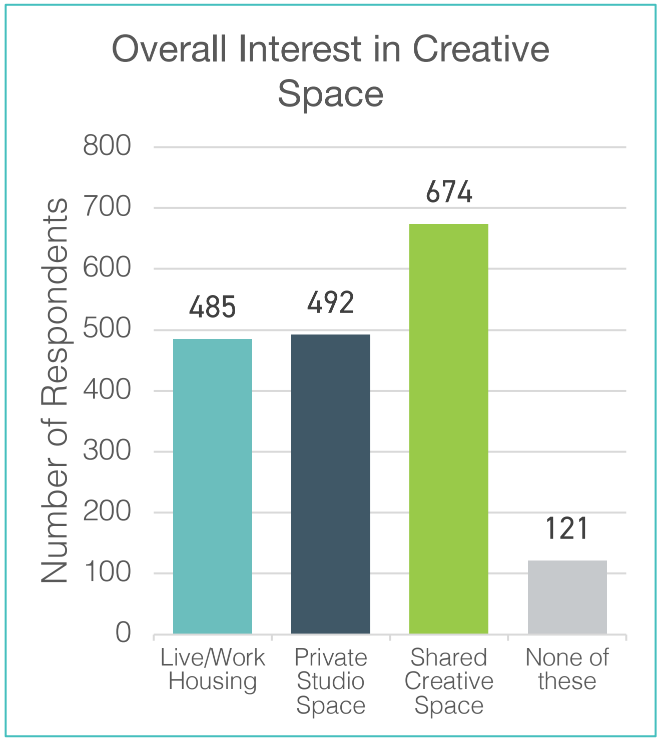
OVERVIEW

In September 2020, a group of passionate local leaders (Artspace Tampa Initiative) partnered with Tempus Projects to invite Artspace Projects, a national nonprofit leader in the field of affordable creative space development, to assess the potential for an affordable mixed-use, artist live/work facility in Tampa. The vision is to serve artists (and their families) who live or work in Tampa, and artists who would come to Tampa for the opportunity of new space. The Artspace Tampa Initiative commissioned this study to support their case for enhancing the scale, visibility, and sustainability of Tampa's creative community. Which in turn, would be a strategic asset in attracting and retaining the engaged, skilled citizens needed to realize Tampa's aspirations to be an appealing, inclusive center of talent and vibrant community life.



A series of (virtual) focus group meetings with local artists, civic leaders and private-sector stakeholders revealed strong interest and opportunity and set the stage for the next big step, a Creative Space Needs Survey. Input from individual artists helps us test the project concept and determine if there is enough interest to warrant further investment and if so, what types and how many spaces should be

Respondent Race and Ethnicity			*Tampa
White/Caucasian	729	63%	*61%*
Hispanic/Latinx/Spanish	156	13%	*26%*
Black/African American/Caribbean	119	10%	*4%*
Multiracial/Multiethnic	80	7%	*27%*
Not Listed	32	3%	*4%*
Asian American or Asian	28	2%	*5%*
American Indian/Native/Pacific	9	1%	*.5%*
Northern African/Middle Eastern	6	1%	*N/A*
Total	**1,159**	**100%**	

**Tampa Source: Esri Community Analyst. Persons identifying as Hispanic may be of any race, thus totals result in percentages above 100%*

planned, what amenities to include, and what "affordable" really means to the area's artists, makers, and creatives.

RESPONDENT OVERVIEW

There were **1,159 total survey respondents** of which **1,038 (90%)** indicated an interest in at least one type of creative space in Tampa. The 4th largest response to an Artspace AMS. The Arts Market Study achieved broad geographic responses including current Tampa residents (66%), former residents (17%), and those who have never lived in Tampa (17%). See page 15 for a heat map of respondents' zip codes.

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing – **31%**
2. Music **– 23%**
3. Art Gallery/Exhibition – **19%**
4. Photography– **18%**
5. Arts Education/instruction – **17%**
6. Theater arts **– 16%**
7. Digital/Desktop arts – 16%
8. Writing/Literary arts – 15%
9. Film/Video/TV/Web – 12%

Note: Respondents could select up to 4 options

There was a wide representation of arts, cultural, and creative industries, as well as a mix of races and ethnicities as self-reported by respondents. Shared creative space was revealed as the top space need, followed nearly equally by private studio space and live/work housing.

The general profile of artist respondents interested in live/work housing is compelling. In general, the interested artists are younger and more diverse than the overall pool of total respondents and a much smaller percentage of them own homes.

HOUSING RECOMMENDATIONS

The Arts Market Study data demonstrates strong demand for a mixed-use, artist live/work project in the model of an Artspace Project. Because the space need is strong and varied, multiple project models and space solutions can be explored by local stakeholders. For example, local building owners and developers might consider incorporating private studios (1-year or longer leases), shared creative spaces, public engagement/community flex space, and/or live/workspaces into their own projects. The following recommendations are a starting place for planning of any new creative space projects:

- **89-128 affordable artist live/work housing for households qualifying at or below 60% of AMI or…**
- **110-149 qualifying at or below 80% of AMI.**
- See pages 16- 20 for more information

This demand range is a conservative estimate for new live/work housing that takes into consideration the percentage of interested respondents who:

- Reported household incomes > 60% or 80% of AMI (making them ineligible for LIHTC housing)
- Currently own their homes
- Never have lived in Tampa
- Indicated that multiple household members may have taken the survey and expressed interest (Demand Duplication)
- Not interested in a rental model for housing
- Full-time students (whose incomes and living situations will likely change after graduation)

Most of the need is for one and two-bedroom units. 20% indicated that their households would qualify at or below 30% Area Median Income (AMI), 48% between 30% and 60% AMI and 61% falling between 60% and 80% AMI. Offering a range of affordability is appropriate for any new project.

Household Income Qualification by Self-Reported Incomes		
% of respondents who income qualify for 30% AMI	20%	99
% of respondents who income qualify for 60% AMI	48%	233
% of respondents who income qualify for 80% AMI	61%	295
Total Respondents		**485**

CREATIVE WORKSPACE RECOMMENDATIONS

- **Up to 100 private studio spaces** in addition to live/work housing.
- **Affordability**: At least 2/3 of the spaces should be leased at $1.00psf or less. There is demand for spaces rented at $1.00psf or greater.
- Small and moderately sized studios; 200-500 square feet with more than half priced at $300 or less per month, will be the most marketable.
- See page 24 for more information.

For **shared creative spaces**, data supports a first phase of concept planning and financial testing of:

- General-use studios (private short-term or multiple user)
- Teaching/Workshop spaces
- Rehearsal space for dance, theater and music
- Exhibition spaces for multiple uses (gallery, screening, installations)
- Performance space (informal, flexible, blackbox)
- See page 30 for more information.

RECOMMENDATIONS & NEXT STEPS

The market demand demonstrates this is an opportunity to retain and attract creatives to Tampa.

Creating new space for the creative sector would help retain artists in Tampa. 76% of those who live in Tampa and are interested in live/work housing (299 respondents) have considered leaving, but nearly all of them (95%) would stay for this opportunity. Approximately 38% of those who are interested in housing do not currently live in Tampa, but in the surrounding areas, demonstrating an opportunity for Tampa to attract artists from the metro region.

It is reasonable to assume that the survey promotion was hampered by the unprecedented circumstances of COVID-19 and that the response-rate is therefore under-representing market demand. Whether new space is limited to the recommended ranges in this report or increased, we strongly recommend the following:

- **Appropriately designed spaces** for artists and creatives that are managed in a way that supports the unique needs of a creative community.
- **Building and designing for a critical mass of creative people** such that the new community of artists is a draw. For example, twenty housing units clustered together may be more compelling to artists than fewer units or units that are scattered throughout a larger project.
- **Continued outreach** and engagement of local and regional artists identifying as Black, Indigenous, and People of Color (BIPOC). The survey respondent pool under-represented the region's diversity quotient, indicating an untapped market and an opportunity to intentionally address racial equity in a new project through ongoing outreach. Continued engagement of artists who live in any given neighborhood is critical for stakeholders and to garner attention of potential future residents.
- **Continued promotion** of the project concept to artists in the metro Tampa region should come along with a clear message of commitment to the vision of creating a long-term affordable arts community in any new mixed-use housing project.

