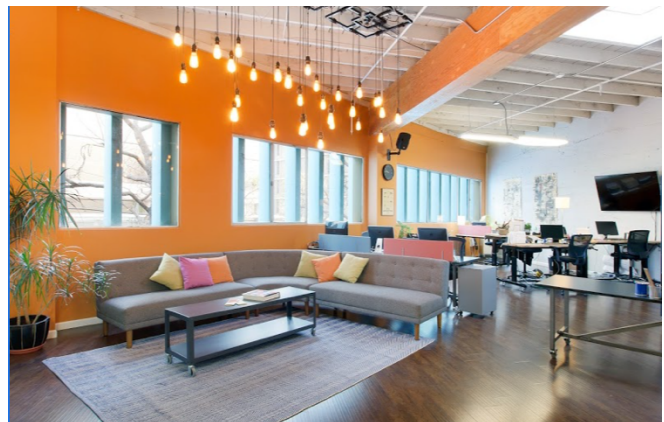


# Working Differently Post-Pandemic

A Report on Bay Area Artist Space Needs in 2021



By Marc Vogl & Kelly Varian

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**VOGL CONSULTING**

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## Introduction

In the Spring of 2021, the San Francisco Bay Area arts community, and the wider world, are reconnecting after more than a year of isolation. Vaccination rates are rising, and cultural facilities are reopening alongside schools, restaurants, and office buildings. California Governor Gavin Newsom announced a full reopening of the state's economy on June 15<sup>th</sup>, 2021.

Artists and cultural workers are asking the same questions as workers in many other sectors and industries:

***What does reopening really mean?***

***What types of spaces do we need going forward?***

***How can we embrace lessons learned during the pandemic to make our workplaces more effective, equitable, and enjoyable?***

Three San Francisco-based arts service organizations, Dancers' Group, Intersection for the Arts, and Theatre Bay Area commissioned this report to explore these questions and illuminate how artists and culture workers from diverse communities across the San Francisco Bay Area are adapting to changing circumstances. This report also explores how these organizations could collaborate and share space to support the arts community's changing needs, increase organizational capacity and resilience, and work differently post-pandemic.

This study is rooted in findings from:

- A survey of nearly 500 Bay Area artists, arts administrators, and arts educators
- Focus groups with 18 diverse artists and cultural organization representatives
- Review of reports and articles documenting trends in the arts and real-estate sectors
- Interviews and facilitated forum with Dancers' Group, Intersection for the Arts, and Theatre Bay Area staff and Board members

The story of this study began before the pandemic. In 2018, Dancers' Group, Intersection for the Arts, and Theatre Bay Area formed a working group to explore opportunities to share space and deepen organizational collaboration. The San Francisco Art Commission supported their work, and they called themselves the Space Alliance.

In the Spring of 2020, the world shut down due to the COVID-19 pandemic, and the Space Alliance paused its work. In February 2021, the group reconvened and engaged Marc Vogl and Kelly Varian of Vogl Consulting to support a new round of research and discussion about the potential to share space, deepen collaboration, and address the space needs of artists and cultural organizations in a profoundly different post-pandemic context.

Given the tremendous uncertainty of the moment, a new mandate focused on pragmatic concerns for the Space Alliance members rather than expending energy on lofty visions built on guesses about what the future might hold. Therefore, this report examines the potential, desire, and cost/benefits for Space Alliance members to co-locate administrative headquarters.

It also endeavors to understand the new arts sector and regional context in which these service organizations operate and think broadly about how arts service organizations could support a more vibrant, equitable, and accessible ecosystem of Bay Area arts spaces.



*Intersection for the Arts' office and coworking space at 1446 Market Street.*



## Key Findings:

### Arts Community Space Needs & Barriers to Access

An investigation of Bay Area artist and cultural worker needs via a robust Bay Area Arts Community Survey and focus groups with diverse participants resulted in three top findings:

#### #1. Post-Pandemic, the Bay Area arts community has a range of new and perennial space needs.

Bay Area artists, arts administrators, and arts educators identified their greatest space needs in the Bay Area Arts Community Survey. Five types of space emerged as most needed, with a majority of respondents reporting they need:

- Studio/rehearsal space [77%]
- Theater/gallery space [67%]
- Large multi-use event space [64%]
- Affordable housing [62%]
- A/V recording space [54%]

While studio/rehearsal space, theater/gallery space, and affordable housing are perennial needs, an increased interest in large multi-use event spaces where people can gather and spread out, and audio and visual recording spaces where artists can record and stream virtual content, may indicate a shift in the types of work artists want to make and how they want to present their work.

Further, there seems to be less need for dedicated physical office space, likely due to a year of learning to work remotely. Still, artists and culture workers in the focus groups indicated that having a place to meet in-person sometimes remains valuable.

#### #2. The top barriers to accessing space are cost, pandemic-related closures, and not knowing what spaces are available.

75% of survey respondents indicated that cost is the most significant barrier to accessing the space they need. Not surprisingly, those who identified as low-income were more negatively impacted, with a full 94% saying cost is a primary barrier. Some artists proposed that sharing studio and event space (and the associated expenses) could lower this barrier to access. Others said the Bay Area arts community needs more robust advocacy for policy shifts to increase rent subsidies and incentivize landlords and venue operators to discount rates to nonprofit and arts community renters.

54% of survey respondents identified closures due to the pandemic as a primary barrier to accessing space. Further, 40% indicated that public health and safety concerns were barriers to accessing space.

These new, pandemic-specific challenges may gradually dissipate as the effects of the virus subside. Still, focus group participants indicated uncertainty about virus variants and a potential COVID wave in the fall of 2021. They questioned when audiences, artists, and arts administrators will feel comfortable returning to pre-pandemic spaces, if ever. These layers of uncertainty make knowing what kind of space to secure (and how much to pay for it) difficult.

Strikingly, 35% of survey respondents indicated that simply not knowing what spaces are available was a significant barrier to accessing space. This challenge may be the easiest for the Space Alliance members to tackle as they are natural community connectors linked to thousands of Bay Area artists and culture workers.

### **#3. For BIPOC artists, feeling unwelcomed is another major barrier to accessing space.**

The survey data indicates that artists and culture workers across demographic difference face common challenges. However, barriers are not felt equally.

BIPOC individuals are *two to five times* more likely to report that feeling unwelcome limits their ability to access the space they need. Only 10% of respondents who identify as white said feeling unwelcome was a barrier, compared to 20% of Latinx and Middle Eastern respondents, 25% of Asian respondents, 45% of Black respondents, and 57% of Hawaiian Native/Pacific respondents.

Overcoming this immense challenge is critical if BIPOC artists are to have equitable access to the resources they need to work in the Bay Area. As focus group participants explained, making spaces equitable, inclusive, and welcoming for BIPOC communities is non-negotiable.

***“I am so uninterested in majority white spaces. This is super not okay. Not okay ever, and really not okay now. We need to equalize opportunities and make spaces welcoming for people of color.”***

- BIPOC artist and focus group participant

Andréa Spearman, Artist Resource Manager at Dancers’ Group, reflected that this perspective is both urgent and unsurprising. “The data on BIPOC artists feeling unwelcome is not news to me,” she said, “and the desire to work in spaces where artist and host organization values are in alignment really connects.”

## Potential Space Alliance Response, Collaboration, & Space Sharing

An investigation of how Dancers' Group, Intersection for the Arts, and Theatre Bay Area could work together to respond to these needs and increase their own capacity and sustainability resulted in four top findings:

**#1. The Space Alliance is well-positioned to help address the arts community's top space needs via information sharing, combined advocacy efforts, and cross-disciplinary community building.**

Many artists and culture workers who contributed to this study asserted that Space Alliance organizations could help address the arts community's space needs through collaborative and expanded efforts to:

- Increase information sharing and match artists with space owners/managers
- Combine advocacy efforts to push for more affordable, accessible spaces
- Deepen efforts to foster cross-disciplinary community building
- Support community learning and action to create more equitable spaces where BIPOC artists feel welcome

**#2. The Space Alliance staff, Board, and artist memberships support greater collaboration among the three service organizations and in the Bay Area arts community more broadly.**

Nearly 9/10 of artists and culture workers surveyed agreed that the local arts ecosystem would be stronger with greater collaboration and space sharing among arts community members.

Further, large majorities of the Space Alliance organizations' memberships support these arts service organizations collaborating more deeply and potentially sharing space. Enthusiasm is shared by Space Alliance staff and Board members as well.

***"These are very good organizations with shared values. If we can develop a tighter relationship we can mitigate financial risk and test new services with these organizations with a faster learning curve."***

- Space Alliance member organization Board member

### **#3. Sharing space makes sense for two of three Space Alliance organizations at this time.**

During the spring of 2021, Theatre Bay Area decided to secure coworking space rather than seeking a dedicated, permanent office. The decision made sense for Theatre Bay Area because it had already relinquished the lease on its previous office, its staff worked well virtually and cost savings were meaningful. No final decision has been made, but coworking at Intersection for the Arts is a strong possibility as it meets key criteria for Theatre Bay Area and the opportunity to be co-located in a space with other artists and arts-workers is compelling.

Dancers' Group determined that it would renew its lease on its administrative offices at 44 Gough Street in significant part because favorable lease terms provided flexibility given unpredictable circumstances. Dancers' Group is well-positioned to support its staff to work predominantly remotely for the time being and return to in-person work when it is safe and feasible. It also retains the ability to explore further and even to ultimately join a shared office with fellow arts organizations in the future without the burdensome expenses of exiting its current lease agreement.

Alison Snopek, Deputy Director at Intersection for the Arts, reflected that Space Alliance organizations could move forward as a 'super-group' even without all sharing a physical space. "We can share resources about space and help artists in our community access space without us all being in the same building," said Snopek.

### **#4. Space Alliance organization Staff want the win-win of working remotely and in-person.**

Employees at these organizations have learned how to have more efficient 1:1 and small group discussions virtually, they want to retain the flexibility and autonomy that working at home provides, and they don't miss lengthy daily commutes. They want to be intentional about some Staff coming into the office several days a week for longer and larger meetings, intensive, complicated, and creative conversations, onboarding new coworkers, and the social connection they deeply value. In this regard, Space Alliance employees are like most Bay Area arts and culture workers, 62% of whom report that post-pandemic, they want to work in hybridized in-person/virtual format.



## Methodology

This report used multiple methods to understand the Space Alliance's operating context post-pandemic and solicit first-hand perspectives reflecting the diversity of the San Francisco Bay Area arts community.

### Board Member Interviews

Consultants Marc Vogl and Kelly Varian conducted confidential 1:1 interviews with two Board members from each of the Space Alliance organizations. These interviews centered on Board impressions of their organization's ongoing space needs, how these needs could be reconsidered in light of the pandemic, and their openness to sharing space with fellow Space Alliance organizations. Board members were also asked about their assessment of the types of creative space artists needed now and what potential they saw for their organizations to help them access it.

### All-Staff Discussions

Consultants facilitated all-Staff meetings with Dancers' Group, Intersection, and Theatre Bay Area. These discussions revolved around practical descriptions of how they've used space in the past and how staff would like to work and use space for administrative and programmatic purposes going forward. Significantly these sessions catalyzed conversations about what returning to the office might look like and what the pros/cons of continuing to work in a hybridized in-person/virtual format would entail.

### Internal Document Review

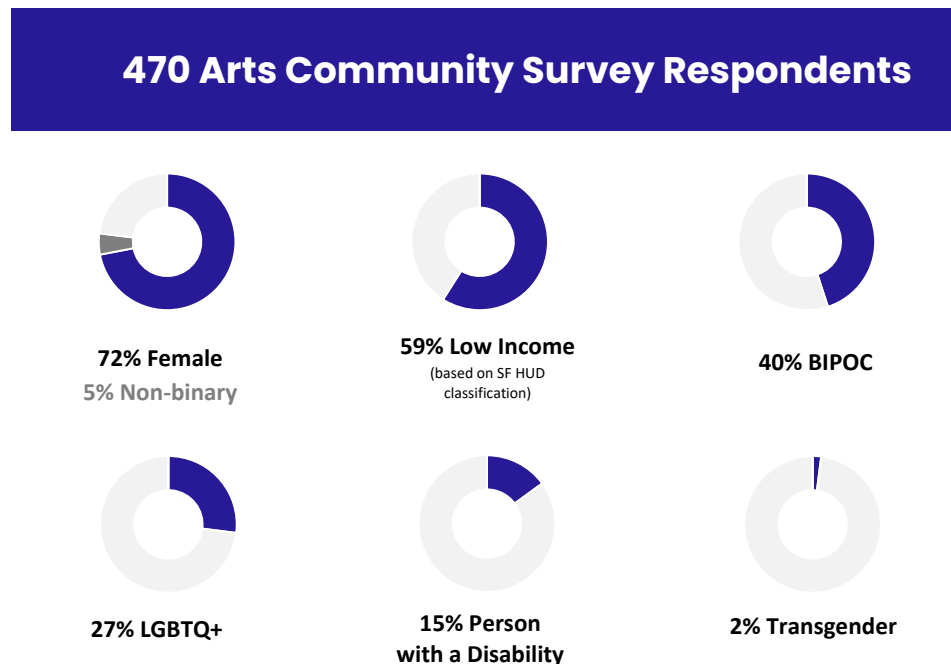
Financial statements and budgets were reviewed to understand how Space Alliance members used and paid for space historically. In the case of Intersection for the Arts, a follow-up interview was conducted with the staff member tasked with managing their coworking space as it is a critical revenue generator for the organization.

### Desk Research

An understanding of the operating context was established by desk research on contemporaneous articles on the outflow of workers and residents from San Francisco and the broader Bay Area in 2020, commercial real estate analysis of changes in the local market, reports conducted by funders on the social and economic impact of the arts in San Francisco (see a complete list of sources on page 30).

### Survey of 470 Arts Community Members

In April 2021, Dancers' Group, Intersection for the Arts, and Theatre Bay Area distributed a 23 question survey to their members. 470 individual artists, arts educators, and arts administrators responded. Participants represented great diversity with regard to artistic discipline, organizational budget size affiliation, residence in San Francisco and the Bay Area, and a spectrum of demographic identifiers. (See Appendix: Space Alliance Forum #2 Presentation slides 9-14)



### Artist Focus Groups

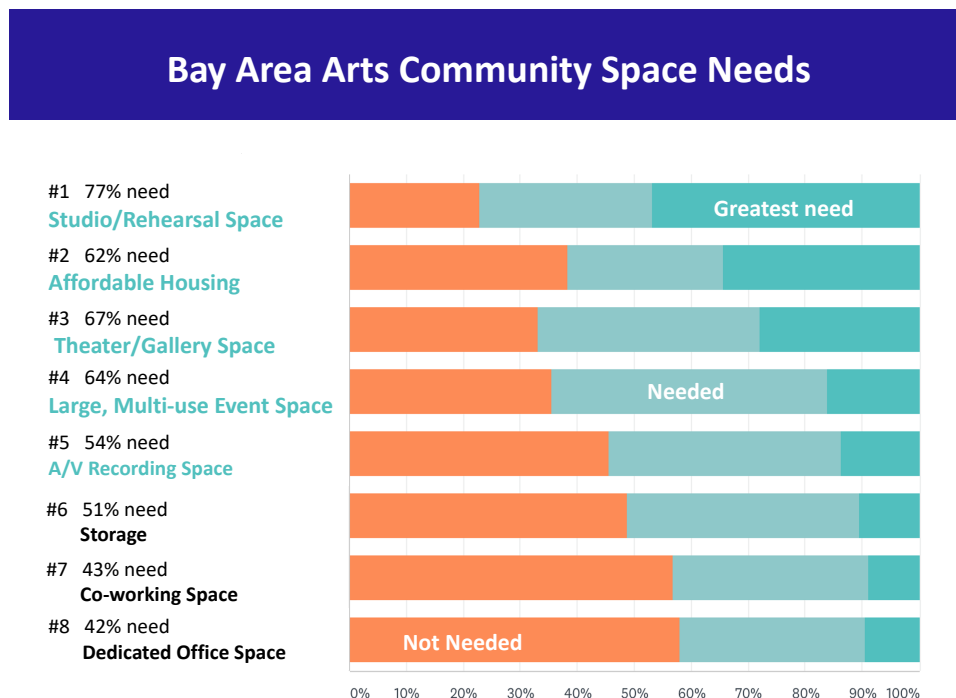
To complement the quantitative data provided by the survey respondents, the consultants conducted three focus groups with a total of 18 participants invited by the Space Alliance companies representing theatre, dance, music, literary, and multi-media arts disciplines and was 50%+ BIPOC. The hour-long sessions focused on understanding the types of space practitioners need now, barriers they experienced to accessing space, and what role Dancers' Group, Intersection for the Arts, and Theatre Bay Area could play in helping them overcome those barriers.

## Part 1: Arts Community Space Needs & Barriers

Together Space Alliance member organizations represent thousands of San Francisco and Bay Area individual artists, fiscally sponsored artistic projects, and nonprofit cultural organizations. These organizations are acutely aware of their responsibilities to respond to their diverse members' changing needs when it comes to finding and securing space and engaging in critical conversations regarding issues of access and equity.

### Arts Community Space Needs

Via the survey and focus groups, artists and arts workers shared that they need various spaces.



