The Economic Impact of the Cultural Industry on the State of South Carolina

Prepared for
The SC Arts Commission

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Division of Research

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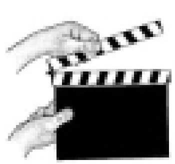

Acknowledgements

A project of this magnitude owes its completion to a wide variety of resources. The principal investigators have been pleased to work with the South Carolina Arts Commission to update the 1992 study of the economic impact of the cultural industry in South Carolina.

The Division of Research is especially grateful to Dr. Morgan Maclaughlan of the Department of Anthropology, University of South Carolina (Columbia campus) and his associates who worked diligently to collect data from visitors at Spoleto, Piccolo Spoleto, and the Southeastern Wildlife Expo. In accomplishing this task, Dr. Maclaughlan worked with the management of each of these organizations. We appreciate the cooperation provided by the management staffs of Spoleto, Piccolo Spoleto, and the Southeastern Wildlife Expo.

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The Economic Impact of the Cultural Industry on the State of South Carolina

Introduction

Cultural activities are an important component of a region's quality of life. They provide an outlet for artistic expression and add to personal fulfillment. The arts also add to regional development in many ways. The arts are a significant force in the economy, with complex linkages throughout. Just as there is a tourism or textile industry, there is a cultural industry. It contributes to the economy in ways that can be measured. Broadly speaking, the cultural industry spends money on various kinds of inputs and produces the cultural goods or services. An analysis of this chain of economic activity reveals the breadth of the economic linkages centered on the cultural industry. This report documents the impact of cultural activities on South Carolina. In both 2000 and 2001, the arts in South Carolina, on average, directly and indirectly supported about $700 million in wages and salaries annually, 30,000 jobs, and $1.9 billion in economic output.

In some cases, it is possible to go beyond an analysis of the level of economic activity that is supported by the arts and look at how much economic activity is actually created by specific cultural activities. In particular, the Spoleto USA and Piccolo Spoleto festivals attract a substantial amount of spending from people outside South Carolina. This new money flowing into the state can be said to create additional earnings, jobs, and output for South Carolina, and in this case, for Charleston in particular.

The cultural industry encompasses three major activities, each examined in this report. This cultural industry triad is depicted in Figure 1. *Heritage and culture* form one side of the triad. Included in this group are museums, historical sites and parks, libraries, and K-12 arts education in South Carolina schools. Another side of the triad is *performance and exhibition* activities. Performers and perform-

Figure 1. The Cultural Industry

ing groups, galleries, and filmmaking are part of this point of the triad. The final side of the triad is the *individual artist*. The individual artist ranges from a craftsperson using his/her art only for personal satisfaction to the artist performing in an international arena. Businesses surround the triad, providing services and selling goods to meet the needs of each component.

The next section provides a discussion of the economic impact results broken down by various segments of the cultural industry in South Carolina. Then, the report turns to a closer examination of the Spoleto USA and Piccolo Spoleto festivals focusing on the impact of non-South-Carolina-resident expenditures and with an updated estimate of the year 2002 impacts. An overview of the impact analysis methodology is provided in the last section, followed by concluding remarks. An extensive analysis of the surveys used to elicit information is available in the appendices.

Cultural Industry Impacts

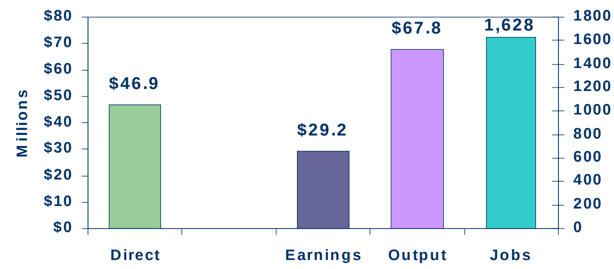
The importance of the arts as an economic force is supported by the magnitude of its impacts on wages and salaries, jobs, and economic output in South Carolina. An extensive survey and economic analysis uncovered some surprising results.

Overall, the state's cultural industry supports about $700 million in labor earnings, 30,000 jobs, and $1.9 billion in output. It can be difficult to appreciate the size of these numbers, unless they are put in relative terms. The earnings impact amounts to 1.3 percent of total earnings statewide, while the employment impact represents 1.6 percent of total nonfarm employment. That is, of every $100 of wages and salaries earned in South Carolina, $1.30 can be linked to the cultural industry. Of every 100 jobs in the state, 1.6 are directly or indirectly linked to the arts.

Major arts-related festivals draw visitors and garner media attention for regions. The annual Spoleto Festival USA and Piccolo Spoleto in Charleston, South Carolina, rank among the most visible aspects of the cultural industry in the state. Spoleto USA was founded in 1977 as the American counterpart to the Festival dei Due Mondi—Festival of Two Worlds—in Spoleto, Italy. It is a mix of dance, theater, opera, music, and the visual arts. Piccolo Spoleto, launched in 1979 by the City of Charleston's Office of Cultural Affairs, is a modestly priced complement to the parent Spoleto Festival and provides a venue for excellent local and regional artists.

An estimated 153,500 visitors attended the two festivals in 2000. These attendees spent a total of $43.1 million in the Charleston area. The largest expenditures were on lodging, food, and beverages. In addition to the visitor spending, the festivals themselves spent an additional $3.8 million in South Carolina on salaries, marketing, and other expenses. As shown in Figure 2, this spending of $46.9 million supported a total of $29.2 million in labor earnings, the equivalent of 1,628 full-time jobs, and $67.8 million in economic output.

Figure 2. Economic Impact of Spoleto USA and Piccolo Spoleto*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

Over time, these festivals have emerged as an indispensible part of the state's cultural identity. Besides promoting the arts in South Carolina, they attract visitors from across the country and the world. For the two festivals combined, 37.9 percent of attendees live outside South Carolina, while 53 percent live outside of Charleston. These are the average percentages for both festivals—the Spoleto USA festival attracts a greater percentage of nonresidents than does Piccolo Spoleto.

Not surprisingly, nonresidents spend more, on average, than either Charleston or South Carolina residents. For example, South Carolina residents spent an average of $16.72 per day on lodging while nonresidents spent $138.12 per day on accommodations. Because of these patterns, 61 percent of visitor spending comes from non-South Carolina residents. Meanwhile, 72.4 percent of spending comes from people living outside Charleston. Therefore, the Charleston area in particular receives a tremendous economic boost from this inflow of new money to the city. This impact is explored further in the next section.

The Charleston area also receives a significant economic boost because of the annual Southeastern Wildlife Exposition held there each February. Since attracting 5,000 visitors to the first show in 1983, the festival has grown to reach an attendance of more than 40,000. More than 37 percent of visitors travel to Charleston from outside South Carolina, another 34 percent is drawn from elsewhere in South Carolina. Spending by visitors totaled $36.4 million, while the Southeastern Wildlife Exposition itself spent an additional $1.8 million on various expenses. The largest categories of spending by visitors include lodging and food and beverage, though by far a majority of spending by visitors to the Southeastern Wildlife Exposition goes to purchase artwork.

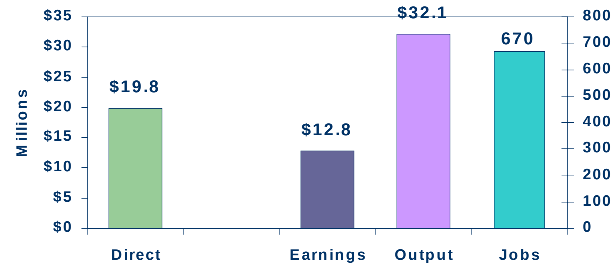
When the full amount spent on artwork is included in the economic impact, the overall output impact of the festival is in excess of $50 million. Nevertheless, a substantial portion of this money spent on artwork does not stay in South Carolina. Rather, it goes home with the artists that come from across the Southeast. The impact on the South Carolina economy is, therefore, smaller. Starting with adjusted total in-state spending of $19.8 million, the Expo supported a total of $12.8 million in labor earnings, 670 jobs, and $32.1 million in economic output, as seen in Figure 3.

