artspace

ARTSPACE CONSULTING

ARTS MARKET STUDY
REPORT OF FINDINGS

ON THE ARTISTS, MAKERS AND CREATIVES SPACE NEEDS AND PREFERENCES SURVEY

Prepared For:

Windgate Foundation

Little Rock & North Little Rock // January 2020

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- Will Hogg, VP, Senior Relationship Manager, U.S. Bank

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Arkansas Arts Council

THE DEPARTMENT OF ARKANSAS HERITAGE

The Center for Humanities and Arts

CHARTS | UA • PULASKI TECH

Windgate FOUNDATION

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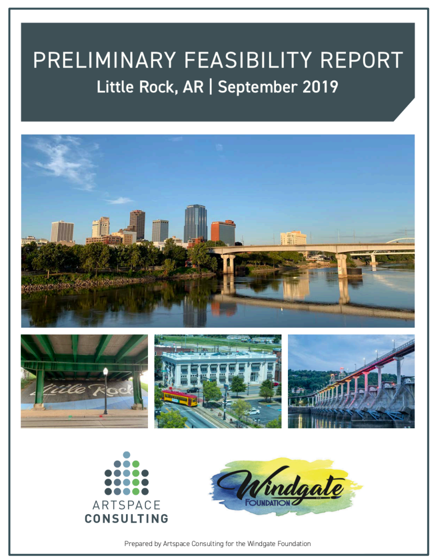
INTRODUCTION

Artspace was contracted by the Windgate Foundation to analyze the creative space needs in the Little Rock and North Little Rock region (LR/NLR) to understand what creative spaces would be the most valuable for the community. The Arts Market Study (AMS) follows the Preliminary Feasibility Study (PFS) conducted in July 2019. The PFS involved a general feasibility assessment of the potential to develop new affordable, self-sustaining space for the creative sector, 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, Teri Deaver, Vice President, and Roy Close, former Vice President, Special Projects. Artspace conducted a series of focus groups and community meetings in LR/NLR, 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: how an arts-centric project could **align with broader community goals; local leadership** support; assessment of **potential sites**; **funding and financing** opportunities; the **arts market** and its need for new space; and **project concept** for a potential new arts facility.



The AMS goes a step further. It tests the priority Project Concept assumptions for LR/NLR, including: a mixed-use project with affordable artist live/work housing and creative work-only and commercial space; live/work housing-only; and/or, an arts centric commercial-only development. Whatever the space concept, it must be in the context of the four top community goals mentioned during the PFS study: bridging geographic and cultural communities, supporting creative businesses and nonprofits, anchoring an arts district, and preserving affordability. The purpose of the AMS is first to determine if there is enough demand and interest by the creative sector to warrant new spaces, second, to inform the design of those spaces, and third energize the community around advancing new space initiatives whether as an Artspace project or a series of local entrepreneurial efforts. The AMS includes: an in-depth data collection survey deployed online, this Report of Findings, in-person Organization Focus Group, and the Technical Report Addenda that contains the data and analytics.

THE SURVEY

After the PFS, Artspace worked with the "The Artspace Rocks" Core Group to develop the **Space Needs and Preferences Survey of Artists, Makers and Creatives.** The purpose of the survey is to quantify the local creative sector's interest in new, affordable space in Little Rock and North Little Rock. The online survey was open for six weeks September 24th – November 5th, 2019 and available at ArtspaceRocks.org. There were **825 total respondents**. **26** individuals indicated they were not in a creative field, therefore the term "creative" respondent is used to identify the **799** respondents who 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, neighborhoods of interest, preferences for live/work and private or shared studio/work space, as well as demographic information.

The Arts Market Study for Little Rock/North Little Rock quantified the need for:

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 on an ongoing basis, referred to as "**private studio**" in this report;

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

4. Shared performing arts spaces 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 survey results are intended to help the **Windgate Foundation, Artspace, Arkansas Arts Council,** Cities of **Little Rock and North Little Rock,** other **real estate developers** and **property owners** interested in creative space and artist housing, determine if there is a market for new space and program investment. Further, these findings, the design guidelines (page 27), and Technical Report Addendum can be used to advance space planning, financial modeling, and early concept design work of any future developments. Findings may be of particular interest to **nonprofits and businesses** interested in operating the types of shared spaces and equipment of interest to artists.

Advocates for the local arts community and creative economy can use this information as evidence of the space needs, cultural asset gaps, and space-related challenges of the local creative sector. The data offers a compelling narrative about the who, what, and why behind any future, new space effort. This in turn can help supportive local leaders including both **North Little Rock and Little Rock's Mayors Offices, City Councils, the County, and its Planners** confidently usher forward projects and identify priority areas for investment.

The design guidelines starting on page 27, are included to benefit **all developers** looking to make space available for artists and creatives. The Technical Report and arts organizations' focus group addendum should be reviewed by those embarking on new space initiatives as it contains data critical to fully understanding the arts 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. The Little Rock/North Little Rock survey launched on September 24th with a reception and presentation at the University of Arkansas-Pulaski Technical College Center for Humanities and Arts (CHARTS) in North Little Rock.

Artspace provided weekly survey assistance to the Core Group 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 six weeks via the Survey Gizmo online platform and closed on November 5th, 2019. During that timeframe, there were **825 respondents** to the survey. The survey link was disseminated through the following means:

Artspace and Core Group members at the Survey Launch Event

- **Press Outreach:**
    - **Press Release** sent out September 6th titled, "Little Rock/North Little Rock (The Rocks) to launch online survey September 24th to determine affordable space needs for area artists, arts organizations, and creative businesses."
    - **UALR Public Radio/KUAR/NPR,** "Nonprofit Considering Creating Affordable Artist Housing in Arkansas." 7/24/29 by David Monteith
    - **UALR Public Radio/KUAR/NPR,** "Second Phase of Affordable Spaces for Artists Launches in North Little Rock." 9/25/19 by David Monteith
    - **Arkansas Times,** "Artspace Projects to come to LR." 7/11/19 by Leslie Newell Peacock
    - **Arkansas Democrat Gazette,** "Nonprofit Artspace checks out Little Rock, North Little Rock." 7/28/29 by Ginny Monk
    - **Picture This** - Audio Essays written and recorded by Brad Cushman for Public Service announcements broadcast on the NPR radio stations (KUAR/KLRE) in Central Arkansas.
    - **LR Culture Vulture,** "19 LR Cultural Touchstones in 2019." 12/31/19.
    - **Idle Class Magazine**
    - **Talk Business,** "2019 Artlinks conference focuses on the arts as an economic engine." 10/8/19 by Nancy Peevy
    - **Arkansas Money & Politics News,** "Building a Thriving Arts and Creative Economy in Arkansas." 10/2/19 by Patrick Ralston

Psalm 150 Gospel Choir at the Survey Launch Event

- **Printed Outreach:**
  - Flyers: 400 flyers were distributed by Core Group members to area small businesses, friends, family, and the various citizens of Little Rock, in the South End, East End, South Main, Quapaw Quarter, Pettaway, and Downtown Little Rock neighborhoods.
  - Canvassed the Joint Theatre, The Rep, 7th Street Tattoos, multiple businesses in southwest LR, and Stifft Station businesses/coffee shops/restaurants.
  - Distributed 50 survey postcards at Arts Council GetSmART events in September.
  - Posters and postcards throughout the Arkansas Arts Center