While some space needs mirror those pre-pandemic, others have shifted.

A majority of survey respondents don't need a dedicated office or coworking space. Yet, in the focus groups, artists and arts administrators underscored that while they have less need for office space after a year of working virtually, they would still value having a place to meet in-person as needed.

*"It's nice to have a neutral meeting space that is not someone's home."*

- Artist and focus group participant

*"My staff would like to work in-person when we need to, and from home when we don't need to, for the convenience and to save cost."*

- Arts organization Director and focus group participant

The survey and focus groups also revealed an increased interest in large multi-use event spaces where people can gather and spread out, and audio and visual recording spaces where artists can record and stream virtual content.

As the Space Alliance thinks about the types of space the arts community needs, there are meaningful distinctions between their memberships, and between practicing and arts administrators.

## DISTINCTIONS BETWEEN DG, TBA, & IFTA MEMBERS

### More IFTA & DG members need

#### large, multi-use event spaces

- 88% of IFTA
- 72% of DG
- 40% of TBA

### More IFTA members need

#### co-working space

- 53% of IFTA
- 37% of DG
- 39% of TBA

### More IFTA members need

#### storage space

- 70% of IFTA
- 55% of DG
- 53% of TBA

### Large, Multi-Use Event Space Detail

#### What

- 1,000+ sq ft
- Open indoor w/ high ceilings
- Or high-quality outdoor
- \$0-\$25/hr. rent

#### To be used for...

- Hosting events and classes (with ability to spread out for public safety)
- Creating and perform large-scale work
- Producing, recording, and streaming films and virtual productions



## DISTINCTIONS BETWEEN PRACTICING ARTISTS AND ARTS ADMINISTRATORS

### A higher percent of Practicing Artists\* Need

Co-working Space (+7%)

Studio/Rehearsal Space (+18%)

Theater/Gallery Space (+19%)

Affordable Housing (+10%)

(\*Who don't identify as administrators)

### A higher percent of Arts Administrators\*\* Need

Dedicated Office Space (+25%)

Storage Space (+33%)

Large Multi-Use Event Space (+7%)

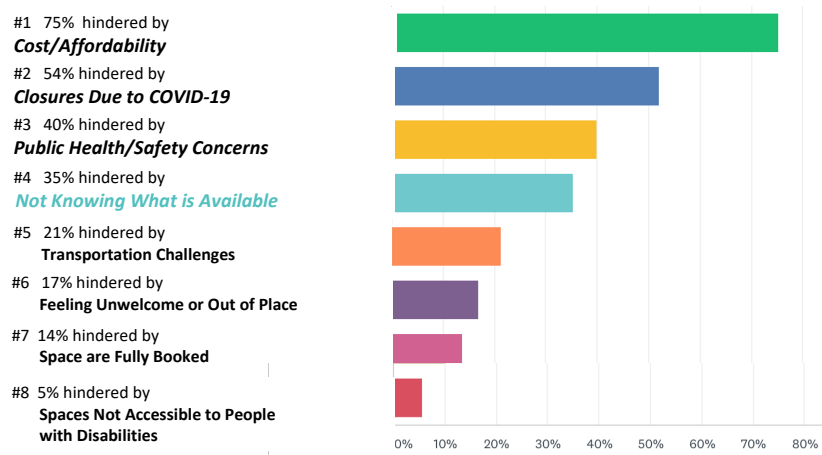
(\*\* Who don't identify as practicing artists)

## Barriers to Accessing Space

The Bay Area Arts Community said the top barriers to accessing space are cost, pandemic-related closures, and not knowing what spaces are available.

## TOP BARRIERS THAT KEEP PEOPLE FROM ACCESSING THE SPACES THEY NEED

*What barriers keep you from accessing the types of space you need?*



Some of the barriers identified, such as cost, can be addressed through advocacy to funders and government agencies that result in policy shifts that increase rent subsidies, incentivize landlords and venue-venue operators to discount rates to nonprofit and artist renters, and offer technical support for negotiating cost-effective rental contracts.

Barriers related to COVID-19 may gradually dissipate as the effects of the pandemic subside. Still, focus group participants indicated that shifts in artistic practice and consumer behavior might endure. "We need to have outdoor spaces that we control. We didn't need that before," said one choreographer. This sentiment was echoed by a theater-maker making plans based on the assumption that:

*"Audiences don't want to return to indoor theaters, so we anticipate performing outdoors more in the future."*

- Artist and focus group participant

Barriers due to lack of information may be the most easily tackled by the Space Alliance as they are natural community connectors and information sharers.

### Addressing barriers that disproportionately harm BIPOC artists and culture workers

While survey respondents across demographic groups face common challenges, it is clear that BIPOC and low-income individuals face barriers more acutely.

#### BARRIERS ARE NOT FELT EQUALLY

##### **More people who identify as BIPOC feel unwelcome.**

*People for whom feeling unwelcome is a barrier:*

- **57%** of those who identify as **Hawaiian Native/Pacific Islander**
- **45%** of those who identify as **Black/African American**
- **25%** of those who identify as **Asian/Asian American**
- **20%** of those who identify as **Hispanic/Latinx**
- **20%** of those who identify as **Middle Eastern**
- **10%** of those who identify as **White**

##### **People from households earning <\$20K a year are more negatively affected by ALL barriers.**

*In particular:*

- **94%** say costs is a barrier (compared to 75% average)
- **38%** say feeling unwelcome is a barrier (compared to 17% average)

In particular, BIPOC individuals are two to five times more likely to report that feeling unwelcome limits their ability to access the spaces they need. Overcoming this immense challenge is critical if BIPOC artists are to have equitable access to resources. As focus group participants explained, making spaces welcoming is non-negotiable, “I am so uninterested in majority-white spaces! This is super not okay. Not okay ever, and really not okay now. We need to equalize opportunities and make spaces welcoming for people of color.” A colleague in the session concurred:

**“As someone who presents BIPOC playwrights, our artists want to share their work with audiences that reflect our community, and they don’t want to work in a space patronized by all white audiences.”**

- BIPOC artist and focus group participant

### Artists and Cultural Workers Plan to Return to In-Person Spaces

Despite the barriers and uncertainty about the ongoing pandemic, most survey respondents are making plans to access a wide range of spaces as society reopens. Many intend to access spaces for free, suggesting that substantial space sharing, subsidies, and bartering may already be happening. Whether these plans come to fruition is unknown. Still, as a complement to articulations of what types of spaces artists need, this may serve as a good guide for arts service organizations, funders, and policymakers looking to help the Bay Area arts community members navigate reopening and create work on their terms.

#### SPACES PEOPLE PLAN TO RENT, OWN, OR ACCESS AFTER REOPENING (distinct from needs)

<b>65%</b> (307 people) plan to use <b>Studio/Rehearsal</b> <ul style="list-style-type: none"> <li>65% rent</li> <li>29% access for free</li> <li>6% own</li> </ul>	<b>47%</b> (211 people) plan to use <b>Theater/Gallery</b> <ul style="list-style-type: none"> <li>65% rent</li> <li>32% access for free</li> <li>3% own</li> </ul>	<b>36%</b> (171 people) plan to use <b>Co-Working</b> <ul style="list-style-type: none"> <li>63% access for free</li> <li>32% rent</li> <li>5% own</li> </ul>
<b>35%</b> (164 people) plan to use <b>Dedicated Office</b> <ul style="list-style-type: none"> <li>46% access for free</li> <li>38% rent</li> <li>16% own</li> </ul>	<b>33%</b> (153 people) plan to use <b>A/V Recording</b> <ul style="list-style-type: none"> <li>53% rent</li> <li>36% access for free</li> <li>11% own</li> </ul>	<b>31%</b> (145 people) plan to use <b>Storage</b> <ul style="list-style-type: none"> <li>56% rent</li> <li>32% access for free</li> <li>12% own</li> </ul>

## Part 2: Space Alliance Collaboration & Space Sharing

As esteemed local arts service organizations, Space Alliance member organizations are uniquely positioned to help address the arts community's space needs. As a collective, they could have an even more significant impact

### Working Together to Address Arts Community Needs

Artists and culture workers who contributed to this study suggested that Space Alliance organizations could address arts community space needs through:

#### Information Sharing and 'Match-Making'

While Space Alliance member organizations have historically compiled and shared information about art space availability, artists and culture workers suggested a slightly different approach focused on nurturing human connection. Focus group participants recommended developing a network of affordable spaces and connecting artists to those spaces via relatively inexpensive and uncomplicated 'match-making events' and email newsletters.

*"A lot of spaces don't realize how valuable their space is and how easy it is to share it. We need a connector to studios, galleries, and outdoor spaces because it's hard to find out about spaces and people that would be willing to make a relationship work."*

- Artist and focus group participant

*"I want a Space Fair! Get friendly people together who need and have space to connect... where the host spaces have a representative and information available for folks. Offer a discount code for TBA, Dancers' Group, and Intersection members and fiscally sponsored projects."*

- Artist and focus group participant



### Combined Advocacy Efforts

Throughout the pandemic, many artists sought to adapt their work to new spaces. Some worked in outdoor settings, and others saw myriad opportunities to create and present art in vacant commercial spaces from store-fronts to warehouses. However, accessing these spaces posed a range of legal and financial challenges. Artists expressed a need for greater advocacy and hope that greater collaboration between Space Alliance members (and the arts community) could lead to greater political power.

***“Service organizations should lobby city government to leverage what we need. They represent a lot of artists and I don’t see that their combined political ability is being fully leveraged.”***

- Artist and focus group participant

Some artists said technical assistance securing permits for outdoor and vacant spaces would be highly valuable. Others encouraged the arts community as a whole to join forces and think big.

***“If our city could provide space for us for free, this would be a huge support and make a great impact.”***

- Artist and focus group participant

### Cross-Disciplinary Community Building

The artists and culture workers who responded to our survey embraced hybridity in many forms. 60% of those that identified as arts administrators also identified as practicing artists, and 45% of practicing artists said they were also educators. Many reported working in multiple artistic disciplines. With all these artistic and professional identities, it is not surprising that arts community members voiced a desire for “more multidisciplinary networks and spaces to connect across artistic disciplines.”

As sociologists have long observed, when diverse communities come together (or in this context, in places where artists from different disciplines gather), there is an increased capacity to share knowledge and apply new information to solve old problems.

One focus group member said:

*“Something I like about working with Intersection is that they are multidisciplinary, and other artists there have ideas of spaces for music, dance, and visual art that I wouldn’t know about as a theater artist.”*

- Artist and focus group participant

### Supporting community learning and action to create more equitable spaces where BIPOC artists feel welcome

Artists and culture workers offered advice about how art spaces can work to become more equitable and welcoming:

- **Meaningful change takes hard work and time**

As nearly every institution and corner of society is discovering, there are no shortcuts to addressing racial injustice. Advancing the discussion about making spaces welcoming takes time, skill, and practice.

As one artist observed: “Philosophically, we all want spaces where everyone is welcome, but it is hard to have a conversation about how to make that happen without professional facilitation.” Such conversations are critical and, according to an artist who spoke to this in the focus group session, require investment to be done right:

*“The solution is not efficient or fast, and we need racial equity facilitators for a process that might take a long time.”*

- BIPOC artist and focus group participant

- **Values-based relationships are better than transactional relationships**

The BIPOC artists and culture workers who participated in the survey and focus groups were both the most likely to feel unwelcome entering arts spaces and keenly aware of their agency to determine where and with whom they work.

A dance artist who has been renting rehearsal and performance space for years has concluded that “host organization values matter to me extremely. We only rent from, and give money to, organizations that share our values.”

Another artist explained what they’re looking for (and what they’re not):

“When I rent space to rehearse or perform it is from people I know, and they have been welcoming and supportive and reduced rates or allowed us to use props, etc. It is most challenging when you don’t know the people and everything is a negotiation. It is important to me for it to be personal, not transactional, and that the space owner wants to be helpful.”

- Bay Area artist and focus group participant

This sentiment was reflected across the focus groups, as was a straightforward policy when it comes to accessing space, and partnership generally:

“I look for the diversity of people in the space and the staff. If I don’t see it, I don’t want to be there.”

- Bay Area artist and focus group participant

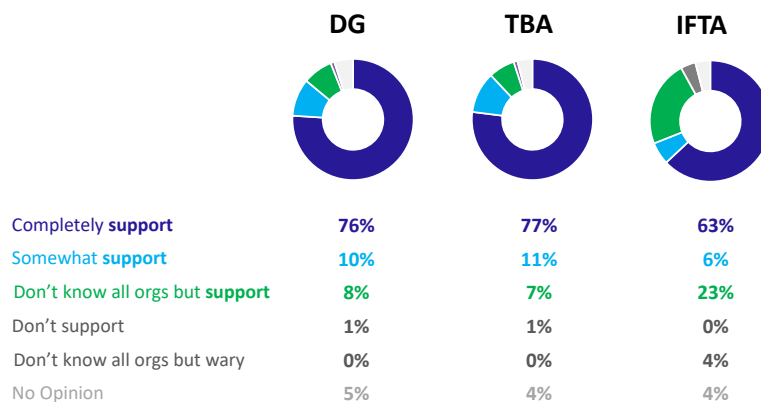
- **Customer service matters**

Artists in the focus groups also underscored that a commitment to customer service from studio, gallery, and coworking space representatives goes a long way towards making BIPOC community members feel welcomed. As was articulated by artists who had positive and negative experiences in recent years, venue operators can strive to keep rates affordable, ensure their spaces are clean and comfortable, and train their staff to be friendly. Offering snacks once in a while is appreciated too!

## Support for Greater Collaboration and Space Sharing

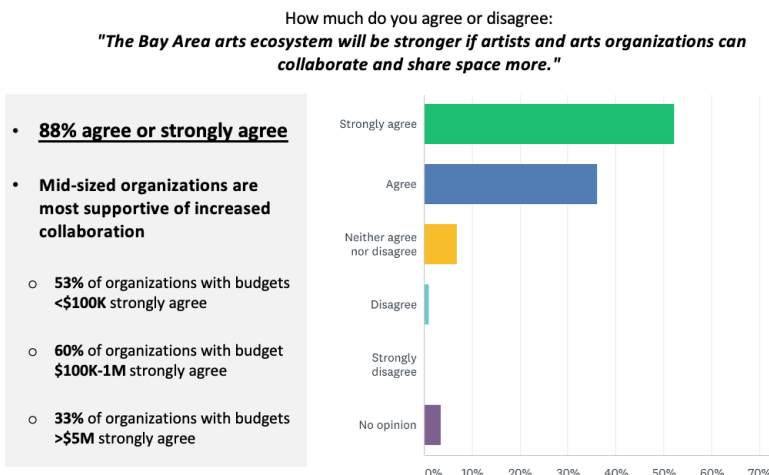
Greater collaboration and space sharing among these three organizations also present an opportunity to increase each organization's capacity and resilience. Across all three Space Alliance memberships, there is emphatic support for the companies to share space and collaborate more.

### Membership support for Sharing Space and Collaborating More



Further, survey respondents strongly support greater collaboration throughout the Bay Area Arts Community.

### THE ARTS COMMUNITY WANTS MORE COLLABORATION



## Context for Considering Space Sharing in San Francisco

The Space Alliance initially convened in 2018 to consider ways for deeper collaboration, including possible collective solutions to their ongoing need for administrative space. At the time, the San Francisco commercial real estate market had been going up, up, and up. The Space Alliance partners had negotiated market-beating terms for their respective leased office spaces, and the inexorable forces of San Francisco's economy suggested that if they wanted to expand or move to a better space individually or jointly, they should expect to pay more (see Appendix, Space Alliance Forum #1 Presentation, Slide #18).

The pandemic turned that assumption upside down.

The sudden shuttering of the economy, and of downtown office spaces specifically, resulted in a historic 500% increase in commercial space availability in 2020 from the previous year and a parallel decline in rental costs. Commercial realtors estimated that rents fell 25-35% for high-quality "turnkey plug and play" spaces, and by the first quarter of 2021, the average annual asking rate for office space in Mid-Market/Civic Center was down to \$60 per square foot.

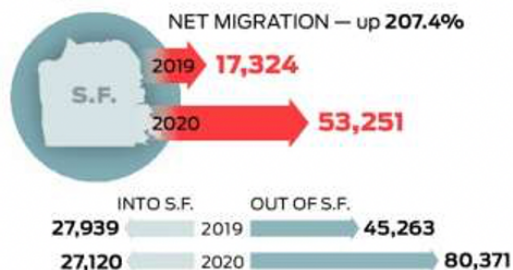
And yet, while advantage accrued to renters in a down economy, it was because tragic forces threatened the financial health of small businesses (including arts nonprofits) and a realization that companies may never again need office space in the way they once did.

Throughout 2020, San Francisco was rife with headlines about how companies like Twitter, Slack, and Spotify would be forever 'remote-first.' Major local employers like Google, Airbnb, and Uber announced that their employees could work remotely at least through September 2021. These corporate policy shifts accelerated the outflow of residents from San Francisco.