We hope that this executive summary offers the types of insight useful to the Artspace Tampa Alliance, arts advocates, and developers alike in Hillsborough County. More details around these recommendations are found in the findings section beginning on page 15. Feasibility of new space must consider development related factors beyond market demand. Artspace's recommendations are based on the survey findings as well as 30+ years of experience in the field of affordable art facility development.

INTRODUCTION

The Arts Market Study (AMS) in Tampa, Florida follows the Preliminary Feasibility Study (PFS) conducted from August to October 2020. The PFS included virtual focus groups and a public meeting by Artspace staff Wendy Holmes, Senior Vice President, and Teri Deaver, Vice President, both from the Artspace Consulting department. The PFS is a project concept feasibility assessment of the six key areas Artspace considers essential to successful community-led development. These include: how an arts-centric project could **align with broader community goals; local leadership** support; assessment of **potential sites** and neighborhoods; **funding and financing** opportunities; the **arts market** and the need for new space; and the **project concept** for a potential new arts facility.

The AMS goes a step further. It tests assumptions formed during the PFS, including the priority Project Concept, a mixed-use project with affordable artist live/work housing and commercial spaces for the creative sector. The Project Concept is formed in context of the top five broader community goals mentioned during Tampa's PFS study:

1) Addressing Racial and Economic Disparity
2) Maintaining Affordability
3) Supporting Creative Businesses and Nonprofits
4) Transit-Oriented Development
5) Supporting a Cultural Community

The purpose of the AMS study is first, to determine if there is enough demand and interest by the creative sector to warrant new spaces; second, to inform the conceptualization of those spaces; and third, to energize the community around advancing the creation of a creative space project. The AMS includes an in-depth data collection survey deployed online, this Report of Findings, and the Technical Report that contains the data and analytics.

THE SURVEY

The online Arts Market Survey was open for six weeks (March 25 through May 6, 2021) and available at ArtspaceTampaSurvey.org. There were **1,159 total respondents**. Respondents were asked a series of questions about their art/creative/cultural work, current studio or creative workspace, current living situation, interest in space in a future project, preferences for live/work housing, and private or shared studio/workspace and creative space, as well as demographic information. The survey specifically asked about respondents' interest in the following space options, if available for an affordable rate in Tampa:

1. Relocating to live/work housing specifically designed for artists, creative individuals, and their families, referred to as "**live/work housing**" in this report.

2. Renting private studio or creative workspace 1-year lease minimum, referred to as "**private studio**" in this report. Examples of this include ArtsXChange, Ybor Art Colony, and The Factory in St. Pete.

3. Shared, specialized creative space 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. Examples of this in the Tampa region include Tampa Hackerspace, The Hive, Labyrinth Studios, and Morean Center for Clay.

INTENDED AUDIENCE

The survey results are intended to inform the **Artspace Tampa Initiative** stakeholders as well as other **real estate developers** and **property owners** interested in developing creative space and/or artist live/work housing. Further, these findings, the design guidelines (page 32), and Technical Report Addendum can be used to advance space planning, financial modeling, and early concept design work of any future project developments.

Advocates for the local arts community in **Tampa including Tempus Projects** can use this information as evidence of the space needs, neighborhood preference, cultural asset gaps, and space-related challenges of the local creative sector. This in turn can help local leaders in Tampa confidently work to move projects forward and identify priority areas and uses for creative space and program investment.

SURVEY METHODOLOGY

Artspace relies on the expertise of local partners to help promote and spread awareness about the study. The Tampa Creative Space Needs Survey launched on March 25, 2021. Given the COVID-19 pandemic, the public launch event was held virtually, and the promotional plan relied heavily on virtual platforms including social media, videos, artist testimonials, and a weekly social hour series. Successful survey promotion is critical to the usefulness of the Arts Market Study (AMS) findings and data. The survey also serves as a community development and outreach tool for any future creative space projects.

Artspace Tampa Initiative sought creative solutions to engage with the community virtually. Throughout the AMS, some outdoor/socially distanced events began to take place, and as team members were vaccinated, in-person promotion was able to happen. Artspace Tampa Initiative assembled an AMS subcommittee to lead marketing efforts that was composed of Steering Committee and Core Group members, including those in paid positions (Assistant Project Manager, Project Manager, and Steering Committee Secretary). Artspace provided weekly survey data updates to help the AMS subcommittee, who were charged with survey promotion planning and outreach implementation, to strategically focus their outreach efforts, paying attention to the respondent pool's demographics, age, and artistic disciplines. The survey was open for six weeks via the Survey Gizmo (Alchemer) online platform and closed on May 6, 2021. During that timeframe, **1,159 respondents** took the survey. The full survey outreach methodology can be found in the report addendum. Highlights of the comprehensive survey strategy include:

- **In-person/Virtual Presentation:**
    - The survey launch event was held virtually due to Covid-related restrictions and safety concerns. The hour-long event was hosted on Zoom and live-streamed on Facebook Live. There were 83 attendees the event included special performances by local artists – singer/songwriter Alex Harris and spoken word artist Tiffany Vitale and door prizes donated by local arts organizations.
    - 13 additional community presentations, including:

        - Kiwanis Club of Tampa
        - Café con Tampa
        - Ybor City Redevelopment Area Culture, Arts, and Special Events Committee
        - USF College of the Arts Directors Council
        - West Tampa Community Redevelopment Area
        - Tampa Arts Alliance
        - Hillsborough Arts Council
        - Graphicstudio/USF CAM Advisory Board
    - 5 virtual Social Hours with a spoken word artist guest at the final social hour.
- **Traditional Media**
    - 3 recorded interviews
        - St. Pete Catalyst
        - On the Record with Sarina Fazan
        - Art in Your Ear
    - 2 news articles
        - 83 Degrees Media
        - Creative Loafing: Tampa Bay
- **Social media**
    - Facebook (ArtspaceTampa)– posts to accounts totaling 78,712 followers
    - Instagram (@ArtspaceTPA)– posts to accounts totaling 37,234 followers
    - Twitter – posts to accounts totaling 2,969 followers
    - 55 Artspace Tampa Initiative posts in total, some with paid advertising.
    - “Why Tampa Needs Artspace” series with written and video testimonials from local artists/creatives

- **Printed Outreach**
    - Displayed 40 flyers in different community locations
    - Distributed 310 Postcards for display at 8 different community locations and college/university art programs
    - Hand distributed 455 postcards, including at the following events:
        - Heightened Senses at Labyrinth Studios
        - Second Saturday ArtWalk in St. Petersburg
        - Open Mic Night by Wave Theory Collective at Shuffle Tampa
        - Heights Night Market at Armature Works
        - Shufflea Market at Shuffle Tampa
- **Email Outreach**
    - Artspace Tampa Initiative direct contact list of over 200

- Steering Committee and Core Group members' personal and professional networks
- Individuals and organizations around the community were asked to share with their networks
- Notable email campaigns include:
  - Tempus Projects (7 emails to 1,200+ contacts)
  - Alex Sink's Hillsborough and Pinellas County mailing lists (2 emails to 32,000+ contacts)
  - Tampa Museum of Art (2 emails to 12,000+ contacts)
  - National Pan-Hellenic Council Tampa Chapter (2 emails to 1,100+ contacts)
  - Symphonic Distribution (2 emails to 680+ contacts)
  - City of Tampa Arts & Cultural Affairs (2 emails to 400+ contacts)
  - Arts4All Florida (2 emails to 100+ contacts)
  - Green Book of Tampa Bay (paid by Artspace Tampa Initiative to share with their mailing list of Black artists, makers, and creatives)
  - Stageworks Theatre (2 emails to 6,400 contacts, plus a link in 5 e-newsletters)
  - Jobsite Theater (2 emails to 1,200 contacts)
- Additional survey promotion emails were sent by:
  - Gobioff Foundation
  - University of Tampa art department
  - University of South Florida art listserv
  - Gasparilla Music Festival
  - Straz Center for the Performing Arts
  - Tampa City Ballet
  - America's Ballet School
  - Tampa Bay Businesses for Culture and the Arts
- Total potential email reach was 72,000+