- **Email Outreach: (the following organizations sent notices about the survey via email)**
  - Arkansas Arts Council (13,000+)
  - Arkansas Cinema Society
  - Arkansas Arts Center (20,000+)
  - Arkansas Repertory Theatre
  - Arkansas Symphony Orchestra
  - Arkansas Times
  - Arkansans for the Arts
  - Art Outfitters
  - Ballet Arkansas
  - City of Little Rock
  - City of North Little Rock
  - Oxford American
  - Thea Foundation
  - University of Central Arkansas
  - Yella Dog Press
  - Children International
  - Let our Violence End
  - Our House
  - Planned Parenthood
  - Centers for Youth and Families
  - Arkansas Food Bank
  - Little Rock Arts District Neighborhood Association
  - Arts & Science Center, Pine Bluff
  - Hot Spring Documentary Film Festival
  - Emergent Arts
  - Food Jobs Work
  - Sola Salon group
  - Arkansas Times
  - Gayle Corley Law
  - AETN
  - HP Trading Co.
  - Hogan Taylor
  - Mid-America Arts Alliance
  - Arkansas Children's Hospital
  - Clinton Foundation
  - Gallery 26
  - Personal contacts and connections of Core Group members – 400+ contacts

- **University Outreach: (each school was requested to contact alumni from the past 5 years who were living in Central Arkansas)**
  - John Brown University
  - University of Central Arkansas
  - University of Arkansas
  - University of Arkansas Fort Smith
  - University of Arkansas Little Rock
  - Henderson State University
  - University of Arkansas Pine Bluff
  - University of Arkansas Pulaski Tech
  - Philander Smith College
  - Hendrix College
  - Arkansas State University
  - Museum School (3,000 Art Center students)

- **Arkansas Arts Council Outreach:**
  - The Arkansas Arts Council released news releases, blogs and newsletter stories leading up to and after the Artspace events and its market survey launch. It promoted Artspace via social media platforms, including Twitter, FB (14,200 followers), Reddit, and Instagram and live-streamed the kick-off event, reaching more than 700 people with a single post. AAC also posted extensive follow-up photo albums and slideshows.
  - Posts reached thousands of Arkansans, each individual Artspace Facebook post reached 300 people, and one post was shared by Arkansas Tourism which has a following of 127,000 people.
  - AAC sent emails three times in 2019 to the more than 1,300 people on its listserv through eblasts and newsletters.
  - AAC promoted Artspace through their biennial statewide arts conference, ArtLinks in Fayetteville where Artspace Consulting SVP, Wendy Holmes spoke. The talk was featured in a special speaker's section on the AAC website as part of ArtLinks.
  - Linked to the survey directly from arkansasarts.org.
  - AAC continues to release updates on the initiative as recently as the December newsletter.

Flyer created by CC Mercer promoting the survey

- **Social Media Outreach:**
  - Core Group shared on personal pages via text message, Facebook, Facebook messenger, Instagram, direct message, email among many networks and friends
  - Core Group member CC Mercer ran the social media campaign for the survey for Facebook, Instagram, and Twitter for seven weeks, creating and curating original content, copyright text, posters, and shared articles on current Artspace's in operation. She posted to each site daily for 50 days straight, which resulted in lots of engagement and shared content.
  - Arkansas Arts Council continuously promoted the survey.
  - Thea Foundation shared on their page
  - Latinos/Hispanics Over 40 Little Rock Group

- **In Person Outreach:**
  - Artspace Survey Launch event at CHARTS on 9/24/19
  - Downtown Little Rock's 2nd Friday Art Night (including library system and Butler Galleries),
  - Argenta's Third Friday Art Night (NLR),
  - Promoted survey at Little Rock Pride Parade,
  - Promoted survey at the Arkansas Black Hall of Fame, which had over 2,000 attendees.
  - Artspace Consulting SVP, Wendy Holmes spoke at the Windgate Center of Art+Design on 9/25/19.
  - Promoted survey at the Arts Council GetSmART events in September.
  - ArtLinks Annual Conference, where Artspace Consulting SVP, Wendy Holmes also spoke.

- **Unique Outreach Methods:**
    - In combination with social media postings, CC Mercer recorded videos encouraging folks to take the survey. It was an engaging way to reach people by showing them a real person invested in the process. People who watched the videos connected and shared more content on other postings.
    - Chalk painted car window to promote survey participation (seen in picture above)
    - Video for ArtLinks that featured Artspace.
    - NPR radio spots, Picture This
    - #ARTSPACEROCKS unique hashtag and handle

Ashley Pauline Moore's car promoting the survey

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

- Social media outlet – 357 (37%)
- Email invitation – 233 (24%)
- Friend/colleague/acquaintance – 231 (24%)
- Survey launch event/public meeting – 58 (6%)
- Other – 30 (3%) Arkansas Arts Center, Arkansas Cinema Society, Arkansas Symphony, ASID Newsletter, Ballet Arkansas, College Professor, newsletter, MFA program, Art Department at UA Little Rock
- Another web-based source – 20 (2%)
- Flyer, poster, postcard – 20 (2%)
- Information media source, not web-based- 16 (2%)
- Postcard in the mail – 4 (0%)

Note: Respondents may have selected multiple options

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 Little Rock and North Little Rock) 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 collected data was conducted via SPSS Statistics software and Microsoft Excel.

Artspace has conducted over 94 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.

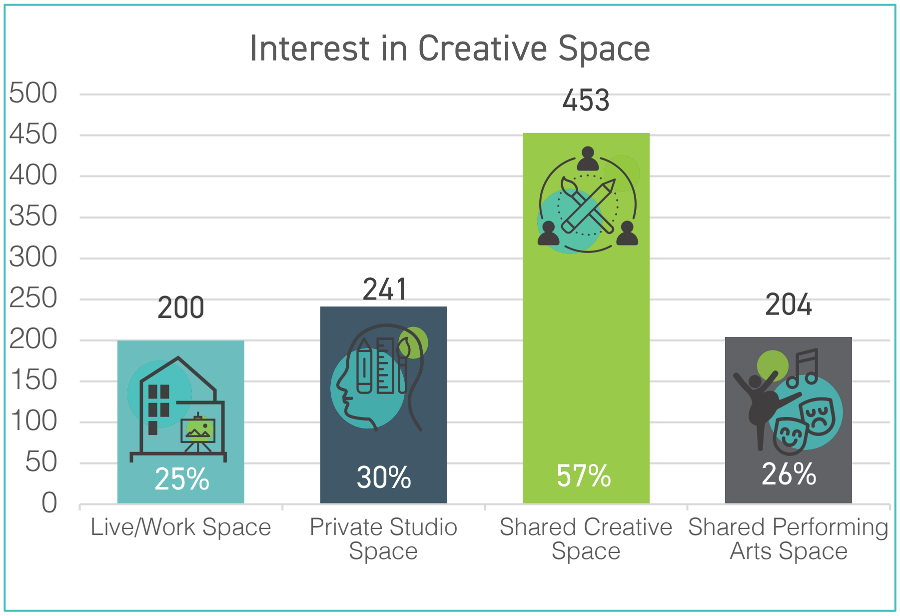
KEY FINDINGS ON THE CREATIVE SECTOR

The primary focus of this report is on the **799 total creatives** and more specifically the **683 (85%) creatives who indicated an interest in at least one type of creative space in Little Rock/North Little Rock.**