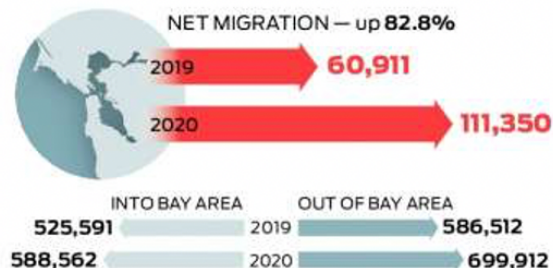
Even as corporate and government offices reopen, many of them are decentralizing their organizational cultures as they compete for remote workers beyond the Bay Area and relaxing requirements that local employees come into the office daily. Apple announced in June 2021 that most Bay Area employees would work two days at home and three days in-person going into 2022.

### San Franciscans on the move

The number of households in San Francisco that filed a change of address from March to November:



### Bay Area residents on the move



Source: U.S. Postal Service

### Where people moved

Most popular destinations among those from San Francisco who filed a change of address in a new county:



Todd Trumbull / The Chronicle

*The San Francisco Chronicle*, 1 Mar. 2021

Against this backdrop, the Space Alliance members rapidly moved their work online to support their employees in a public health and economic crisis, and considered opportunities to pursue their mission without the requirements (and expenses) of a permanently dedicated office.

Before the pandemic, several Space Alliance organization employees had already relocated, or made plans to relocate, out of state to work remotely full-time. And while San Francisco remains a cultural hub where tens of thousands of artists and culture workers want to live (as measured in the Bay Area Economic Institute's "The Economic and Social Impact of the Arts in San Francisco" March 2021 report), artists have struggled for decades with the high cost of living.

Thus, the opportunity to secure relatively inexpensive rent was at odds with organizations (including Space Alliance members) questioning if they should work in an office at all.

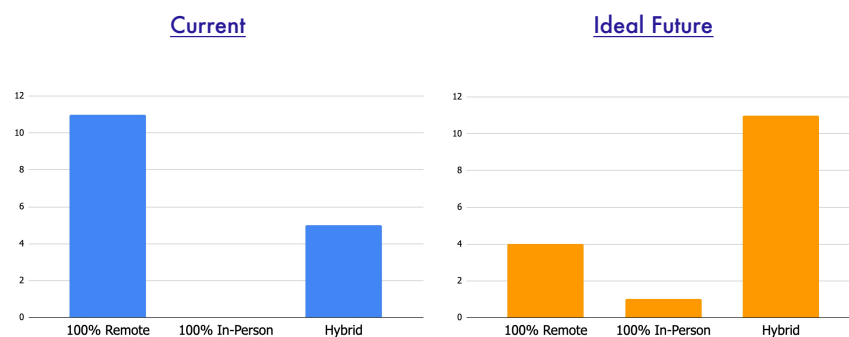
## Envisioning a Post-Pandemic Hybrid In-Person/Virtual Workplace

Prior to the pandemic, Theatre Bay Area and Dancers' Group rented office spaces in San Francisco to serve as administrative headquarters for their organizations. As a fiscal sponsor of dance projects, Dancers' Group's office on Gough Street was also a convenient place for artists to meet with Staff and pick up checks. Theatre Bay Area hosted member meetings and conducted workshops in their conference room on Market Street. However, Theatre Bay Area and Dancers' Group were not, for the most part, managing space to deliver programs or provide rehearsal or performance space to community members.

Intersection for the Arts, in addition to headquartering their administrative staff at their Market Street location, also made 42 'hot' desks available to arts-community members as part of their coworking program and provided professional development workshops for members at their facility. Their 8,500 square foot location also includes rentable conference rooms and sound-proofed studio/rehearsal space.

Given that Space Alliance members have historically needed San Francisco office space, this study sought to clarify where Dancers' Group, Intersection for the Arts, and Theatre Bay Area staff want to work post-pandemic. We learned that most staff want to continue working from home on some days and be more purposeful about time spent together in the office.

### SPACE ALLIANCE STAFF REMOTE VS. IN-PERSON PREFERENCES



*Note: During the pandemic, 2 staff moved out-of-state and 1 out-of-state Staff member was hired (TBA)*

The desire to work remotely stems mainly from a desire to reduce commute time. Most Space Alliance employees lived outside San Francisco, had commutes of more than 30 minutes, and relied on public transit to get to work pre-pandemic.



Employees at these organizations value flexibility and autonomy. Working from home is appealing because of the greater self-direction about schedules, both for getting work done and attending to home life and wellness. Each of the Space Alliance organizations acknowledged that they had to accelerate their switch to working virtually in the cloud once the pandemic began. And each embraced new software and developed guidelines and expectations for online project management, file-sharing, video-conference, and financial systems.

Space Alliance staff also said that they generally had more efficient 1:1 and small-group meetings on Zoom, were less distracted by coworkers when doing individual tasks, and valued the reduction in both paperwork and paper waste.

Working remotely, however, was not romanticized. Each of the Space Alliance members concluded that while they didn't want to spend as much time in the office, having a place to meet was essential.

Partly, there was collective exhaustion with being entirely reliant on video-conference platforms. Erratic internet conductivity was demoralizing to some, the self-consciousness of continually 'performing' on camera bothered others, and the seeming endlessness of 'life on Zoom' was wearying for everyone. However, the primary reason for retaining a physical office space was that these close-knit teams missed one another. Meeting face-to-face was deemed indispensable for building camaraderie among colleagues in a small company, fostering organic collaboration, and working together on complex projects.

So while going fully remote was attractive for a few employees already living out of state, and the cost-savings of giving up an office space were not trivial, Space Alliance members agreed that a hybrid approach was the best. Staff will likely go into the office for lengthier and larger meetings, intensive conversations, onboarding new employees, and developing social connections. And as the Space Alliance members adapt to new work rhythms, they'll experiment with cadences for in-person and virtual work. For example, staff may elect to:

- **Schedule in-person and work-from-home days** – everyone works remotely 3-4 days a week and goes into the office 1-2 days for group meetings and in-person connection.
- **Default to remote with access to an in-person conference space** - everyone works remotely and can use a conference room for meetings with colleagues and members.
- **Designate in-person workers and remote workers** - based on job descriptions, some positions work totally remote, some totally in-person, and some hybrid. The whole team comes together in-person periodically (*i.e., quarterly, bi-annually, or annually*).

While the Space Alliance members have made different decisions about whether to keep or relinquish permanent office space, conversations with their teams revealed that making a remote/in-person hybrid a true win-win could be done with the following investments and approaches:

### **KEY INVESTMENTS AND APPROACHES TO SUPPORTING A REMOTE/IN-PERSON HYBRID WORK BALANCE**

#### At home:

- Great internet connection
- Ergonomic set up
- Schedules, policies, and signifiers to delineate work and non-work time

#### Co-working space:

- Conference spaces designed for team collaboration and to accommodate both in-person and virtual participants
- Secure mail pick up
- Physical storage capacity

#### No matter where you are:

- Fast, robust cloud-based tools and training (for project management, staff-to-staff communication, file sharing, finance tracking, and customer/member management)
- Clear communication among staff regarding hybrid work schedules and expectations
- Consistent check-ins about work and general well-being

The desire to combine remote and in-person work expressed by employees at Dancers' Group, Intersection for the Arts, and Theatre Bay Area is consistent with the direction the field as a whole is moving. Our survey found that 62% of respondents want to work in hybridized format. A third look forward to working in-person as much as they did before, and only 5% would like to work remotely all the time.

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## Where The Space Alliance Members Decided To Work Post-Pandemic

### Theatre Bay Area

Theatre Bay Area has rented office space at several addresses over the past ten years, all at or near San Francisco's Civic Center. In the fall of 2020, approximately six months into the shutdown, Theatre Bay Area's Board and Executive leadership decided to opt out of their lease agreement and gave up their office space on Market Street. The cost savings of \$96,000 a year in rent alone (with further savings on utilities, security, and custodial services) were appreciable against an approximately \$1M budget, especially in a period of economic uncertainty.

In the Spring of 2021, as this report was being developed, Theater Bay Area decided not to look for a new permanent office space but instead to relocate to a coworking space. This decision was partly made because it's cost-effective, but significantly because Theatre Bay Area staff and Board developed great confidence that continuing to work remotely could be effective, especially when augmented with opportunities to meet in-person.

While a contract with a specific coworking space has not been finalized, a leading possibility is to co-work at Intersection's space at 1446 Market Street as it meets key criteria: affordability, convenience to public transit, onsite conference spaces, and 'zoom-room' capacity. Moreover, the value-add of co-locating with other artists and culture workers makes it an appealing possibility.

### Dancers' Group

Dancers' Group held on to its space at 44 Gough Street in 2020 and will renew its lease in the summer of 2021. Favorable lease terms provided Dancers' Group Board and Executive Leadership the flexibility it sought, given the unpredictability of the moment. Dancers' Group can afford to both pay the rent and facility-related overhead costs on its 1,000 square foot space and support its four-person staff to work predominantly remotely for the time being. When it is safe and feasible to return to in-person work, the space is well suited.

Dancers' Group also retains the ability to explore further, and even to ultimately join in on, a shared office or coworking space with fellow arts organizations without the burdensome expenses of exiting its current lease agreement.

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## Intersection for the Arts

Intersection for the Arts has rented a floor of a commercial office building on Market at Van Ness for several years. During the pandemic, owners sold the building to a conglomerate with whom Intersection for the Arts is currently discussing lease terms. The 8,500 square foot space makes sense to retain so long as there is sufficient demand from the arts community for coworking desks, conference rooms, and event space.

Before the lockdown, Intersection for the Arts was home to 24 nonprofits, fiscally sponsored projects, and individual artists using 40 desks per month. Artists use the space to work, create, meet, receive mail, print documents, receive support, and various services. Even with this high level of usage, Intersection for the Arts can welcome more artist members because coworkers access the space at different times.

The potential decision by Theatre Bay Area to become an ongoing monthly-renter at Intersection for the Arts would affirm the mission and economic alignment of sharing space for these two organizations. It's strong interest in collocating also signals that other arts organizations that previously had their own administrative space may be in the market to join Intersection's coworking space. In our survey, 36% of respondents indicated that they plan to use a coworking space, most of whom are not already Intersection for the Arts members.

## Conclusion:

San Francisco has always had an uneasy relationship with space. The ground beneath our feet has always moved, periodically knocking down the homes and buildings we live and work in. The pandemic that struck in 2020 also knocked us all down. Like the city after the great earthquake, or a great recession, decisions will be made about how to rebuild that will privilege some people and disadvantage others.

The organizations that comprise the Space Alliance are dedicated to helping Bay Area artists and culture workers weather the ongoing covid crisis, navigate reopening and create more equitable, accessible, and vibrant art spaces.

Space Alliance members have long known that barriers to accessing art spaces are far higher for BIPOC, low-income, disabled, LGBTQ+, and other historically marginalized members of the Bay Area arts community. Addressing these enduring injustices, which a once-in-a-lifetime global pandemic has exacerbated, will necessitate working differently.

“Even having lived through other pandemics and space crises, this is unlike any other time, and we can’t operate as we did before,” says Dancers’ Group Executive Director Wayne Hazard.

Operating differently post-pandemic may mean working virtually and in-person, creating and presenting art in unconventional spaces indoors, outdoors, and online. It will call for new learning and knowledge sharing across artistic disciplines, organizations, and diverse community groups.

As the Space Alliance members look to help the artists and culture workers access space, and tend to their own organizational needs, one lesson emerges clearly from this research:

**Embracing collaboration with newfound energy and imagination will be essential to address challenges and embrace opportunities posed by post-pandemic uncertainty.**

“On equity, financial, leadership, space levels, we are holding these conversations and challenges differently because of the pandemic and the isolation we’ve experienced,” continues Hazzard, “the word collaboration is core to us going forward as a community. We’ve grown up [in the Bay Area art world] in a very siloed and competitive environment. But going forward, we should ask: ‘can we do this work together rather than by ourselves?’”

The answer provided by nearly 500 Bay Area artists and culture workers and the staff and Board at the Dancers’ Group, Intersection for the Arts, and Theatre Bay Area, is a resounding: “yes.”

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## Acknowledgments

Thank you to Dancers' Group, Intersection for the Arts, Theatre Bay Area, who commissioned this research, and the San Francisco Arts Commission, which provided underwriting support.

Thanks to the Space Alliance Planning Group members who shaped the questions we asked and assisted in interpreting the answers we received. Thanks also for the support in inviting so many Bay Area artists and culture workers to take our survey and participate in our focus groups.

Space Alliance Members:

Dancers' Group

Wayne Hazzard  
Andrea Spearman  
Shelley Jew

Intersection for the Arts

Randy Rollison  
Allison Snopek  
Daniel Harvey

Theatre Bay Area

Brad Erickson  
Sunshine Lampitoc Smith  
Nicole Gantshar

Cover photos:

Top center: Image of dance performance featured on [www.dancersgroup.org](http://www.dancersgroup.org), June 2021

Bottom left: Image of workshop participants featured on [www.theatrebayarea.org](http://www.theatrebayarea.org), June 2021

Bottom right: Intersection for the Arts' office and coworking space at 1446 Market Street featured on [www.theintersection.org](http://www.theintersection.org), June 2021

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## Sources

*Artist and Arts Groups Covid-19 Impact Survey.* CAST, 31 July, 2020.

*Arts and the Economy – The Economic and Social Impact of the Arts in San Francisco.* Bay Area Economic Council. March 2021.

*Tracking the San Francisco Tech Exodus.* SFCiti.org, March 2021.

State of the Market Newsletter – Q4 2020 and Q1, 2021 – Colton Commercial & Partners, Inc.

Bowles, Nelli. "They Can't Leave the Bay Area Fast Enough." *The New York Times*, 14 Jan. 2021

Horowitz, David Mamaril. "Amid news of 'tech exodus' why so many are staying and still arriving." *Mission Local*, 30 Jan, 2021.

Li, Roland and Neilson, Susie. "Bay Area's migration is real, but Postal Service Data shows California exodus isn't." *The San Francisco Chronicle*, 1 Mar. 2021

Seabrook, John. "Has the Pandemic Transformed the Office Forever?" *The New Yorker*, 25 Jan. 2021

Thackara, Tess. "After San Francisco loses Gagosian, the city's galleries are collaborating to survive." *The Art Newspaper*, 26 Feb. 2021



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## Appendices

Space Alliance Forum #1 Presentation

Space Alliance Forum #2 Presentation

*With Arts Community Survey & Focus Group Analysis*

# SPACE ALLIANCE FORUM #1

March 11, 2021

Phase 1 Internal Assessment  
Debrief and Discussion

# Goals for Today!

Update you on what we've learned so far

Discuss what hybrid in-person/virtual workspaces could really look like for you individually and together

Get your guidance on what to ask your members in the upcoming Focus Groups and Survey

# AGENDA

2:30 pm Introduction & Check-In

2:45 pm Remote vs. Virtual Work

*Discussion # 1: Imagining a New Workspace*

3:15 pm Going Hybrid and Working Together

*Discussion #2: Imagining a Space Alliance*

3:45 pm Arts Community Space Needs

*Discussion #3: Phase 2 Community Feedback*

4:30 pm Adjourn

# PROJECT OBJECTIVE & OVERVIEW

## Objectives:

1. Assist Dancers' Group, Intersection for the Arts, and Theatre Bay Area to **prepare and plan for physical space needs** in the years ahead
2. Explore potential for Space Alliance partners to **share co-working space** post-pandemic
3. Illuminate **current thinking from arts community** about how and where they want to create work and come together

## Timeframe: February-May 2021

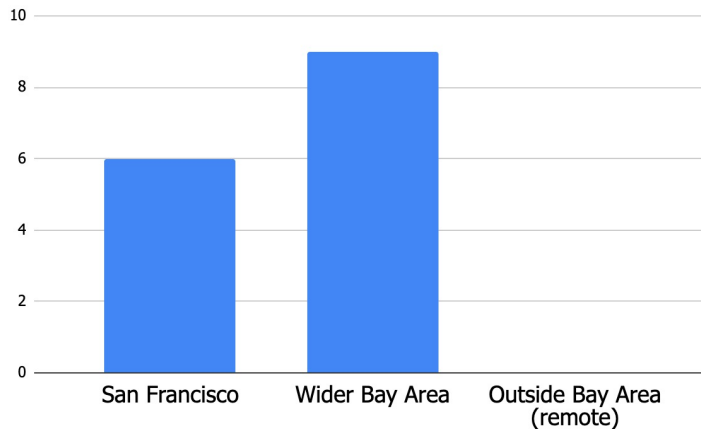
- **February/March: Internal Assessment** – Interviews with Dancers' Group, Intersection for the Arts, and Theatre Bay Area Executive, Board, and Staff to gather perspectives on current space-related priorities and aspirations
- **March/April: External Research** – Focus Groups and Survey of DG, IFTA, TBA members and key stakeholders; review alternative-space models
- **May: Report Writing and Delivery**

# PHASE 1 PROCESS & PARTICIPATION

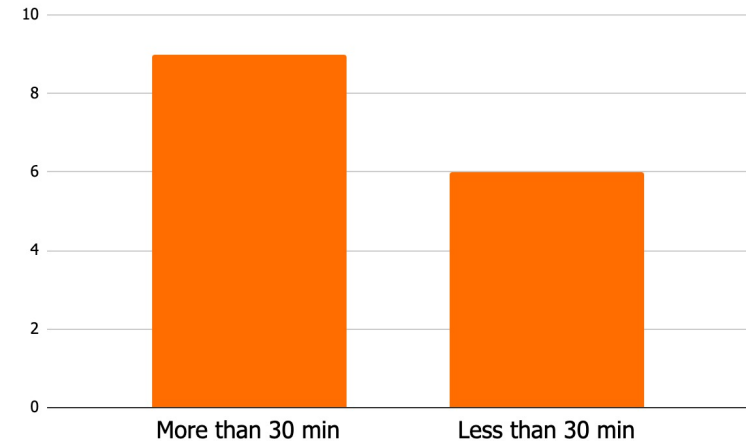
1. All-Staff Meetings with DG, IFTA, and TBA
2. Interviews with Randy, Brad, and Wayne
3. Interviews with Board Members:
  - *DG– Debbie Kajiyama, Gianna Shephard*
  - *IFTA – Scott Flicker, Pavan Singh*
  - *TBA– Shafer Mazow, Janice Sagar*
4. Organizational data review

# PRE-PANDEMIC STAFF COMMUTE

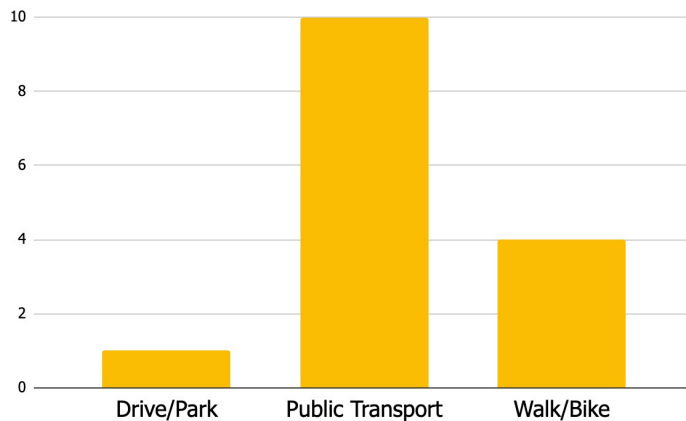
## From where?