Other festivals across the state (excluding Spoleto USA, Piccolo Spoleto, and the Southeastern Wildlife Exposition) spent a total of $40 million in South Carolina. The largest expenditures were for personnel, materials and supplies, and marketing. Figure 4 reveals that this spending supports a total of $27.7 million in labor earnings, 1,044 jobs, and $105.4 million in output.

South Carolina artists spent a total of $35.8 million on supplies and services in the state. Among the expenditure categories are materials and supplies, personnel expenditures, marketing, travel, and property expenses. Through the economic multiplier effects, the artists' activities supported a total of $23 million in earnings, 870 jobs, and $120.5 million of economic output. Recall, as with all segments of the cultural industry, these total impacts presented in Figure 5 encompassed impacts spread across many sectors of the state's economy, reaching well beyond the cultural industry itself.

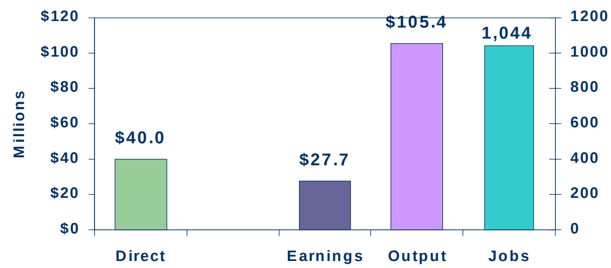
Using data provided by the South Carolina School Districts, it is estimated that a total of $75 million is spent on arts education for

Figure 3. Economic Impact of the Southeastern Wildlife Expo in SC*



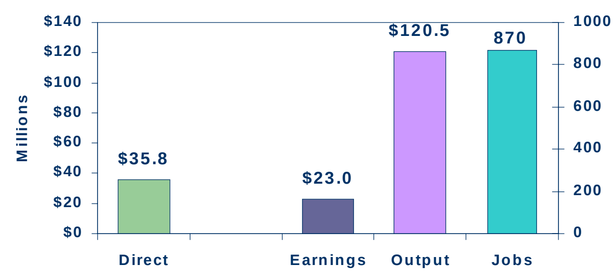
*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

Figure 4. Economic Impact of Festivals in South Carolina*



*Festivals exclude Spoleto, Piccolo Spoleto, and the Southeastern Wildlife Expo. Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

Figure 5. Economic Impact of South Carolina Artists*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

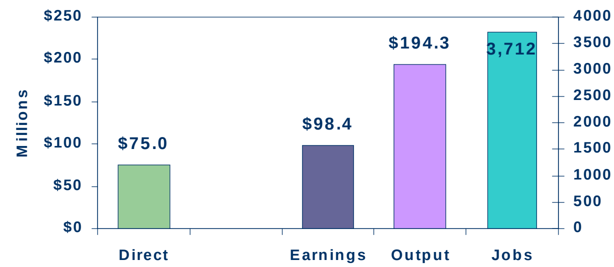
kindergartners through 12th graders in public schools. As shown in Figure 6, this expenditure by the schools, primarily in the form of salaries, supports a total of $98.4 million in earnings, 3,712 jobs, and $194.3 million in output.

To form a complete picture of the arts' impact, numerous types of cultural organizations were identified and surveyed. These include local arts councils, historical sites and associations, libraries, museums, parks, and other organizations. These groups had total expenditures of $159.9 million in South Carolina. The largest expenditures of these organizations were generally for personnel, materials and supplies, property expenses, and other operating expenses. Figure 7 indicates that the operations of these organizations supported a total of $149 million in earnings, 5,639 jobs, and $424.9 million in economic output.

The burgeoning motion picture industry in South Carolina spent a total of $49.1 million in the state. A majority of these expenditures represent new money to the state (that is, money spent by nonresidents). The film industry is therefore an "export" base industry, providing an injection of new business into the state's economy. Overall, as seen in Figure 8, these direct expenditures support a total of $29.5 million in wages and salaries, 1,491 jobs, and $74.5 million in output.

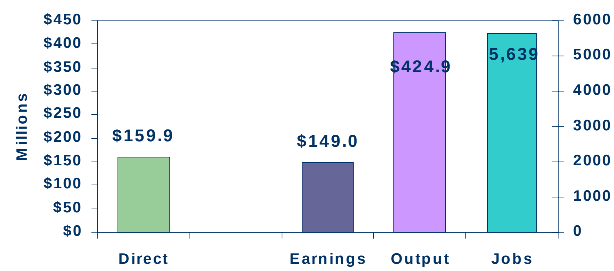
A separate survey was sent to elicit information from the for-profit segment of the cultural

Figure 6. Economic Impact of Arts Education in South Carolina*



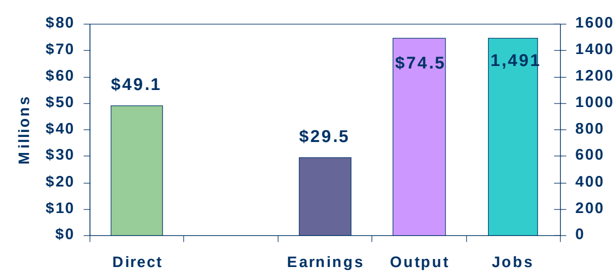
*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

Figure 7. Economic Impact of Cultural Organizations in SC*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

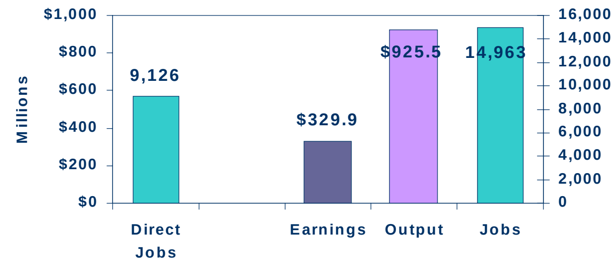
Figure 8. Economic Impact of the Film Industry in South Carolina*



*Direct, Earnings, and Output plotted on left axis; Jobs plotted on right axis.

industry. Among these businesses are art galleries, craft suppliers, dance instructors, and photographers. Estimates of full-time employment at these businesses were used to model the total economic impacts. The survey results indicate that a total of 9,126 jobs are directly linked to the for-profit cultural firms. For all other segments of the cultural industry, the estimated impacts begin with a total for direct expenditures. For the for-profit organizations, the impact model begins with the estimate of employment. Generally, these organizations fit neatly into a standard industry definition, making this an acceptable approach for modeling this segment of the cultural industry. Figure 9 shows that the amount of business activity at these firms corresponding with this level of employment results in total impacts of $329.9 million in earnings, 14,963 jobs, and $925.5 million worth of economic output.

Figure 9. Economic Impact of the "For-Profit" Organizations Serving the Cultural Industry in SC*



*Earnings and Output plotted on left axis; Direct and Jobs plotted on right axis.

Spoleto USA and Piccolo Spoleto: Another Look

The wealth of information contained in the street surveys of attendees to the Charleston festivals makes it possible to look at two additional issues on the impact of these festivals. First, detailed information on the pattern of resident versus nonresident expenditures can be used to estimate the impacts due only to the new money coming into the state and the Charleston region. Second, the most recent surveys can be analyzed relative to previous surveys to calculate an impact estimate of the 2002 Spoleto USA and Piccolo Spoleto festivals.

