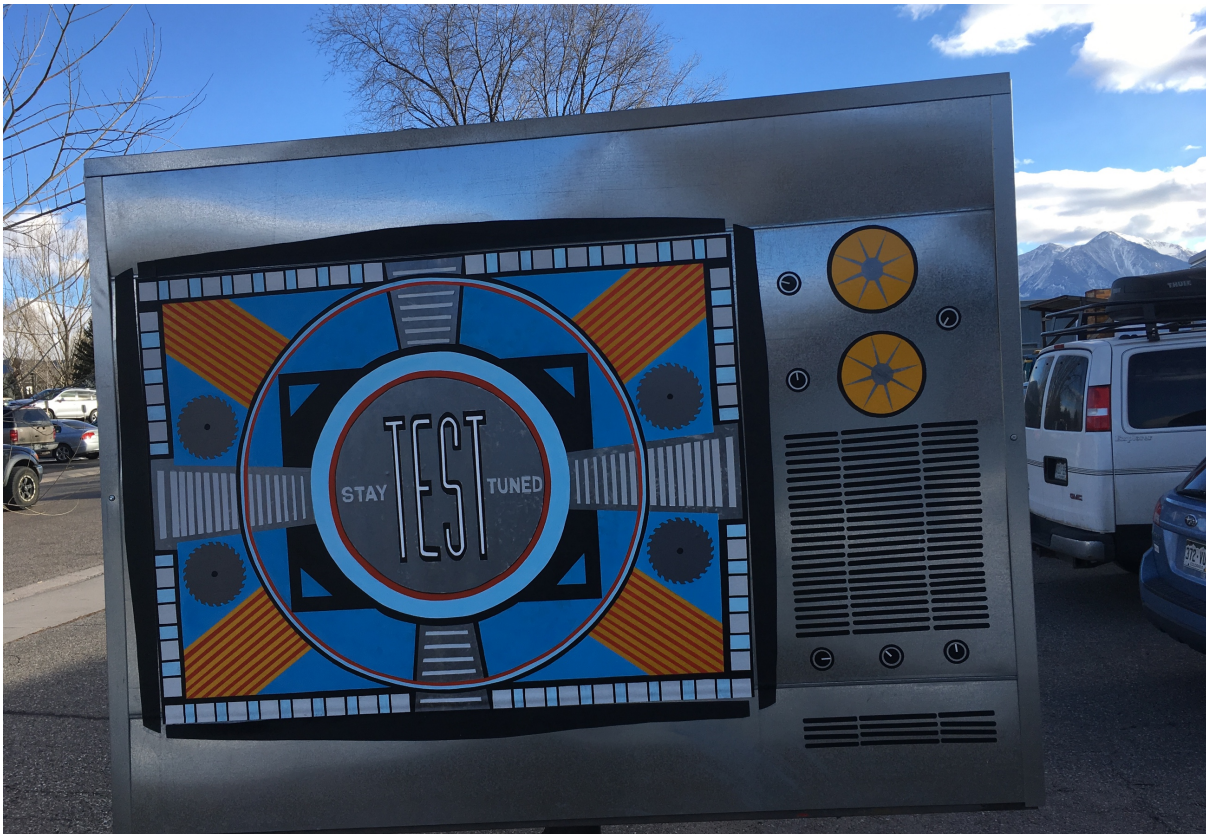


ARTS MARKET STUDY REPORT OF FINDINGS



REPORT AND RECOMMENDATIONS ON THE SURVEY OF ARTISTS AND CREATIVE
INDIVIDUALS' SPACE NEEDS AND PREFERENCES IN CARBONDALE

Prepared For:



Carbondale, CO // November 2018

ACKNOWLEDGEMENTS:

Artspace would like to thank the Town of Carbondale and Carbondale Arts, specifically Angie Sprang, Management Analyst, Town of Carbondale, Jay Harrington, Town Manager, and Amy Kimberly, Executive Director, Carbondale Arts for the opportunity to inform possible new affordable creative space initiative(s) in Carbondale. The Arts Market Study process and resulting data would not be possible without the participation of funders and Carbondale stakeholders and partners. A big thank you is extended to the following public and private entities who played a critical role in outreach and implementation of this study.

FUNDING AND SUPPORT PROVIDED BY:



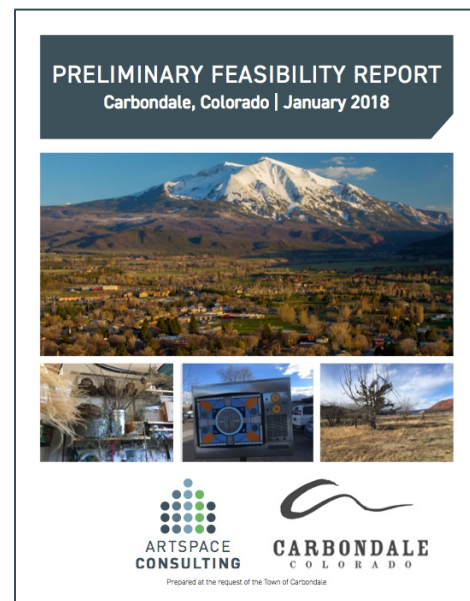
TABLE OF CONTENTS

INTRODUCTION	4
SURVEY METHODOLOGY	6
KEY FINDINGS & RECOMMENDATIONS	8
LIVE/WORK HOUSING	11
PRIVATE STUDIO SPACE	17
SHARED CREATIVE SPACE/ SHARED PERFORMING ARTS SPACE	21
DESIGNING ARTIST SPACES	24
CONCLUDING REMARKS	28
TECHNICAL REPORT	ADDENDUM

INTRODUCTION

Artspace was contracted by the Town of Carbondale to determine if there is sufficient demand to support the development of new affordable space for the creative community and if so, what types of space(s) and amenities are most needed. The Arts Market Study (AMS) follows the Preliminary Feasibility Study (PFS) conducted in December 2017. The PFS involved a general feasibility assessment of the potential to develop new affordable, self-sustaining space, and this study focuses specifically on quantifying the need for affordable live/work artist housing and creative workspace. The PFS included a two-day visit by Artspace staff from the Consulting and Strategic Partnerships Department, Wendy Holmes, Senior Vice President, and Anna Growcott, Director. Artspace conducted a series of focus groups and community meetings in Carbondale, took a tour of area arts assets and potential sites, and wrote an in-depth report of preliminary findings. The PFS is a feasibility assessment of the six key areas Artspace considers essential to successful community-led development. Those include: **project concept** for a potential new arts facility; the **arts market** and its need for new space; **local leadership** support; **funding and financing** opportunities; assessment of **potential sites**; and, how an arts-centric project could **align with broader community goals**.

The Arts Market Study goes a step further. It tests assumptions formed during the Preliminary Feasibility Study, including a priority Project Concept that includes live/work units on its upper floors and creative commercial space on the ground floor. The purpose of the AMS study is first to determine if there is enough demand and interest by the creative sector to warrant new space, second, to inform the conceptualization and design of that space, and third energize the community around advancing the creation of the project. The Arts Market Study includes: an in-depth data collection survey deployed online; this Report of Findings; and, the Technical Report Addendum that contains the data and analytics.