## How Long?



## What method?



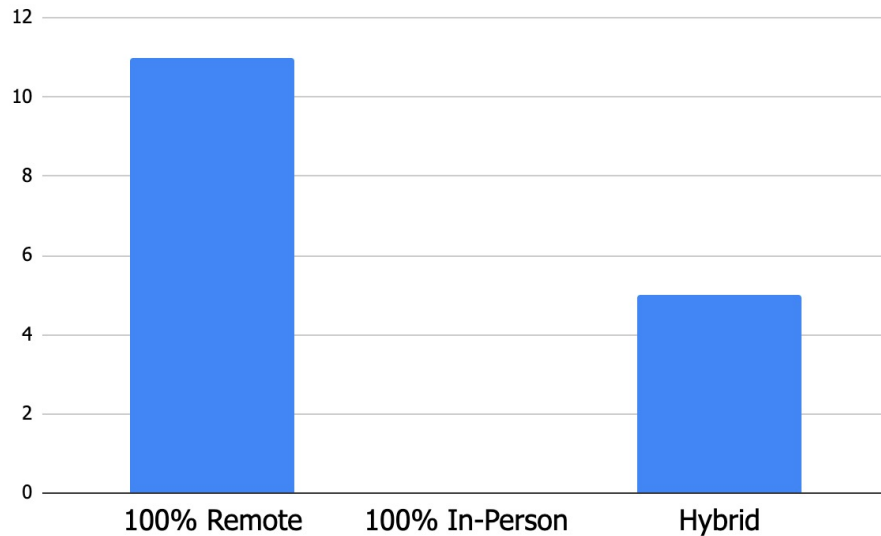
### *Notes:*

- *Pre-pandemic, many Staff commuted 1+ hours*
- *a couple of staff commuted 2+ hours*

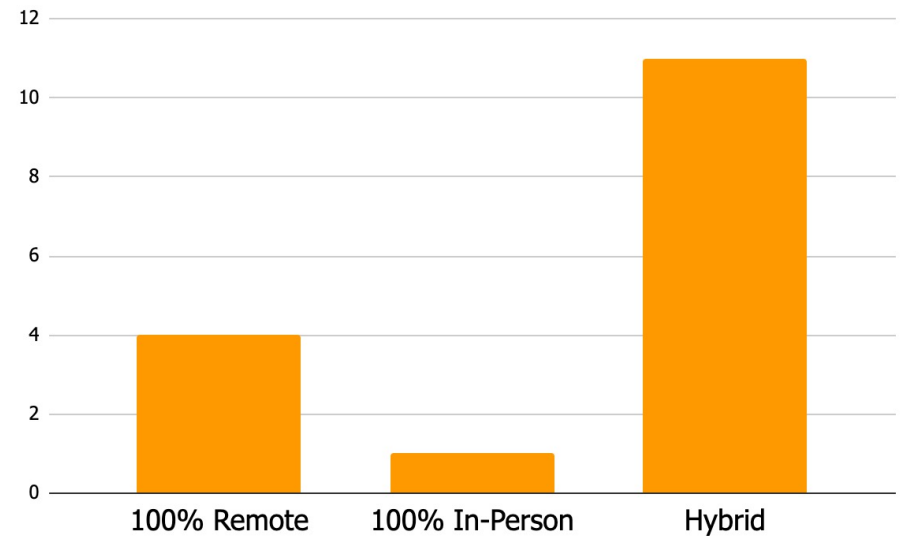


# REMOTE VS. IN-PERSON VS. HYBRID

Current



Ideal Future



*Note: During the pandemic, 2 staff moved out-of-state and 1 out-of-state Staff member was hired (TBA)*

# VIRTUAL WORK TOOLS YOU'RE USING

Software Type	DG	TBA	IFTA
Collaboration & project management	NA	SharePoint	G-Suite
File-sharing	Google Drive	Google Drive & SharePoint	Google Drive
Video-conference	Google Meet	Zoom	Zoom
Finance	File-maker	QuickBooks Desktop	QuickBooks Online

# WHAT WE'VE LEARNED ABOUT VIRTUAL WORK

## PROS

- **#1 – No Commute**
- Flexibility and wellness (breaks when you want, sleep in later, eat healthier)
- Efficient meetings with better agendas (*“Every minute is optimized”*)
- Less paperwork and paper waste
- Fewer distractions
- No office rent
- Expanded hiring pool beyond Bay Area

## CONS

- **#1 - Miss seeing coworkers!**
- Working too much (need to make firmer schedules)
- Too much Zooming (especially if meetings get tedious)
- Glitchy internet frustrations
- Stress of “performing” on camera
- Can’t swivel your chair to ask a question
- Can’t tell who is having a bad day

# WHAT WE'VE LEARNED ABOUT VIRTUAL WORK

## WHAT WORKS WELL VIRTUALLY

- 1:1 or small group discussions
- Programming that involves long-distance participants
- Independent work

## WHAT WORKS WELL IN-PERSON

- Intensive, longer, larger meetings (esp. full board or staff retreats)
- Building relationships and camaraderie among a team
- Onboarding new employees
- Deepening community connection
- Spontaneous conversations
- Fostering creative, organic collaboration
- Important to have an HQ!  
*“Good to have a secure place where you can keep the files, and get the mail – having a desk somewhere feels important!”*

# INVESTMENTS THAT MAKE HYBRID WORK GREAT

## At home:

- Great internet
- Ergonomic set up
- Schedules, policies, and signifiers to delineate work and non-work time

## Co-working space:

- Conference spaces designed for team collaboration and to accommodate both in-person and virtual participants
- Secure mail pick up
- Physical storage capacity

## No matter where you are:

- Fast, robust cloud-based tools and training (for project management, staff-to-staff communication, file sharing, finance tracking, and customer/member management)
- Clearly communication among staff regarding hybrid work schedules and expectations
- Consistent check-ins about work and general well-being

# BREAKOUT DISCUSSION 1:

Imagine it's 2022 and it is safe to work together in-person again. You and your colleagues have established the *ideal* mix of in-person and virtual work in space(s) that suit your new needs.

- *What work are you doing at home? What work are you doing in the office?*
- *What does your space(s) look like?*

# CORPORATE TREND TO REMOTE WORK

*“27 % of the American workforce will be remote in 2021”*

Source: Upwork survey as quoted in *The New Yorker* 1/25/21

*“55 % of tech companies surveyed expect at least 1 /4 of their Bay Area workforce to **remain permanently remote**.*

Source: sf.citi survey of 83 SF tech companies 1/26/21

Remote first:

Brex, Coinbase, Okta, Twitter, Slack, Spotify, Square,  
Upwork, Zillow

Hybrid remote work:

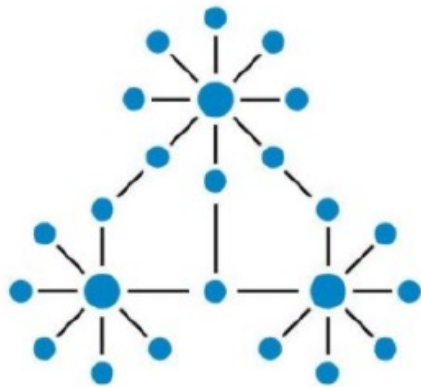
Facebook, Microsoft, Salesforce

Remote work until at least June 2021:

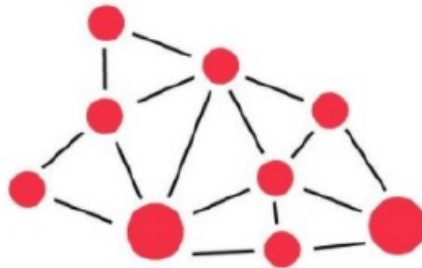
Airbnb, Google, Uber



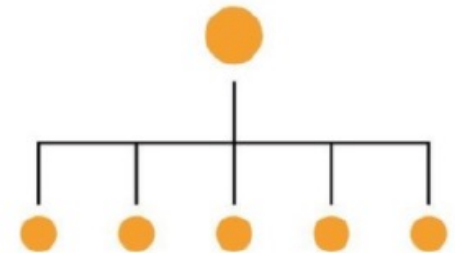
# DIFFERENT WAYS OF WORKING



**Hub and Spoke**



**Fully Decentralized**

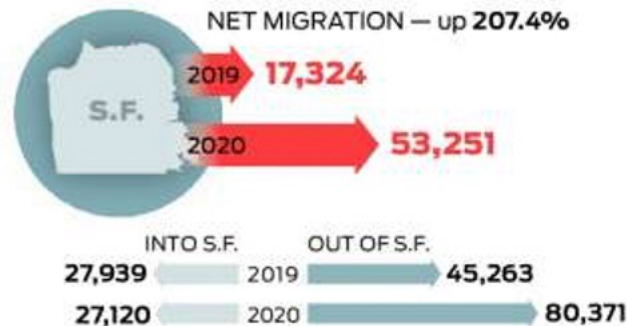


**Primary Office**

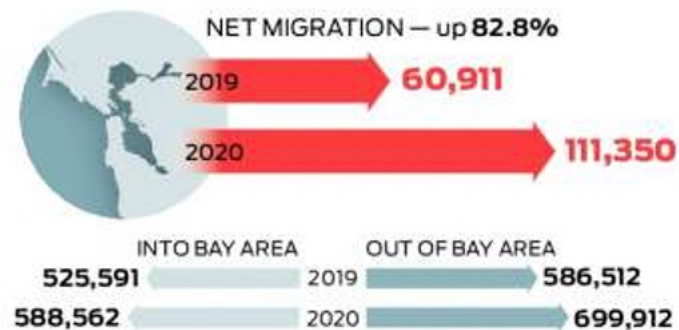
# THERE IS A LOT OF LOCAL WORKFORCE MIGRATION

## San Franciscans on the move

The number of households in San Francisco that filed a change of address from March to November:



## Bay Area residents on the move



Source: U.S. Postal Service

## Where people moved

Most popular destinations among those from San Francisco who filed a change of address in a new county:



Todd Trumbull / The Chronicle

# MORE AFFORDABLE SPACE IS AVAILABLE IN SF

SUB MARKET	AVG ANNUAL ASKING RATE PER SF	VACANCY RATE	RENTAL RATE TREND
N. Financial District	\$78.00	16.9%	↓
S. Financial District	\$76.25	12.2%	↓
Jackson Square	\$65.50	25.5%	↓
North Waterfront	\$59.75	22.9%	↓
Union Square	\$60.25	21.8%	↓
Yerba Buena	\$72.50	13.5%	↓
Mid Market & Civic Center	\$60.00	21.0%	↓
Rincon / South Beach	\$77.50	9.3%	↓
SOMA	\$60.25	17.9%	↓
Mission	\$55.00	14.0%	↓



## SF Business Closures since March 16, 2020 Shelter-in-Place Order:

- 5,000 total SF businesses
- 54% of all SF storefronts
- 85% of all SF restaurants

# CURRENT OFFICE SPACES & COSTS

Space Specs	DG	TBA	IFTA
Monthly rent	\$3,790	NA	\$29,307
Monthly total facility costs (including rent, insurance, utilities, maintenance, taxes, cleaning, supplies, etc.)	\$6,500	NA	\$35,308
Office square footage	1,000	NA	8,520
Price per square foot, per year	\$45.48	NA	\$41.28
# of square feet per staff member	235	NA	1,065
# of square feet per person in office on a typical day	143	NA	284
Conference space? (y/n)	Y	NA	Y
Conference space capacity (# of people)	10	NA	2 - 80 (4 Rooms)
Storage space? (y/n)	T	NA	Y
Parking (y/n)	N	NA	N
Lease End/Renewal Date	July 30, 2021	NA	Nov 30, 2023

# MARKET-RATE COMPARISON

## Annual Asking Rate Per Square Foot



# IMAGINING A NEW WAY OF WORKING, A FEW EXAMPLES

- a) **Scheduled In-Person & WFH Days** - Everyone works remote 3-4 days a week and comes into office on the same 1-2 days for group meetings and in-person social connection
- b) **Default Remote with Access to In-Person Conference Space** - Everyone works remote and has access to a shared co-working space where they can meet colleagues or Members, and full staff meetings can take place in-person as-needed
- c) **In-Person Workers and Remote Workers** - Based on job descriptions, some positions work totally remote, some totally in-person, and some hybrid. Whole team comes together in-person periodically (*i.e. quarterly, bi-annually, or annually*)

# POTENTIAL FOR SHARED SPACE

- *“These are very good organizations with shared values... If Intersection can have a much tighter relationship with TBA and DG - we can test new services with these organization with a faster learning curve.” – Trustee*
- *“DG-TBA-IFTA makes a lot of sense... being part of arts community feels important to me.” – Trustee*
- *“Sharing space is a great way to mitigate financial risk, if multiple organizations pool resources, then each one is less exposed... and there are non-financial benefits being in a shared space with other artists.”  
– Trustee*



# BREAKOUT DISCUSSION 2:

- *What would you like about working in a shared space together?*
- *What would you worry about?*
- *What questions do we need to answer before you would commit to sharing space together?*

# MANY ARTISTS AND CULTURE WORKERS STILL WANT TO LIVE HERE!

In 2018-19, GFTA & SFAC supported:

13,495

Individual artists

8,237

Independent contractors

7,506

FTE arts & culture workers

---

29,473

*SF arts & culture jobs*

*Source: Arts and the Economy – The Economic and Social Impact of the Arts in SF, March 2021*

# YOUR IDEAS ABOUT SPACES THE **ARTS** **COMMUNITY** NEEDS NOW

- Affordable **creation space** (especially large, flexible and newly empty spaces not originally designed for art, such as corporate offices)

*“Space to make dance is more important than space to perform dance.”*

- High-quality **outdoor performance** spaces
- High-tech **film/recording studios** to stream and record performances, events, and podcasts (and the tools, training, and support to use them well)
- High-tech **office/co-working** space suited to virtual/hybrid work (audio visual, wifi, sound proofing, etc.)
- Safe **community gathering** spaces
- Physically, financially, and emotionally **accessible** spaces
- Affordable **housing**

# GROUP DISCUSSION 3:

In our focus groups and survey of your members what do we want to learn about:

- *Where **you** should be working and the type of space you need?*
- ***Their** space needs and how they think they'll work going forward?*

# SPACE ALLIANCE FORUM #2

May 11, 2021

Phase 2 External Research  
Debrief and Discussion

# Goals for Today!

Update you on what we've learned

Discuss emerging themes for the report

Discuss possible implications for your organizations

# AGENDA

10 min	Hello and Check-In
45 min	Survey and Focus Group Debrief
	<i>Discussion # 1</i>
5 min	<i>Break</i>
45 min	Emerging Themes and Implications
	<i>Discussion #2</i>
15 min	Report Delivery and Communication

# REFRESH: PROJECT OBJECTIVE & OVERVIEW

## Objectives:

- Assist Dancers' Group, Intersection for the Arts, and Theatre Bay Area to **prepare and plan for physical space needs** in the years ahead
- Explore potential for Space Alliance partners to **share co-working space** post-pandemic
- Illuminate **current thinking from arts community** about how and where they want to create work and come together

## Timeframe: February–May 2021

- **February/March: Internal Assessment & Desk Research** – Interviews with Dancers' Group, Intersection for the Arts, and Theatre Bay Area Executive, Board, and Staff to gather perspectives on current space-related priorities and aspirations
- **March/April: External Research** – Focus Groups and Survey of DG, IFTA, TBA members and arts community members
- **May: Report Writing and Delivery**