825 TOTAL RESPONDENTS

799 (97%) TOTAL CREATIVES

683 (85%) ARE INTERESTED IN AT LEAST ONE TYPE OF CREATIVE SPACE



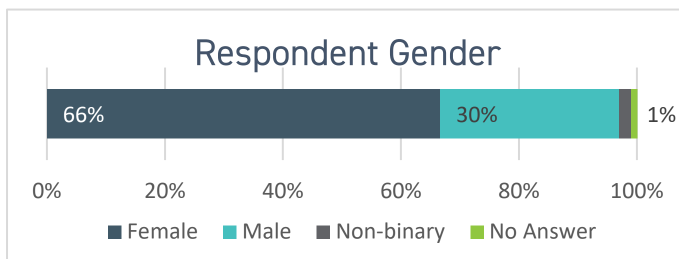
TOTAL RESPONDENT OVERVIEW

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT (ALL CREATIVES)

1. Painting and Drawing – **35%**
2. Arts Education/Instruction – **19%**
3. Mixed Media – 18%
4. Writing/Literary Arts – 17%
5. Crafts – **17%**

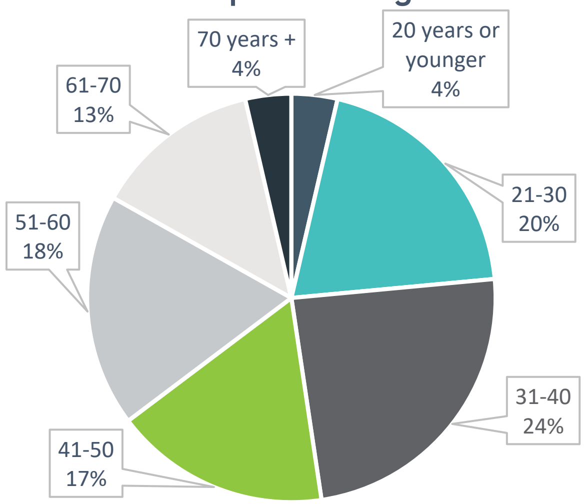
Note: Respondents could select up to 4 options

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



Respondent Race and Ethnicity		
White/Caucasian	669	81%
Black/African American/Caribbean	67	8%
Multiracial/Multiethnic	28	3%
Hispanic/Latinx/Spanish	24	3%
Asian American/Asian	19	2%
Not Listed	9	1%
American Indian/Alaskan or Hawaiian	8	1%
North African/Middle Eastern	1	0%
Total	**825**	**100%**

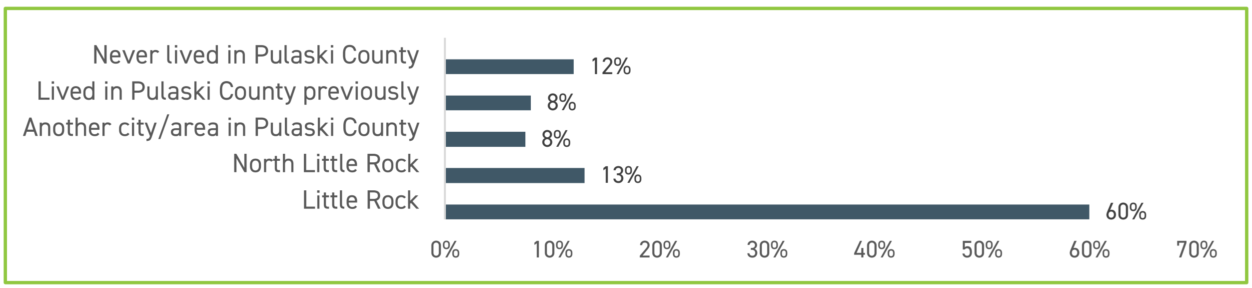
Respondent Age



CURRENT SPACE STATS

- 58% own their living space
- 52% do not have dedicated workspace only for art or creative work
- 46% use space within their home for their creative work (dedicated or not)
- 78% earn less than 25% of their income from their art/creative work including
    - 43% earn no income

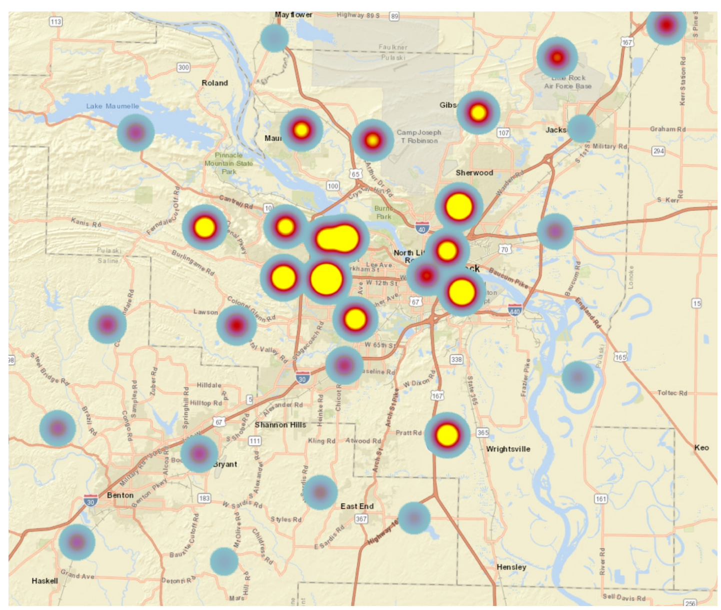
RESPONDENT LOCATION (ALL RESPONDENTS)



OF THE 665 WHO LIVE IN PULASKI COUNTY, CURRENT LOCATIONS AND COUNTS INCLUDE:

- Little Rock – 492 (74%)
    - Hillcrest – 75
    - West Little Rock - 59
    - Midtown - 36
    - SW Little Rock/UA District -31
    - Downtown LR – 29
    - Park Hill -24
    - SoMa - 22
    - Heights - 22
    - Lakewood - 21
    - Stifft Station -15
    - Riverdale – 13
    - MacArthur Park Historic District - 11
    - Capitol View - 10
    - Dunbar - 6
    - Main Street Corridor - 4
- North Little Rock – 109 (16%)
    - Argenta - 22
- Another City/Town – 48 (7%)
- Unincorporated – 16 (2%)

RESPONDENT LOCATION (ALL RESPONDENTS)



RECOMMENDATIONS

The Arts Market Study data revealed that the market supports a new, affordable live/work mixed-use project concept in Little Rock/North Little Rock as well as other creative space initiatives. Interest was expressed in both cities, allowing a development team flexibility in its site search and offering an opportunity for entrepreneurs in both cities to address the need. A new facility with a variety of space types will fill a great need in the community as 52% of respondents do not currently have dedicated space for their creative work. The data supports creation of the following space types in LR/NLR:

- **Between 35 and 67 units of affordable artist live/work housing** in Little Rock/North Little Rock. The lower end of the range is very conservative for a 100% LIHTC project, while the high end assumes a mix of some higher incomes.
- Housing that is affordable to households between 30% and 60% of AMI

- **Up to 44 new private studio spaces** in addition to live/work housing
- Mostly rented at or below $200/mo. and no greater than $300/mo.
- Mostly small and moderately sized studios; 200 - 350sf minimum

- **Shared creative spaces** emphasizing shared and short-term studio rentals
- **Prioritizing:** Gallery/exhibition space, ceramics/clay and printmaking studios, rehearsal and performance space

Artspace does not operate shared creative space, rather rents affordable commercial space to organizations or businesses that do. **(See Addendum II Organization Focus Group Summary for more information on some interested organizations).** Local entrepreneurs, non-profits, municipalities and/or creative businesses that currently offer or want to offer the types of shared spaces that are of interest to respondents, should review Section IV of the Technical Report for more information about the documented need.

Artspace's market interpretation and recommendations are based on 30+ years of experience in the field of affordable art facility development. They are intended to inform any future Artspace project and other locally lead space initiatives. **There are factors besides market demand that influence future project concepts and feasibility of new space. The data presented here is intended to quantify demand and offer a framework within which new space initiatives may be conceived, tested, refined and created.**

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 **200 creatives** interested in live/work housing in LR/NLR.