THE SURVEY

After the Preliminary Feasibility Study, Artspace worked with the Town of Carbondale to develop the **Survey of Artists and Creative Individuals** to assess the local creative sector's interest in new, affordable space in Carbondale. The online survey was open for seven weeks June 24th, 2018- August 8th, 2018 and available at CarbondaleAffordableCreativeSpaceSurvey.org. This allowed respondents to articulate their needs and preferences for live/work housing, private workspace as well as shared creative and performing arts spaces. They were also asked about their preferences related to these space types including design features, shared building amenities, and types of shared spaces and/or specialized equipment. Respondents were asked to provide descriptive information including their arts and creative activities, current living and working arrangements, household income and other demographics. Lastly, the survey asked how much they would consider paying for new affordable live/work artist housing and private workspace. For brevity, this survey will be referred to as the **"artist survey"** in this report.

The Arts Market Study for Carbondale quantified the demand for a variety of spaces for artists and creatives, specifically about respondents' interest in:



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



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



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



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

INTENDED AUDIENCE

The results of these surveys will help **Artspace**, other **real estate developers** and **property owners** interested in creative space and artist housing, determine if Carbondale is the right market for new space investment. Further, these findings, the design guidelines (page 25), and Technical Report Addendum can be used to advance space planning, financial modeling, and early concept design work.

Advocates for the local arts community and creative economy can use this information to communicate the space needs, cultural asset gaps, and related space-based challenges of Carbondale's creative sector. The data can be translated into a compelling narrative about the who, what, and why behind any future, new space effort. This in turn can help the **Town** and its **City Planners** identify priority areas for investment.

The design guidelines starting on page 24, are included to benefit **all developers** looking to make space available for artists and creatives. The Technical Report should be reviewed by those embarking on new space initiatives as it contains data critical to fully understanding the artist market's need and preferences for new space.

SURVEY METHODOLOGY

Artspace relies on the expertise of local partners to help promote and spread awareness about the study and reach the greatest number of artists. Carbondale's survey launched on June 24th, and on July 17th Artspace made a public presentation to encourage survey participation at Marble Distillery in Carbondale. Artspace was represented by Wendy Holmes, Senior Vice President, and Anna Growcott, Director, Consulting and Strategic Partnerships. There were nearly 20 people present at the event along with Artspace's community partners Angie Sprang and Amy Kimberly.

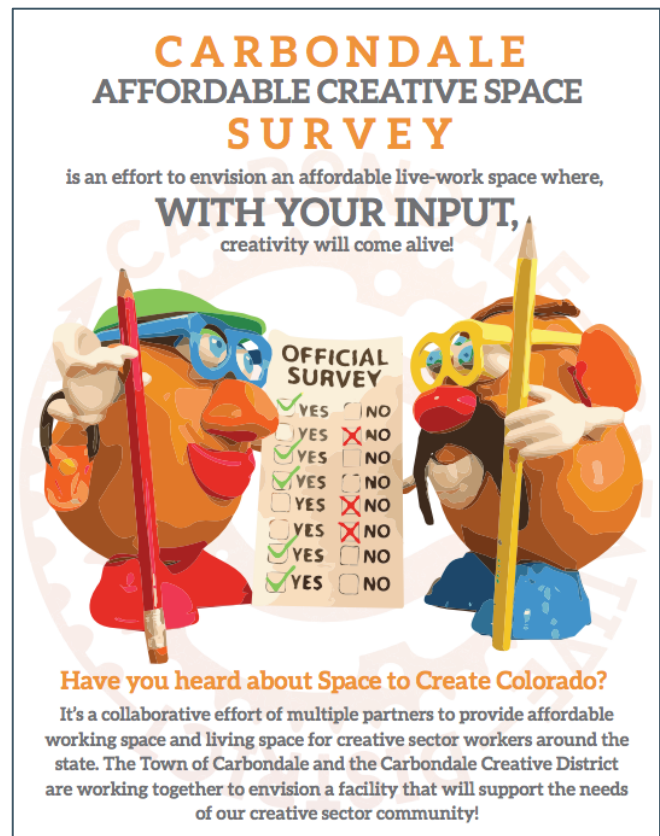
Artspace provided weekly survey assistance to the Town of Carbondale and Carbondale Arts to help with outreach efforts, particularly with an eye to encouraging diversity and inclusiveness of all community members and art forms. The survey was open for seven weeks via the Survey Gizmo online platform and closed on August 17th, 2018. During that timeframe, there were **342** respondents to the artist survey. The partners in Carbondale disseminated surveys notifications through the following means:

- **Press Outreach:**
 - Sopris Sun, Social Media Facebook accounts for the Town, KDNK Radio, Aspen Public Radio
- **Printed Outreach:**
 - Every door direct mailer (approx. 1,100), post card distributed at Town Hall and at Carbondale Arts
- **Survey link:**
 - On the town website, creative district website, and chamber of commerce website
- **Social Media Outreach:**
 - Town Facebook pages, creative district pages, and chamber of commerce pages

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

- Email Invitation – 146 (33%),
- Postcard in the mail – 82 (19%),
- Social media outlet – 62 (14%),
- Friend/colleague/acquaintance – 56 (13%),
- Information media source, not web-based- 29 (7%)
- Flyer, poster, postcard – 24 (5%)
- Other – 19 (4%) including, Carbondale Arts, Carbondale Mountain Fair Announcement, and the Sopris Sun newspaper.

Note: Respondents may have selected multiple options



SURVEY DISCLAIMER

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

Data that is not statistically relevant due to low response numbers is mostly omitted from this report. Small group differences or percentages should be interpreted carefully. Statistical analysis of the Survey Gizmo

collected data was conducted via SPSS Statistics software and Microsoft Excel.



Carbondale Survey Event,
July 17, Marble Distillery

Artspace has conducted over 95 Arts Market Surveys across the country reaching more than 40,000 artists. The experience and lessons learned from surveying artists and creatives around the country plays heavily into the market considerations, assumptions, and recommendations in this report.

ONGOING OUTREACH

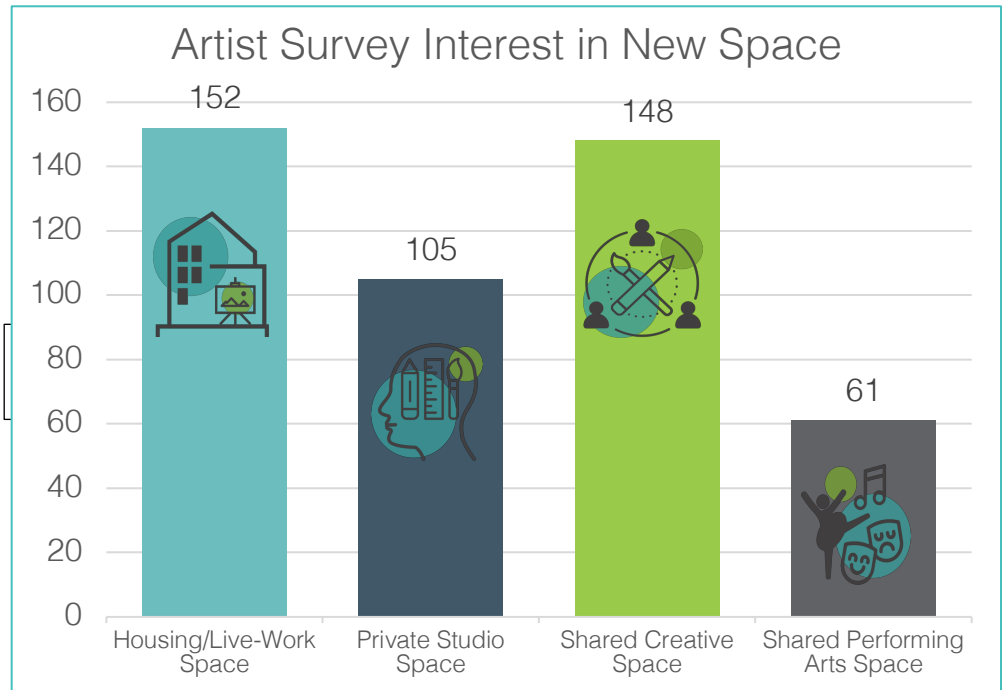
Responses to the artist survey are representative of a need for space. Interested respondents may not be the same people who eventually rent space in a future project. Ongoing outreach is recommended to keep a diversity of artists engaged in any evolving conversation and future project(s). For this purpose, Artspace has provided the Town of Carbondale with confidential contact information for **the 233 (68%)** who requested further information and/or updates on this project in a separate attachment.