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

- Social media – 493 (35%)
- Friend/colleague – 375 (27%)
- Email invitation – 282 (20%)
- Other, please specify – (83 Degrees, Art class, College class, Heightened senses event, Morean Arts Center, Tampa Bay Hackerspace) – 99 (7%)
- Virtual meeting/event – 59 (4%)
- Website – 36 (3%)
- News media – 30 (2%)
- Poster or flyer or postcard – 16 (1%)

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 Tampa) generalization of the findings to these broader populations cannot be conducted. 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 representative of 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, barring any apparent erroneous or duplicate 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 survey, given the bounds of confidentiality. 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. Statistical analysis of the Survey Gizmo (Alchemer) collected data was conducted via SPSS Statistics software and Microsoft Excel. The supplemental materials including contact information has been provided to the Steering Committee.

ARTSPACE DISCLAIMER

The successful realization of non-residential creative space is often reliant upon local entrepreneurs, non-profits, community stakeholders and municipalities and/or creative businesses that want to rent and program space within a new facility. Rarely is the developer of new space also the program operator of space desired by the survey respondents. Those who wish to offer the types of specialized creative spaces that are of interest to respondents, should review Section IV of the Technical Report for more information about these unique space needs.

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; projected growth of the area; available sites; and any planned creative space developments for the area. 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 that they would be interested in renting or relocating to and duplication of interest is possible. When determining demand, we consider respondents' priorities when asked whether they would prefer one type of space over another or to lease multiple space types at one time. Artists may also have indicated a willingness to share private studio space that is lease for a minimum of one year, reducing demand. Artspace's overall recommendations are conservative to consider the possible impact of overlapping space interests and capacity to rent new non-residential space on an ongoing basis.

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 plays heavily into the market considerations, assumptions, and recommendations in this report.

SURVEY CHALLENGES DURING COVID

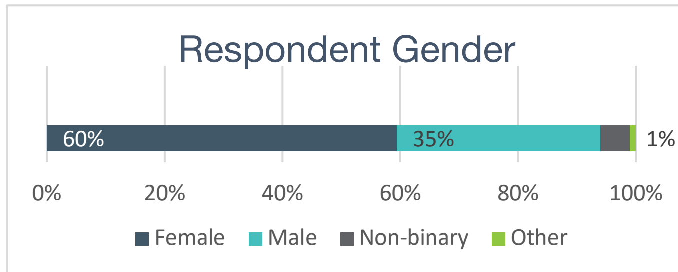
While the survey response was exceptional, it is reasonable to assume that the survey promotion was hampered by the unprecedented circumstances of COVID-19 and that the response-rate could be under-representing market demand. While social media played a large role in promotion (35% learned about the survey through social media) the limited opportunities for formal and informal in-person gatherings that lead to information sharing within artist communities and the fewer options for artists to see posters and other notices in spaces that they frequent, may have limited artist awareness of the survey. Artist engagement, information sharing, and generated excitement about the opportunity of new space is a key tool in the survey outreach process. With that in mind, the Tampa team did a phenomenal job spreading the word to the creative community. A big thank you again to all the local leaders who spread the word and the marketing campaigns the team developed.

Social Media Campaign Collateral from Tempus Projects

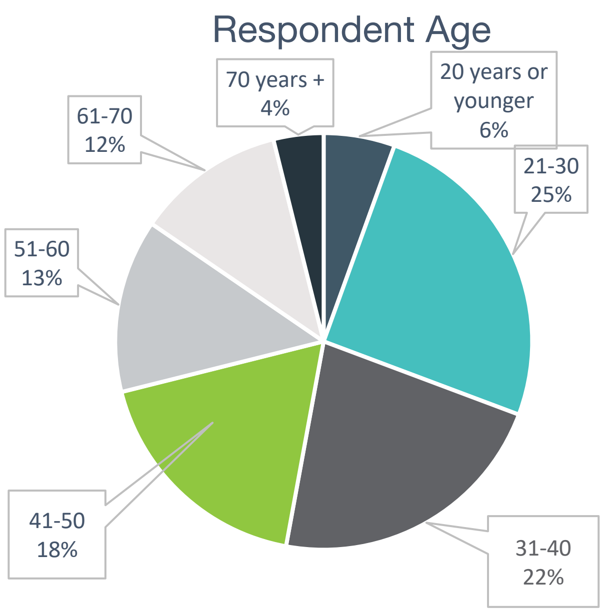
The primary focus of this report is on the **1,038 (90%) of respondents who indicated an interest in at least one type of creative space in Tampa, Florida.**

1,159 TOTAL RESPONDENTS

1,038 (90%) ARE INTERESTED IN AT LEAST ONE TYPE OF CREATIVE SPACE



42 Respondents (4%) are veterans of the United States Armed Forces



CURRENT SPACE STATS

- 42% own their living space
- 10% rent or own studio/workspace on an ongoing basis
- 37% use space within their home for their creative work
- 38% do not have the space they need for their art or creative work

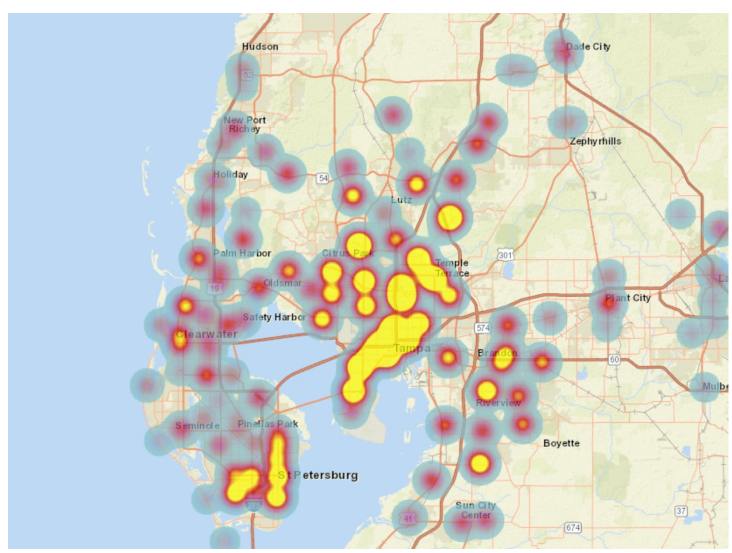
Current Income from Creative Pursuit

74% earn 25% or less of their income from their art/creative work including.

- 36% earn **NO** income
- 27% earn **between 0-10%**
- 11% earn **between 10-25%**

(A common national AMS finding)

RESPONDENT LOCATION MAP



ARTIST SURVEY INTEREST IN:

LIVE/WORK HOUSING

The information on the following pages is solely about the **485 respondents** interested in live/work housing in Tampa.

485 (42%) OF THE **1,159** TOTAL RESPONDENTS ARE INTERESTED IN LIVE/WORK HOUSING

176 (36%) ARE ONLY INTERESTED IN LIVE/WORK HOUSING

Definition: Live/Work Housing
Space that meets standard residential codes and is somewhat larger than a typical dwelling unit. For example, 600-800 sq. ft. for an efficiency, and up to 1,400 sq. ft. or larger for a 3-bedroom unit in a typical Artspace project. The space is designed flexibly, incorporating both wide open areas and private rooms, to allow artists and creatives to arrange their living and working environment in a way that best suits their artistic/creative and family needs. The aesthetics favor durable surfaces, allowing residents to create in a variety of mediums anywhere in the space and artist-friendly design features, amenities and management policies are incorporated.