200 (25%)

OF THE 799 TOTAL CREATIVE RESPONDENTS ARE INTERESTED IN LIVE/WORK HOUSING

73 (37%)

ARE ONLY INTERESTED IN LIVE/WORK HOUSING

HOUSEHOLD COMPOSITION

- One-person – 89 (45%)
- Two-person – 60 (30%)
- Three-person – 21 (11%)
- Four or more – 30 (15%)
- Children (under 18) – 31 (16%)

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

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing – **44%**
2. Writing/Literary Arts - **26%**
3. Mixed Media - **23%**
4. Arts Education - **20%**
5. Music – **18%**

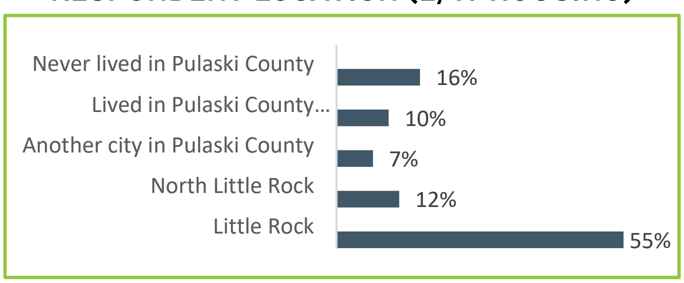
Note: Respondents could select up to 4 options

65% OF LIVE/WORK INTERESTED ARTISTS ARE AGED YOUNGER THAN 40

CURRENT SITUATION

- 123 – 59% Do not have workspace only for art/creative work
- 120 – 60% Currently rent/lease their living space, a much higher percentage than total survey

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 2019 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 Pulaski County, Arkansas 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.

2019 HUD Income and Rent Limits for LIHTC Projects in Pulaski County

Household Size	Income Max (30% - 60% AMI)	Income Max (80% AMI)	Bedrooms	Max Rent (30% - 60% AMI)	Max Rent (80% AMI)
1	$14,640-$29,280	$39,040	Efficiency	$366-$732	$976
2	$16,710-$33,420	$44,560	1-bedroom	$391-$783	$1,045
3	$18,810-$37,620	$50,160	2-bedroom	$470-$940	$1,254
4	$20,880-$41,760	$55,680	3-bedroom	$543-$1,086	$1,448

Source: Novogradac & Co. Rent and Income Calculator; Novoco.com, 2019

130 (65%) of creatives interested in live/work housing self-identified as income qualifying at 80% or below AMI per HUD guidelines. **106 (53%) income qualify at 60% of AMI** and 50 (25%) report incomes that fall at 30% or below AMI qualifying them for deeply subsidized units. The median income from the self-reported data of creatives interested in live/work housing is $30,001-$35,000. The HUD income limits correspond to household size, so taking in account the size of the household is very important. **The table on the following page shows that a development for residents earning up to 60% of AMI would be appropriate in Little Rock/North Little Rock, aligning well with the LIHTC program**. Also, of note, 20 respondents (10%) indicated incomes over $85,000, indicating a small opportunity for conventionally financed artist housing as well.

$69,600 – 4-PERSON MEDIAN HOUSEHOLD INCOME FOR PULASKI COUNTY, ARKANSAS (SOURCE: NOVOCO/HUD 2019)

143 (72%) earn less than 25% of their income from their art/creative work and **60 (30%)** earn no income from their art

Income by Household Size for respondents interested in affordable artists' live/work housing								
Annual Household Income	**1**	**2**	**3**	**4 or more**	**Total**	**Income Qualify - 30% AMI**	**Income Qualify - 60% AMI**	**Income Qualify - 80% AMI**
Prefer Not to Answer	3	1	1	4	9			
Under $10,000	9	8	1	2	20	20	20	20
$10,000 - $15,000	7	6	4	0	17	17	17	17
$15,001 - $20,000	11	7	3	2	23	12	23	23
$20,001 - $25,000	10	4	3	1	18	1	18	18
$25,001 - $30,000	12	4	2	2	20		20	20
$30,001 - $35,000	7	3	0	1	11		4	11
$35,001 - $40,000	6	2	0	3	11		3	11
$40,001 - $45,000	3	3	0	1	7		1	4
$45,001 - $50,000	5	2	0	3	10		0	3
$50,001 - $55,000	2	1	1	2	6		0	3
$55,001 - $60,000	5	0	2	0	7		0	0
$60,001 - $65,000	4	4	0	2	10		0	2
$65,001 - $75,000	2	2	0	0	4		0	
$75,001 - $85,000	2	4	0	1	7		0	
$85,001 - $100,000	1	4	1	2	8		0	
$101,000 - over	0	5	3	4	12		0	
Total	89	60	21	30	**200**	50	106	130
% of respondents who income qualify for 30%								**25%**
% of respondents who income qualify for 60%								**53%**
% of respondents who income qualify for 80%								**65%**

RENTAL AFFORDABILITY

In addition to questions about household income, Artspace asked creatives, what is the maximum amount they would consider paying monthly for live/workspace (shown in the table on the next page). This is to understand how to model the live/work rent structure; the number of households who would consider the 2019 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 LR/NLR Survey Respondents						
Max monthly rent	Household Size				Total	
	One	Two	Three	Four or more	#	%
$400	7	8	4	3	22	11%
$500 - $600	34	15	8	7	64	32%
$700 - $800	28	19	6	5	58	29%
$900-$1,000	10	11	1	8	30	15%
$1,100 - $1,200	5	6	1	2	14	7%
$1,300 - $1,500	3	1	0	3	7	4%
Over $1,500	2	0	1	2	5	3%
Total	89	60	21	30	200	100%

**Shaded area represents the point of alignment between the maximum respondents would consider paying for housing and the maximum 60% AMI rents for the size unit their household would qualify for in 2019. Those who can pay less may qualify for the lower 30%AMI rents. Those who can pay more may be over-income. See Rent table on Page 14.*

Nearly half of the respondents 103 (52%) indicated that the maximum they would consider paying for live/work housing aligns or exceeds the rents that can be charged per HUD limits (relative to household size) for 60% of AMI affordable housing in Pulaski County. This indicates that rent limits at 60% AMI would be affordable just over half of interested respondents.

The current median monthly housing cost (for those renting and owning), excluding utilities was reported as $701-$800 which is in the range of one and two- bedroom LIHTC units. This indicates that housing prices may already be affordable in the community. This can be problematic if the 60% AMI units are too expensive for lower income households. See the allowable income limit range seen on page 14. A development team will need to carefully consider the financing and operating model and consider units for 30%-60% of AMI.

RECOMMENDATIONS FOR LIVE/WORK HOUSING

Artspace recommends building **35 to 67 live/work housing units for creatives in "The Rocks".** This is a conservative estimate that is calculated on the low end, using only the number of interested respondents whose household incomes are 60% or less of AMI. On the high end, it considers the demand without regard to qualifying incomes. In both cases the calculation is based on a 3:1 redundancy. This methodology accounts for the many factors that must be considered when interpreting the data. In Artspace's experience, the factors that can influence demand for live/work housing include:

- **Income Qualification:** The number of interested respondents who self-identified as income qualifying at or below 60% of AMI is 53%. Although the market demand is there, the incomes provided by respondents are unverified and household compositions may change. HUD's published income limits also change annually.
- **Rental Affordability:** Residents would have to consider LIHTC rents affordable

- **Duplication:** 13% indicated someone else in their household was also taking this survey and expressing interest in live/work housing, and 19% were unsure. This suggests a possible reduction in demand by an estimated 4– 11 units, if those households remain intact upon relocation.
- **Student Interest:** Interested creatives who are currently full-time students are 22% (43 respondents) and their household incomes/compositions are likely to change post-graduation.
- **Relocation:** 26% (52) of the interested respondents currently live outside of Pulaski County. Artspace assumes that respondents outside of an area may overstate their interest in relocating.
- **Home ownership:** 34 (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.
- **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.
- **Drop off:** An Artspace development can take years to pull 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.