# **BAY AREA ARTS & CULTURE**

## **3 Focus Groups**

***18 PARTICIPANTS***

# Focus Group Participants



# Focus Group Participants

*18 Focus Group Participants*

*9 – Dancers Group Members*

*6 – IFTA members or renters*

*3 – TBA members*

50%+ BIPOC

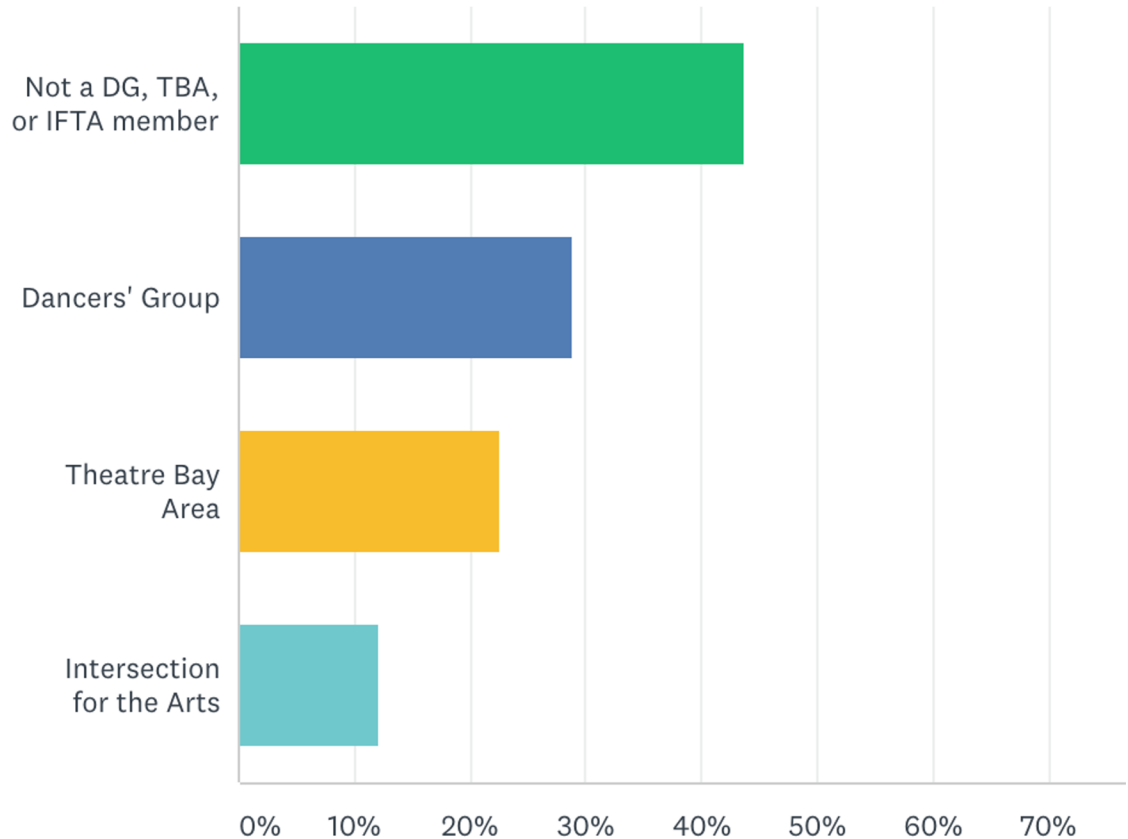
# **BAY AREA ARTS & CULTURE COMMUNITY SURVEY**

***470 PARTICIPANTS***

# PARTICIPANTS BY MEMBERSHIP

- **131 DG Members**  
(41 are also FS projects)
- **103 TBA Members**
- **55 IFTA Members**  
(30 are also FS projects)

*199 non-members  
(34 are also fiscally  
sponsored by another  
organization)*



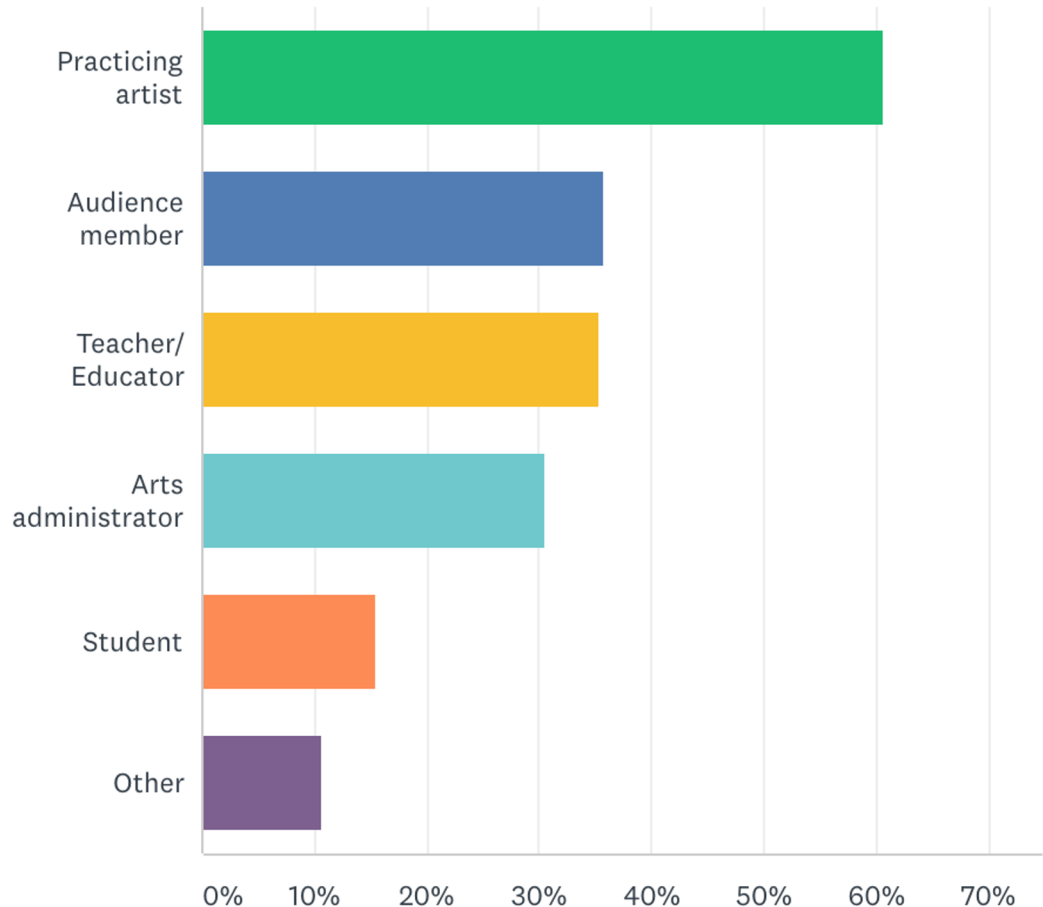
# PARTICIPANTS BY ROLE

- **60% Practicing Artists**
- **30% Administrators**

*There is significant overlap between groups, for example:*

*61% of arts admins are also practicing artists*

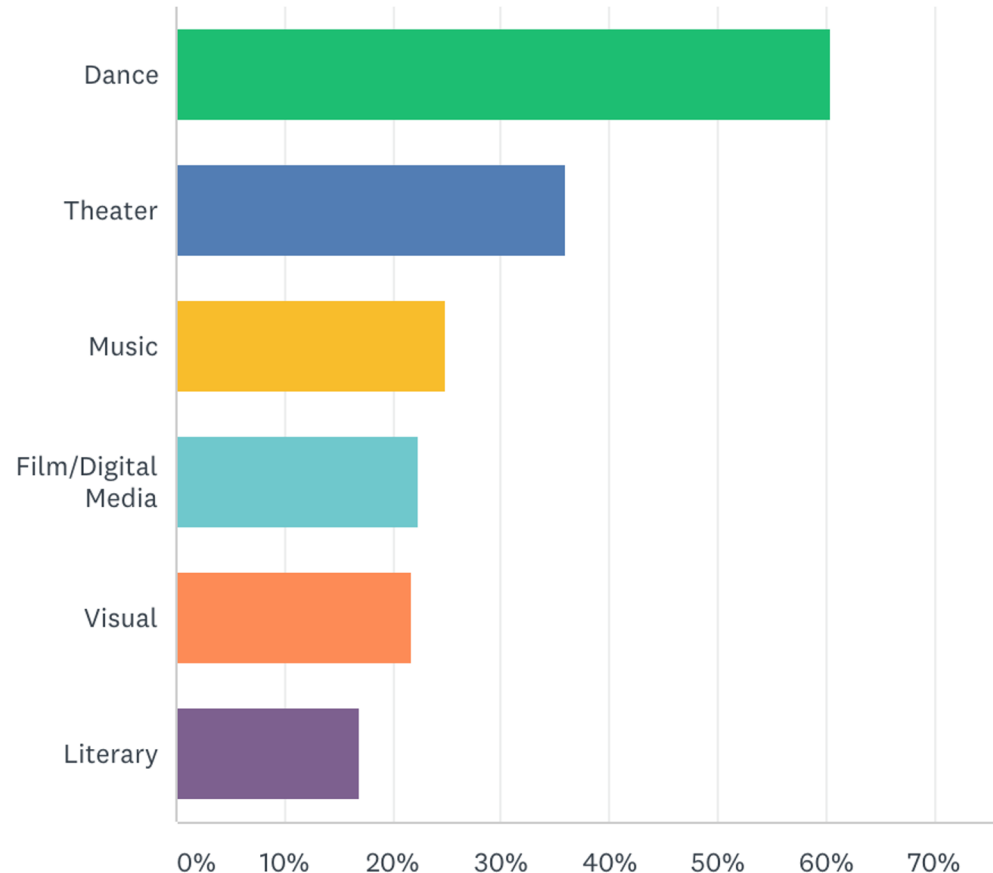
*45% of practicing artists are also educators*



# PARTICIPANTS BY DISCIPLINE

- **272 Dance Artists**
- **162 Theater Artists**
- **122 Music Artists**
- **101 Film/ Media Artists**
- **98 Visual Art Artists**
- **76 Literary Artists**

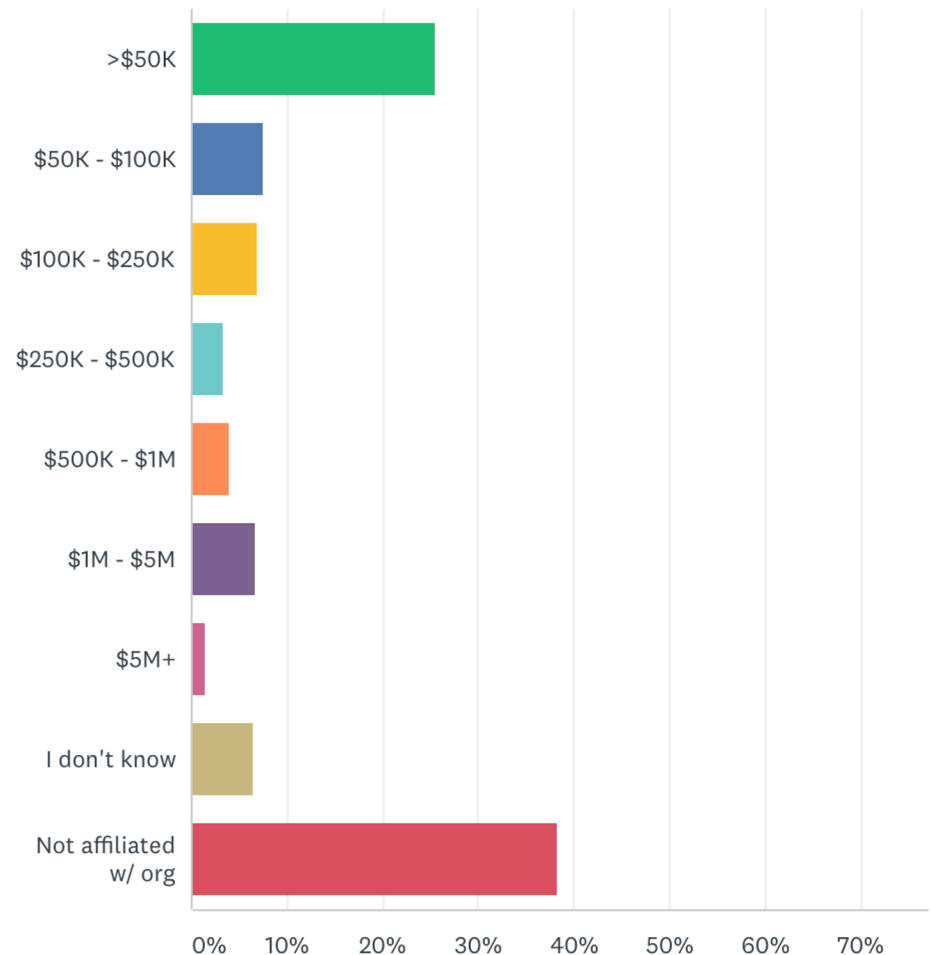
*overlap between groups*



# PARTICIPANTS BY BUDGET SIZE

**82% of participants:**

- represent an organization with a **budget under \$500K**
- OR are not affiliated with any organization





# PARTICIPANTS BY GEOGRAPHY

*Of those who shared geographic information...*

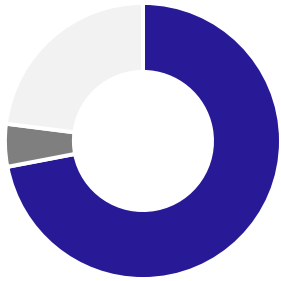
**41% *live in SF***

**59% *live elsewhere***

**54% *work in SF***

**46% *work elsewhere***

# PARTICIPANTS IDENTIFY AS...



**72% Female**  
**5% Non-binary**



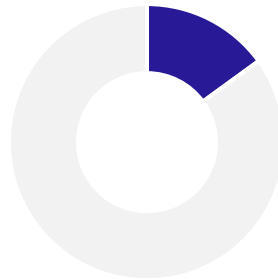
**59% Low Income**  
(based on SF HUD  
classification)



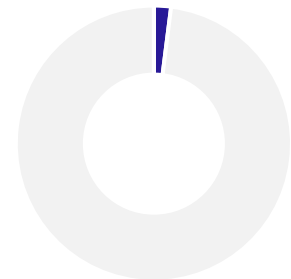
**40% BIPOC**



**27% LGBTQ+**



**15% Person  
with a Disability**



**2% Transgender**

# Key Takeaways

# Discussion Prompts

- 1. What themes stand out?*
- 2. What are possible implications for changing how/where you work and supporting the arts community?*

# KEY TAKEAWAYS

1. The Bay Area Arts & Culture Community wants to collaborate more.
2. And supports DG, IFTA, and TBA sharing space and working more closely.
3. The arts community's greatest space needs are...
  - *Rehearsal/studio space*
  - *Theater/gallery space*
  - *Affordable housing*
4. Top barriers to access are...
  - *Affordability*
  - *Pandemic closures and public health concerns*
  - *Not know what spaces are available*
5. Most cultural workers want a combination of in-person and remote work after reopening.

# KEY TAKEAWAYS: Co-working **Spotlight**

1. 36% of Cultural Workers plan to use a co-working space after reopening.
2. Of those who plan to use a co-working space, only 20% are IFTA members.
3. When it comes to co-working space...