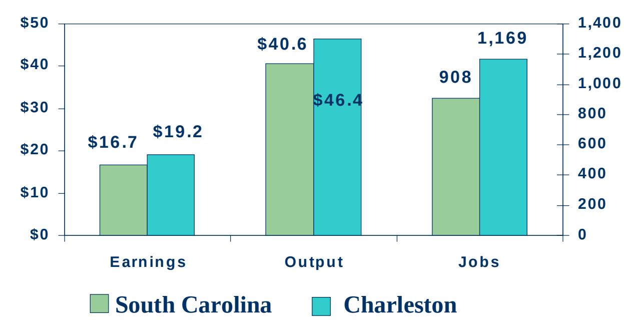
Valid economic impact modeling can be performed in one of two ways. The first approach could be called an "economic linkage" approach that describes how some direct activity supports additional economic activity through the full array of industry linkages that exist in an economy. This was the approach used to calculate the impacts discussed in the previous section. This is an acceptable approach to impact analysis, as long as the effects are interpreted correctly. For example, the 30,018 jobs reported earlier are jobs that are *supported* by activities of the cultural industry. That is, these are existing jobs in the state that are related to the cultural industry through various inter-industry linkages. However, these are not necessarily new jobs that were created by the arts in South Carolina.

For an industry to truly provide a net addition to the economy, it must, to some degree, be an export-base industry. This simply means that the industry produces a good or service in the state that is purchased by someone who is not a resident of the state. Therefore, new money is being brought into the state. Impact analysis that hinges on this kind of export activity is also called an "economic base" analysis. Here, the impacts represent the net addition to the existing economic base.

The Spoleto USA and Piccolo Spoleto festivals are excellent examples of export activities. The money spent at these festivals by nonresidents is a true net addition to the South Carolina, and especially the Charleston, economies. At the 2000 festivals, of the $43.1 million of total visitor spending, $26.3 million was spent by people living outside South Carolina, while $31.2 million was spent by people residing outside Charleston. The earnings, jobs, and output impacts driven by these nonresident expenditures represent impacts *created* by the festivals, as opposed to the earlier concept of impacts *supported* by the festivals. If the Spoleto USA and Piccolo Spoleto festivals were to cease, the impacts created by the festivals would actually disappear from the economy.

The estimated net additions to the South Carolina and Charleston economies of the recently held 2002 editions of the festivals are given in Figure 10. The first result to note is that, as should be expected, it is the Charleston region that primarily reaps the economic benefits of the Spoleto USA and Piccolo Spoleto festivals. For example, the earnings created by nonresident spending for the state amounted to $16.7 million, while earnings created in the Charleston area totaled $19.2 million. How can the earnings impact on Charleston exceed that for the state as a whole? The reason is the nonresident spending in the Charleston area includes spending by residents of, for example, Columbia, South Carolina. Thus, a Columbia resident spending money at the Spoleto USA festival injects new money into the Charleston economy, but not into the state economy as a whole.

Figure 10. 2002 Spoleto USA and Piccolo Spoleto Festivals, Impacts of Nonresident Spending



During 2002, a total of 1,1,69 fulltime equivalent jobs are expected to have been created in Charleston due solely to nonresident spending at the festivals. This amounts to roughly 0.5 percent of total employment in the Charleston metro area. Put another way, of every 200 jobs in the region, one will exist this year exclusively because of the outside money brought in by the Spoleto USA and Piccolo Spoleto festivals.

The estimated impact on Charleston's economic output for the 2002 editions of these festivals is $46.4 million. This represents the total value of all goods and services purchased in the Charleston region stemming from the direct injection of visitor spending. Again, unlike the economic linkage analysis presented earlier, this economic base analysis reveals what the economy stands to lose if the festivals were to leave the region. Thus, these impacts describe how much the festivals add to the economic base.

Estimating the Economic Impacts

This section explains how the total impact of the cultural industry is determined. First, the cultural industry entails a variety of direct impacts on the economy. For example, an artist may purchase supplies from a local business. These expenditures by the artist increase the output of the supplier, and hence of the economy. Similarly, visitors to the Spoleto USA festival in Charleston will inject spending into the local economy supporting, for example, activity at hotels and restaurants. A museum will directly contribute to the economy by providing jobs and income to its workers, and selling goods and services to its patrons.

These various direct impacts are simply the beginning of the economic effects, however. The museum worker will spend a portion of her earnings in the local economy. If she uses these earnings to build a house, the local construction sector receives a boost. Suppliers to the construction sector will also see an increase in activity, and so on. The total impact on the economy is greater than the initial direct impact. For this reason, these additional effects are often called the *multiplier effects*. Thus, to estimate the total impact of the cultural industry, there are two requirements. First, there must be a reliable measure of the direct effects associated with each different type of cultural activity. Second, there must be a reliable model used to estimate the full range of multiplier effects.

To uncover the direct impacts, a survey-based approach was used. For most of the cultural activities, a survey was designed to elicit information on the pattern of expenditures. This approach was used for artists, festivals (other than Spoleto USA, Piccolo Spoleto, and the Southeastern Wildlife Exposition), and cultural organizations including libraries, museums, arts councils, parks, and historical sites and associations. A separate survey was used to estimate visitor expenditures at the Spoleto USA and Piccolo Spoleto festivals and the Southeastern Wildlife Exposition. Another survey was used to estimate full-time employment at a variety of for-profit cultural industry businesses, such as galleries and music or dance studios. Finally, information on the size of the motion picture industry and arts education was calculated from data provided by state and local governments. The surveys were conducted throughout 2000 and

2001. The impact results given previously therefore represent the impact during that time. Survey results are given in the appendix to this report.

The appropriate estimates of the direct impacts were then used in conjunction with a detailed model of the South Carolina economy to arrive at the total impact figures. This model of the state's economy is known as an *input-output* model. The model quantitatively describes the complex relationships between different industries in the state. That is, the input-output model can be used to determine the extent to which a specific industry utilizes the output of various other industries as inputs to production (Figure 11).

Figure 11. Economic Impact Definitions

Direct Impact. *These are cultural industry expenditures that are injected into the state's economy.*

Indirect Impact. *These are the ripple effects on other industries based on impact analysis.*

Induced Impact. *These are impacts of household expenditures from wages and salaries.*

Total Impact. *This sums the direct, indirect, and induced impacts.*

For example, consider the direct impact of food and beverage expenditures made by visitors to any of the state's festivals. This direct activity at a restaurant will require the restaurant to make various kinds of input purchases, such as food. The restaurant's demand for food will then affect activity at the food supplier, so the wholesale trade sector would see a boost in business activity. This type of impact—the ripple effect caused by input purchases by a firm—constitutes the *indirect* economic impacts.

However, there is still more to total impact than the relationship between a firm in one industry and the supplies it purchases from other firms. In the above example, a portion of the labor earnings of the restaurant employees, and the supplier's employees, will be attributable to the direct impact of the visitor spending. As these earnings are spent they begin to circulate throughout the economy, resulting in another round of economic impacts, the *induced* impacts.

Therefore, the total economic impact of the direct spending at the restaurant includes the direct, indirect, and induced impacts. The input-output model used to estimate all of these impacts is provided with the software package IMPLAN. The IMPLAN modeling software is widely used and offers an accepted standard for economic impact analysis.

Providing the Competitive Edge

The economic impacts quantified here highlight the importance of the arts as a vital economic force in South Carolina. The cultural industry in the state, especially festivals like Spoleto USA and Piccolo Spoleto, is certainly related to the state's highly touted tourism industry. The presence of cultural activities in South Carolina helps attract out-of-state visitors. As discussed above, it is the new money brought into the state by these nonresident visitors that provides a true net addition to the state's economy. However, the economic linkage analysis also reveals the importance of the cultural industry by demonstrating how much of the state's current economy is centered around the arts.