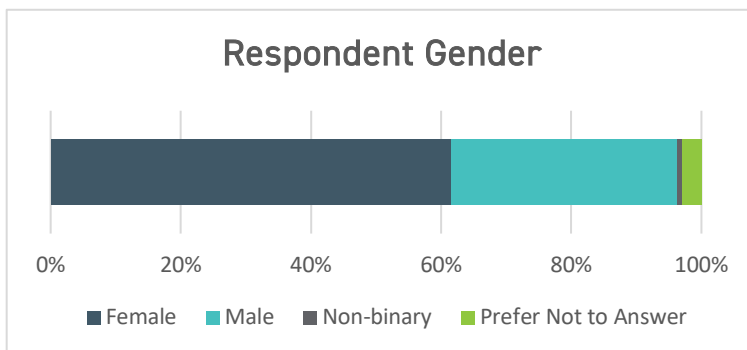
KEY FINDINGS & RECOMMENDATIONS

The primary focus of this report is on the **269 (79%)** of the total **342 survey respondents** who indicated an interest in at least one type of space in Carbondale, CO.

**342 TOTAL
RESPONDENTS**



RESPONDENT OVERVIEW



- **127 (37%)** Use space within their home for art/creative work
- **89 (26%)** Do not have the space they need for their art or creative work

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

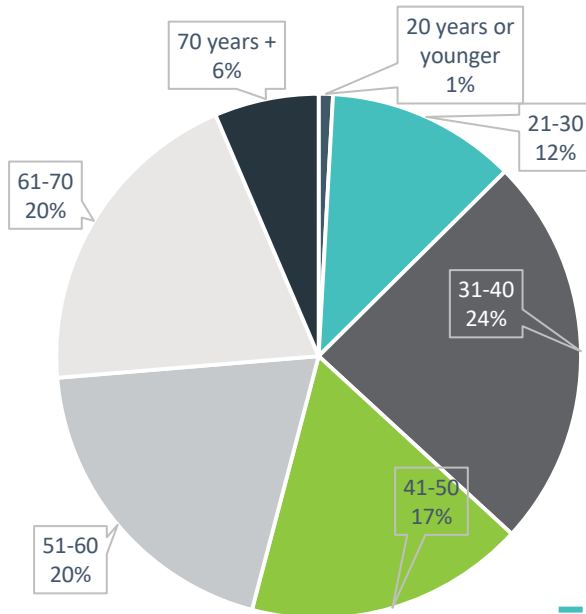
(Respondents could choose up to 4)

1. Painting and Drawing – 23%
2. Crafts/ Fine crafts – 19%
3. Music – 15%
4. Architecture/Landscape A – 14%
5. Education/Instruction – 14%

Note: Respondents could select multiple options

RESPONDENT OVERVIEW CONTINUED

Respondent Age



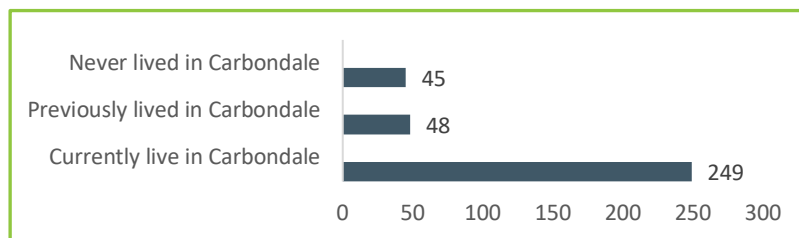
Respondent Race and Ethnicity

White/Caucasian	312	915
Multiracial/Multiethnic	14	4%
Hispanic/Latino(a)	6	2%
Not listed	4	1%
Indigenous American	3	1%
Asian	2	1%
Black/African-American	1	0%
Total	342	100%

HIGHEST LEVEL OF EDUCATION




- High School Grad/GED (3%)
- Some College/Associates (18%)
- Bachelor's Degree (34%)
- Some post-grad (13%)
- Post-grad degree (32%)

RESPONDENT LOCATION



RECOMMENDATIONS

The Arts Market Study data revealed that the market supports a moderately sized affordable mixed-use project concept. Such a facility could provide a variety of affordable spaces serving artists and creatives in Carbondale. Artspace recommends advancing a mixed-use facility with both residential and commercial space that can be adapted for a variety of creative space uses. The data supports the following creative space types and amounts in Carbondale:

	<ul style="list-style-type: none">Up to 42 units of affordable artist live/work housing
	<ul style="list-style-type: none">11 units of new private studio spaces in addition to live/workVariety: Half at \$100 - \$300 a month; Larger spaces \$400 +Create mostly small and moderately sized studios; 500 SF or less
	<ul style="list-style-type: none">Shared creative spaces emphasizing shared and short-term studio rentals that also incorporates shared performing arts space needsInclude: Gallery/exhibition space, rehearsal, classrooms & communal (meeting/networking/lounge) space

Artspace does not operate shared creative space, but rather rents commercial space to an organization that operates a program as part of their business plan. To maintain a financially feasible project, commercial space is typically less than 20% of an overall building's square footage. Local entrepreneurs, non-profits and/or creative businesses that currently address or want to address shared space needs should review Section IV of the Technical Report.

Artspace's recommendations are based on 30+ years of experience in the field of affordable art facility development. There are factors besides market demand that will influence a future project concept and feasibility of new space including: funding opportunities and funder priorities; civic leader priorities; available sites; and new complementary developments that offer desired space.

Survey respondents could select multiple types of spaces that they would be interested in renting or relocating to and duplication of interest is possible. For example, an artist may want both live/work housing and private studio space, however it is reasonable to assume an artist expressing interest in both spaces, does not intend to rent both at the same time. Artspace's overall recommendations are conservative to consider the possible impact of overlapping space interests.



ARTIST SURVEY INTEREST IN:

LIVE/WORK HOUSING

The information on the following pages is solely about the **152 artists** interested in live/work housing in Carbondale

152
(44%)

OF THE 342
RESPONDENTS ARE
INTERESTED IN
LIVE/WORK HOUSING

66
(43%)

ARE ONLY INTERESTED IN
LIVE/WORK HOUSING
AND NO OTHER SPACE



HOUSEHOLD COMPOSITION

- One-person – 55 (36%)
- Two-person – 70 (46%)
- Three-person – 18 (12%)
- Four or more – 9 (6%)
- Children (under 18) – 32 (21%)

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

(Respondents could choose up to 4)

1. Painting/Drawing – 30%
2. Arts Education/Instruction – 20%
3. Art Gallery – 17%
4. Graphic Arts/Design – 16%
5. Crafts/Fine Crafts – 16%

48% OF INTERESTED ARTISTS
ARE 21-40 YEARS OLD

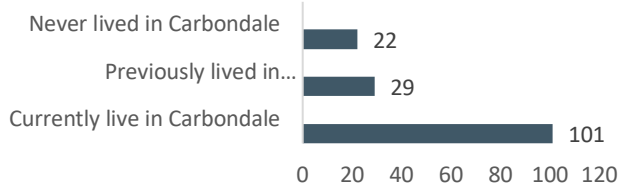
CURRENT SITUATION

- 87 – 46% Do not have work space they use only for art/creative work
- 102 – 67% Currently rent/lease their living space

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

RESPONDENT LOCATION





FINANCING FOR AFFORDABILITY

To keep live/work housing attainable, the Artspace financing model combines public and private funding to ensure long-term, self-sustaining, affordable housing. A primary funding tool is the Federal Low-Income Housing Tax Credit (LIHTC) program which drives private equity investment to capitalize projects. Two types of allocations, a 4% credit and 9% credit, differ in that the 4% credit drives less private equity and results in a larger funding gap. The 4% program imposes fewer constraints on the project concept and while project threshold criteria must be met, it is a non-competitive funding source.