*The most important qualities of the **space** are:*

- Cost
- Proximity to transit
- Accessibility

*The most important qualities of the **community** are:*

- Equity values/policies/practices
- Community connection

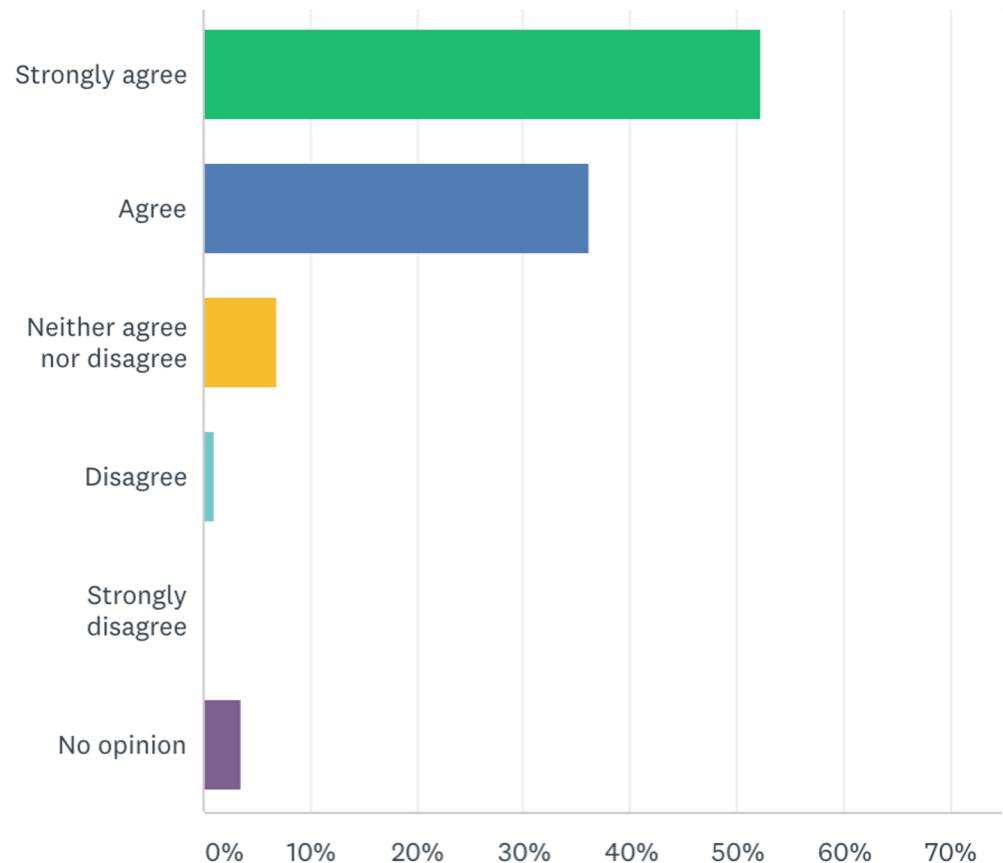
# **SPACE SHARING & COLLABORATION**

# PEOPLE WANT MORE COLLABORATION

How much do you agree or disagree:

*"The Bay Area arts ecosystem will be stronger if artists and arts organizations can collaborate and share space more."*

- **88% agree or strongly agree**
- **Mid-sized organizations are most supportive of increased collaboration**
  - 53% of organizations with budgets <\$100K strongly agree
  - 60% of organizations with budget \$100K-1M strongly agree
  - 33% of organizations with budgets >\$5M strongly agree

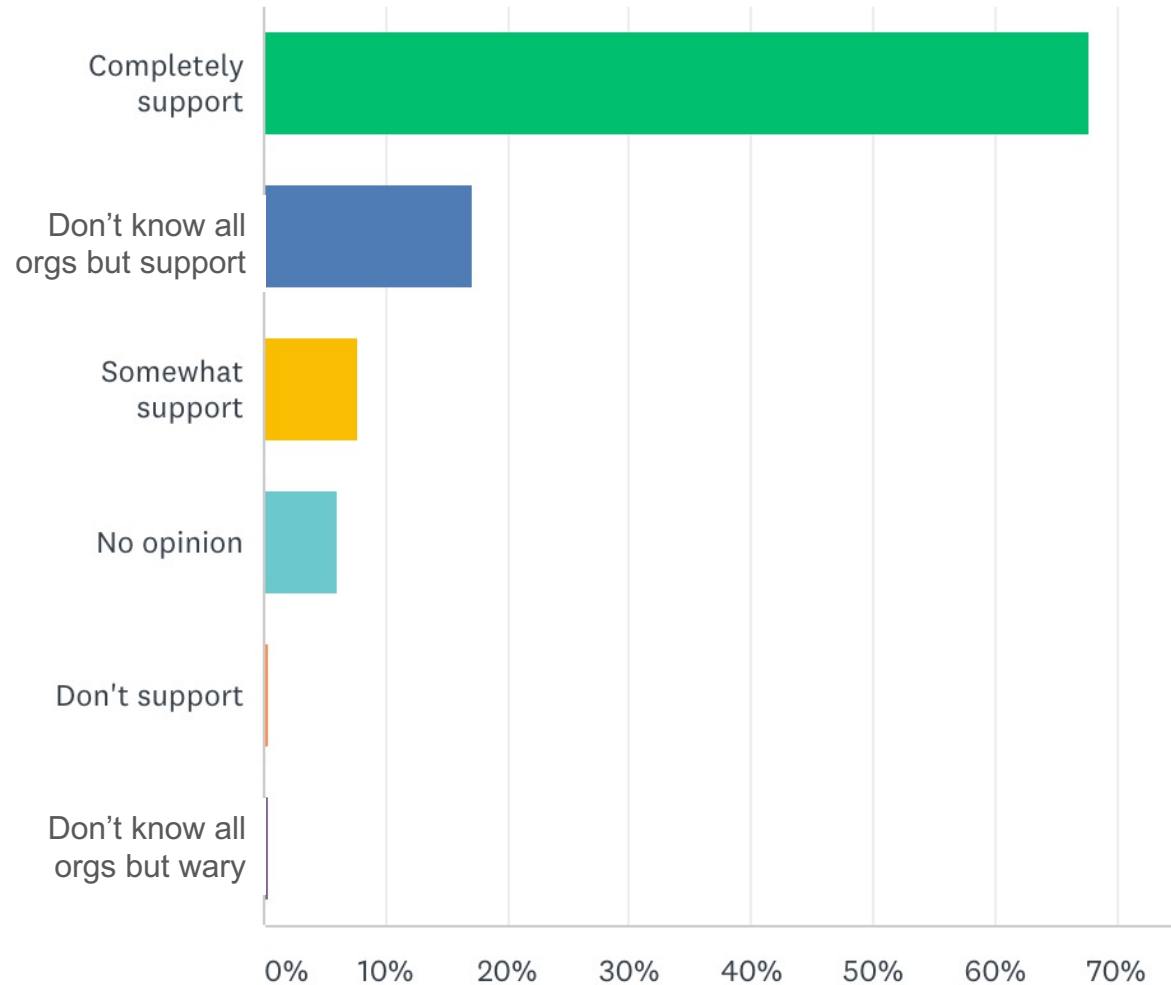




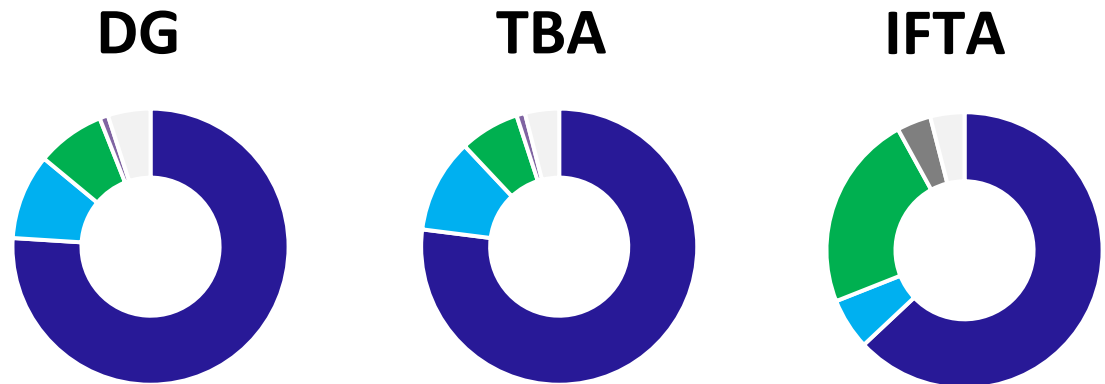
# AND SUPPORT DG/TBA/IFTA SHARING SPACE AND COLLABORATING MORE

**67% completely support the idea**

18% don't know all organizations but generally support greater collaboration



# DETAIL BY ORGANIZATION



**Completely support**

**76%**

**77%**

**63%**

**Somewhat support**

**10%**

**11%**

**6%**

**Don't know all orgs but support**

**8%**

**7%**

**23%**

**Don't support**

**1%**

**1%**

**0%**

**Don't know all orgs but wary**

**0%**

**0%**

**4%**

**No Opinion**

**5%**

**4%**

**4%**

# **Focus Group Comments** **on DG/TBA/IFTA COLLABORATING**

**"If these organizations can collaborate more, I am all for it."**

**Focus Group members said DG/TBA/IFTA collaboration can address artist community space needs:**

- Information sharing and 'matchmaking'
- Advocacy for more space
- Facilitation of multidisciplinary community building

# Focus Group Comments on DG/TBA/IFTA COLLABORATING

## (1) Information sharing and Matchmaking

*“We need help developing a network of available affordable spaces – they (DG/TBA/IFTA) could do resource building and network building.”*

*“A lot of spaces don’t realize how valuable their space is and how easy it is to share it. We need a connector to studios, galleries, and outdoor spaces.”*

*“I would like to have a weekly email about spaces, or matching-making with spaces... it’s hard to find out about spaces and people that would be willing to make a relationship work.”*

# Focus Group Comments on DG/TBA/IFTA COLLABORATING

## (2) Advocacy

*“Permitting is a big issue - especially with COVID restrictions – and service organizations can help.”*

*“ We need advocacy! How can artists access all of the vacant spaces in the Bay Area?”*

*“They should lobby city government to leverage what we need – subsidize venues – they represent a lot of artists. I don’t see that their combined political ability is being fully leveraged.”*

*“If our city could provide space for us for free, this would be a huge support and make a great impact.”*

# Focus Group Comments on DG/TBA/IFTA COLLABORATING

## (3) Multidisciplinary Community Building

*“Our community needs more multidisciplinary networks and spaces to connect across artistic disciplines. ”*

*“Something I like about working with Intersection is that they are multidisciplinary, and other artists there have ideas of spaces for music, dance, visual art that I wouldn’t know about as a theater artist.”*

*“I want a Space Fair! Just get friendly people together who need and have space to connect. ... where the host spaces have a rep and information available for folks. Offer a discount code for TBA members, DG and IFTA Fiscally Sponsored Projects.”*

**SPACES THE ARTS & CULTURE  
COMMUNITY NEEDS MOST AS  
SOCIETY REOPENS  
& BARRIERS TO ACCESS**

# GREATEST SPACE NEEDS

#1 77% need

**Studio/Rehearsal Space**

#2 62% need

**Affordable Housing**

#3 67% need

**Theater/Gallery Space**

#4 64% need

**Large, Multi-use Event Space**

#5 54% need

**A/V Recording Space**

#6 51% need

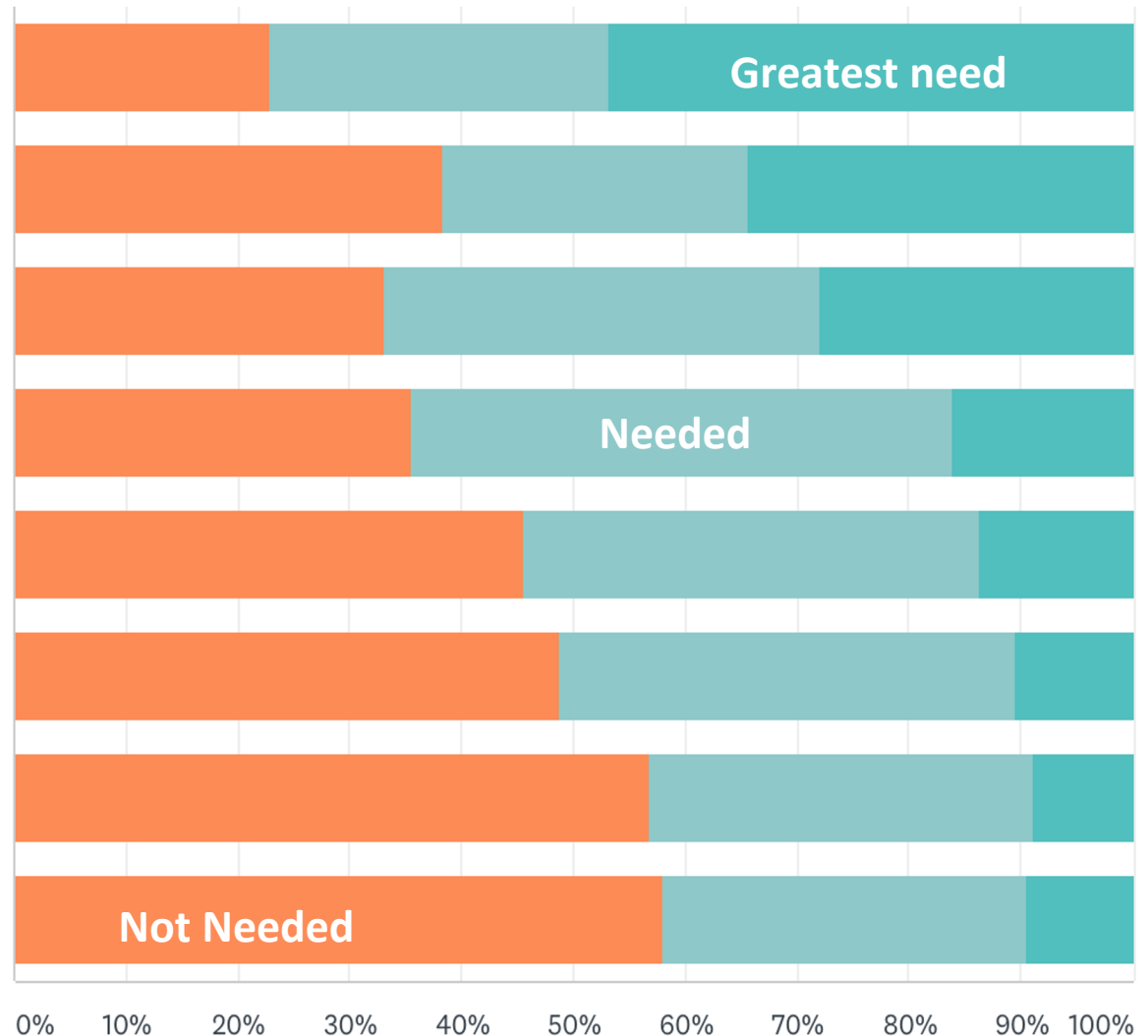
**Storage**

#7 43% need

**Co-working Space**

#8 42% need

**Dedicated Office Space**





# DISTINCTIONS BETWEEN PRACTICING ARTISTS AND ARTS ADMINISTRATORS

## *A higher percent of Practicing Artists\* Need*

Co-working Space (+7%)

Studio/Rehearsal Space (+18%)

Theater/Gallery Space (+19%)

Affordable Housing (+10%)

(\*Who don't identify as administrators)

## *A higher percent of Arts Administrators\*\* Need*

Dedicated Office Space (+25%)

Storage Space (+33%)

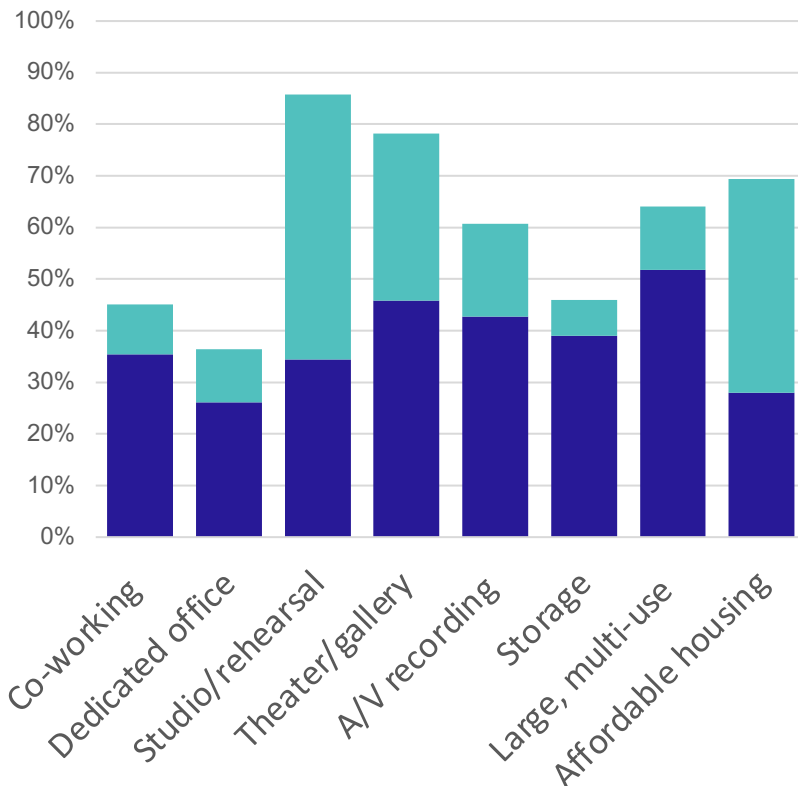
Large Multi-Use Event Space (+7%)

(\*\* Who don't identify as practicing artists)

# DISTINCTIONS BETWEEN PRACTICING ARTISTS AND ARTS ADMINISTRATORS

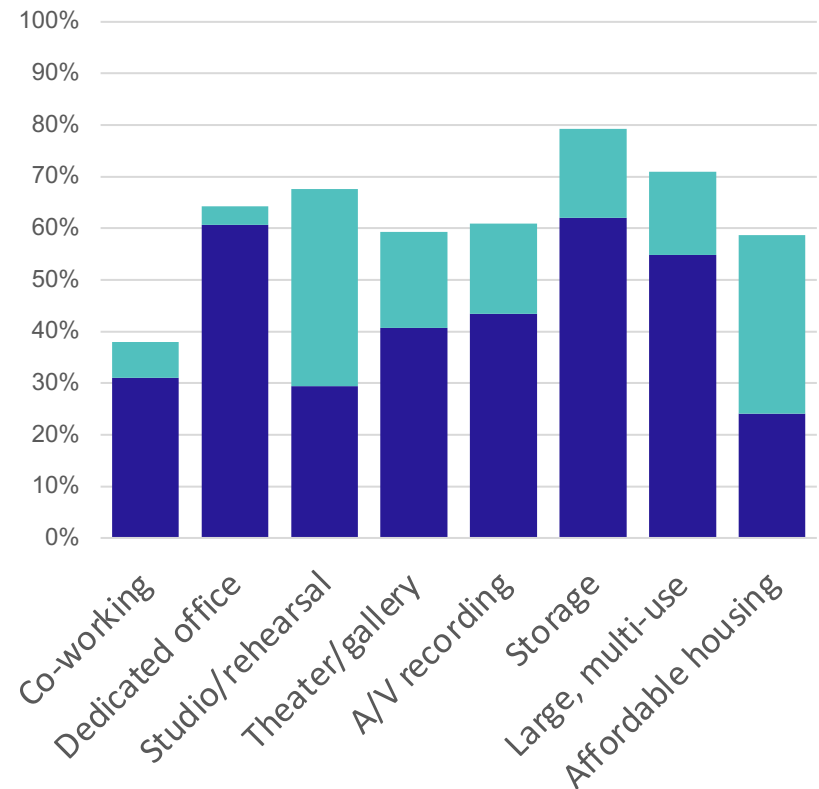
■ Needed ■ Greatest Need

% of **Practicing Artists\***  
Who Need...