Of course, the full impact of the arts on the state of South Carolina reaches well beyond the measures estimated here. First, a diverse cultural industry is vital to attracting retirees and new businesses to the state. In terms of economic development, cultural amenities unquestionably play a role in business location decisions. As states grow increasingly competitive in designing tax incentives for economic development, a strong cultural industry can provide a state with the competitive edge it needs to stand out from the crowd.

In the end, however, it is the arts' contribution to the quality of life in South Carolina that is perhaps the most important—though inherently immeasurable—impact. Indeed, the arts exist primarily because of the numerous qualitative ways they enrich our lives. The full range of positive impacts of the cultural industry in South Carolina, measurable or not, justifies ongoing support of the arts.

Appendices to Report on Economic Impact of the Cultural Industry

Reports in the following order

Cultural Organizations
Festivals
Spoleto USA
Piccolo Spoleto
Southeastern Wildlife Exposition
Artists
For-Profit Organizations

Report on the Survey of Cultural Organizations

Introduction

Surveys were mailed to a variety of cultural organizations including museums, libraries, county or municipal arts councils, historical sites and parks, music organizations, dance companies, and so forth. This report focuses primarily on the average cultural organization to respond to the survey.

Profile

On average, cultural organizations in South Carolina have existed 38 years, and their programs and services have benefited 96,000 persons. Of these, only 14 percent are from outside South Carolina. More than half are from the county in which the organization is located, with the majority of these from the local community. Cultural organizations break down their constituencies into school groups (24.7 percent of admissions), handicapped (1.9 percent), senior citizens (26.0 percent), minorities (16.9 percent), and other special constituencies (6.8 percent). Across all cultural organizations, 63 percent of their constituents receive free admission or services.

Revenue/Income & Expenditures

The following table shows the total estimated revenue as well as expenditures by category for the typical (average) cultural organization in South Carolina. The percentage of the total is shown in parentheses.

Revenue

amount of money brought in by admission sales	$72,926 (8.9%)
amount of money brought in by contractual service	$27,507 (3.4%)
amount of money brought in by investment and endowment income	$27,508 (3.4%)
amount of money brought in by sales of goods	$55,721 (6.8%)
amount of money contributed by corporations	$15,201 (1.9%)
amount of money contributed by foundations	$7,745 (0.9%)
amount of money contributed by the government	$534,636 (65.2%)
amount of money contributed from private gifts, contributions, donations	$35,659 (4.3%)
amount of money raised by fundraisers, galas, special events	$12,667 (1.5%)
amount of other income	$30,327 (3.7%)
total amount of revenue/income	*$819,896 (100%)*

Expenditure in South Carolina

total expenditure on administrative personnel	$350,939 (51.1%)
total expenditure on artistic personnel	$21,071 (3.1%)
total expenditure on technical/production personnel	$7,620 (1.1%)
total expenditure on artistic fees and services	$21,444 (3.1%)
total expenditure on other professionanl services	$9,056 (1.3%)
total expenditure on space rental	$3,654 (0.5%)
total travel expenses	$3,013 (0.4%)

total expenditure on marketing	$20,870 (3.0%)
total expenditure on materials and supplies	$65,486 (9.5%)
total fund raising expense	$8,853 (1.3%)
total amount spent on debt interest	$2,923 (0.4%)
total amount spent on utilities	$20,728 (3.0%)
total expenditure on telephone bills	$4,650 (0.7%)
total amount spent on any other expense	$78,512 (11.4%)
total amount spent on the acquisition of all kinds of cultural works	$24,422 (3.6%)
total amount spent on property expenses	$44,025 (6.4%)
total expenditures	*$687,265(100%)*

Not surprisingly, the majority of income/revenue for libraries is from government support. For expenditures, administrative personnel constitute half percent of total expenditures. Materials and supplies comprise more than 10 percent of the total. Note these are expenditures *in South Carolina*. About 11 percent more expenditures were made outside the State.

Other Information

Each cultural organization employs, on average, 13 fulltime equivalents and has 90 volunteers donating 9,051 hours in the most recent year of operations. Each cultural organization also employs an average of 44 professional artists and serves 39 professional artists. In terms of contributors, the average cultural organization had 145 individual contributors, 26 business/corporate contributors, and 5,800 subscribers/members.

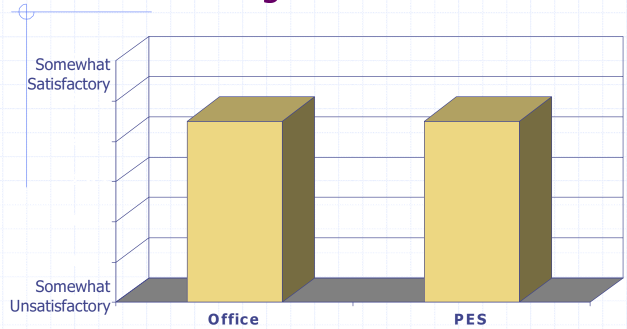
Rank of Activities in Terms of Importance to Cultural Orgs.

Children's Workshops/Lectures	1
Exhibitions	2
Adult Workshops/Lectures	3
Performances	4
Service to Other Organizations	5
Service to Artists	6
Collecting/Collections	7
Advocacy	8
Research	9
Awarding Grants	10

Cultural Organization personnel were asked to rank ten activities in terms of their importance to the library. As seen, children's workshops and lectures rank as most important across all cultural organizations (figure above), followed closely by exhibitions. Awarding Grants and Research are ranked as least important.

Cultural organizations were also asked to assess office as well as performance or exhibition or service (PES) space. The typical organization reports 1,670 square feet of office space and 7,690 square feet of PES space. About two-thirds report ownership of office space, and slightly more than half report ownership of PES space. Thirteen percent share office space, and 35 percent share PES space. Using a scale of "very satisfactory to "very unsatisfactory", cultural organizations rated the adequacy of office and PES space. As seen in the figure to the right, both PES space and office space are viewed as somewhat satisfactory.

Adequacy of Office and PES* Space for Cultural Organizations



*Performance or Exhibition or Service

Report on the Survey of Festivals

Introduction

South Carolina is host to about 400 festivals annually. These range from the Salley Chitlin' Strut to the Flopeye Fish Festival and World Grits Festival. And, of course, there's Spoleto, Piccolo Spoleto, and the Southeast Wildlife Expo. Almost any town of any size in South Carolina hosts a festival. Surveys were sent to festival organizers to elicit their attitude and opinions in addition to developing the economic impact of the cultural industry. This part of the full report details the results of the survey, but excludes the results for Spoleto, Piccolo Spoleto, and the Southeast Wildlife Expo. These festivals are covered in other sections of the full report.

Profile

SC festivals have been in operation an average of 19 years. Ten percent of respondents report having been in operation less than five years, and 10 percent report operating for more than 40 years. A third of the festivals are day-long events, and one-fourth run for two days. Festivals are routinely managed by a board, the city in which they operate, or a specific group established for planning and conducting the festival. Half of the festivals report no admission fee, and 90 percent report that parking is free. Public parks or recreation areas is commonly the location for a quarter of the festivals, with privately-owned oroperty is the location for 20 percent.

Purpose of the Festival

Festival organizers were asked to rank seven potential purposes for the festival in terms of its importance. As seen in the figure on the right, the primary purpose is to enhance community spirit. Least important among these potential purposes is the use of the festival to generate retail traffic in the local community.