HOUSEHOLD COMPOSITION
- One-person – 174 (36%)
- Two-person – 180 (37%)
- Three-person – 62 (13%)
- Four or more – 69 (14%)
- Children (under 18) – 80 (16%)

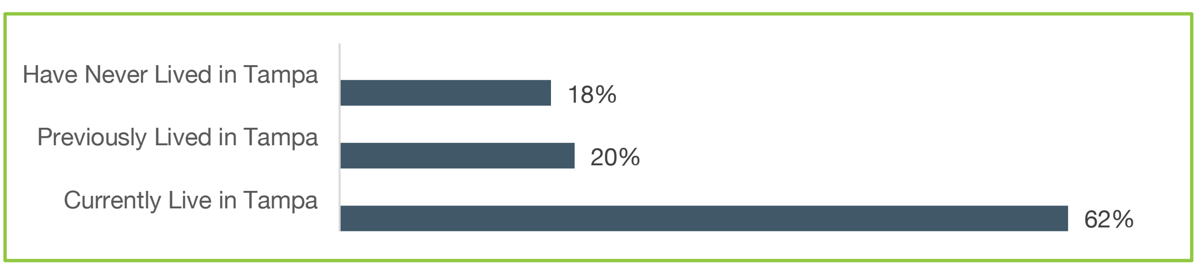
65% ARE 40 YEARS OF AGE OR YOUNGER

63% ARE PET OWNERS

55% OF LIVE/WORK INTERESTED ARTISTS HAVE A BACHELOR'S DEGREE OR HIGHER

HOUSING TENURE
- **293 (60%)** Currently rent/lease their living space, a much higher percentage than total survey respondents
- **84 (17%)** Own their home
- **108 (22%)** Neither rent nor own

RESPONDENT LOCATION (L/W HOUSING)



FINANCING FOR AFFORDABLILTY

To keep live/work housing affordable while ensuring projects remain financially self-sustaining, the Artspace financing model combines 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 household income limits for residents and the maximum monthly rents that can be charged. HUD also sets "utility allowances" that in effect further lower rent and ensure that low income residents are not paying more than they can reasonably afford toward their housing. These limits change annually. The 2020 HUD published maximum household income for those earning 80%, 60%, and 30% or less of the Area Median Income (AMI) and the corresponding rents for Hillsborough County, Florida are in the following table. Tampa falls within the Tampa-St. Petersburg-Clearwater, FL Metropolitan Statistical Area, so the rent and income limits set by HUD reflect the trends in the whole metro area. Rents are expressed by month and incomes maximums are annual.

2021 HUD Income and Rent Limits for LIHTC Projects in Hillsborough County

Household Size	Income Max (30% - 60% AMI)	Income Max (80% AMI)		Bedrooms	Max Rent (30% - 60% AMI)	Max Rent (80% AMI)
1	$15,510-$31,020	$41,360		Efficiency	$387-$775	$1,034
2	$17,730-$35,460	$47,280		1-bedroom	$415-$831	$1,108
3	$19,950-$39,900	$53,200		2-bedroom	$498-$997	$1,330
4	$22,140-$44,280	$59,040		3-bedroom	$576-$1,152	$1,536

Source: Novogradac & Co. Rent and Income Calculator; Novoco.com, 2021

Of the 485 creatives interested in live/work housing, **295 (61%)** self-identified as income qualifying at 80% or below AMI per HUD guidelines. **233 (48%) income qualify at 60% of AMI** and **99 (20%)** report incomes that fall at 30% or below AMI qualifying them for deeply subsidized units.

$72,700 – 4-PERSON MEDIAN HOUSEHOLD INCOME FOR TAMPA METRO REGION

(SOURCE: NOVOCO/HUD 2021)

The median income from the self-reported data of creatives interested in live/work housing is $**35,001-$40,000.** The HUD income limits correspond to household size, so taking into account the size of the household is very important. **The table on the following page shows there is a significant market for a development aimed at residents earning up to 60% of AMI, aligning well with the Low-Income Housing Tax Credit (LIHTC) program.**

Of those interested in Live/work housing 68% earn less than 25% of their income from their art/creative work including162 (33%) who earn NO INCOME from their art pursuit.

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	5	7	2	12	26	0	0	0
Under $10,000	17	11	9	4	41	41	41	41
$10,000 - $15,000	19	8	2	7	36	36	36	36
$15,001 - $20,000	15	15	3	1	34	19	34	34
$20,001 - $25,000	13	11	2	3	29	3	29	29
$25,001 - $30,000	21	13	3	3	40	0	40	40
$30,001 - $35,000	11	16	2	3	32	0	32	32
$35,001 - $40,000	16	11	4	4	35	0	19	35
$40,001 - $45,000	12	7	1	2	22	0	2	22
$45,001 - $50,000	12	12	7	2	33	0	0	21
$50,001 - $55,000	7	10	2	2	21	0	0	4
$55,001 - $60,000	4	5	2	1	12	0	0	1
$60,001 - $65,000	6	6	4	1	17	0	0	0
$65,001 - $75,000	1	12	5	0	18	0	0	0
$75,001 - $85,000	6	14	5	6	31	0	0	0
$85,001 - $100,000	3	6	4	5	18	0	0	0
$101,000 - over $400,000	6	16	5	13	40	0	0	0
Total	**174**	**180**	**62**	**69**	**485**	**99**	**233**	**295**
% of respondents who income qualify for 30% AMI								**20%**
% of respondents who income qualify for 60% AMI								**48%**
% of respondents who income qualify for 80% AMI								**61%**

RENTAL AFFORDABILITY

In addition to questions about household income, Artspace asked creatives, what is the maximum amount they would consider paying monthly for live/work housing. This is to understand how to model the live/work rent table. 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, by HUD to rent a three-bedroom unit. The maximum rental rates for any future project are set by HUD and vary according to bedroom count and household income.

Max Amount Willing to Pay for Rent on a Monthly Basis		
Max monthly rent	**Total**	
	#	**%**
$400	31	6%
$500 - $600	73	15%
$700 - $800	122	25%
$900-$1,000	102	21%
$1,100 - $1,200	84	17%
$1,300 - $1,500	33	7%
Over $1,500	40	8%
Total	485	100%

Respondents were also asked what they currently pay in monthly housing costs (for those renting and owning), excluding utilities and the median was reported as $901-$1,000. Comparing this to what artists are willing to pay for new live/work housing, many may consider their current housing costs to be too high. See, the HUD rent and income limits on page 17 for more information.

RECOMMENDATIONS FOR LIVE/WORK HOUSING

Artspace estimates the market demand for a 30% - 60% AMI targeted LIHTC live/work housing development to be **165-204 units** for creatives in Tampa. This is a conservative estimate and the methodology accounts for the many factors that Artspace has seen influence the demand for live/work housing.

Live/Work Housing Demand in Tampa				
Factor	**Count**		**Discount Multiplier**	**Discounted Number**
	#	%		
Total Interested Artists	485	100%		
Incomes between 60% - 80% AMI	62	13%	2/3	41
Incomes over 80% AMI	164	34%	100	164
Incomes not reported	26	5%	1/2	13
Current Homeowners	84	17%	1/2-2/3	42-56
Have never lived in Tampa	89	18%	1/4	22
Households with more than one survey respondent ("yes" and "unsure" responses)	201	41%	1/8-1/4	25-50
Not interested in rental housing	34	7%	¾	26
Current Full-Time Students	95	20%	¼	24
Est. Market Support 30% - 60% AMI	89 - 128 units			
Est. Market Support 30% - 80% AMI	Support for an additional 21 units			

- **Income Qualification:** The number of interested respondents who self-identified as income qualifying at or below 60% of AMI is 233 (48%), which is a common, but solid percentage for an urban center. Given that the incomes provided by respondents are unverified and household compositions may change, there are still a considerable number of respondents potentially over-income, thus those between 60% and 80% are discounted by a 2/3 multiplier. Those with incomes above 80%AMI are removed. HUD's published income limits are revised annually. If funding sources support up to 80% AMI, the market will support more live/work housing.
- **Homeownership:** 84 (17%) of respondents who want live/work housing currently own their residences. These interested creatives may be less likely to relocate to a rental situation from their ownership situation; thus, demand was discounted by 1/2-2/3.
- **Relocation:** 18% (89) of the interested respondents have never lived in Tampa and another 97 (20%) do not currently live in Tampa. Artspace assumes that

respondents outside of an area may overstate their interest in relocating and discounted this by 1/4.