(\*Who don't identify as administrators)

% of **Arts Administrators\*\***  
Who Need...



(\*\* Who don't identify as practicing artists)

# DISTINCTIONS BETWEEN DG, TBA, & IFTA MEMBERS

## More IFTA & DG members need large, multi-use event spaces

- 88% of IFTA
- 72% of DG
- 40% of TBA

## More IFTA members need co-working space

- 53% of IFTA
- 37% of DG
- 39% of TBA

## More IFTA members need storage space

- 70% of IFTA
- 55% of DG
- 53% of TBA

## Large, Multi-Use Event Space Detail

### What

- 1,000+ sq ft
- Open indoor w/ high ceilings
- Or high-quality outdoor
- \$0-\$25/hr. rent

### To be used for...

- *Hosting events and classes (with ability to spread out for public safety)*
- *Creating and perform large-scale work*
- *Producing, recording, and streaming films and virtual productions*

# Focus Group Comments on Greatest Space Needs

**Post-pandemic, some needs will change while others will remain the same.**

- 1) Less need for dedicated physical office space
- 2) Meeting space is still valued
- 3) Same eternal need for physical creative space
- 4) More need for better outdoor creative space
- 5) More need for flexible, affordable, **shared** art-making space

# Focus Group Comments on Greatest Space Needs

## 1) Less need for dedicated physical office space

*“Admin. has worked really, really well virtually. I used to dream of having my own dedicated office space and now I don’t have that dream anymore.”*

# Focus Group Comments on Greatest Space Needs

## 2) Meeting space is still valued

*“Before the pandemic I would do my administrative work at home and meet colleagues at East Bay Community Space, Mission Cultural Center, or anywhere we could find and afford, to hug and connect in person. It’s nice to have a neutral meeting space that is not someone’s home, like an office.”*

*“My staff would like to work in person when we need to, and from home when we don’t need to, for the convenience and to save cost.”*

# Focus Group Comments on Greatest Space Needs

## 3) Same eternal need for physical creative space

*“Space is irreplaceable for dance – moving through space with people requires space.”*

*“I have been teaching online, difficult to do partnering, and also remarkable to rehearse online then come together in person and have a piece!”*

# Focus Group Comments on Greatest Space Needs

## 4) More need for better outdoor creative spaces

*“We need to have outdoor spaces that we control. We didn’t need that before.”*

*“Outdoor spaces aren’t all the same. We need spaces that are safe and accessible with not too many cars driving fast on the street nearby.”*

*“Many dancers want a sprung, marley floor outside.”*

*“Audiences don’t want to return to indoor theaters, so we anticipate performing outdoors more in the future.”*



# Focus Group Comments on Greatest Space Needs

## 5) More need for flexible, affordable, shared art-making space

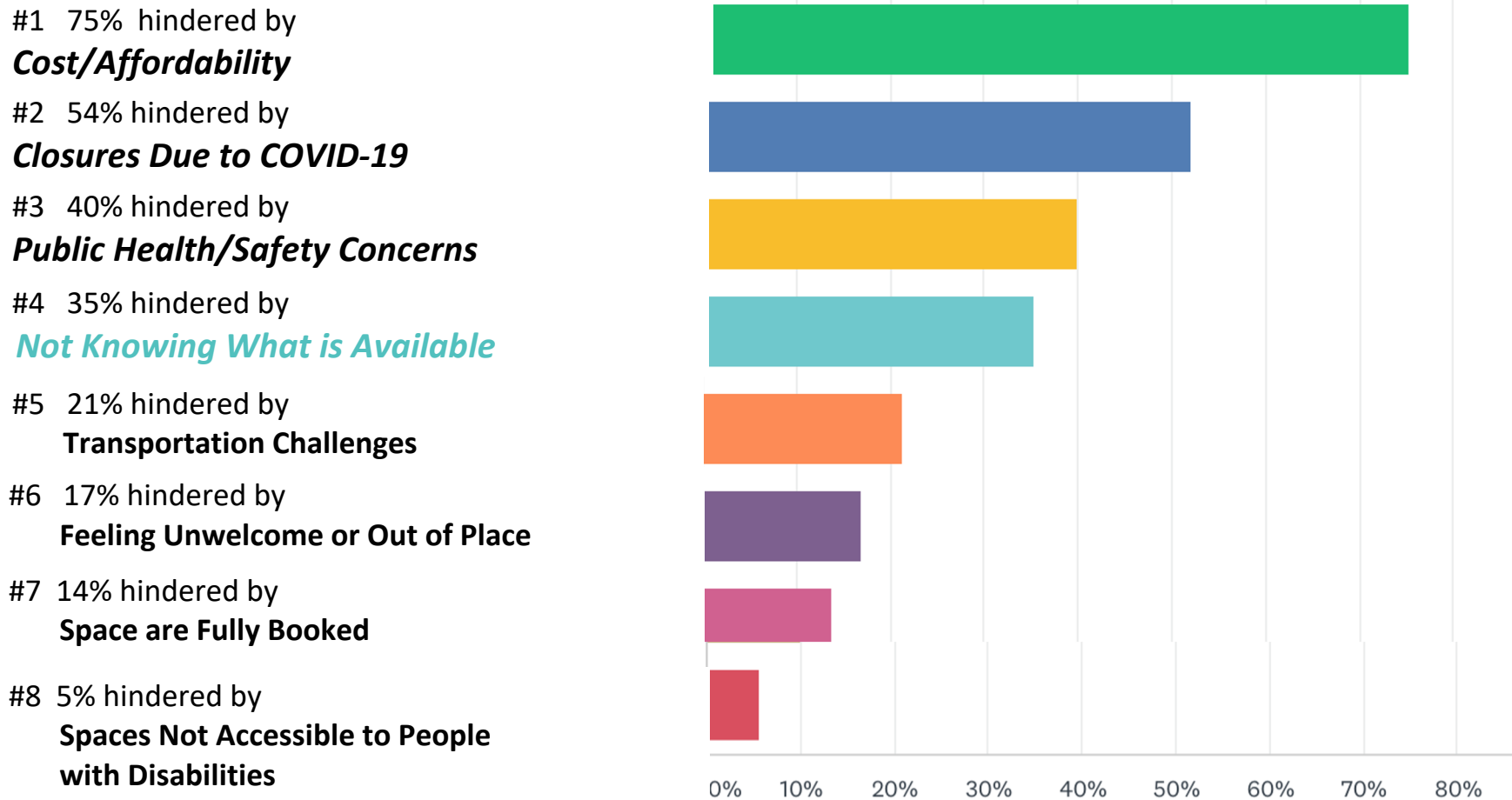
*"IFTA studio was a god send. Great to have access to a small studio at reduced rate."*

*"If I had a consistent studio that was cheap, could leave my stuff, and go in two times a week, that would be ideal."*

*"A small membership fee and a limited number of guaranteed hours would be a good way to go."*

# TOP BARRIERS THAT KEEP PEOPLE FROM ACCESSING THE SPACES THEY NEED

*What barriers keep you from accessing the types of space you need?*



# BARRIERS ARE NOT FELT EQUALLY

**More people who identify as BIPOC feel unwelcome.**

*People for whom feeling unwelcome is a barrier:*

- **57%** of those who identify as **Hawaiian Native/Pacific Islander**
- **45%** of those who identify as **Black/African American**
- 25% of those who identify as **Asian/Asian American**
- 20% of those who identify as **Hispanic/Latinx**
- 20% of those who identify as **Middle Eastern**
- 10% of those who identify as **White**

**People from households earning <\$20K a year are more negatively affected by ALL barriers.**

*In particular:*

- **94%** say costs is a barrier (compared to 75% average)
- **38%** say feeling unwelcome is a barrier (compared to 17% average)

# **Focus Group Comments** **on Barriers to Accessing Space**

**It can be challenging to make spaces welcoming, but it's increasingly a non-negotiable and there are good models to emulate.**

- 1) Artists want to work in BIPOC spaces, not white spaces
- 2) Meaningful change takes work and time
- 3) Values-based relationships > transactional relationships
- 4) Customer service really matters

# Focus Group Comments on Barriers to Accessing Space

## 1) Artists want to work in BIPOC spaces, not white spaces

*“I am so uninterested in majority white spaces! This is super not okay, not okay ever, and really not okay now. We need to equalize opportunities and make spaces welcoming for people of color.”*

*“As someone who presents BIPOC playwrights, our artists want to share their work with audiences that reflect our community, and they don’t want to work in a space patronized by all white audiences.”*

# Focus Group Comments on Barriers to Accessing Space

## 2) Meaningful change takes work and time

*“Philosophically, we all want spaces where everyone is welcome BUT it is hard to have a conversation about how to make that happen without professional facilitation.”*

*“The solution is not efficient or fast, and we need racial equity facilitators for a process that might take a long time.”*

# Focus Group Comments on Barriers to Accessing Space

## 3) Values-based relationships > transactional relationships

*“When I rent space to rehearse or perform it is from people I know, and they have been welcoming and supportive and reduced rates or allowed us to use props, etc.... It is most challenging when you don’t know the people and everything is a negotiation. It is important to me for it to be personal, not transactional, and that the space owner wants to be helpful.”*

*“Host organization values matter to me extremely. We only rent from and give money to organizations that share our values. I don’t feel welcome in ballet schools – because, typically, they don’t embrace other cultural styles and aesthetics.”*

*“I look for the diversity of people in the space and the staff. If I don’t see it, I don’t want to be there.”*

# Focus Group Comments on Barriers to Accessing Space

## 4) Customer service really matters

*The Sphere Co-Working Community in Oakland (now closed) was really welcoming because:*

- *Affordable rate (similar to Intersection)*
- *Space was very CLEAN*
- *They provided snacks*
- *Nice plates and glasses in kitchen (not paper)*
- *Person to check you in was welcoming*
- *Offered fitness and meditation classes*



# SPACES PEOPLE **PLAN TO RENT, OWN, OR ACCESS** AFTER REOPENING (distinct from needs)

**65%** (307 people)  
plan to use

## Studio/Rehearsal

- 65% rent
- 29% access for free
- 6% own

**47%** (211 people)  
plan to use

## Theater/Gallery

- 65% rent
- 32% access for free
- 3% own

**36%** (171 people)  
plan to use

## Co-Working

- 63% access for free
- 32% rent
- 5% own

**35%** (164 people)  
plan to use

## Dedicated Office

- 46% access for free
- 38% rent
- 16% own

**33%** (153 people)  
plan to use

## A/V Recording

- 53% rent
- 36% access for free
- 11% own

**31%** (145 people)  
plan to use

## Storage

- 56% rent
- 32% access for free
- 12% own

# MOST PEOPLE WANT A HYBRID IN-PERSON/REMOTE WORK ENVIRONMENT

**62%** Hope to have a **combination of remote and in-person work**.

**33%** Look forward to working **in-person** as often as they did before.

**5%** Hope they can continue to work **remote** all the time.

# **CO-WORKING SPOTLIGHT**

# WHO PLANS TO USE CO-WORKING SPACE?

**43% of cultural workers report they need co-working space.**

**36% plan to *use* a co-working space after reopening**  
(suggesting an unmet need for some).

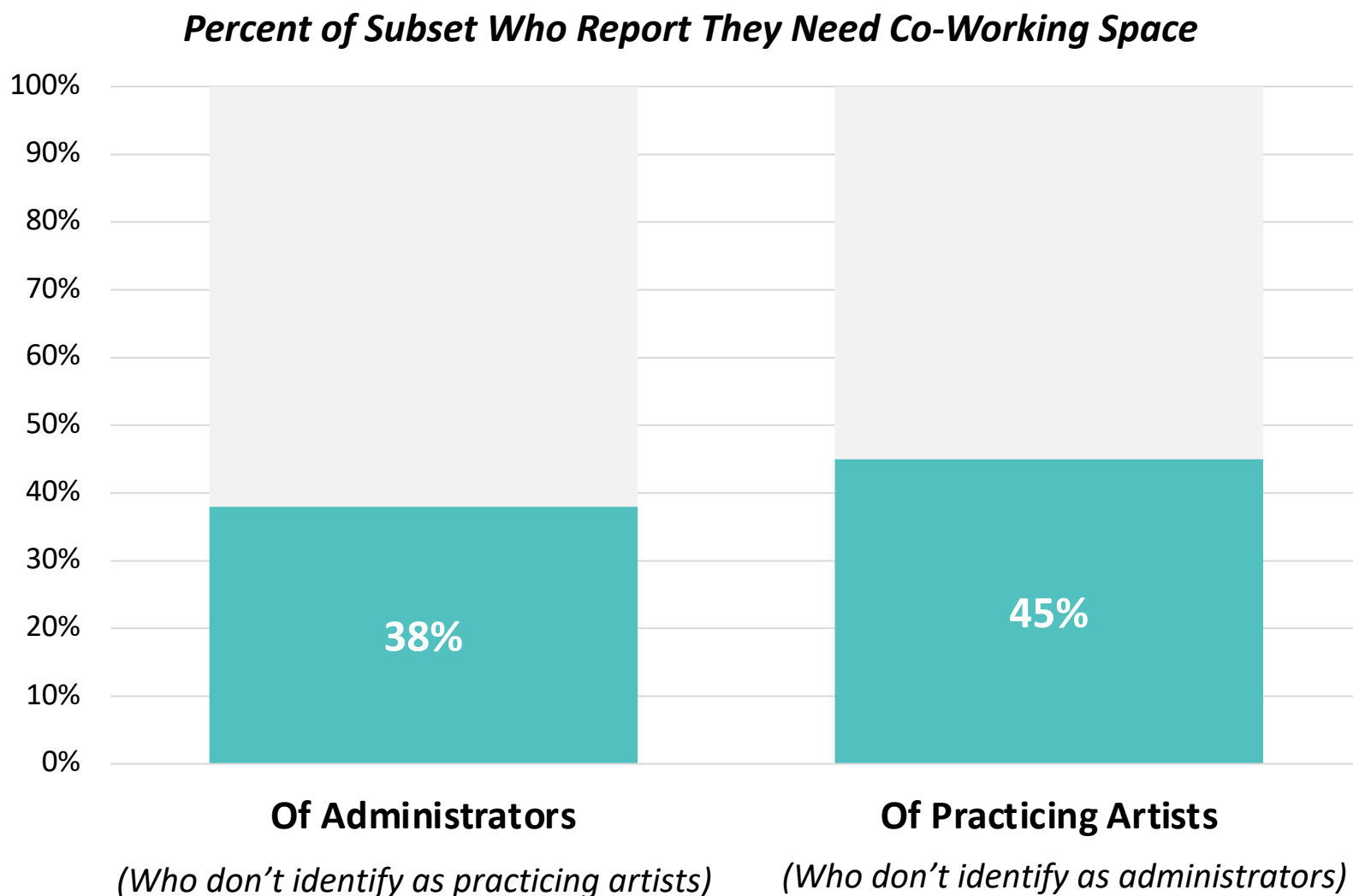
**Only 20% of those who plan to use co-working space are**  
**currently IFTA members.**

