
SUMMARY REPORT OF FINDINGS

Make It in Napa Space Needs Survey for Makers, Creatives, and Artists

BACKGROUND

On August 9th, 2021, the ***Make It in Napa Space Needs Survey for Makers, Creatives, and Artists*** was launched online at *MakeltInNapaSurvey.org* and was available for seven weeks. The survey was promoted primarily to Napa City and County individuals and businesses in the making, creative and arts sectors, with a social media push that reached as far as 60-miles from Napa. The survey focused on creative space and other support needs of creatives who currently or would be interested in living, working, or making in the city of Napa.

The purpose of the survey was to inform Artspace and Placemade's findings for the ***Creative Space and Local Manufacturing Action Plan***. The survey data is used to:

1. Determine the demand and interest by the creative sector to warrant new spaces focused on the creative sector in the city of Napa.
2. To conceptualize those spaces.
3. To encourage the city of Napa, creative community local organizations and property owners and developers to foster and create new creative spaces.
4. Develop initiatives, and programs that can help support and grow this important economic sector.
5. Maintain an interest list of those individuals and organizations who need space and help matchmake with available spaces.

FINDINGS, OBSERVATIONS AND RECOMMENDATIONS

There were **207 total survey respondents** of which a notable **174 (84%) indicated an interest in at least one type of creative space in the city of Napa**. The majority (77%) of respondents are current residents and another 9% are former residents of the city of Napa. One-hundred

and thirty-eight (138) or 80% of the respondents primarily create, make, practice their art, or have a business in the city of Napa.

The significant hyperlocal response suggests that investment in new spaces and initiatives would not only serve local residents and businesses but that the regional market remains largely untapped. The nascent Make It in Napa initiative and the *Creative Space and Local Manufacturing Action Plan* reveal opportunities to reach a larger market.

RESPONDENT PROFILE

The arts, creative, artisan, and maker fields were diversely represented by survey respondents. 39% of total respondents are involved in “Painting/Drawing, Illustration and Mixed media”. The strong showing by these visual arts is representative of the local arts scene and the partner organizations who helped promote the survey. Those involved in crafts were 18% of total respondents and fire arts (ceramics, glass, metalworking/metalsmithing) were 14% and the highest represented maker-specific fields.

Outreach plays a significant role in how respondents hear about the survey and anecdotally we know there are many food and beverage product makers active in Napa who are underrepresented in the results. The total respondent pool lacked a strong response from makers, creatives and artists who are 30 years of age or younger. 54% are 50 years of age or older. This statistic may echo the feedback received during focus groups and one-on-one conversations, namely that younger makers/creatives/artists are priced-out of the city of Napa due to high costs of housing and workspace.

In similar surveys conducted nationally, higher responses from young and emerging artists typically result in a greater interest in live/work housing. Reaching younger artists within and outside of the city of Napa, through ongoing outreach, may reveal a deeper market than suggested by this sample.

Respondents at a Glance

Most respondents are....

- Producing unique, one-of-a-kind creations (74%)
- Working from a space within their home or don't have the space they need (79%)
- 40 years of age or older (71%)
- City of Napa residents (77%)

...and identify as:

- Female (64%)
- White/Caucasian (71%)

Of those who rent/own space on an ongoing basis outside their home...

- Most have that space in the city of Napa (65%)

Of those who do not....

- Most primarily create, make, practice art or base their business in the city of Napa (80%)

Respondent Race and Ethnicity Profile

Diversity, Equity, Inclusion, and Accessibility are core to the mission of Artspace and the utmost effort was given to include diverse voices as part of this study. One in-person outreach event was hosted in partnership with the Napa Hispanic Chamber of Commerce as well as subsequent follow-up to get the word out. Despite best efforts, the outreach and resulting data is not representative of the diversity of Napa.

There are also a number of organizations working on diversity initiatives that we found out about through the survey responses but wish we had connected to during the outreach period. Those include NV Latino Heritage, Suscol Council focusing on indigenous rights, and Napatitlan.