- **Duplication:** 98 (20%) indicated someone else in their household was also taking this survey and expressing interest in live/work housing, and 103 (21%) were unsure. This is very important caveat as we think about these respondents potentially renting units as a household. This suggests a possible reduction in demand by an estimated 25-50 units (1/8-1/4) if those households remain intact upon relocation.
- **Not interested in rental housing:** 93% of respondents indicated they are interested in a rental model of housing, which is what would be created using LIHTC. 34 (7%) said they would not be open to renting, this has been heavily discounted by ¾ considering these respondents indicated they would not be interested in the live/work housing model Artspace offers.
- **Student Interest:** Interested creatives who are currently full-time students are 20% (95 respondents) and their household incomes/ location preferences/ compositions are all likely to change post-graduation. With that in mind demand was reduced by 1/4 (24 units).

OTHER NON-QUANTIFIABLE FACTORS

- **Overstatement of Interest:** While not quantifiable, enthusiasm for new space and the project concept may influence an affirmative response, but not result in actual relocation.
- **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. This can be seen as a high amount to spend on housing to many. 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 influx/outflux trends.
- **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 any adverse decisions are not considered in this calculation. Market need is only one of many factors that shape 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 the site, financing methods, and the related LIHTC Qualified Allocation Plan (QAP), if applicable.

UNIT SIZES

Artspace's live/work units 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:** 700 sf – 800 sq. ft.
- **Average 1BR:** 800 sq. ft. – 1,000 sq. ft.
- **Average 2BR:** 1100 sq. ft. – 1,200 sq. ft.
- **Average 3BR:** 1400 sq. ft. – 1,600 sq. ft.

AMENITIES

The live/work building amenities most preferred by the creatives interested in live/work housing are below, and other live/work design considerations are further explained on page 32. Addressing these preferences through design, is important to the marketability of any future development. Respondents were asked about their interest in a work/live housing configuration, where working space was shared with other residents separate from their living space. 57%, 278 respondents were interested in the work/live configuration and 89% of respondents in the live/work, meaning the working space is within the artists' unit. Respondents could select both options if interested. This opens the possibility to including working studio space as a building-wide resident amenity and having smaller living spaces for residents.

Most Preferred Shared Building Amenities

- General-use studio/workspace – **238 (49%)**
- Gallery/Exhibition Space – **182 (38%)**
- Rehearsal Space – **130 (27%)**
- Music Practice Room (sound attenuated) – **106 (22%)**
- Additional storage – **102 (21%)**
- Outdoor work area – **95 (20%)**
- Gardening area – **94 (19%)**
- Informal meeting/lounge – **87 (18%)**

*Respondents may have selected multiple options

LOCATION INTEREST

Respondents were asked where in Tampa they would consider relocating for live/work housing. Seminole Heights was the most preferred neighborhood, followed closely by Downtown. Ybor City and Tampa Heights are locations of interest to more than 40% of respondents. Site selection for a future project will be driven by real estate availability, cost and alignment with funding tools. When feasible, locating new space in a preferred neighborhood offers greater assurance of a successful lease-up. In general, respondent preferences indicate a high degree of flexibility regarding location. Those who selected "no preference" may not have enough context about the neighborhoods to offer informed input.

Live/Work Housing Location Interest

1. Seminole Heights – 263 (54%)
2. Downtown – 250 (52%)
3. Ybor City – 238 (49%)
4. Tampa Heights – 209 (43%)
5. West Tampa – 159 (33%)
6. No Preference – 118 (24%)
7. Another Location – 48 (10%)

Note: Respondents could select multiple options

RETAINING AND ATTRACTING THE CREATIVE SECTOR

Of the 485 respondents who indicated that they would relocate to live/work housing designed for artists and their families, **299** currently live in Tampa. Of this subset, 227 (76%) have considered leaving Tampa. **95% (215) indicated that they would be encouraged to remain for the opportunity to have affordable artists' live/work housing.** This is a significant number, and this statistic can be conveyed when explaining the dire need for this type of housing to retain the existing Tampa artists and creatives.

ARTIST SURVEY INTEREST IN:

PRIVATE STUDIO SPACE

The following statistics are about the **492 respondents** interested in private studio space on an ongoing basis.

---

492 (42%) OF THE 1,159 TOTAL RESPONDENTS ARE INTERESTED IN PRIVATE STUDIO SPACE

236 (48%) INTERESTED IN BOTH PRIVATE STUDIO SPACE AND LIVE/WORK

109 (22%) INTERESTED IN ONLY PRIVATE STUDIO SPACE

Definition: Private Studio Space

Space designed for the creation or practice of art (e.g., for visual arts, performing arts, or other creative work space needs). This space is not code compliant for residential use but may be in a building that includes residential

OF THE 492, **312 (63%)** DO NOT HAVE SPACE DEDICATED TO THEIR ART/CREATIVE WORK

153 (31%) HAVE STUDIO/WORKSPACE WITHIN THE HOME

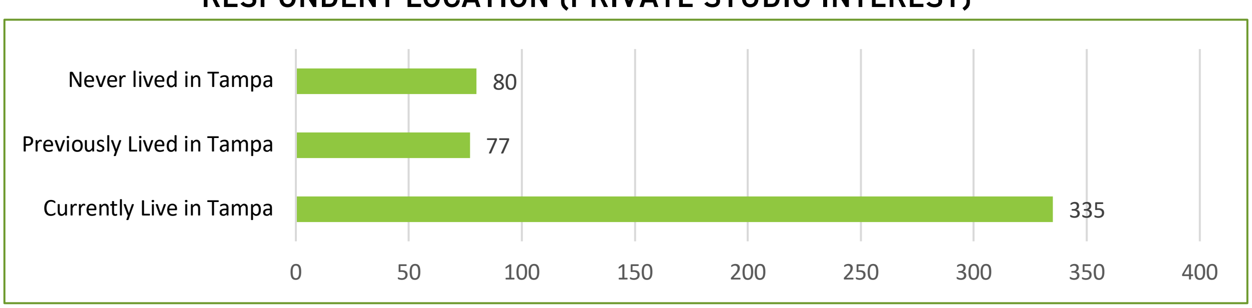
235 (48%) DON'T HAVE THE SPACE THEY NEED FOR THEIR ART/CREATIVE WORK

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing – **37%**
2. Art gallery/curatorial – **22%**
3. Music – **21%**
4. Photography – **19%**
5. Digital/Desktop Arts – **18%**
6. Art Education – **17%**

(Note: Respondents could select up to 4 options)

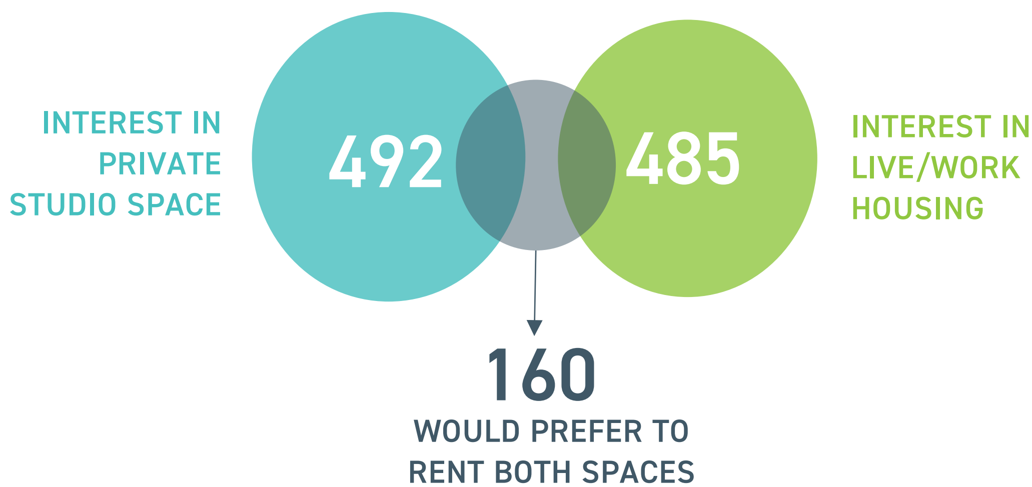
RESPONDENT LOCATION (PRIVATE STUDIO INTEREST)



DETERMINING THE NEED 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 for the creation or sharing of their work, or by an individual for similar artistic or creative purposes. This space can be an interior space or located on an upper story of a building. It is not necessarily retail facing storefront space.