3:1 REDUNDANCY

Given the variety of factors that impact the respondents' stated need for space, Artspace uses a redundancy method to calculate demand. 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 live/work housing space to be built.

200 ÷ 3 = 67

The live/work housing project being tested for LR/NLR would be for households qualifying at or below 60% of AMI. The low end of the unit range to consider for an income-restricted development is calculated using only the income qualifying household data.

106 ÷ 3 = 35

The design of space and other development decisions (for example: location, amenities, the mix of income restriction targets in a project) may impact leasing and the effect of any adverse decisions are not considered in this calculation. New space should be affordable to the interest group and preferred features and shared spaces (as identified on the following page) accommodated to the extent feasible. 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 consideration of all project feasibility factors, including financing method and the related LIHTC Qualified Allocation Plan (QAP), if applicable.

UNIT MIX

In Little Rock/North Little Rock 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.

Suggested Unit Mix			
Number of Bedrooms	**Requested #**	**Percentage**	**Recommended # of units**
Efficiency/Studio Units	17	9%	3 - 6
One-Bedrooms	96	48%	17 - 32
Two-Bedrooms	61	31%	11 - 21
Three + Bedrooms	26	13%	4 -8
Totals	**200**	**100%**	**35 - 67**

* *This market-derived guide is for early planning purposes only and should be refined as needed during predevelopment to align well with LIHTC priorities, operating budget and site conditions.*

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.

The following live/workspace and building amenities and features were most preferred by the creatives interested in live/work housing (of interest to at least 20%). These and other design considerations are further explained on page 27. Addressing these preferences through design, is important to the marketability of any future development.

MOST PREFERRED SHARED BUILDING AMENITIES

- Common Area Wi-Fi (42%)
- Gallery/Exhibition Space (35%)
- General-use studio/flex space (34%)
- Community Garden (ground or rooftop) (27%)

MOST PREFERRED LIVE/WORK UNIT FEATURES

- Abundant natural light (64%)
- Internet access (high-speed) (60%)
- Washer/Dryer hook-ups (35%)
- Soundproofing (32%)
- High ceilings over 10 ft (29%)
- Storefront/direct street access (20%)

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

RETAINING AND ATTRACTING THE CREATIVE SECTOR

Of the 200 respondents who indicated that they would relocate to live/work housing designed for artists and their families, 148 are currently residents of Pulaski County and more specifically 74% live in Little Rock and 16% live in North Little Rock (132 total), approximately representing a 4:1 ratio which is on par with 2019 population estimates. **(71%) of the 132 Little Rock/North Little Rock residents responded that they have considered leaving, and 99% of them (93 creatives) would be encouraged to stay for the opportunity to have affordable live/workspace.**

LOCATION INTEREST

Respondents were asked where in Little Rock/North Little Rock they would consider relocating for live/work housing. Downtown Little Rock, Argenta (in North Little Rock), and SoMa (Little Rock) were overwhelmingly the most preferred. These neighborhoods should be considered as priorities for new space, if feasible.

TOP LOCATION INTEREST (L/W Housing)

1. DOWNTOWN LITTLE ROCK – 141 (71%)
2. ARGENTA – 122 (61%)
3. SOMA – 121 (61%)
4. EAST VILLAGE – 54 (27%)
5. DUNBAR – 49 (25%)
6. UA LITTLE ROCK DISTRICT – 38 (19%)
7. OTHER – 30 (15%)
8. NO PREFERENCE – 28 (14%)

**Respondents could choose multiple options*

ARTIST SURVEY INTEREST IN:

PRIVATE STUDIO SPACE

The following statistics are about the **241** creatives interested in private studio space on an ongoing basis.

241 (30%) OF THE 799 CREATIVE RESPONDENTS ARE INTERESTED IN PRIVATE STUDIO SPACE

176 (73%) INTERESTED IN ONLY PRIVATE STUDIO SPACE AND NOT LIVE/WORK

65 (27%) INTERESTED IN BOTH PRIVATE STUDIO SPACE AND LIVE/WORK

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. Space is rented on a long-term (annual lease) basis.

OF THE 241, **123 (51%)** DO NOT HAVE ANY TYPE OF DEDICATED STUDIO/ WORKSPACE

99 (41%) HAVE STUDIO/WORKSPACE WITHIN THE HOME

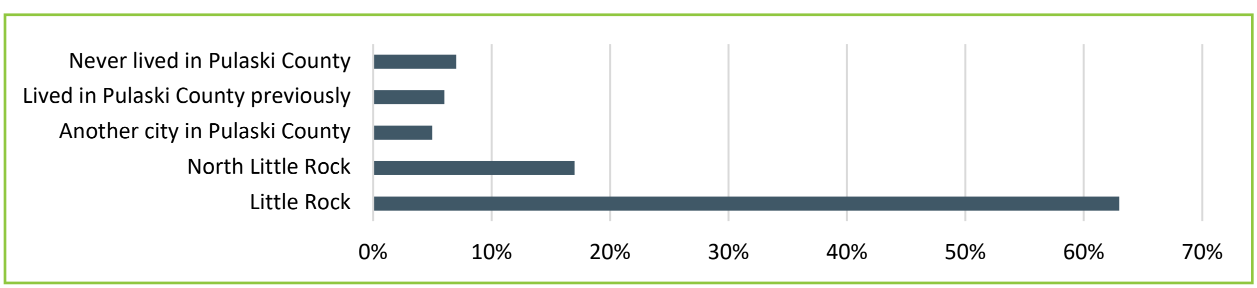
78 (32%) DON'T HAVE THE SPACE THEY NEED FOR THEIR ART/CREATIVE WORK

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing – **42%**
2. Arts Education/instruction – 23%
3. Mixed Media – **21%**
4. Art gallery/curatorial – **19%**

Note: Respondents could select up to 4 options

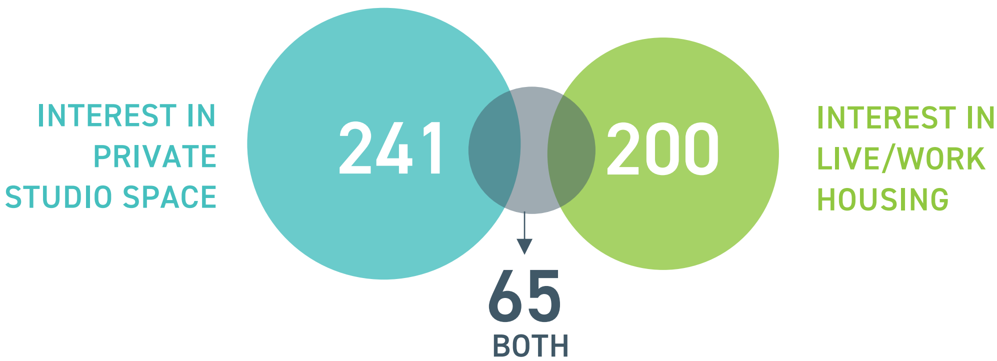
RESPONDENT LOCATION (PRIVATE STUDIO INTEREST)



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.