Rank of Possible Purposes for Festival

Raise revenue for civic projects	5
Provide recreational opportunities	3
Enhance community spirit	1
Generate retail traffic in local community	7
Educational	4
Increase tourism to community	2
Foster the arts	6

All of the festivals had been held in 2000 or 2001. About 60 percent were last held in 2001. On average (for all festivals), 20,000 people attended the most recent festival. Of course, this ranges from the 20 percent of respondents who report fewer than 1,000 attending to 5 percent who report 125,000 or more attending. Respondents were asked to estimate the percentage of festival attendees who came from outside South Carolina, from South Carolina, from the county where the festival was held, and from the city/or town that the festival is associated with. The results of this question are:

18%	Outside South Carolina
80%	South Carolina
61%	County
44%	City/Town

Revenue/Income & Expenditures

The following table shows the total estimated revenue as well as expenditures by category for all festivals in South Carolina. The percentage of the total is shown in parentheses.

Revenue

amount of money brought in by admission sales	$4,966,083 (9.8%)
amount of money brought in by contractual service	$3,889,226 (7.7%)
amount of money brought in by investment and endowment income	$1,493,355 (2.9%)
amount of money brought in by sales of goods	$15,426,631 (30.4%)
amount of money contributed by corporations	$20,172,454 (39.7%)
amount of money contributed by foundations	$13,320 (<0.1%)
amount of money contributed by the government	$3,877,146 (7.6%)
amount of money contributed from private gifts, contributions, donations	$174,162 (0.3%)
amount of money raised by fundraisers, galas, special events	$40,759 (<0.1%)
amount of other income	$726,999 (1.4%)
total amount of revenue/income	*$50,780,135 (100%)*

Expenditure

total expenditure on administrative personnel	$9,677,627 (19.2%)
total expenditure on artistic personnel	$691,626 (1.4%)
total expenditure on technical/production personnel	$1,301,884 (2.6%)
total expenditure on artistic fees and services	$7,485,633 (14.8%)
total expenditure on other professionanl services	$2,756,760 (5.5%)
total expenditure on space rental	$859,576 (1.7%)
total travel expenses	$653,352 (1.3%)
total expenditure on marketing	$6,242,552 (12.4%)
total expenditure on materials and supplies	$6,100,444 (12.1%)
total fund raising expense	$2,570,347 (5.1%)
total amount spent on debt interest	$666 (<0.1%)
total amount spent on utilities	$1,602,426 (3.2%)
total expenditure on telephone bills	$277,609 (0.6%)
total amount spent on any other expense	$4,830,765 (9.6%)
total amount spent on the acquisition of all kinds of cultural works	$63,270 (0.1%)
total amount spent on property expenses	$5,342,940 (10.6%)
total expenditures	*$50,457,476 (100%)*

From this information it is clear that festivals receive most from corporations and sales of goods. In contrast, the greatest amounts spent are for administrative personnel and artistic fees and services. Expenditures on materials and supplies comprise more than 10 percent, as do expenditures for marketing. Expenditures on debt interest are virtually nonexistent. Each festival employs 2.6 fulltime equivalents (average among all festivals) and 25.6 professional artists. In addition, each festival has an average of 214 volunteers who contribute a total of 14,272 hours to assure that the festival operates as it should. The respondents estimate an average of 17 professional artists actually receive services from the festival.

Rank of Promotional Media Effectiveness

Newspaper	1
Radio	2
Television	4
Billboards	6
Brochures	7
Posters	5
Press Releases	3

Finally, respondents were asked to rank eight promotional methods that may be used to publicize the festival in terms of the effectiveness of the promotional method. The figure to the left shows the results of the ranking. In particular, respondents rate newpapers, radio, and press releases appear as most effective media for festivals. Billboards and brochures are rated as least effective.

Report on the Survey of Spoleto Visitors 2000

June 2002

Introduction

A statement of the economic impact of the cultural industry on South Carolina would be useless without including the impact of South Carolina's major arts festival—Spoleto Festival U.S.A. To this end, interviewers collected data during the 2000 Spoleto Festival U.S.A. in Charleston. The following reports these results.

Methodology

The research team developed a data collection method to assure a wide diversity of respondents in the sample group. Criteria factored into the data collection method were time of the day, day of the week, location, event type, and ticket price, and event series. With Spoleto management permission, interviewers distributed a survey instrument and pencil to potential respondents prior to the start of the event. Potential respondents were asked to turn in both (survey and pencil) as they exited the event arena. In addition, interviewers scanned audiences to visually count males and females and to approximate age and ethnic representation. This information was used to verify that the responses received from each audience were reasonably representative of that audience.

Survey data were processed using standard verification procedures and analyzed using *SPSS*.

Respondent Group

Across all Spoleto events, 1,198 respondents completed and returned surveys to the research team. Of these, one-third reside in Charleston, and 16 percent reside elsewhere in South Carolina. Less than 3 percent reside in countries outside the United States. The remainder (49 percent) reside in states other than South Carolina (34 other states and the D.C.).

> *I rank it [Spoleto 24] near the top, and give it several gold stars for success in the face of adversity.*
> Robert Jones
> *http://www.charleston.net/pub/spoleto/spojones/jonewrap0613.htm*

Sixty percent of respondents completing the survey are female. This proportion remains the same across residential locations; that is, female respondents from Charleston are in the same proportion as female respondents from other places in South Carolina, other states, or outside the United States.

Almost all respondents describe their ethnic background as “white”. Two percent are African American, and another 2 percent are Asian American. Other ethnicities represented are Native American, Hispanic, and Pacific Islander, each at less than 1 percent of the total. Looking at location of residence shows that a greater proportion of African American respondents are from Charleston, S.C.

The mean age of respondents is 52 years; about 20 percent are 65 years old and older. Only about 10 percent are 30 years old or younger (including 2 percent who are 18 years old and younger). Generally, respondents from outside the United States are younger (mean 41 years) than respondents from Charleston (mean 49 years), other areas of South Carolina (mean 53 years), and other states (mean 55 years).

The visual inspection encompassed audiences at performances of Chick Corea, the Colla Marionettes, Les Grandes Ballets Canadiens, Iphigenie en Tauride, Susan Marshall and Company, the Opening Ceremony, The Silver River, and the Westminster Choir. As expected, the concerts used a wide variety of performing spaces: The North Charleston Performing Arts Center, Albert Simmons Auditorium, Gailliard Auditorium, Dock Street Theatre, Sottile Theatre, Four Corners of Law, Cathedral of St. Luke and St. Paul, and the Garden Theatre. The visual inspections spanned the breadth of the Spoleto Festival from May 26 through June 10, 2001.

The table below shows the numbers observed across all performances by broad ethnic classification.

	Seniors	*Adults*	*Young Adults*	*Teens*	*Kids*	*Total*	*% of Total*
White male	735	939	260	17	86	2,037	*39.5*
White female	867	1,398	409	70	118	2,862	*55.6*
African American male	5	44	9	2	1	61	*1.2*
African American female	16	72	14	2	0	104	*2.0*
Other ethnicity male	3	14	10	0	3	30	*0.6*
Other ethnicity female	5	16	17	2	17	57	*1.1*
Totals	1,631	2,483	719	93	225	5,151	
Percentage of Total	*31.7*	*48.2*	*14.0*	*1.8*	*4.4*		

As is evident, the respondent group and the visual audience count are similar. In particular, the count shows about 40 percent male as is the respondent group. Young adults, teens, and kids compose 20 percent of the count and 10 percent of respondents. Similarly, Seniors comprise one-third of the count and 20 percent of respondents.

Results

Almost 3 percent of respondents report having attended Spoleto U.S.A. for all of its 25 years. Among all respondents, the mean number of years having attended Spoleto U.S.A. is 6.5. As may be expected, respondents from Charleston have attended the most years (mean 10), and respondents from outside the United States have attended the least years (mean 4).