When calculating the demand for private studio space, Artspace uses the total number of respondents interested in private studio space (492) and discounts for certain factors including interest in multiple space types and likeliness that they will share space. In Tampa, 52% of the 492 interested respondents want private studio space and not live/work too (256), this includes those interested in shared creative space as well. 109 (22%) are interested in **only** private studio space and no other type of space.



RECOMMENDATIONS FOR PRIVATE STUDIO SPACE

There is demand for **up to 100 private studio spaces** in addition to live/work housing and shared creative space.

SUSTAINABLE RENTAL RATES

The factors considered in the Artspace demand calculation are in the table below. Typically, workspace needs to be rented at $1.00/square foot or more to be financially self-sustaining. Only 175 (36%) respondents indicated an ability to pay $1.00/square foot or more. Respondents predominately require private studio space priced at or below $1.00 SF, which is common nationally. For this reason, sustainable rental rate is included as a factor in our calculation.

INTEREST IN BOTH LIVE/WORK HOUSING AND PRIVATE STUDIO SPACE

Respondents who were 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 given the opportunity. 68% of those 236 respondents interested in both spaces said they would prefer to rent live/work housing and private studio space at the same time. 42 (18%) indicated they would prefer to only rent live/work housing, since the Project Concept we are testing assuming live/work housing, we've discounted that demand by half.

DEMAND TABLE

Artspace's demand model is conservative and attempts to account for the many factors that can impact an individual artist's decision to rent long-term private studio space such as choosing a less costly option like sharing a long-term studio space rental with other artists or renting space for a shorter term instead.

Private Studio Space Demand for Tampa

Factor	Total Interested Artists Count		Discount Multiplier	Discount # (Total Interest)
	#	%		
Total Interested Artists	492	100%		
Currently have Dedicated Workspace	180	37%	1/4	45
Have never lived in Tampa	80	16%	1/3	27
Overlapping Interest in Shared Creative Space	304	62%	1/8	38
Would share private studio space (Definitely and likely)	371	76%	1/4	93
Prefer L/W Scenario	42	1%	1/2	21
Unlikely to pay min. $1/SF	317	64%	1/3	106
Other Economic factors	N/A	N/A	1/8	62
Est. Market Support	**Up to 100 studio spaces**			**(392)**

In addition to the two main data points listed above, the factors labeled as “other economic factors” are important to consider but harder to quantify and include, for example:

- Amenities and square footage that is required by interested respondents may not be feasible to provide affordably (e.g., ventilation for industrial arts and spaces over 500 SF etc.).
- Income fluctuation, leading to shorter studio renting tenure and greater tenant turnover.

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

STUDIO SIZES & RENTAL RATES

Understanding what interested respondents can afford and how large of a space they need is critical to planning for financially self-sustaining space that is also marketable. The following table provides a summary of this information. Respondents were asked the minimum square footage necessary for private studio space and the maximum monthly amount they would consider paying. Artspace considers $1.00/square foot a sustainable, below-market affordable rent for clean, visible studio space in its projects.

For Tampa, 175 respondents out of 492 are willing to pay more than $1.00/SF per month for their private studio space. That amount is shaded in light green in the table below.

**Note that this table creates ranges for studio sizes, conservatively rounds up square footage, and highlights those who can pay more than $1.00/SF (175), as compared to the chart in the Technical Report that indicates 263 respondents can pay $1.00/SF or greater for the minimum square feet they require.*

Monthly Rent	Minimum Square Footage Needed										Total
	Under 100 SF	100 - 200 SF	200 - 300 SF	300 - 400 SF	400 - 600 SF	600 - 800 SF	800 - 1,000 SF	1,000-2000 SF	Over 2,000 SF	Not Sure	
$1 - $100	36	13	17	7	14	5	-	-	-	18	**110**
$100-$200	8	18	28	16	22	6	3	2	-	8	**111**
$201-$300	7	11	19	10	17	9	7	2	-	3	**85**
$301-$400	3	3	9	2	15	8	4	1	-	2	**47**
$401-$600	-	4	9	8	22	6	4	7	1	11	**72**
$601-$800	-	-	5	3	9	3	3	5	-	1	**29**
$801-$1,000	2	-	2	-	6	2	5	3	2	1	**23**
$1,000-$2,000	-	1	-	-	1	1	-	11	-	0	**14**
More than $2,000	-	-	-	-	0	0	-	1	-	0	**1**
Total	**56**	**50**	**89**	**46**	**106**	**40**	**26**	**32**	**3**	**44**	**492**
Total (1/SF)	20	37	44	13	38	6	5	12	-	-	**175**

Based on the data and the summary statistics, a draft program plan for up to **100 private studio spaces** should consider units of varying sizes and price points. For example:

- **41 studios up to 200 square feet.**
- **23 studios 200 - 400 square feet.**
- **17 studios 400 - 600 square feet.**
- **10 studios 600-900 square feet.**
- **9 studios over 900 square feet.**
- Rents that **do not exceed $600 gross per month** regardless of studio size **or $1.00 SF (whichever is less).**
- At least half of the studio spaces should rent **at or below $300/month.**

MOST REQUESTED PRIVATE STUDIO SIZE*
70% (347) would be served by
up to 500 square feet
**A variety of sizes are needed*

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

Respondents interested in private studio space would use it for the creative work types listed below. Developers interested in building private studios are encouraged to consider this information and artist friendly amenities such as common area Wi-Fi, utility sinks with traps, and additional storage when making space for artists.

Private Studio Preferred Use

- Studio Arts, Non-industrial– **254 (52%)**
- Exhibition or Presenting Space – **159 (32%)**
- Performances or public gathering spaces – **128 (26%)**
- Desktop Arts **– 112 (23%)**
- Rehearsals/Movement – **108 (22%)**
- Classes/Workshops – **92 (19%)**
- Audio – **89 (18%)**
- Light industrial – **82 (17%)**

**Respondents may have selected multiple options*

LOCATION

The most preferred locations should be prioritized for new private studio space to the extent feasible. The top four neighborhoods overlap with the location preferences for live/work housing and supports the project concept of a mixed-use arts building.

In all cases, studio and creative work-only space should be developed conservatively. Despite the relatively strong interest, investment in studio space is inherently riskier than housing. Phasing in new space, rather than immediately building to the maximum is the recommended approach.