When calculating the demand for private studio space, Artspace uses the number of respondents only interested in private studio space and not live/work housing too **(176 respondents).** Top priority shared amenity and design feature preferences are based on the responses of all those interested in private studio space **(241 respondents)**. The assumption is an artist is unlikely to rent both live/work and private studio space. In Little Rock/North Little Rock, (73%) of the 241 respondents, only want private studio space.



RECOMMENDATIONS FOR PRIVATE STUDIO SPACE

There is demand for **up to 44 private studio spaces, if live/work housing is also built, or up to 60 spaces if it is not**. However, there is also overlapping interest in shared studio spaces (see Shared Creative Space section beginning on page 24). A project concept must consider this overlap to ensure that too much space is not created. Artspace arrives at its recommendation for maximum studio spaces to create, with a more conservative 4:1 redundancy methodology. This attempts to account for the impact of factors including the fundamental need for housing vs workspace. Other factors considered in this recommendation 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
- Amenities and square footage that is required, may not be feasible to provide
- Location of project/new space may not be preferred
- Income fluctuation, leading to shorter studio renting tenure and greater tenant turnover

TOTAL MARKET SUPPORT WITH LIVE/WORK HOUSING	TOTAL MARKET SUPPORT WITHOUT LIVE/WORK HOUSING
176 ÷ 4 = 44	241 ÷ 4 = 60

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. The need for affordable space is clear in the community. 51% interested in this space do not have workspace currently, and 47% who do rent space outside of the home pay more than $500/month for space.

LOCATION

The most preferred locations should be prioritized for new private studio space to the extent feasible. These neighborhoods include Downtown, and SoMa in Little Rock and Argenta in North Little Rock. This overlaps with location preferences for live/work housing supporting a mixed-use project concept.

TOP LOCATION INTEREST (Private Studio)

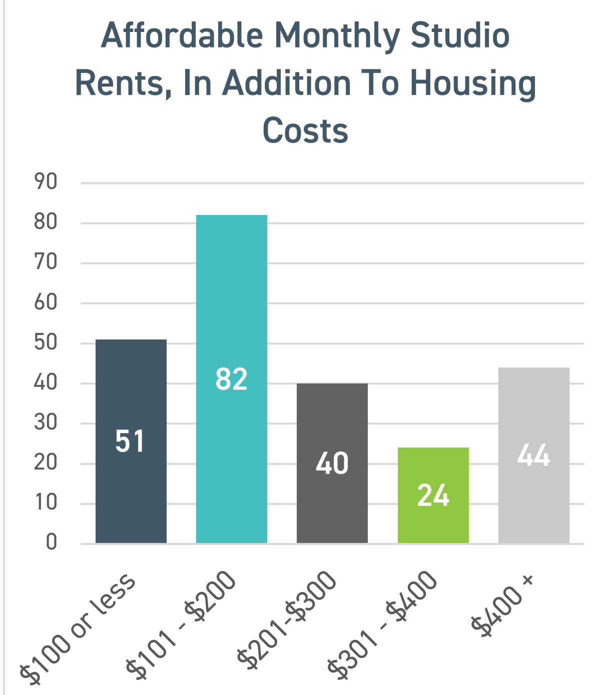
1. DOWNTOWN LITTLE ROCK – 147 (61%)
2. SOMA – 125 (52%)
3. ARGENTA – 118 (49%)
4. EAST VILLAGE – 56 (23%)
5. OTHER – 53 (22%)
6. UA LITTLE ROCK DISTRICT – 47 (20%)
7. NO PREFERENCE – 41 (17%)
8. DUNBAR – 37 (15%)

**Respondents could choose multiple options*

STUDIO SIZES & RENTAL RATES

Understanding what creatives in Little Rock/North Little Rock 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	47	20%
200 - 350 sq. feet	85	35%
351 - 500 sq. feet	41	17%
501 - 650 sq. feet	22	9%
651 - 800 sq. feet	13	5%
801 - 1,000 sq. feet	10	4%
More than 2,000 sq. feet	6	2%
Don't Know/Unsure	2	1%



Based on the data and the summary statistics, a draft program plan for up to **44 private studio spaces** should consider units of varying sizes and price points. For example:

- **26 studios 200 to at least 350 square feet.**
- **13 studios between 351-650 square feet.**
- **5 studios over 650 square feet.**
- Rental agreements that **do not exceed $300 gross rent per month**, regardless of studio size.
- At least half of the studio spaces should rent **at or below $200/month.**

If planning for studios larger than 650 square feet or more than $300/month, Artspace recommends pre-leasing, collecting letters of interest, and/or developing a waiting list before construction.

MOST REQUESTED PRIVATE STUDIO SIZE*
35% (85) would be served by
200-350 square feet
**A variety of sizes are needed*

Respondents interested in private studio space would use it for the art forms listed below and prefer these amenities. Developers interested in building private studios are encouraged to consider this information and the other design strategies further explained on page 27 and in Section IV of the Technical Report.

INTENDED USE FOR PRIVATE STUDIO SPACE

- **Fine/Visual arts (44%)**
- Exhibition/Presentation (20%)
- Desktop arts (18%)
- Industrial fabrication (16%)
- Classes/Workshops (15%)

MOST PREFERRED BUILDING - WIDE AMENITIES

- Common area Wi-Fi (55%)
- Gallery/Exhibition Space (42%)
- Utility sink with trap (38%)
- Additional Storage (22%)
- Classroom/Teaching space (21%)
- Business Center (19%)

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

Thirty-four percent (82 respondents) of the 241 who indicated an interest in private (long-term) studio space also indicated interest in ***shared*** short-term studio spaces (covered in the next section). 50 expressed interest in studio space (general-purpose, for occasional private use) and 53 in studio space (general-purpose, multiple user). 21 expressed interest both shared space types. **If short-term space is created to meet this occasional and shared-use community need, then the number of spaces created for long-term private studio space should be reduced accordingly (and vice versa) as the interest may be overlapping.**

In all cases, studio and creative work-only space should be brought online conservatively. Despite the strong interest there is a diversity of space preference that make investment inherently riskier than housing. Phasing in new space, rather than immediately building to the maximum is a reasonable and recommended approach.

ARTIST SURVEY INTEREST IN:

SHARED CREATIVE SPACE AND SHARED PERFORMING ARTS SPACE

453 (57%)

OF THE 799 CREATIVE RESPONDENTS ARE INTERESTED IN ACCESS TO <u>SHARED CREATIVE SPACE</u>

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Painting/Drawing - **39%**
2. Crafts/Fine Crafts – **22%**
3. Mixed Media - **21%**
4. Arts Education – **20%**

**Respondents could choose up to 4*

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.