The U.S Department of Housing and Urban Development (HUD) imposes annual household income limits and sets maximum rents in projects awarded tax credits from either program. These rent limits are accompanied by a HUD-determined “utility allowance” that further lowers base rents in order to keep overall housing costs affordable for low-income households. These limits change annually. The 2018 HUD published maximum household income for those earning 80% and 60% or less of the Area Median Income (AMI) and corresponding rents for Garfield County, Colorado are in the following table. The rents and income limits set by HUD reflect the trends in the whole County, rents are expressed by month and incomes are annual.

2018 HUD Income and Rent Limits for LIHTC Projects in Garfield County

Household Size	Income Max (30% - 60% AMI)	Income Max (80% AMI)	Bedrooms	Max Rent (30% - 60% AMI)	Max Rent (80% AMI)
1	\$15,030-\$30,060	\$40,080	Efficiency	\$375-\$751	\$1,002
2	\$17,160-\$34,320	\$45,760	1-bedroom	\$402-\$804	\$1,073
3	\$19,320-\$38,640	\$51,520	2-bedroom	\$483-\$966	\$1,288
4	\$21,450-\$42,900	\$57,200	3-bedroom	\$558-\$1,116	\$1,488

Source: Novogradac & Co. Rent and Income Calculator; Novoco.com, 2018

77 (51%) of artists interested in live/work housing in Carbondale self-identified as income qualifying at 80% or below AMI per HUD guidelines. 49 (32%) income qualify at 60% of AMI and 12 (8%) report incomes that fall at 30% or below AMI and would qualify for the more deeply subsidized units made possible using the 9% LIHTC model. The percentage of interested income-qualifying artist households is a bit lower than similar surveys conducted in other cities across the nation.

\$71,500 - 4-PERSON MEDIAN HOUSEHOLD INCOME FOR GARFIELD COUNTY, COLORADO (SOURCE: NOVOCO/HUD 2018)

61 (40%) earn less than 25% of their income from their art/creative work and **27 (18%)** earn no income from their art

RENTAL AFFORDABILITY

In addition to questions about household income, Artspace asked artists what the maximum amount they would consider paying monthly for live/work housing (shown in table below). This is to understand how developers should model their rent structure; the number of households who consider the 2018 HUD maximum rental guidelines to be affordable; and, how many would qualify for that rent based on their current reported household size.

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

Affordability to Carbondale Respondents						
	Household Size				Total	
Max monthly rent	One	Two	Three	Four or more	#	%
\$400	3	2	1	2	8	5%
\$500 - \$600	4	3	0	2	9	6%
\$700 - \$800	8	11	4	1	24	16%
\$900-\$1,000	17	10	5	7	39	26%
\$1,100 - \$1,200	8	5	5	1	19	13%
\$1,300 - \$1,500	6	13	3	2	24	16%
Over \$1,500	4	8	11	6	29	19%
Total	50	52	29	21	152	100%

**Shaded area represents maximum respondents would consider paying relative to household size and to 2018 rent guidelines for 30% AMI in Garfield County. Rent table on Page 12.*

112 (74%) of respondents indicated that the maximum they would consider paying for live/work housing is generally aligned with the rent limits that can be charged per HUD guidelines (relative to household size) for affordable housing in Garfield County. This indicates the rent limits in the 30%-60% range are affordably priced for the majority of the respondents to this survey. Applicants for residential units would need to meet income guidelines, but this is a good indicator that this price point is considered generally affordable for the Carbondale rental market.

ADDITIONAL CARBONDALE RENTAL CONSIDERATIONS

Respondents were asked additional questions about their housing situation, to fully understand the affordability issues in the community. 95% indicated they compensate with the high cost of housing through at least one additional mean. 28% have one or more household members working more than 40 hours a week, 27% pay more than 30% of their income towards housing effectively making them rent burdened, and 15% of households have roommates/housemates out of necessity. Affordable housing in the community could alleviate some of these pressures in Carbondale and allow for residents to dedicate more time to their creative pursuit.

In which of the following ways does the cost of your current housing situation impact you/your household?	Count	% of Respondents	% of responses
One or more household members work more than 40 hours a week (e.g. working more hours at one job, working multiple part-time jobs or short-term contracts)	86	28%	57%
One or more previously retired household members have returned to the workforce	8	3%	5%
One or more household members have delayed retirement	27	9%	18%
Household includes rent-paying roommates/housemates out of necessity	47	15%	31%
Household is paying more than 30% of overall income toward housing costs (rent/mortgage)	83	27%	55%
Household does not have a permanent living situation (e.g. staying with friends/family, living in non-residential space, house-sitting, homeless, etc.)	24	8%	16%
Not applicable, the cost of housing has not directly impacted me/my household	8	3%	5%
Other - Write In	24	8%	16%
Total Responses	307	N/A	
Total Respondents	152	100%	

RECOMMENDATIONS FOR LIVE/WORK HOUSING

Artspace recommends building up to **42 live/work housing units in Carbondale**. This is a conservative estimate using 3:1 redundancy which accounts for the many factors that influence the overall market need as well as Artspace's national experience as a developer of live/work housing. The factors that can inflate the reported need for space include:

- **Income Qualification:** The number of interested artists who self-identified as income qualifying at or below 60% of AMI is 32%. Any future tenant would need to income qualify by HUD standards and this could vary.
- **Duplication:** Interested households in which more than one artist responded to the survey. 16% indicated someone else in their household was also taking this survey, and 25% were unsure.
- **Student Interest:** Interested artists who are currently full-time students (3%), and whose household incomes/compositions are likely to change post-graduation.
- **Relocation:** 66% of respondents currently live in Carbondale, respondents may have overstated their willingness to relocate.
- **Overstatement of Interest:** While not quantifiable, enthusiasm for new space and the project concept may not in every case equate to an artist household choosing to relocate.
- **Drop off:** An Artspace development can take years to pull together, the time between this survey and the time of lease up and construction can mean the needs of interested respondents change.

3:1 REDUNDANCY

Given the variety of factors that impact the respondents' stated need for space, Artspace uses the triple redundancy method to account for the considerations that influence demand. Due to the relatively high number of duplicate households who took this survey (24) and those that were unsure of duplication (38) Artspace reduced the overall interest count from 152 to 127 respondents. The threshold for market support for a live/work housing project requires a minimum 3:1 redundancy, meaning at least 3 interested artists/creatives should be identified for every 1 live/work housing space created.

$$127 \div 3 = 42$$

The development and design decisions for new space may impact marketability and the effect of any adverse decisions are not considered in this calculation. New space should be leased affordably with preferred features and shared spaces (as identified on the following page) accommodated to the extent feasible. Market need is only one consideration when developing a project concept. A development team may choose to increase or decrease a final unit count after a review of all project feasibility factors, including financing method and the related LIHTC Qualified Allocation Plan (QAP), if applicable.