*29% are DG Members.*

*19% are TBA Members.*

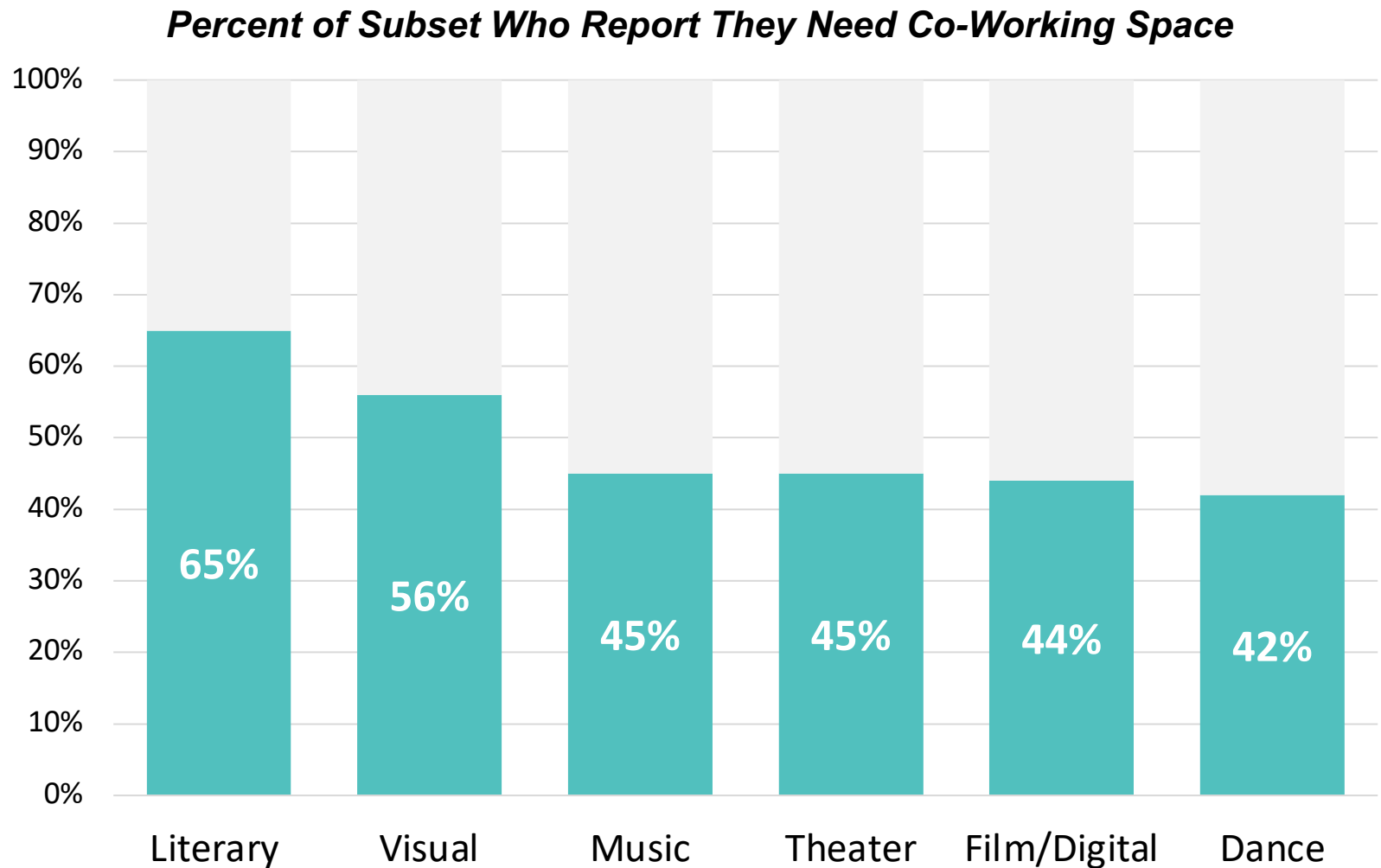
# WHO NEEDS CO-WORKING SPACE MOST?

## By Cultural Worker Role



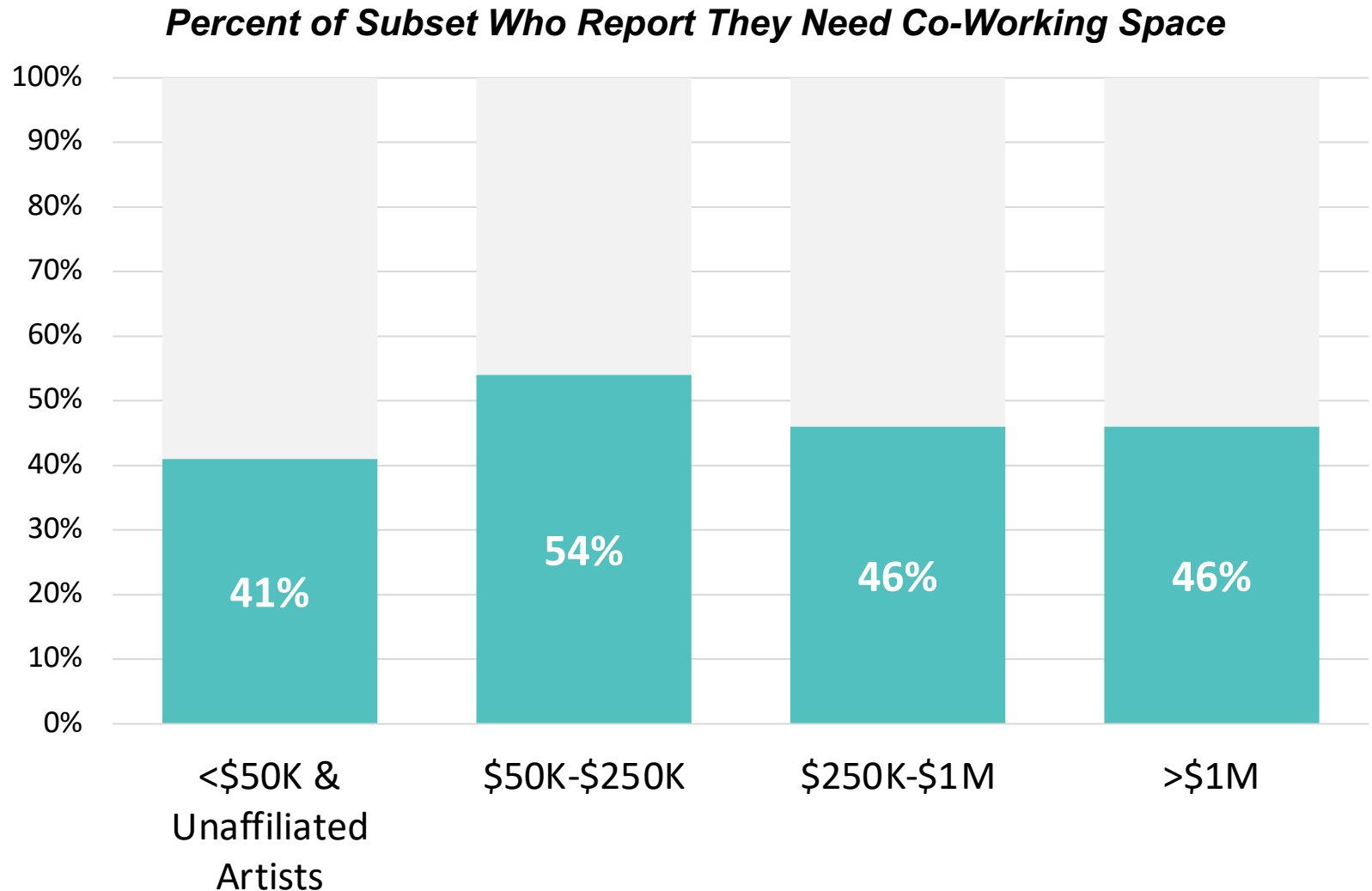
# WHO NEEDS CO-WORKING SPACE MOST?

## By Artistic Discipline



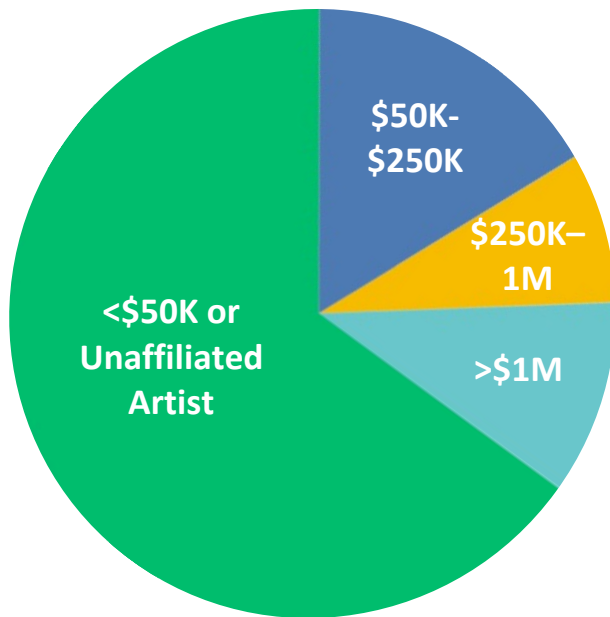
# WHO NEEDS CO-WORKING SPACE MOST?

## By Organization Budget Size



# WHO PLANS TO **USE** CO-WORKING SPACE AFTER REOPENING?

*171 Cultural Workers  
Breakdown by Organization Budget Size*



*Proportions reflect those of the survey overall*

## 107 Cultural Workers at <\$50K Orgs & Unaffiliated Artists

- 68% access for free
- 27% rent
- 5% own

## 26 Cultural Workers at \$50K-250K Orgs

- 54% rent
- 42% access for free
- 4% own

## 13 Cultural Workers at \$250K-1M Orgs

- 46% access for free
- 38% rent
- 15% own

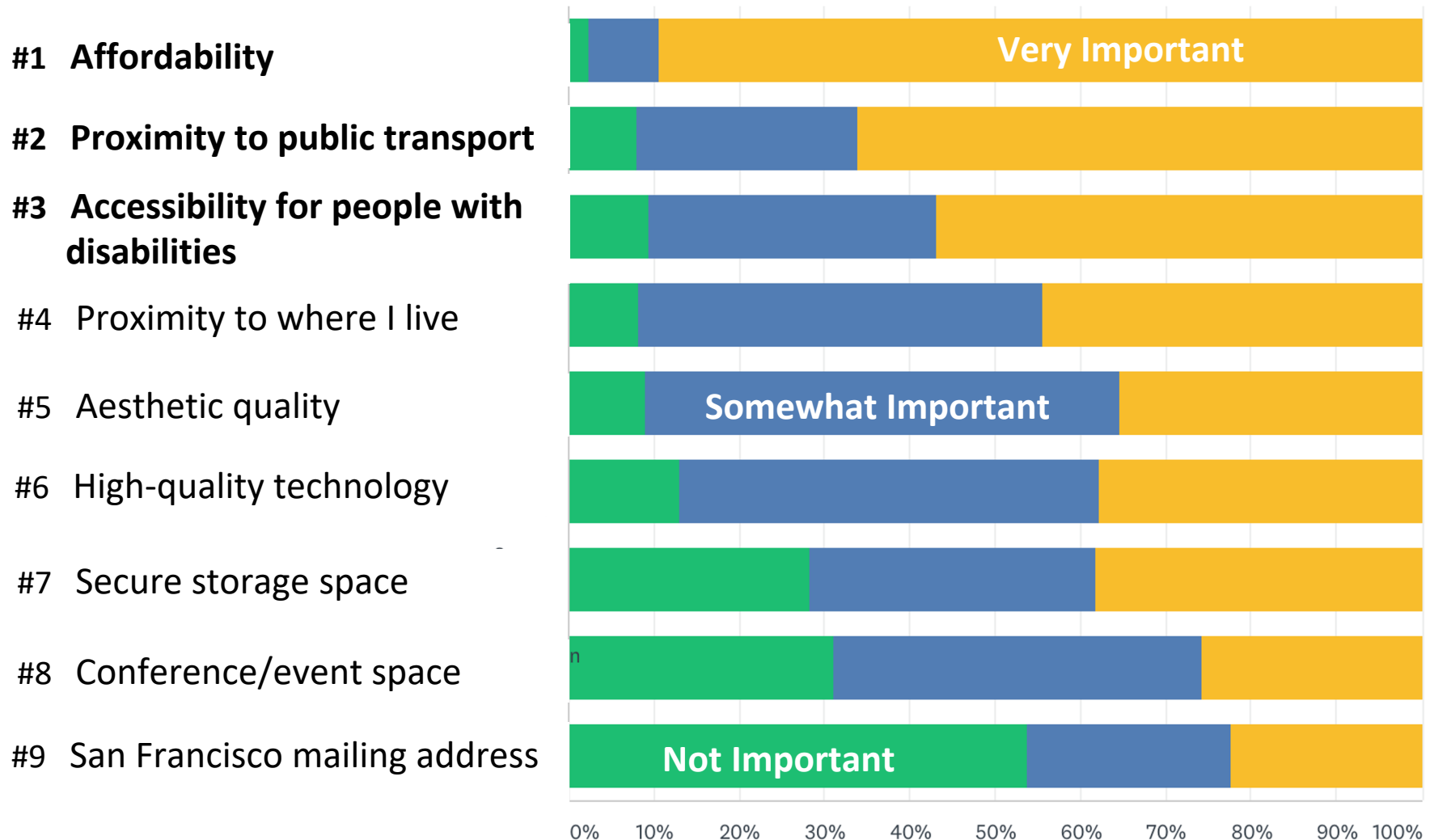
## 17 Cultural Workers at >\$1M Orgs

- 59% plan to access for free
- 35% rent
- 5% own



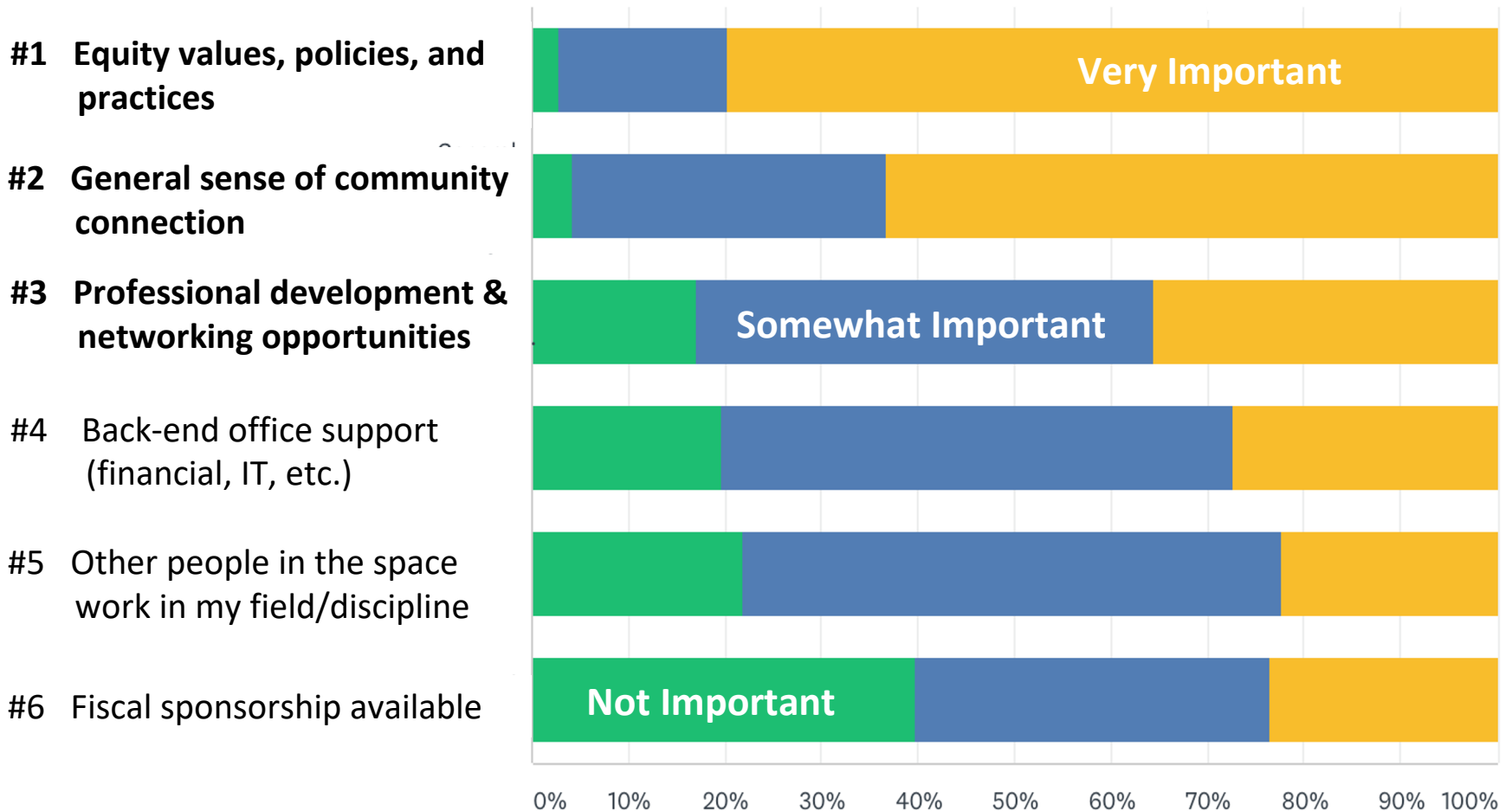
# IMPORTANT SPACE QUALITIES

*If you use, or are interested in using, a co-working space for administrative work, what qualities of the **SPACE** are most important to you?*



# IMPORTANT COMMUNITY QUALITIES

*If you use, or are interested in using, a co-working space for administrative work, what qualities of the **COMMUNITY** are most important to you?*



# EMERGING THEMES

# POSSIBLE IMPLICATIONS

# RECOMMENDATIONS

- **Collaborate and share space/resources with each other** and redirect savings to higher ROI investments (such as Staff compensation and subsidizing programs, services, and space for artists)
- **Connect** artists with creative space owners and provide multidisciplinary, space-focused networking events
- **Advocate** for city governments to make more spaces available and for funding community to subsidize space
- **Communicate** what you offer already (especially flexible/affordable desks, meeting space, and studio space)
- **Continue to invest** in EDI work