Respondent Race and Ethnicity			*City of Napa
White/Caucasian	147	71%	72%
Hispanic/Latinx/Latino/a	26	13%	41%
Asian American or Asian	11	5%	3%
Multiracial/Multiethnic	10	5%	4%
American Indian/Native Alaskan or Hawaiian	6	3%	1%
Not Listed	4	2%	19%
Black/African American/Caribbean	2	1%	1%
Pacific Islander	1	0%	.5%
Total	207	100%	

**City of Napa Source: Esri Community Analyst. 2019 Persons identifying as Hispanic may be of any race, thus totals result in percentages above 100%*

DEMAND FOR SPACE

The survey asked about respondents’ interest in the following space options, if available and affordable in the city of Napa:



1. Relocating to live/work housing designed for artists/creative/makers and their families, referred to as **“live/work”** housing in this report.



2. Renting workspace (1-year lease minimum), (for creating, making, product production, office and other business or art-related uses) referred to as private **“workspace”** in this report.



3. Shared, specialized workspace (paid membership or short-term rental) (e.g., makerspace, gallery/retail, performance, industrial, teaching, food production, etc.) **“shared, specialized workspace”** in this report.

The following are the respondents' space needs listed in order of greatest interest.
(Respondents may have selected multiple options.)

1. **Shared, specialized workspace: 100 (48%)**
2. **Workspace: 79 (38%)**
3. **Live/Work housing: 66 (32%)**

In similar surveys conducted nationally, it is common for shared, specialized space to be the top priority space need of the creative sector. This type of space is most successful if a local programmer or organization is available to operate it.

Based solely on responses to this survey we arrive at the following demand for affordable artist live/work housing and workspace in the city of Napa:



Affordable live/work housing: up to 18 – 26 housing units



Workspace: up to 59 workspaces

We believe this to be a very conservative estimate and a starting point for initial planning purposes. Several factors impact demand calculations that are applied to reach this total housing unit range. For affordable live/work housing (that is targeted to those at or below 60% or 80% of AMI) demand factors include:

- Self-reported household incomes and whether a household would income qualify;
- The number of bedrooms required by respondents;
- Overlapping interest between live/work housing and workspace; and
- Homeownership status

For the workspace demand calculation, consideration is given to the ability for interested respondents to pay at least \$1.00 per square foot; whether interested respondents currently or have previously lived in Napa; and, how likely they would be to share the workspace that they would rent.

CONCEPTUALIZING NEW SPACE

The Technical Report of Findings Addendum that accompanies this summary report offers critical and detailed data that can be used for conceptualizing new space. It includes what respondents consider to be affordable rental rates, their preferred live/work housing configurations, parking requirements, and the types and minimum square feet required for workspaces. Respondent highlights for each space is included below.



- One- and two-bedroom units are the greatest need (66%).
- Rental rates between \$1,000-\$2,300/month will be affordable to most (65%).
- Working space incorporated into flexibly designed living space is most preferred (80%).
- Include 1 or 2 parking spaces per unit.
- Locate new space and provide amenities that support walking & biking as a key alternate transportation method.



- Provide one-year lease options.
- Allow space sharing/sub-leasing (57% would “definitely” or “be somewhat” likely, to share space). This will help with space affordability.
- Include business-friendly amenities. (94% will be operating a business from their workspace.)
- Charge \$500/month gross *or less*, for most spaces to maintain affordability or up to \$1/square foot gross. Some higher rents are possible on a limited basis.
- Create a variety of space sizes. Emphasize spaces up to 500 sq. feet (will serve 69%). Some larger spaces are needed, but the price/square foot rate that is affordable may not be commensurate in all cases. Pre-lease or obtain letters of interest for larger spaces.
- Ensure that zoning and code compliance and design support non-industrial/studio art uses as a priority (56%). Secondarily, consider the same to support exhibition/presentation, light industrial, retail, and high-volume class/workshop uses (23% - 30% will use workspace for these purposes).



- Offer short-term and occasional access options including membership, hourly, daily, and weekly rentals. Rates charged should be determined through a business plan development process.
- Prioritize exhibition / presentation spaces (e.g., for gallery shows, screenings, installations).
- Prioritize studio/non-industrial spaces (e.g., for drawing, graphic arts, photography, beading writing).
- Consider other, preferred shared space needs listed in the Technical Report when putting together a shared space /equipment program.