Respondents from other areas in South Carolina have attended about one more year than respondents from other states (mean 6 and 5, respectively).

In general, few respondents attend Spoleto U.S.A. alone—only 7 percent report a single-member party. The typical respondent party has 3 members. About 2 percent of respondents report traveling in large groups, that is, more than 10 in the party. The smallest parties are reported by respondents from Charleston—2.5 persons. Respondents from other states report the largest parties—3.3 persons.

In response to a query about the length of the stay in Charleston to attend Spoleto U.S.A. events, almost 10 percent of respondents were somewhat ambiguous, reporting "a lot", "many", and "don't know." This suggests that respondents were staying as long as they were entertained. Among respondents who gave a specific number of days, 13 percent are in Charleston for the day of the survey only. About 15 percent of respondents expect to stay 2 days. Another 20 percent will stay 3 days, while 17 percent more will stay 4 days. About 15 percent of respondents will stay between one and two weeks. The remainder (about 5 percent) will stay almost 3 full weeks. The overall mean is 5 days attending Spoleto events. Charleston respondents report an average of 7 days; respondents from outside South Carolina report an average of 4 days; respondents in other South Carolina areas report an average of 3 days.

The typical respondent attends five to six Spoleto U.S.A. events. One-fourth of respondents attend two or fewer events, and only about 10 percent attend more than ten events. On average, respondents will attend about one event each day of their stay in Charleston: mean number of events is 5.6 and mean number of days is 5.1. Respondents from Charleston and other states attend 6 events (mean of 5.9 and 6.0, respectively) while respondents from other areas in South Carolina and outside the United States attend 4 events (mean of 4.4 and 4.0, respectively).

Of utmost importance in determining the economic impact is how much these visitors spend. Respondents were asked to indicate their spending by category for their entire stay in Charleston. The table below shows the mean dollars spent per person by category. The largest expenditures are lodging, food and beverages, and Spoleto tickets.

	All Groups	*% of Total*
Lodging	$118.99	*28.4*
Food & Beverages	$84.99	*20.3*
Crafts	$12.66	*3.0*
Other Shopping	$59.37	*14.1*
Parking & Local Transportation	$9.07	*2.2*
Piccolo Tickets	$16.28	*3.9*
Spoleto tickets	$93.71	22.4
Other Expenses	$24.07	5.7
Totals	$417.09	

As would be expected, these numbers differ significantly when residence location is considered. As the following table shows, even the proportions of total expenditures differs by residence location. Red, blue, and green figures represent the largest, second largest, and third largest, respectively, proportion of total expenditures. Spoleto attendees from Charleston spend the most on Spoleto tickets, then Food & Beverage, then Piccolo tickets. In contrast, Lodging is the greatest expenditure for Spoleto attendees from other areas in South Carolina. The second and third highest expenditures among these attendees are for Spoleto tickets and Food & Beverage, respectively. Spoleto attendees from other states are similar to those from other areas in South Carolina in that the top three expenditures are the same, with Lodging leading the group. The second and third highest expenditures, however, are flipped with Food and Beverage eking out the second position over Spoleto tickets. Interestingly, the greatest expenditure among Spoleto attendees from outside the United States is the Other category. There was no revealing information provided about this category. Second highest for these attendees is Food and Beverage. The third highest category, Lodging, was unanticipated.

	Charleston Only		*Other S.C.*		*Other State*		*Outside U.S.*	
	$	*%*	*$*	*%*	*$*	*%*	*$*	*%*
Lodging	$6.17	2.7	$120.09	33.0	$158.26	32.2	$83.84	17.0
Food & Beverage	$54.73	23.6	$64.95	17.8	$98.57	20.1	$121.92	24.7
Crafts	$12.60	5.4	$7.38	2.0	$13.98	2.8	$4.57	0.9
Other Shopping	$9.85	4.2	$56.04	15.4	$78.50	16.0	$52.81	10.7
Parking/Local Transportation	$5.26	2.3	$7.26	2.0	$11.24	2.3	$10.07	2.0
Piccolo Tickets	$23.18	10.0	$12.40	3.4	$13.32	2.7	$13.19	2.7
Spoleto Tickets	$104.14	44.8	$85.14	23.4	$90.66	18.5	$76.09	15.4
Other Expenses	$16.41	7.1	$10.88	3.0	$26.34	5.4	$131.04	26.6
Totals	*$232.34*		*$364.14*		*$490.87*		*$493.53*	

Report on the Survey of Piccolo Spoleto Visitors 2000

June 2002

Introduction

Though established a few years after the Spoleto Festival USA drew its curtains (in 1979), Piccolo Spoleto has become almost inextricably entwined with Spoleto Festival USA. Hence, interviewers elicited a wealth of data from Piccolo Spoleto visitors during 2000. The following reports the results of the data collection.

Methodology

The research team developed a data collection method to assure a wide diversity of respondents in the sample group. Criteria factored into the data collection method were time of the day, day of the week, location, event type, and ticket price, and event series. With Piccolo Spoleto management permission, interviewers distributed a survey instrument and pencil to potential respondents prior to the start of the event. Potential respondents were asked to turn in both (survey and pencil) at the end of the event. In addition, interviewers scanned audiences to visually count males and females and to approximate age and ethnic representation. This information was used to verify that the responses received from each audience were reasonably representative of that audience.

Survey data were processed using standard verification procedures and analyzed using *SPSS*. A copy of the survey instrument is included at the end of this section of the report.

Respondent Group

Across all Piccolo Spoleto events, 1,367 respondents completed and returned surveys to the research team. Of these, 55 percent reside in Charleston, and 15 percent reside elsewhere in South Carolina. Less than 2 percent reside in countries outside the United States. The remainder (28 percent) reside in states other than South Carolina (7 other states and at least one other country).

Sixty-five percent of respondents completing the survey are female. However, a smaller proportion of respondents from other states is female (60 percent), and a larger proportion of respondents from outside the United States is female (80 percent). This is a statistically significant result using α of 0.10.

Almost all respondents (94 percent) describe their ethnic background as “white;” 4 percent are African American. Other ethnicities represented are Native American, Hispanic, and Pacific Islander, each at less than 1 percent of the total. Looking at location of residence shows that a greater proportion of African American respondents is from from areas in South Carolina other than Charleston.

The mean age of respondents is 52 years (which is about the same as Spoleto Festival USA visitors). Almost 22 percent are 65 years old and older. Fewer than 15 percent are 30 years old or younger (including 3.5 percent who are 18 years old and younger). Respondents from outside the United States are younger (mean 50 years) than respondents from Charleston (mean 51 years), other areas of South Carolina, and other states (mean 52 years for both). However, these differences are not statistically significant.

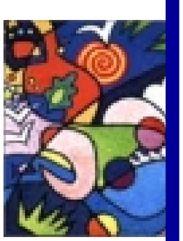
Visual inspection of audiences were conducted at Piccolo Spoleto events as itemized below. Also listed below are the performing spaces used for the events. The visual inspections spanned the breadth of the Piccolo Spoleto Festival from May 26 through June 12, 2001.