UNIT MIX

In Carbondale, the unit mix trends toward one- and two-bedroom units. Using the 3:1 redundancy method, Artspace suggests the following unit breakdown to begin concept planning.

Carbondale - Suggested Unit Mix			
Number of Bedrooms	Requested #	Percentage	Recommended # of Units
Efficiency/Studio Units	9	6%	3
One-Bedrooms	52	34%	14
Two-Bedrooms	67	44%	19
Three-Bedrooms	22	14%	6
4+ Bedrooms	2	1%	0
Totals	152	100%	42

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

UNIT SIZES AND FEATURES

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/studio:** 700 sq. ft. – 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.

Alternative live/work housing models may separate the living and working space or build out the space for specific uses. When planning for these types of models work space square footage can be estimated by incorporating information gathered from respondents interested in both live/work and private studio space. Sixty-two (59%) of those interested in private studio space are also interested in live/work housing (detailed on the following pages) and over half of those interested in private studio/creative work space would need that space to be up to 350 square feet. The following live/work space and building amenities and features were most requested by respondents interested in live/work housing. These and other design considerations are further explained on page 24. Addressing these preferences through design, is important to the marketability of any future development.

MOST PREFERRED SHARED BUILDING AMENITIES

- Common Area Wi-Fi (55%)
- Sustainable Design (52%)
- Community Garden (ground or rooftop) (41%)
- General-use studio/flex-space (39%)
- Additional storage (36%)

MOST PREFERRED LIVE/WORK UNIT FEATURES

- Abundant natural light (80%)
- Internet access (high-speed) (61%)
- High Ceilings over 10 ft (36%)
- Soundproofing (35%)
- Washer/Dryer hookups in unit (35%)

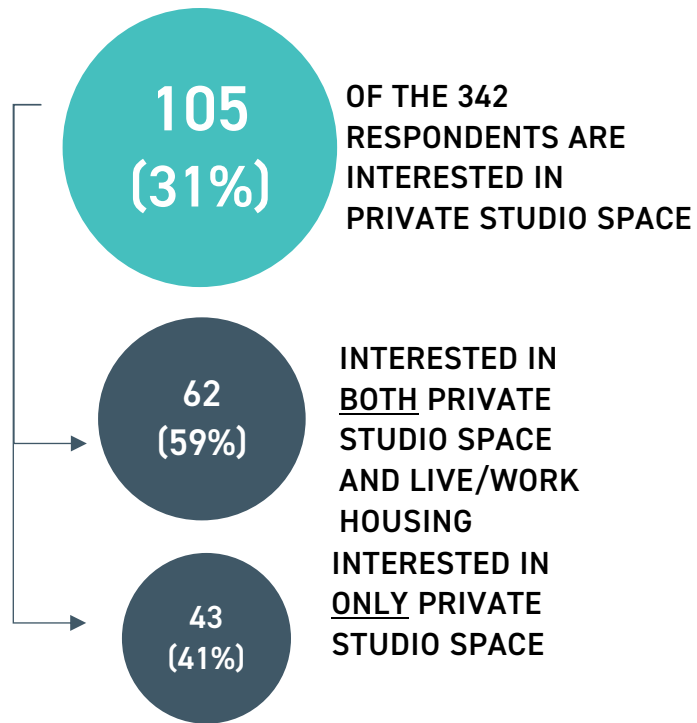
Note: Respondents could choose up to five shared amenities and up to four live/work features

RETAINING AND ATTRACTING THE CREATIVE SECTOR

Of the 152 respondents who indicated that they would relocate to a live/work housing community, 101 currently live in Carbondale. **69 (68%) of the 101 Carbondale artists responded that they have considered leaving, and 100% of those respondents indicated that the availability of new space would encourage them to stay.** Data collected through the survey supports the creation of new housing and importantly demonstrates that affordable live/work housing would both attract regional artists to relocate to Carbondale and encourage Carbondale resident artists to stay.



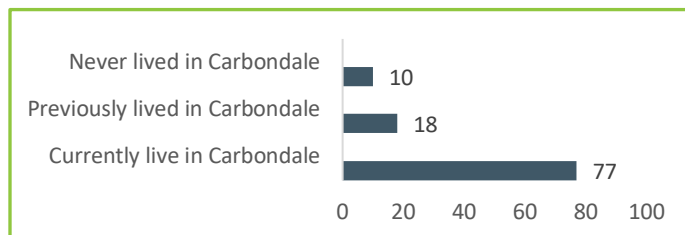
ARTIST SURVEY INTEREST IN: PRIVATE STUDIO SPACE



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 space.

RESPONDENT LOCATION



71 (21%) of all respondents **CURRENTLY RENT/OWN STUDIO SPACE** on an ongoing basis

CURRENT RENT FOR PRIVATE STUDIOS (29 REPORTING)

4 pay \$1 - \$200/month
8 pay \$201 - \$400/month
7 pay \$400 - \$750/month
10 pay more than \$750/month

OF THE TOTAL, 127 (37%) HAVE STUDIO/WORK SPACE WITHIN THE HOME

89 (26%) DON'T HAVE THE SPACE THEY NEED FOR THEIR ART/CREATIVE WORK

OF THE 105, 47 (45%) DO NOT HAVE ANY DEDICATED STUDIO/WORK SPACE

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

(Respondents could choose up to 4)

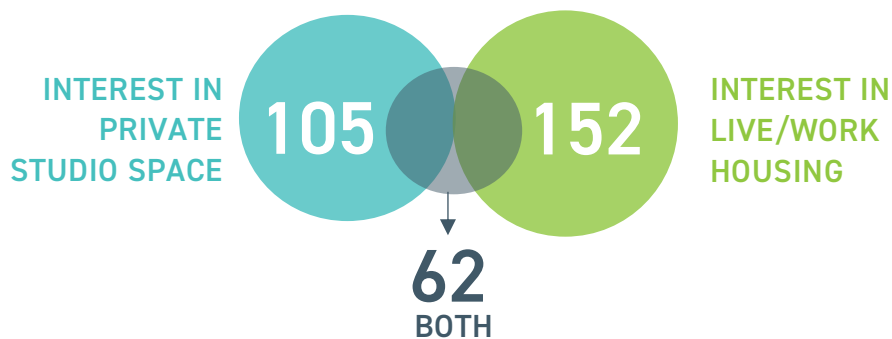
1. Painting and Drawing - 28%
2. Crafts/Fine Crafts - 22%
3. Art Gallery/Curatorial - 20%
4. Graphic Arts/ Design - 19%
5. Arts education/instruction - 18%
6. Photography - 14%



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.

When calculating the demand for private studio space, Artspace looks primarily at the number of respondents only interested in private studio space and not live/work housing (**43 respondents**). Top priority shared amenity and design feature preferences are based on the responses of all those interested in private studio space (**105 respondents**). The assumption is that if an artist resides in a live/work unit then an additional separate private studio space is less likely to be needed. In Carbondale, 43 (41%) of the 105 respondents, only want private studio space and 62 (59%) are interested in both.