OTHER SUPPORT NEEDS

Affordable space is only one component of the need respondents have when it comes to growing their portfolios and their creative/maker work and businesses in Napa. The input from respondents largely confirms the findings from focus groups and one-on-one meetings held during the *Creative Space and Local Manufacturing Action Plan* community input phases. For this sector to thrive, the top needs of respondents should be addressed.

The following are the most important* actions respondents indicated in the survey that need to be taken to support the creative sector in Napa.

- Develop a **“made local” brand** to enhance marketing and sales.
- Foster **networking opportunities** for artists/creatives and maker/manufacturing businesses.
- Increase **grant funding**.
- Make **business support** technical assistance available (e.g., business planning, legal, marketing, website).
- Provide **real estate** technical assistance (e.g., topics that include buying/leasing, space planning, and budgeting for new space)

*(*of interest to at least 20% of the total respondents or 30% of a subset)*

SAMPLING OF RESPONDENT OBSERVATIONS & SUGGESTIONS

- Underutilized spaces at local colleges are an opportunity to improve space access through partnerships.
- Create an Indigenous Cultural Center / Multi-cultural center / Community Center downtown with related programs to promote and offer access to artists from diverse cultural, social, and economic backgrounds.
- Activate vacant/empty and after-hours storefronts with art and locally made products.
- A multi-city / county effort is needed for success of this initiative.
- Celebrate and make visible emerging local artists/creatives through public art and private opportunities. Less reliance on out-of-town artists.
- Increase light-industrial zoning and ensure commercial landlord code / safety compliance.
- Visit Napa Valley tourism bureau is “lagging behind” in its promotion of local arts.

IMPACT OF NEW SPACE

New space (and supportive initiatives) that are advanced in response to this survey will have a clear impact on the local creative/maker residents and businesses and in turn the City of Napa. The following are important reflections on the potential of this impact and who will be served.

- **Addressing the issue of affordable and available space will help retain local makers/artists/creatives and their businesses.**

Input during focus groups and one-on-one meetings revealed concerns that younger and emerging artists/creatives/makers and those identifying as a Person of Color (POC) are largely unable to live and work in Napa due to the cost of space. This cost concern is further supported by the data. **42% of total respondents who “primarily create, make, practice their art or have a business based in the city of Napa” have considered moving their work/business outside of Napa city.** Some of these respondents are at risk of losing their housing and workspaces. The top three reasons given are all space related

- Cost of commercial space is too high
- Cost of housing is too high
- No available commercial/workspace for my needs

Of those interested in live/work housing, 86% of respondents have considered moving, but 97% would stay for the opportunity of new affordable housing for artists/creatives.

- **Addressing the issue of affordable and available commercial/creative space will help retain jobs in Napa city.**

Of those who are interested in workspace (and primarily create, make, practice their art or have business based in the city of Napa) 49% have considered moving that work/business outside of Napa, and 96% would stay for the opportunity of affordable workspace. **Further, 37% of those interested in workspace hire full or part-time / short-term employees (not including themselves or their business partners).** Fostering new affordable workspace will help retain jobs in the city of Napa. Taking this a step further, the potential to attract new makers/creatives/artists and their businesses to the city of Napa is also evident and new affordable space and support programs could help to make this happen.

- **Affordable live/work housing designed for artists/creatives/makers and their families can impact the broader Napa city workforce ecosystem.**

While respondents took the survey as individuals and businessowners, many of those who are specifically interested in live/work housing hold down other workforce jobs in the community. Supporting them transcends support of the maker/creative sector. **67% of those interested in**

live/work housing work have an occupation in a non-arts /creative/maker field. While the subset is small, it follows national trends of makers/artists/creatives needing to supplement their income. In fact, nearly one-third of the respondents interested in affordable live/work housing make 10% or less of their income from the maker/creative/arts work. The top other fields in which they work include:

- Education
- Wine industry
- Nonprofit administration/management
- Professional and business services
- Retail

ORGANIZATIONS/BUSINESSES INPUT & THOSE SEEKING SPACE

The following organizations/ creative businesses/ artists participated in the survey and offered their websites and social media. They were either interested in at least one type of space in Napa or provided their input in some format.