Events

Abbot Kline
Albert Einstein
Anonymity Dance Company
Bitran & Schreier
Brown Bag & Ballet
Caldwell (Ann) & Magnolia Singers
Caramoor Virtuosi
Carolina Ballet Ensemble
Cathedral Music by Candlelight
Charleston Men's Choir
Children's Festival
Cleveland, Rodney
Coffee Cantata-Bach
Color Purple, The
Columbia Choral Society
CSO Outreach
Craft Fair
Drink Small
Fleming, Suzanne
Friauff, Deborah
Gant, Robert
Good Time Variety Hour
Gwinnett Festival Singers
Gwinnett Youth Orchestra String Quartet
Hekahte's Helper
Hell, Felix
Honky Tonk Angels
How to Succeed
In the Spirit
Irish Songs
Ivey (Robert) Ballet
Jazz Dance Theatre South
Johnson, Edie
Johnson, Richard
Last Train to Nibroc
Life Before the Crisis
McBroom, Deanne
Mother Courage
Old Camp Meeting
Orlando XIII
Piccolo Finale
Puppet Playhouse
Quintango
St Petersburg String Quartet
Sandlapper Singers
Second City
Sermon of Fire
Session I
Session II
Seuss & Silverstein
Storlazzi & Hunt
Suzuki String Ensemble
T Tikker
Tibetan Monks
Tribute to Lewis Grizzard
Unicorn
Vivaldi's Four Seasons
You Can't Catch Me
Young Poets

Performing Spaces

Allan Park
Cathedral of St John the Baptist
Cathedral of St. Luke & St. Paul
Chapel Theatre
Charleston Ballet Theatre
Circular Congregational Church
Citadel campus
Cumberlands
Davies Auditorium (Ashley Hall)
Dock Street Theatre Courtyard
First Baptist Church
First (Scots) Presbyterian Church
Footlight Players Theatre
Hampton Park
Jahal Kadosh Beth Elohim
Mark Clark Hall
Midtown Theatre
Mt Zion AME Church
Physicians Auditorium
Public Library (Chas Co)
Randolph Hall
Riley (Joseph) Park
St Mathews Lutheran Church
St Mike's
St Philips Church
Second Presbyterian Church
Simons Center Recital Hall
Theatre 220
Trinity UNC
Washington Square
Wragg Square Park



The table below shows the numbers observed across all performances by broad ethnic classification.

	Seniors	*Adults*	*Young Adults*	*Teens*	*Kids*	*Total*	*% of Total*
White male	1,011	1,594	348	40	333	3,326	*36.5*
White female	1,393	2,507	522	116	424	4,962	*54.4*
African American male	20	78	20	31	68	*217*	*2.4*
African American female	32	151	49	33	108	373	*4.1*
Other ethnicity male	9	43	16	2	27	97	*1.1*
Other ethnicity female	6	71	29	5	35	146	*1.6*
Totals	2,471	4,444	984	227	995	9,121	
Percentage of Total	*27.1*	*48.7*	*10.8*	*2.5*	*10.9*		

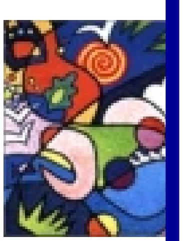
As is evident, the respondent group and the visual audience count are similar. In particular, the count shows about 40 percent male as is the respondent group. Young adults, teens, and kids compose almost one-fourth of the count and 15 percent of respondents. Similarly, Seniors comprise a little more than one-fourth of the count and 22 percent of respondents.

Results

Almost 4 percent of respondents report having attended Piccolo Spoleto since its inception in 1979. Among all respondents, the mean number of years having attended Piccolo Spoleto is 7.6. As with Spoleto U.S.A. visitors, respondents from Charleston have attended the most years (mean 10), and respondents from outside the United States have attended the least years (mean 2). Respondents from other areas in South Carolina have attended about one more year than respondents from other states (mean 6 and 5, respectively).

In general, few respondents attend Piccolo Spoleto events alone—about 12 percent report a single-member party. The typical respondent party has 3 members. About 2 percent of respondents report traveling in large groups, that is, 10 or more members in the party. The smallest parties are reported by respondents from Charleston—2.5 persons. Respondents from other areas in South Carolina report the largest parties—4.3 persons.

In response to a query about the length of the stay in Charleston to attend Piccolo Spoleto events, about 15 percent of respondents were somewhat ambiguous, reporting “a lot”, “several”, and “don’t know.” Among respondents who gave a specific number of days, 13 percent are in Charleston for the day of the survey only. About 13 percent of respondents expect to stay 2 days. Another 15 percent will stay 3 days, while 13 percent more will stay 4 days. About 18 percent of respondents will stay between one and two weeks. The remainder (about 7 percent) will stay almost 3 full weeks. The overall mean is 5 days attending Piccolo Spoleto events. Charleston respondents report staying an average of 7 days; respondents from outside South Carolina report an average of 4 days; respondents in other South Carolina areas report an average of 3 days. These differences are statistically significant at α of 0.01.



The typical respondent attends six Piccolo Spoleto events. One-third of respondents attend three or fewer events, and about 20 percent attend more than ten events. On average, respondents will attend about one event each day of their stay in Charleston: mean number of events is 5.9 and mean number of days is 5.7. Respondents from Charleston and other states attend 6 events (mean of 6.4 and 5.6, respectively) while respondents from other areas in South Carolina attend 5 events, and those from outside the United States attend 4 events.

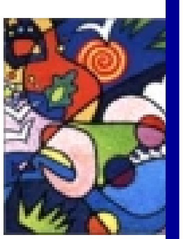
Of utmost importance in determining the economic impact is how much these visitors spend. Respondents were asked to indicate their spending by category for their entire stay in Charleston. The table below shows the mean dollars spent per person by category. The largest expenditures are lodging, food and beverages, and Piccolo Spoleto tickets.

	All Groups	*% of Total*
Lodging	$47.67	*21.1*
Food & Beverages	$47.22	*20.9*
Crafts	$11.00	*4.9*
Other Shopping	$22.00	*9.7*
Parking & Local Transportation	$5.38	*2.4*
Piccolo Tickets	$25.46	*11.3*
Spoleto tickets	$43.98	19.5
Other Expenses	$23.20	10.3
Totals	$225.91	

As would be expected, these numbers differ significantly when residence location is considered. As the following table shows, even the proportions of total expenditures differ by residence location. Red, blue, and green figures represent the largest, second largest, and third largest, respectively, proportion of total expenditures. Spoleto attendees from Charleston spend the most on Spoleto tickets, then Food & Beverage, then Piccolo tickets. In contrast, Lodging is the greatest expenditure for Spoleto attendees from other areas in South Carolina. The second and third highest expenditures among these attendees are for Spoleto tickets and Food & Beverage, respectively. Spoleto attendees from other states are similar to those from other areas in South Carolina in that the top three expenditures are the same, with Lodging leading the group. The second and third highest expenditures, however, are flipped with Food and Beverage eking out the second position over Spoleto tickets. Interestingly, the greatest expenditure among Spoleto attendees from outside the United States is the Other category. There was no revealing information provided about this category. Second highest for these attendees is Food and Beverage. The third highest category, Lodging, was unanticipated.

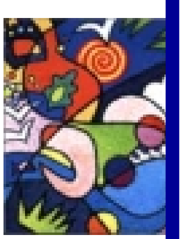
	Charleston Only		*Other S.C.*		*Other State*		*Outside U.S.*	
	$	*%*	*$*	*%*	*$*	*%*	*$*	*%*
Lodging	$1.43	1.0	$22.28	19.2	$126.08	29.8	$46.22	23.0
Food & Beverage	$34.69	24.7	$25.70	22.2	$78.36	18.5	$61.31	30.6
Crafts	$9.06	6.5	$3.99	3.4	$20.06	4.7	$5.44	2.7
Other Shopping	$10.50	7.5	$12.51	10.8	$43.67	10.3	$15.51	7.7
Parking/Local Transportation	$4.58	3.3	$3.09	2.7	$8.36	2.0	$3.81	1.9
Piccolo Tickets	$27.13	19.3	$17.50	15.1	$29.10	6.9	$17.64	8.8
Spoleto Tickets	$44.69	31.8	$22.07	19.1	$58.97	13.9	$42.52	21.2
Other Expenses	$8.24	5.9	$8.61	7.4	$58.93	13.9	$8.10	4.0
Totals	*$140.34*		*$115.76*		*$423.52*		*$200.55*	

Assuming a relatively low attendance figure of 125,000 for Piccolo Spoleto, these per person expenditures yield a sizeable direct expenditures in Charleston. To generate the estimated



total expenditures, 55 percent of the 125,000 were estimated to be from Charleston, about a fourth from elsewhere in the United States, 15 percent from other areas in South Carolina, and about 2 percent from outside the United States.