RECOMMENDATIONS FOR PRIVATE STUDIO SPACE

Artspace recommends creating **up to 11 private studio spaces, if live/work housing is also built, or up to 26 spaces if it is not**. This is a conservative estimate based on a 4:1 redundancy model. There are more variables to consider when assessing market need for private studio spaces versus live/work housing units, most importantly necessity, therefore Artspace relies on the 4:1 model for this type of space. Factors that influence this recommendation and conservative assessment of private studio demand include:

- Artists may choose a more cost-effective option than renting an individual private studio on a long term-basis such as:
 - Sharing a studio space with other interested artists
 - Using less space than they initially indicated
 - Renting short-term spaces
- Amenity specific needs that they require, may not be feasible to include
- Location of project/new space may not be preferred
- Income fluctuation, leading to shorter studio renting tenure



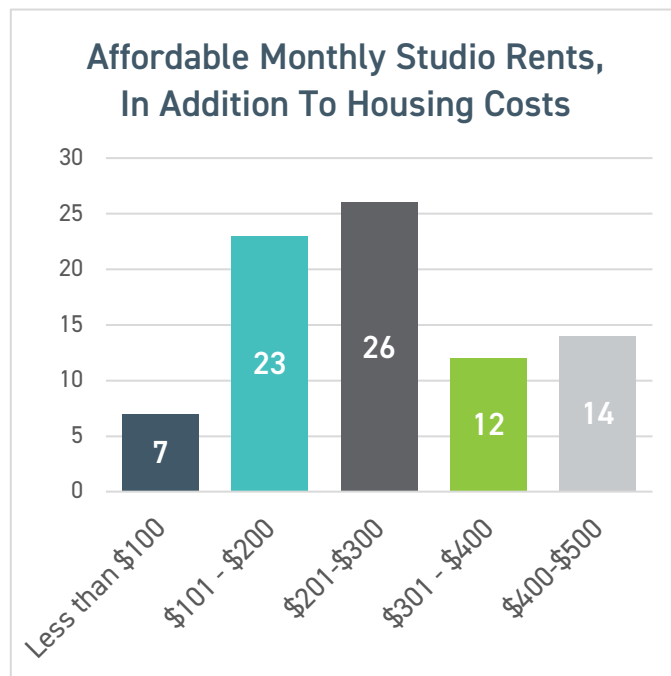
The value of this recommendation relies on a diverse selection of private studio space options that reflect the sizes, rental costs, amenities, and features preferred by interested artists/creatives.

Private studio space rentals, like commercial space, is subject to greater market fluctuations than housing. Thus, Artspace recommends introducing studio space in phases, if feasible.

STUDIO SIZES & RENTAL RATES

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

Desired Square Footage		
Minimum Square Footage	Count	%
Under 200 sq. feet	23	22%
200 - 350 sq. feet	36	34%
351 - 500 sq. feet	15	14%
501 - 650 sq. feet	6	6%
651 - 800 sq. feet	10	10%
801 - 1,000 sq. feet	6	6%
1,001 - 1,500 sq. feet	4	4%
1,500 SF +	4	4%



Compared to the studio rents currently paid (page 17) many over \$400/month, any new affordable space would be welcome in the market. Based on the data and the summary statistics, a draft program plan for 11 private studio space units should consider studio spaces of varying sizes and price points. For example:

- **6 studios under 350 square feet**
- **3 studios between 350-800 square feet**
- **1 over 800 square feet**
- Rental agreements that **do not exceed \$400 gross rent per month**, regardless of studio size.
- At least half of the studio spaces should rent between **\$100-\$300**.

MOST REQUESTED PRIVATE STUDIO SIZE*

56% (59) would be served by
350 square feet or less

**A variety of sizes are needed*

If planning for studios larger than 500 square feet or more than \$400/month, Artspace recommends pre-leasing, collecting letters of interest, and/or developing a waiting list before construction.

Respondents interested in private studio space prefer the following amenities and features. Developers interested in building private studios are encouraged to incorporate these and the other design considerations further explained on page 24 and in the Section III of the Technical Report.

MOST PREFERRED BUILDING -WIDE AMENITIES	MOST PREFERRED STUDIO SPACE FEATURES
<ul style="list-style-type: none"> • Common area Wi-Fi (57%) • Sustainable design (51%) • Additional storage (44%) • Gallery/Exhibition Space (38%) • Community garden (ground or rooftop) (33%) • Outdoor work area (32%) 	<ul style="list-style-type: none"> • Abundant Natural light (72%) • Wired for high-speed Internet (59%) • High ceilings, over 10 ft. (41%) • Special ventilation (29%) • Soundproofing (27%) • Storefront/Direct Street Access (27%)

Note: Respondents could choose up to five shared amenities and up to four studio space features

Forty-one percent (43 respondents) of the 105 that indicated an interest in studio space also indicated interest in ***shared*** short-term studio spaces (covered in the next section). 27 expressed interest in studio space (general-purpose, for occasional private use) and 16 in studio space (general-purpose, multiple user). **If short-term space is created to meet this occasional and shared-use community need, then the number of spaces created for long-term private studio space should be reduced accordingly, as the interest may be overlapping.**



ARTIST SURVEY INTEREST IN: SHARED CREATIVE SPACE AND SHARED PERFORMING ARTS SPACE



148
(43%)

OF THE 342
RESPONDENTS ARE
INTERESTED IN
ACCESS TO SHARED
CREATIVE SPACE

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT (Respondents could choose up to 4)

1. Painting/Drawing - 28%
2. Crafts/Fine crafts - 23%
3. Art Gallery/Exhibition - 21%
4. Photography - 17%
5. Writing/Literary Arts - 16%
6. Fire arts - 16%

Definition: Shared Creative Space and Specialized Equipment

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.

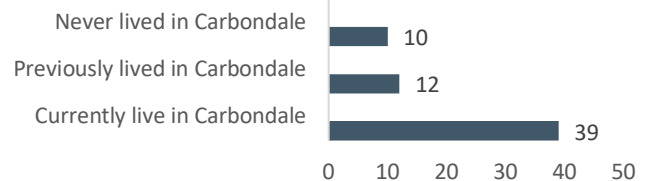
61
(18%)

OF THE 342
RESPONDENTS ARE
INTERESTED IN
ACCESSING SHARED
PERFORMING ARTS
SPACE

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT (Respondents could choose up to 4)

1. Music - 30%
2. Arts Education/Instruction - 20%
3. Dance/Choreography - 18%
4. Writing/Literary Arts - 18%
5. Mixed Media - 15%
6. Performance Art - 15%

RESPONDENT LOCATION



Definition: Shared Performing Arts Space

Space that accommodates the needs of those in the performing arts or other complementary industries. Like shared creative space, the space and specialized equipment may be available for short-term, private rentals (e.g. hourly, daily, weekly, monthly) or accessible to multiple users at the same time through a membership or other rental arrangement.

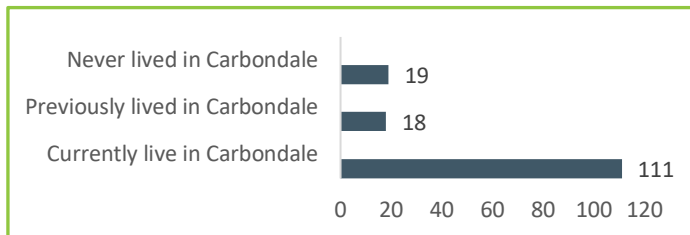


INTEREST IN SHARED CREATIVE SPACE

These spaces and associated programming are typically offered to artists through an organization/operator that has leased long-term space from the property owner for that purpose, i.e. Artspace. *Collaborative* shared spaces may include for example: co-working or makerspaces designed for specific uses such as ceramics, 3D printing, culinary arts, or woodworking. *Private short-term rentals* may include: storage, conference rooms, general use studio, or a screening room. The intent is to offer artists access to space and/or equipment that is too expensive or impractical for individual artists to lease or own outright. Shared creative space can exist in the context of a new multi-use facility, or as a stand-alone venture.

111 (75%) of the artists that are interested in shared creative space also live in Carbondale, the highest amongst all the space types. Developing new shared creative space would address the need of Carbondale's current resident artists.