Private Studio Space Location Interest

1. Seminole Heights – 268 (20%)
2. Ybor City – 243 (18%)
3. Downtown – 243 (18%)
4. Tampa Heights – 224 (17%)
5. West Tampa – 175 (13%)
6. No Preference – 101 (8%)
7. Another Location – 87 (6%)

Note: Respondents could select all that applied

ARTIST SURVEY INTEREST IN:
SHARED CREATIVE SPACE

The following statistics are about the **674 respondents** interested in shared, specialized creative spaces accessed through a *membership or short-term rental. High demand for shared space is a common national AMS finding.*

674 (58%)

OF THE 1,159 RESPONDENTS ARE INTERESTED IN ACCESS TO SHARED CREATIVE SPACE

297 (44%)

ARE ONLY INTERESTED IN ACCESS TO SHARED CREATIVE SPACE

Definition: Shared Creative Space

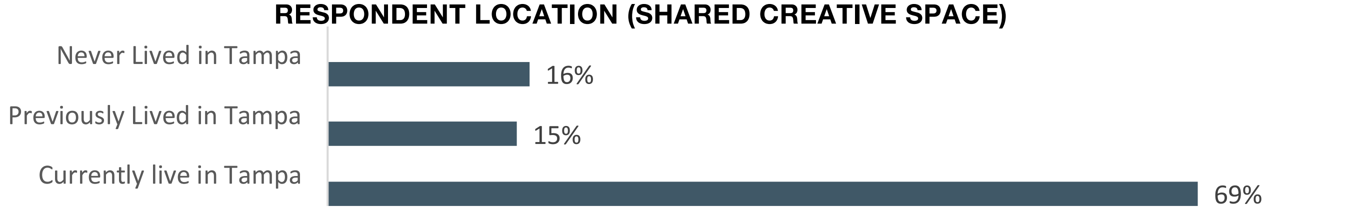
Space that may be available through a paid membership (e.g. makerspace or co-working space model) or rented for a fee on an hourly, daily, weekly or another short-term basis. Space may be available for a single renter's exclusive use during the rental period (e.g. film-screening room or classroom) or shared with others at the same time (e.g. ceramics studio, dark room, business center). 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.

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing - **27%**
2. Music – **25%**
3. Theater arts - **19%**
4. Arts Education **– 18%**
5. Art Gallery – 17%
6. Photography – 17%

**Respondents could choose up to 4*

RESPONDENT LOCATION (SHARED CREATIVE SPACE)



INTEREST IN SHARED CREATIVE SPACE

These spaces and associated programs are typically offered to artists through an organization/operator that has leased long-term space from a property owner for that purpose. *Collaborative* shared space examples include: co-working or makerspaces designed for specific uses such as ceramics, 3D printing, culinary arts, or woodworking. *Private short-term rental* examples 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. Shared creative space can exist in the context of a multi-use facility, or independently. 297 (26%) indicated an interest in **ONLY** shared creative space. The demand for this space is very high. Currently, 467 (69%) of the respondents who are interested in shared creative space live in Tampa, 100 (15%) are previous residents, and 107 (16%) have never lived in Tampa. Developing new shared creative space would first address a local need for space, but also attract new creatives to Tampa.

With 674 total respondents expressing interest, shared, specialized creative space ranks by far as the most preferred space type in this survey. The respondents are involved in a wide variety of industries and correspondingly have a variety of space needs. While 230 of these respondents also expressed an interest in live/work housing, it is anticipated that most specialized shared space needs will remain constant even if new live/work housing is available. Likewise, 304 respondents expressed interest in Private Studio space (discussed in the previous section) and Shared Creative Space. Of these 235 (77%) respondents indicated they would prefer to rent both spaces at the same time.

RECOMMENDATIONS FOR SHARED CREATIVE SPACE

Artspace recommends including, to the extent feasible, shared creative space in any new multi-use facility. A multi-use facility would be enhanced by including some general purpose, flexible studio spaces designed for short-term private use **AND** at least one designed to be shared by multiple users at the same time and appropriate for teaching and workshops. There is

MOST PREFERRED TYPE OF SHARED SPACES*

- General Use Studio – 242 (36%)
- Teaching or Workshop – 195 (29%)
- Rehearsal – 192 (28%)
- Exhibition/Presentation – 189 (28%)
- Performance (informal/flex) – 167 (25%)
- Audio (recording, editing etc.) – 140 (21%)
- Co-working – 125 (19%)
- Light Industrial – 101 (15%)
- Performance (formal) – 100 (15%)
- Retail/Market space – 98 (15%)

**Respondents could choose multiple options* definite interest in shared creative spaces of the following types in the list on the previous page. It will be important to identify an organization/business or individual who could lease commercial space in a new facility and offer the specialty spaces and programs preferred by respondents. The demand is large enough that there is an opportunity for multiple shared creative space concepts to be created or expanded throughout Tampa.

A full list of types of spaces/specialized equipment preferred by respondents can be found in the Technical Report Section IV and can be referenced for the planning and development of other spaces/program ideas.

DESIGNING ARTIST SPACES

Planning for new space requires more than just quantifying interest in live/work housing, private studio, 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 also influence what spaces are created and the amenities and features that are included. Thus, Artspace offers the following design best practices to assist developers of new creative space, informed both by the Tampa Arts Market Study data as well as Artspace's 30+ years designing artist projects.

DESIGN FEATURES AND AMENITIES

GENERAL GUIDELINES

If buildings are 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, and the ability to easily load and unload projects, materials, and equipment. This means wide hallways (6-foot width minimum), oversized doorways and elevators with 3,500 pounds capacity. It can also include loading zones and space for package pick-ups. Certain art materials can be toxic, which adds a level of consideration for trash disposal and utility sink drains. The surfaces 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, and no carpet.)

LIVE/WORK HOUSING

Through Artspace's operation of 40 live/work housing buildings over the past thirty years, we are well-versed in the needs of artists in their living and working spaces. Live/work housing units should be designed to maximize flexible space.

IN-UNIT FEATURES (LIVE/WORK ONLY)

While some 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 consistently a preferred feature of artists. Considering the COVID-19 pandemic, the reliance on virtual connection is more important than ever. 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/workspace 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 may be cost prohibitive to soundproof all the live/work units, consideration could be given to sound attenuating design that limits noise between units. Offering a soundproof space for residents and non-residents for rehearsal and recording purposes could help address some residential needs and 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. If offering this feature, consideration should be given to the impact on building water usage.
- **High ceilings:** Ceilings that are over 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 that they can sell, perform, and share their

work. Artists sometimes prefer an option that will allow them direct access to the outdoors and potential clients, audiences, customers, and other members of the public. Any new project design could consider a few storefront options and/or design elements that encourage public access and interaction.

- **Special ventilation:** 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. Consider allocating a shared private studio(s) space within a building with enhanced ventilation for varnishing, spraying, and where use of other toxic substances is permitted.

COMMUNITY GALLERY

Live/work housing space in its general conception provides the opportunity for residents to collaborate and help one another, but all artist facilities should have a space that enables collaboration and inspires a sense of community. 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, and display their art in the hallways.

Gallery spaces should have 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-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. Include two types of lighting when possible: 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

When designing for the generalized needs of performing artists, the four considerations are unencumbered space (i.e. no posts or pillars), high ceilings, lighting, and sound quality. Specific uses have different requirements such as sprung floors for dancers.

OTHER FEATURES

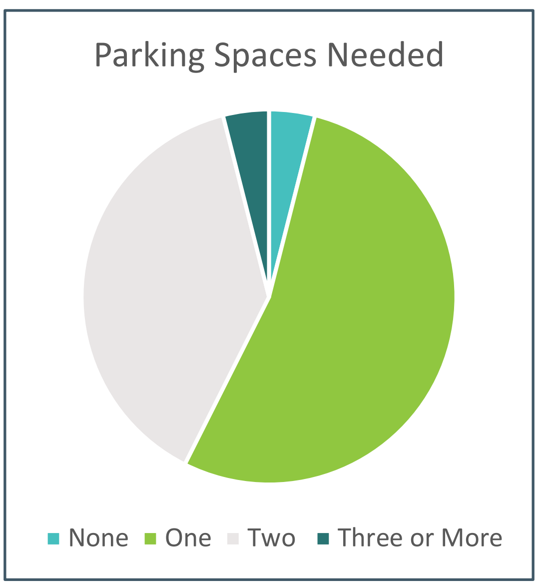
A property management office should be located on the first floor near the main entrance. The exterior of the building should have low maintenance finishes. Consider providing artist designed bike racks for visitors and bike storage for residents. Consider local artist designed components throughout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