204 (26%)

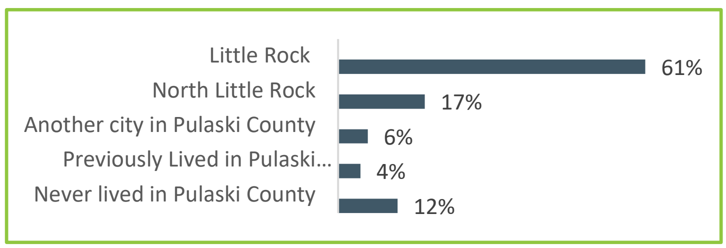
OF THE 799 CREATIVE RESPONDENTS ARE INTERESTED IN ACCESSING <u>SHARED PERFORMING ARTS SPACE</u>

TOP ARTS, CULTURAL, CREATIVE INDUSTRY INVOLVEMENT

1. Music - **29%**
2. Theater Arts – **29%**
3. Writing/Literary Arts – **22%**
4. Arts Education – **20%**
5. Film/Video/TV - **20%**

**Respondents could choose up to 4*

RESPONDENT LOCATION (SHARED PERFORMING SPACE)



Definition: Shared Performing Arts Space

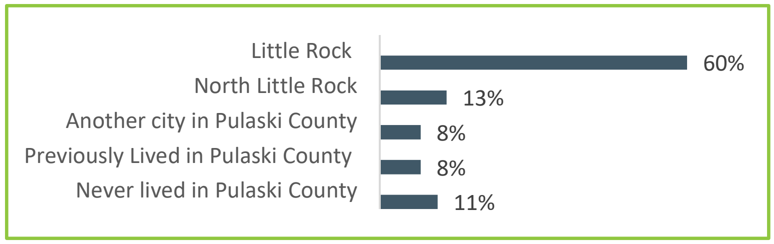
Space that accommodates the needs of those in the performing arts or other complementary industries. Like shared creative space, the space and specialized equipment may be available for short-term, private rentals (e.g. hourly, daily, weekly, monthly) or accessible to multiple users at the same time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

INTEREST IN SHARED CREATIVE SPACE

These spaces and associated programs 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 space examples include: co-working or makerspaces designed for specific uses such as ceramics, 3D printing, culinary arts, or woodworking. *Private short-term rentals* 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.

271 (60%) of the creatives who are interested in shared creative space are current residents of Little Rock and 59 (13%) are residents of North Little Rock. Developing new shared creative space would first and foremost address a local need for space.

RESPONDENT LOCATION (SHARED CREATIVE SPACE)



With 453 total respondents expressing interest, shared creative space ranks by far as the most needed space type of those asked about in this survey. The creatives are involved in a wide variety of industries and have a variety of space needs. While 102 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, or private studio space is created. A clear exception is the overlapping interest in shared general-purpose studio space with private studio space.

RECOMMENDATIONS FOR SHARED CREATIVE SPACE

Artspace recommends including, to the extent feasible, shared creative space in any new multi-use facility and prioritizing the most preferred neighborhoods (Downtown and SoMa in Little Rock, and Argenta in North Little Rock). A multi-use facility would be enhanced by general purpose flexible studio space that offers short-term private use studios and a shared studio for multiple users. Additionally, at least 20% of interested respondents would like to access the following specialized spaces: gallery/exhibition space, ceramics and/or clay studio, and a printmaking studio. Any interested developer, including Artspace, would need to find an organization/business or individual who could lease commercial space and sustainably operate the preferred programs. How needs like a printmaking studio (of interest to 100 respondents) can be met by existing programs and studios is also important to explore.

MOST PREFERRED TYPE OF SHARED SPACES*

- Gallery/Exhibition space – 141 (31%)
- Studio space (gen-purpose, multiple users) – 134 (30%)
- Studio space (gen-purpose, occasional private use) – 122 (27%)
- Ceramics and/or clay studio – 111 (25%)
- Printmaking studio – 100 (22%)

**Respondents could choose up to five options.*

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

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 for example: costume, prop and set design shops, or storage. Examples of *Private short-term rentals* include: rehearsal or performance space; or sound proof practice or recording studio space. Performing arts space can be expensive for artists due in part to the volume of space required for rehearsal and performance and the technical requirements. 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 (204 respondents) is less than the interest for shared creative space (453 respondents), but still sizeable. 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.

MOST PREFERRED TYPE OF SHARED PERFORMING ARTS SPACE

- Rehearsal Space – 61 (30%)
- Theater/Performance (permanent seating) – 58 (28%)
- Theater/Performance (black box/flexible) – 50 (25%)
- Sound booth (voice over/music) – 45 (22%)
- Music recording studio - 43 (21%)

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

Location wise, Downtown Little Rock (63%), Argenta (51%), and SoMa (50%) were the overwhelming top choices for where individuals would like to access shared performing arts space.

Underutilized spaces in LR/NLR is the first consideration for meeting this need. A second strategy is leasing commercial space to a performing arts organization that can build out new space for their own and shared uses. A third strategy is to include flexible space in a new development that can be used for rehearsals, as this would address the most preferred shared performing arts space need. Any operator interested in offering performing arts space in the context of a multi-use facility or independently, should review Section IV of the Technical Report. This section may also be of interest to the organizations listed in Addendum II: Organization Focus Group Summary document.

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 Little Rock/North Little Rock survey 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, 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 does not allow for in-unit washer/dryers.

COMMUNITY GALLERY

Live/work housing space in its general conception provides the opportunity for residents to collaborate and help one another, but all artist spaces 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 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 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. 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.

LITTLE ROCK/NORTH LITTLE ROCK SPECIFIC DESIGN FEATURES AND AMENITIES

LOCATION

The artists interested in space in Little Rock/North Little Rock were asked their location preferences from a list of neighborhoods discussed during Artspace's Preliminary Feasibility Visit. This information is useful when exploring sites. To the extent feasible, preferred locations should influence site exploration and selection. Many factors drive site selection including: cost, funder preference, zoning, environmental conditions, the real estate market, ease of acquisition, site ownership, proximity to amenities (public transportation, retail, arts), and city planning priorities. It is important to note, that if new space is created in a less preferred location artists may remain interested especially if the space is priced affordably, many respondents also indicated they had no preference. The table below shows by percentage which neighborhoods are most preferred by artists interested in live/work housing, private studio space, shared creative space, and shared performing arts space and offers a ranking for each. "1" is the most preferred and "6" the least preferred *overall*. Respondents were asked to select all neighborhoods they would consider renting in.

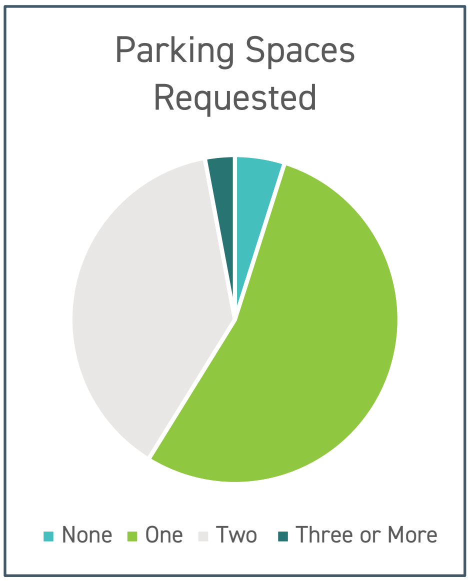
Neighborhood	Live/Work Housing	Private Studios	Shared Creative Space	Shared Performing Space	RANK
Downtown Little Rock	71%	61%	59%	63%	1
SoMa	61%	52%	53%	50%	2
Argenta	61%	49%	52%	51%	3
East Village	27%	23%	26%	27%	4
UA Little Rock District	19%	20%	24%	24%	5
Dunbar	25%	15%	17%	21%	6
Other neighborhood of interest	15%	22%	21%	14%	N/A
No preference	14%	17%	18%	18%	N/A
Total Respondents	200	241	453	204	N/A

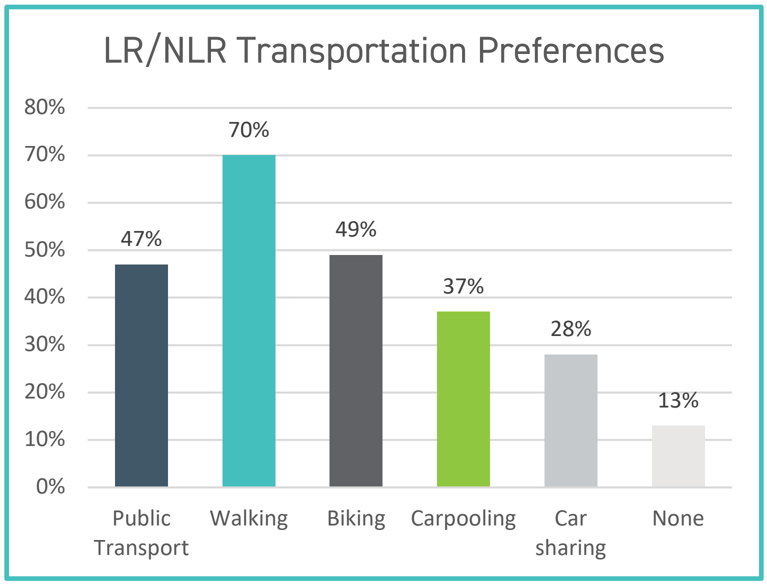
According to the survey responses, individuals are overwhelmingly interested in locating to Downtown Little Rock, SoMa, or Argenta in North Little Rock. These three top preferences stayed relatively the same for all four space types.