RESPONDENT LOCATION



With 148 respondents expressing interest, the need for shared creative space is on par with live/work housing in Carbondale. While 64 (43%) of these artists also expressed an interest in live/work housing, it is anticipated that the need for most shared spaces will remain constant even if new complementary spaces, such as live/work housing, or private studios are created. The exception is the overlapping interest in shared, general-purpose studio spaces both for multiple users and for occasional private-use.

RECOMMENDATIONS FOR SHARED CREATIVE SPACE

Artspace recommends including shared creative space in any new multi-use facility resulting from this study as well as identifying other opportunities in Carbondale. A multi-use facility with live/work housing and/or private studios as core space types would be enhanced by including shared, flexible studios and gallery/exhibition space. Any interested developer, including Artspace, would need to find an organization/business or individual who could operate these sorts of spaces with a sustainable business model.

MOST PREFERRED TYPE OF SHARED SPACES

- Gallery/Exhibition Space – 45 (30%)
- Studio Space (gen. purpose, occasional private use) – 44 (30%)
- Studio Space (gen. purpose, multi-user) – 39 (26%)
- Community Kitchen – 36 (24%)
- Computers with Design Software – 35 (24%)

Note: Respondents could choose up to five options.

The priority should be to address the “most preferred” spaces (of interest to at least 20% of the interested respondents). Providing limited types of appropriate spaces/equipment is more valuable than a variety of mediocre ones. A full list of types of spaces/specialized equipment preferred by respondents can be found in the Technical Report Section IV.



INTEREST IN SHARED PERFORMING ARTS SPACE

These spaces operate similarly to shared creative space but are focused on the performing arts. The spaces and associated programming are typically offered by an organization or business that leases commercial space from the property owner. *Collaborative* shared spaces may include: costume, prop and set design shops, or storage for the same. *Private short-term rentals* may include: rehearsal or performance space; or sound proof practice or recording studio space. Performing arts space is expensive for artists due in part to the volume of space and the technical equipment required (e.g. sprung dance floors, and soundboards). Shared performing arts space can exist in the context of a new multi-use facility, or as a stand-alone venture.

RECOMMENDATIONS FOR SHARED PERFORMING ARTS SPACE

The interest in shared performing arts space (61 respondents) is less than the interest for shared creative spaces (148 respondents), and the low numbers may impact the feasibility of creating and operating the preferred spaces. However, the interest relative to the size of the respondents identifying as practicing in music (30%), arts education (20%), and dance (18%) is still significant. For this reason, it is useful to consider the most preferred shared performing arts space and the shared creative space needs independently.

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

If it is not feasible to partner with a theater company or other arts organizations the developer of a multi-use facility should consider including flexible space that can be used for rehearsal space and classroom space, as this would address two of three two most preferred shared performing arts spaces. That type of space could also be programmed in conjunction with flex/general purpose studio space mentioned on page 22. Any program operator interested in offering performing arts space in the context of a multi-use facility or as a stand-alone venture, should review Section IV of the Technical Report as part of the planning process.

MOST PREFERRED TYPE OF SHARED PERFORMING ARTS SPACE

- Rehearsal Space – 27 (41%)
- Theater/Performance (Black box/flexible) – 27 (41%)
- Classroom/Teaching – 22 (33%)
- Dance studio – 18 (27%)
- Theater/Performance (formal seating/permanent stage) – 17 (26%)
- Sound Proof practice room – 16 (24%)
- Sound Booth – 16 (24%)

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

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 Carbondale Arts Market Survey data as well as Artspace's 30 + years designing 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, 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, that 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

Live/work housing units should be designed to maximize flexible space. 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. Ceilings should be a 10-foot minimum to ensure open space. Windows should be large and operable for natural light and fresh air. Communal laundry rooms are a cost-effective approach if funding allows.

COMMUNITY GALLERY

Live/work housing space in its general conception provides the opportunity to collaborate and help one another, but all artist spaces should have a space intended to enable collaboration and inspire a sense of community. 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 feet height of plywood installed, at 40 inches from the floor, up to 76 inches (and if cost and time allowed, add a foot on each side to accommodate large artwork). Walls should be neutral colored and suitable for displaying artwork. Include two types of lighting when possible: general overhead lighting and directional track

lighting for the art work. 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 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. The Carbondale AMS data also supports soundproof spaces for practice or music/voice recording.

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. 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.

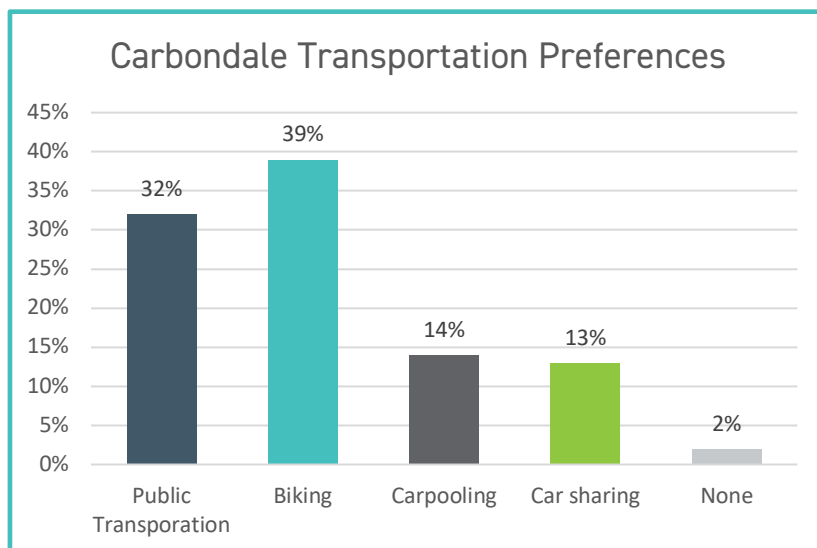
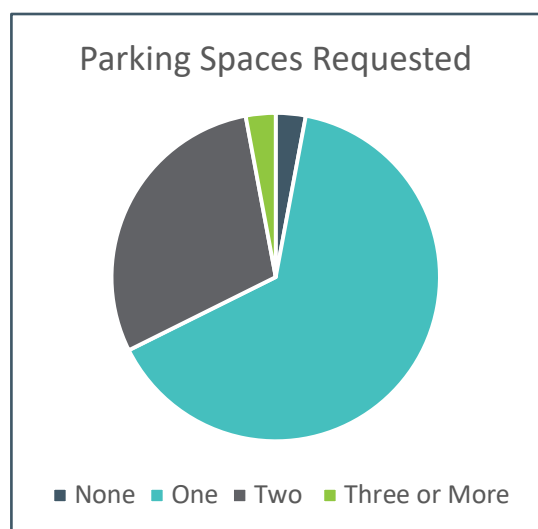
CARBONDALE SPECIFIC DESIGN FEATURES AND AMENITIES

LOCATION

The artists who participated during the Carbondale Preliminary Feasibility Visit mentioned downtown as the preferred location for a future project. Building off the momentum the Carbondale Creative District has created, Artspace also recommends continuing to look at downtown sites for a future mixed-use development. **Downtown would be the best option for any concept that includes live/work housing.**

TRANSPORTATION AND PARKING

Respondents interested in live/work housing (152) were asked if they would use alternative modes of transportation if available, in effect reducing their reliance on driving. The interest level is moderate for biking (39%) but enough that bicycle parking for residents on site is recommended. 32% indicated they would use public transportation systems on a regular basis. Locating near a Roaring Fork Transportation



Authority (RFTA) stop and the Rio Grande Trail can accommodate users of these alternate modes of transportation. However, 98% indicated they still need at least one parking space for their household.