The breadth and diversity of the art forms and the artists is very commendable. A huge variety of artists and organizations responded to the survey including (filmmakers, mehndi artists, cookie makers, candy makers, visual artists, creative marketing, branding, musicians/bands, and baby clothes makers and embroiders to name a few). It's clear many use home studios and festivals/markets, etsy, instagram to get to the word out, and don't have physical spaces. There are also a lot of active Facebook groups for artists in Napa and throughout the Valley. We recommend for the City and Steering Committee to review the full supplemental data provided confidentially as part of this survey.

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| <ul style="list-style-type: none"> • 1700 Film • A Touch of Love Jewelry • AlibytheSea • Andrea Cazares Art • Ann Trinca Arts Management • Aperture Media + Design • Art Association Napa Valley • Art Factory • Art of Taste. Penelope Moore • Beyond The Label Art Show • Blue Okra • Bougie Napa | <ul style="list-style-type: none"> • Brazil Carnival Shop • BUG Wearable Designs • Cathy's Cottage • Cha-Cha Sweets • Charlene Steen Art • Christy's Card Creations • Coffman Home Services • Creative • COOKIES TOO • Daniel Ricco Art • Dirt and Diamonds Printing • E& M Presents • EJD essentials • Emil Yanos Design • Fazio's cat jewelry | <ul style="list-style-type: none"> • Festival Napa Valley • Flying Pig Ceramics • Flying Pig Design • Franco Luna • Frederick & Co. Woodworks • Gaming! on the Rocks Podcast • Gatto Design • Glytchwytych • Jewels of the Vineyard • Jock McDonald Film Inc. • Kaye Fleming Design • Legereart • M.A.P.Designs • Manny Designs • michaelissacdesigns |
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- Morrie Warshawski - Arts Consultant
- Nancy Mott Designs
- Napa Studio Gurl
- Nick Cann design
- Nixie Design Studios
- Photography
- NVUSD
- Olde Town Barbershop
- Parrisworks
- Particularly Nice Find
- PR quilting
- Robert Frank Fine Art
- Rosie Penning Fine Art
- Sanda Design
- Sherri Gallagher Designs
- Storied Productions
- Studio KLY LLC
- The Rosburg Files
- Thru the Haze - band
- Tubiolo Public Art and Sculpture
- Vaughn Creative Services
- Vineyard music academy
- WicklowArt/ The Pin Wizard's Cosmic Mercantile
- Wilkinson Iron Works

SURVEY METHODOLOGY

Local partners led the survey promotion efforts that included social media posts, traditional media coverage, direct emails, sharing flyers at maker events, and attending in-person and virtual meetings with local leaders and service organizations. In particular partners in the maker, creative, and arts sectors including the Art Association of Napa Valley, the Arts Council Napa Valley, the *Make It In Napa* Advisory Team members, Visit Napa Valley and others helped promote the survey. The Napa County Hispanic Chamber of Commerce and members helped us reach more Latino/a/x artists and creatives in Napa.



It is reasonable to assume that the survey promotion was hampered by the unprecedented circumstances of COVID-19 and that the response rate could be under-representing market demand. While social media played the largest role in promotion (33% learned about the survey through social media) the limited opportunities for formal and informal in-person gatherings that lead to information sharing within creative and maker sectors limited artist awareness of the survey locally and regionally.

The survey respondents are a “sample of convenience,” a non-probability sampling method. While believed to be grossly representative of the target population generalization of the findings to broader populations cannot be conducted. The respondents are representative of a need in a healthy, stable, creative/maker market and data is considered relevant for up to five years. The total responses included in Technical Report are all completed survey entries, barring any apparent erroneous or duplicate responses which were removed. Due to the nature of data collection, and the bounds of confidentiality, the analysts at Artspace are not able to

eliminate the entire possibility of duplicate responses. 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 Alchemer (formerly Survey Gizmo) collected data was conducted via SPSS Statistics software and Microsoft Excel.

ONGOING ENGAGEMENT

Respondents overwhelmingly (82%) requested to be kept informed of *Make It in Napa* initiative updates. This suggests a great degree of enthusiasm among the local maker/creative/artist sector. Staying in touch with this motivated group through occasional emails (some provided contact information for this purpose), social media, representative organizations and other channels is highly recommended.