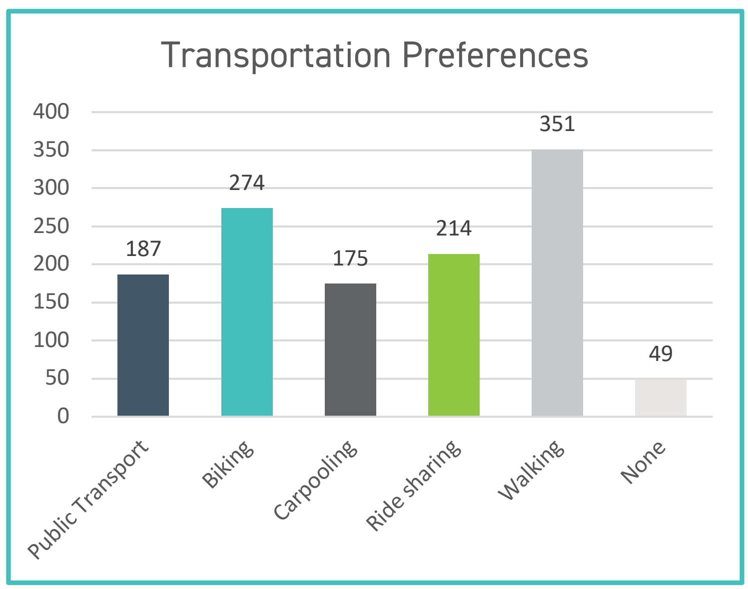
Commercial and communal space public restrooms should be inclusively designed as at least two gender neutral restrooms and include a diaper changing station in at least one unit. Artspace has a plethora of resources on designing artist spaces and is also available to consult with developers looking to create space for artists.

TAMPA SPECIFIC DESIGN FEATURES AND AMENITIES

TRANSPORTATION AND PARKING

Respondents interested in live/work housing (485) were asked what alternative transportation options they would use on a frequent or regular basis if available. Walking (72%), biking (56%), ride sharing (44%), public transportation (39%), and carpooling (36%) were the most popular responses. Including bicycle parking and locating in a walkable environment are recommended. 96% of respondents indicated they need at least one parking space for their household however, 28% (116) of those who would use alternative transportation stated that availability of these options would reduce their parking needs, potentially offering an argument for fewer on-site parking spaces under the right conditions.





Note: Only asked of respondents interested in live/work housing. Respondents could choose more than one option

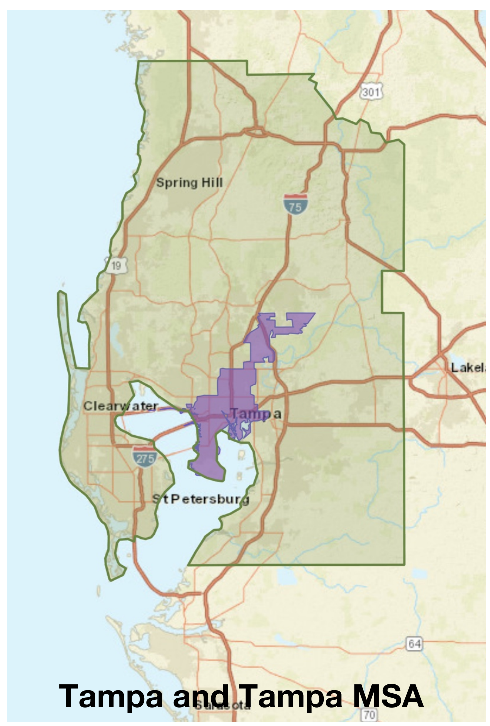
CONCLUDING REMARKS

FURTHER SURVEY PARTICIPANT ENGAGEMENT

Respondents indicated an 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 the Tampa Artspace Initiative Steering Committee. It can take several years to realize a new space and keeping interested parties engaged is important. Periodic and important project updates will be provided to those **894 (77%) respondents** who requested this information.

590 (51%) indicated they would be interested in volunteering to advance this project in Tampa. This interest group could also be contacted to test project concepts and business plan assumptions as they evolve, including more information about fees or membership rates that can be charged for shared creative spaces. Planning the program early, including identifying funding and operating partner(s), is critical to implementing this mixed-use concept.

It is assumed that survey respondents, while broadly representative of the market, may not be the same individuals who ultimately rent new live/work or studio space. For this reason, Artspace recommends that outreach and artist engagement in Tampa continue in order to reach 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. Tampa has an outstanding turnout for the survey considering the challenges from COVID-19. Keeping the arts community informed as new spaces are planned will help with advocacy for any new project as well. This data can also be used to help inform current vacancies and available spaces.



Tampa and Tampa MSA

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 Tampa and its Metropolitan Statistical Area (MSA) (at right). Despite best efforts, surveys of this nature are limited in their ability to engage everyone and, in return, may not truly reflect the diversity of a region regarding age, gender, race, income, ethnicity, and even artistic discipline.

The survey outreach made a concerted effort to target diverse voices and succeeded to a large degree. Survey respondents from across the region identified as Black/African American (10%), and Hispanic/Latino (13%). According to demographic software Esri Community Analyst, in 2021 Tampa's population is estimated as 21% Hispanic/Latino(a) in the Metropolitan Statistical Area and 27% in the city of Tampa.

In terms of gender, 60% of survey respondents were women, 35% were male, and 5% identified as non-binary. In 2020, women make up 52% of Tampa and 48% are men, according to the U.S. Census American Community Survey. While direct comparisons cannot be accurately made from the broader community to the creative sector due to the convenience sampling method of this survey, attention should still be paid to engaging diverse populations as well as all genders during future outreach. In the experience of Artspace, the community's creative sector is typically as diverse, if not more, than the broader population.

Survey Respondent Race and Ethnicity			*Tampa MSA 2020 est.	*Tampa 2021 est.
White/Caucasian	729	63%	75%	61%
Black/ African American/Caribbean	119	10%	13%	26%
Multiracial/multiethnic	80	7%	3%	4%
Hispanic/Latino(a)	156	13%	21%	27%
Not Listed	32	3%	5%	4%
Asian American/Asian	28	2%	4%	5%
American Indian/Pacific Islander	9	1%	0.5%	0.5%
North African/Middle Eastern	6	1%	N/A	N/A
Total population	1159	100%	2,415,633	386,341

**Tampa MSA 2020/2021 Source: Esri Community Analyst. The census data approach is that persons are either Hispanic or Non-Hispanic. Those persons that identify as Hispanic may be of any race, thus totals result in percentages above 100%*

For a future project to be demographically 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 respondents who identified as Latino(a)/Hispanic, multiracial/multiethnic, and Black/African American were interested in live/work housing compared to the overall survey responses. Any outreach on artist housing or studio space should aim to be equitable and specifically engage diverse populations in a community as diverse as Tampa.

NEXT STEPS

There is demonstrated market demand for 89-128 live/work housing units affordable to Tampa creatives in households with incomes at or below 60% of AMI. The market is greater for mixed-income housing. Artspace recommends using this and other study findings to inform new creative space developments, including an Artspace model, mixed-use creative facility.

Next steps can include not only advancing an Artspace model project, but also advocating for new creative space throughout Tampa. Because no singular project can address all space needs, this study may also be used by other developers, building owners, and entrepreneurs to plan other creative space developments and initiatives in Tampa. For example, this data can be shared broadly to encourage new space within any existing, underutilized buildings or new development projects. Critical to addressing the need for shared creative space is first identifying program operators or others interested in renting commercial space or expanding existing programs to offer the types of specialized spaces discussed in this report.

The Technical Report Addendum, upon which this Report of Findings is based, provides an in-depth breakdown of survey responses and offers additional context and data for concept planning new spaces and shared-use / specialty-use space programs. These reports can also be shared with city officials, funders, and other stakeholders who value a sustained and thriving creative sector in the community, in order to encourage capital and predevelopment funding assistance.

Artspace appreciates the opportunity to complete this Arts Market Study for Tampa and graciously commends the Artspace Tampa Initiative Steering Committee, Core Group, and AMS subcommittee members, and Tempus Projects for their dedication and hard work during these past 10 months and their commitment to the creative community in Tampa.