DESIGN CONSIDERATIONS

BUILDING-WIDE AMENITIES

In addition to Artspace’s general design guidelines, survey data guides the program and concept development. When funding is limited it is important to make thoughtful decisions about how to best use resources to benefit the most.

The table below shows the overlapping interest in amenities and short-term spaces among several subgroups of survey respondents. Artspace recommends prioritizing spaces that are of interest to multiple subgroups, can serve multiple uses and/or are the least expensive and complicated to create and operate. Full lists of preferred spaces and amenities are in the Technical Report. Amenities preferred by at least 25% of interested respondents are identified below. Careful consideration should be given to the upfront and operational costs and complexity of incorporating the types of spaces listed in under “costly amenities.” Respondents could choose up to 4 or 5 preferred amenities, for each type of space they expressed an interest.

Building Amenity	Space Subgroup			
	Live/Work Housing	Private Studio	Shared Creative Space	Shared Performing Arts Space
<i>Easy to Incorporate</i>				
Common Area Wi-Fi	X	X		
Sustainable/Renewable Energy-based Design	X	X		
Gallery/Exhibition Space	X	X	X	
Classroom/ Teaching Space				X
General-use studio/ flex-space (private and/or shared)	X		X	
Additional Storage	X	X		
Rehearsal Space				X
Community Garden (ground or rooftop)	X	X		
Utility Sink with Trap		X		
Outdoor work area	X	X		
Networking/Meeting Lounge	X	X		X
Bicycle Parking for residents/tenants	X	X		
<i>Costly Amenities</i>				
Community Kitchen			X	
Music Recording studio				X
Sound booth/sound proof practice room	X	X		X
Business Center (computers, copier, scanner)	X	X	X	

Note: Not all space types and amenities were an option for each subgroup to select.

The building amenities that are preferred by at least three interested subgroups are **gallery/exhibition space, networking/meeting lounge, sound proof space, and business/computer center**. At a minimum, the two easy to incorporate amenities should be designed into a mixed-use project. The others that at least two subgroups expressed interest in should also be given priority consideration.

IN-UNIT FEATURES (LIVE/WORK AND PRIVATE STUDIO)

The top in-unit/in-studio features that at least 25% of survey respondents indicated a need for follow. Respondents could select up to four options.

Abundant natural light – Abundant natural light within the workspace was the most preferred feature among those interested in live/work housing (80%) and in private studios (72%). Any new development should optimize natural light sources to aid the creative work of its future residents and tenants.

Common area wi-fi/wiring for high speed internet – high speed, high bandwidth internet was the second most preferred feature after natural light for artists interested in live/work housing (61%) and those interested in private studio space (57%). New space should aim to provide the necessary technological infrastructure to support tenants' creative work.

High ceilings: Ceilings that are at least 10 feet are desirable to those interested in live/work (36%) and those interested in private studios (41%). High ceilings provide space for tenants to create large scale art work, set up necessary equipment, and move, jump, and lift without obstruction.

Unit soundproofing/ Soundproof spaces: Soundproofing is a preferred space feature of those interested in live/work housing (35%), private studio space (27%), and a sound booth are preferred 25% of those interested in shared performing arts space. While it may be cost prohibitive to soundproof all the live/work units and private studio spaces, consideration could be given to sound attenuating design that limits noise between units. Alternatively, offer soundproof spaces for residents and private studio tenants to share, and that could be rented by non-residents on an occasional or short-term basis, thus also covering the need for this shared performing arts space.

Special ventilation: 29% of respondents interested in private studio space and 23% of those interested in live/work space, indicated a need for special ventilation within their living/studio space. 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) with enhanced ventilation for varnishing, spraying, and where use of other toxic substances is permitted.

Washer/Dryer hook-ups in unit: While a project may include shared laundry facilities, 35% of interested live/work respondents have an additional preference for in-unit washer/dryer hook-ups. If offering this feature, consideration should be given to the impact on building water usage.

Storefront/Direct street access for retail sales: A key to an artist financial sustainability is access to the public so that they can sell, perform and share their work. 27% of artists interested in private studios, prefer an option that will allow them direct access to the outdoors and potential clients, audiences, customers and other members of the public. The project design should consider some storefront studio options and design elements that encourage public access and interaction.

CONCLUDING REMARKS

FURTHER SURVEY PARTICIPANT ENGAGEMENT

Respondents indicated a strong interest in receiving updates about the project and in volunteering to advance the concept. Contact information for those who requested more information on several different topics is provided separately from this report to the Town of Carbondale staff. It can take several years to realize new space and keeping interested parties engaged is important. Periodic and important project updates to those **233 (68%) respondents** who requested further information is highly recommended.

This interest group could also be contacted to test project concept and business plan assumptions as they evolve, including more information about fees or membership rates that can be charged for access to a variety of new shared creative spaces under consideration. 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 that ultimately rent new live/work or studio space. For this reason, Artspace recommends that an outreach strategy be developed locally in Carbondale to engage new artists who may not have participated in this survey. This will help ensure the longer-term relevance of these findings and support a successful project lease-up. Carbondale had one of the more impressive turnouts for the survey in terms of respondents/town population. Keeping this arts community in the know will help with advocacy for a project as well.

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 Carbondale and the surrounding area. In spite of best efforts, surveys of this nature are limited in their ability to engage everyone and in return are not truly reflective of the diversity of a region in regard to age, gender, race, income, ethnicity, and even art form.

A fraction of survey respondents identified as multi-racial (4%), and Hispanic/Latino (2%). According to the US Census, Carbondale's population is 44% Hispanic/Latino. 61% of survey respondents were women, when in reality, women make up 49% of Carbondale's population. 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 men during future outreach. In the experience of Artspace, the community's creative sector is typically as diverse, if not more than the broader population. Extra attention should be made to engaging the Hispanic/Latino population in Carbondale as a project progresses.

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 male and as Hispanic/Latino were interested in live/work housing compared to the overall survey responses. Any outreach on housing should target diverse citizens.

NEXT STEPS

There is demonstrated market demand for up to 42 live/work housing units for artists in Carbondale. Artspace recommends using this information to advance the development of new creative spaces in a mixed-use facility. **An initial live/work housing development concept should begin with an assumption of up to 42 units of housing. The mixed-use concept can be rounded out with no more than 11 private studios (at a variety of sizes and rent targets); and flexible commercial space that can be made available for shared creative and performing arts space uses (e.g. gallery/exhibition, networking, rehearsal space).** In predevelopment this concept can be further refined in the context of financial modeling/pro-forma development, site due diligence and selection, project partner priorities, and philanthropic/gap funding capacity. If the stakeholders in Carbondale wish to continue the path to a project developed by Artspace, the next steps are to engage in conversation with Heidi Zimmer, Senior Vice President of Property Development at Artspace and secure funding for predevelopment.

Artspace recommends reaching out to DOLA to discuss the types of support that could come from various DOLA programs for predevelopment and development and the likely timing. Artspace is happy to participate in these conversations and has a good relationship with DOLA through the other developments in the Colorado pipeline. It is also recommended to connect with local foundations about interest in this type of project (e.g. Boettcher and Aspen Foundation) and to discuss predevelopment funding.

The Technical Report that follows provides an in-depth breakdown of survey responses and can help drive concept planning regardless of who leads a new space development effort. These reports can be shared with developers who are working/are interested in working on projects that serve the creative sector. This data is evidence of the need for new space and the impact that new space will have on the Town of Carbondale and its creative sector.

Artspace appreciates the opportunity to complete this survey in Carbondale and commends the local stakeholders for a stellar response rate.