If creating a project or introducing new space in a neighborhood that is NOT among these three neighborhoods, the overall number of live/work housing or private studio/creative spaces or commercial space should be reduced. A robust outreach campaign that engages the creative sector in the location decision making process is recommended if a site is selected or new space is developed in a lesser preferred location.

TRANSPORTATION AND PARKING

Respondents interested in live/work housing (200) were asked what alternative transportation options they would use on a frequent or regular basis to reduce parking needs. Walking (70%) ranked highest with nearly half of interested respondents selecting biking (49%) and public transportation (47%). A walkable neighborhood is a priority consideration for locating new space, as is offering bike parking and transit within ¼ or ½ mile. 95% of respondents indicated they need at least one parking space for their household.





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

DESIGN CONSIDERATIONS

BUILDING-WIDE AMENITIES

In addition to Artspace's general design guidelines, survey data informs 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 in which they expressed an interest.

Building Amenity	Space Subgroup			
	Live/Work Housing	Private Studio	Shared Creative Space	Shared Performing Arts Space
Easy to Incorporate				
Common Area Wi-Fi	X	X		
Gallery/Exhibition Space	X	X	X	
Classroom(s)/ Teaching Space		X	X	
General-use studio/ flex-space (private and/or shared)	X		X	
Additional Storage		X		
Rehearsal Space	X			X
Community Garden (ground or rooftop)	X			
Utility sink with trap		X		
Networking/Meeting Lounge		X		
Costly Amenities				
Business Center (copier, scanner)		X	X	
Computers with Design Software			X	
Ceramics/Clay Studio			X	
Printmaking Studio			X	
Theater Space (black box or formal)				X
Music recording studio				X
Soundproof practice room				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 two interested subgroups and are "easy to incorporate" should be prioritized for a mixed-use project. These are: **gallery/exhibition space, common area wi-fi, general-use studio/flex space, and classroom/teaching space.** The first and the latter also allow for programming in which non-creatives can participate. The other space types that at least two subgroups expressed interest in should also be given priority consideration: additional storage, rehearsal space, and a business center.

In-unit Features (Live/work only)

The top in-residence features of survey respondents indicated a need for the following. 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 (64%). Any new development should optimize natural light sources to aid the creative work of its future residents.

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 (60%). New space should aim to provide the necessary technological infrastructure to support tenants' creative work.

Washer/Dryer hook-ups in unit: While a project may include shared laundry facilities, interested artists (35%) prefer in-unit washer/dryer access. If offering this feature, consideration should be given to the impact on building water usage.

Unit soundproofing: Soundproofing is a preferred space feature of those interested in live/work housing (32%), and a soundproof practice room is preferred by 19% of those interested in shared performing arts space. 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. 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 addressing the need for this type of shared performing arts space.

High ceilings: Ceilings that are at least 10 feet are desirable to those interested in live/work (29%). 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 financial sustainability is access to the public so that they can sell, perform and share their work. 20% of artists interested in housing 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 could consider some storefront options and/or design elements that encourage public access and interaction.

Special ventilation: 19% of respondents interested in live/work housing, indicated a need for special ventilation within their living 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) space within a building with enhanced ventilation for varnishing, spraying, and where use of other toxic substances is permitted.

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 Windgate Foundation. It can take several years to realize new space and keeping interested parties engaged is important. Periodic and important project updates to those **641 (77%) respondents** who requested further information is highly recommended. Convening additional conversations with organizations and businesses will also help identify future tenants and shared space operators and is recommended as part of any future predevelopment phase of work.

619 (74%) indicated they would be interested in participating in future conversations about supporting the creative sector in Little Rock/North Little Rock, this interest group could also be contacted to test evolving project concept and business plan assumptions developed by operators of future shared spaces, including input on fees or membership rates that would be considered affordable. 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 Little Rock/North Little Rock to engage new artists of diverse backgrounds 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. Little Rock/North Little Rock had a great turnout for the survey keeping this arts community informed 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 Little Rock/North Little Rock and the surrounding area. In spite of 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 in regard to age, gender, race, income, ethnicity, and even art form.

Survey Respondent Race and Ethnicity			Little Rock 2019 est.	North Little Rock 2019 est.
White/Caucasian	669	81%	46.9%	50.9%
Black/ African American	67	8%	43.1%	42.0%
Multiracial/multiethnic	28	3%	2.1%	2.6%
Hispanic/Latino(a)	24	3%	7.5%	6.1%
Asian/ Asian-American	19	2%	3.2%	1.2%
Not Listed/Other race	9	1%	4.3%	2.8%
American Indian	8	1%	0.3%	0.4%
Northern African	1	0%	N/A	N/A
Total population	**825**	**100%**	**203,637**	**65,162**

Source: ESRI Community Analyst, 2019

The survey respondent's diversity does not accurately reflect the diversity in Little Rock/North Little Rock. Survey respondents from across the region identified as Black/African American (8%), and Hispanic/Latino (3%). According to demographic software Esri Community Analyst, in 2019 Little Rock's population is estimated as 43.1% Black/African American and 7.5% Hispanic/Latino and in North Little Rock as 42% Black/African American and 6.1% Hispanic/Latino.

In terms of gender, the disparity also exists. 66% of total survey respondents were women, when in 2019, women made up 52% of Little Rock's and 53% of North Little Rock'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.

For a future project to be demographically relevant and reflective of the community, Artspace highly recommends that ongoing outreach and the make-up of any stakeholder leadership teams helping to advance new space be directed toward achieving that goal. It should be noted that a slightly higher percentage of respondents who identified as Hispanic/Latino, multiracial/multiethnic, and Black/African American 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 67 live/work housing units for creatives in Little Rock/North Little Rock. Artspace recommends using this information along with the location preferences to explore site options for a mixed-use development and to encourage multiple space-based initiatives. No one project can meet all needs. **An initial development concept whether a single mixed-use design or separate facilities should begin with an assumption of up to 67 units of housing. Live/work housing can be rounded out with no more than 44 private studios (at a variety of sizes and rent targets); and flexible commercial space made available for shared creative space uses will begin to fill the affordable space gap in LR/NLR.**

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 and city officials 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 in Little Rock/North Little Rock and its creative sector.

Artspace appreciates the opportunity to complete this Arts Market Study in Little Rock and North Little Rock and commends the local stakeholders for a stellar response rate.

ONGOING OUTREACH

Responses to the survey are representative of a need for space, 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 Windgate Foundation with confidential contact information for the **641 (77%)** survey respondents who requested further information and/or updates on this project in a separate attachment.