	Charleston Only (n=69,250)	*Other S.C. (n=18,375)*	*Other State (n=35,125)*	*Outside U.S. (n=2,250)*	*Total Outside S.C. (n=37,375)*	*Category Total (n=125,000)*
Lodging	$99,103	$409,311	$4,428,460	$104,000	$4,532,460	$5,040,875
Food & Beverage	$2,402,458	$2,956,281	$5,823,763	$4,266,223	$10,089,986	$15,448,725
Crafts	$627,333	$458,924	$1,490,997	$378,715	$1,869,712	$2,955,968
Other Shopping	$727,402	$1,439,077	$3,245,742	$1,079,337	$4,325,079	$6,491,558
Parking/Local Transportation	$317,404	$355,793	$621,078	$265,100	$886,178	$1,559,375
Piccolo Tickets	$1,879,056	$2,012,353	$2,162,541	$1,227,259	$3,389,799	$7,281,208
Spoleto Tickets	$3,094,902	$2,538,670	$4,383,238	$2,959,183	$7,342,421	$12,975,993
Other Expenses	$570,580	$990,655	$4,379,913	$563,338	$4,943,252	$6,504,487
Totals	$9,718,238	$11,161,064	$26,535,731	$10,843,156	$37,378,887	$58,258,189



Report on the Survey of Visitors to the Southeastern Wildlife Exposition 2001

June 2002

Introduction

The Southeastern Wildlife Exposition (SEWE) was held for its twentieth time in 2002. The first SEWE in 1983 had 100 exhibitors and approximately 5,000 visitors. Billing itself as a three-day celebration of nature, SEWE attracted more than 40,000 visitors and 500 artists and exhibitors to its 2002 show. The study of SEWE reported here focuses on the 2001 exhibition. The report begins with an overview of the methodology of the study then continues with a report of the results of the survey grouped by respondent residence. The last section of the report compares respondent groups.

Methodology

The research team developed a data collection method to assure a wide diversity of respondents in the sample group. Criteria factored into the data collection method were time of the day, day of the week, location, event type, and ticket price, and event series. With SEWE management permission, interviewers distributed a survey instrument and pencil to potential respondents. Interviewers were strategically positioned to receive completed surveys (and returned pencils). In addition, interviewers scanned audiences to visually count males and females and to approximate age and ethnic representation. This information was used to verify that the responses received from each audience were reasonably representative of that audience.

Survey data were processed using standard verification procedures and analyzed using *SPSS*.

Across all SEWE events, 1,386 respondents completed and returned surveys to the research team. Of these, 30 percent reside in Charleston, 33 percent reside elsewhere in South Carolina, and 38 percent reside outside South Carolina. The first section below examines visitors who live in Charleston. The next section reports on visitors who live elsewhere in South Carolina. This is followed by the results from visitors who live outside South Carolina. The last section of the report compares the three groups.

Overall, about half of SEWE visitors (49 percent) are female. Fifteen percent are thirty years old or younger, and about 5 percent are 65 years and older. The average age is 46 years. One-fourths of respondents report annual household income of $125,000 or more (Figure 1).

The profile of respondents (except for household income) is borne out by the visual inspection of audiences. The research team conducted visual inspections from February 14 through February 18 (2001) at events open to the public as well as events restricted to members.

Charleston Visitors Profile

Just over half (55 percent) of respondents completing the survey are female, and 97 percent report a “white” ethnic background. Other ethinic backgrounds (all at 1 percent or less of the total) include African American, Hispanic, Arab, Asian, and Polish. The mean age of respondents is 42 years; about 20 percent are under 30 years old. Less than 10 percent are 60 years old or older. As Figure 2 shows, almost 20 percent of respondents are from households earning less than $40,000 a year; another 20 percent are from households earning $125,000 or more a year.

Survey Responses

Respondents were asked to indicate what prompted them to attend SEWE 2001. Previous attendance at SEWE was the most often cited prompt (see Figure 3). Note that Web Site has not yet become an important prompt for SEWE visitors from Charleston.

Sixteen percent of Charleston respondents report 2001 as the first year attending SEWE, and 3 percent report attending from its beginning. The mean number of years attending SEWE 5 years. These respondents report they will stay at the event 1.5 days, though two-thirds report they are staying only one day, and 1 percent report staying all the days of the exhibition. Although 16 percent of Charleston respon-

Figure 1. Household Income for All Respondents

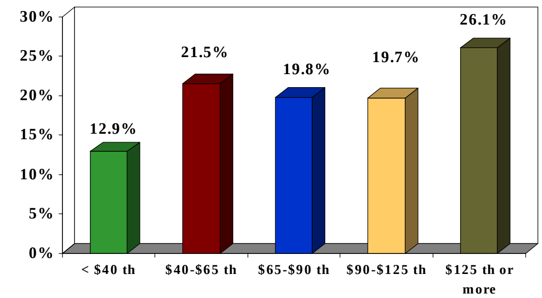


Figure 2. Household Income for Charleston Respondents

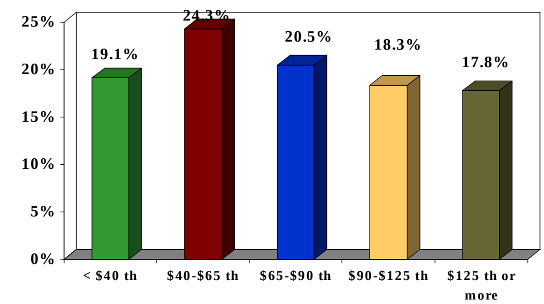


Figure 3. Prompt for Visit to SEWE, Charleston Respondents

Prompt	Rank
Previous Attendance	1
Newspaper	3
Magazine	8
Word of Mouth	2
Web Site	NR
Billboard	7
Television	5
Radio	5
Mail Brochure	5

NR = Not Ranked

dents report they will attend all or most events, the average number of events to attend for all respondents is nine.

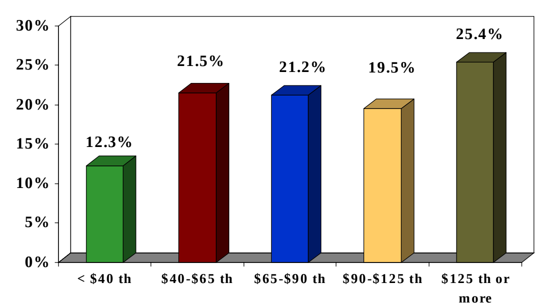
Almost half of Charleston respondents (49 percent) report two people traveling together in their party. Less than 5 percent report traveling with large (more than 5) parties, and the average among all Charleston respondents is three.

SEWE visitors were asked to report dollars they had or would spend at the 2001 exhibition. These results shown below reflect the amount spent for a party of 2 (mean for all respondents). Note this is different from the mean of three in the travel party.

	Charleston Respondents	*% of Total*
Lodging	$9.08	*3.1*
Parking & Local Transportation	$7.48	*2.6*
Food & Beverages	$45.28	*15.5*
Event tickets	$41.77	14.3
Art	$134.43	45.9
Entertainment	$9.34	*14.1*
Crafts	$36.56	*3.2*
Other Expenses	$8.62	2.9
Totals	$292.56	

South Carolina (not Charleston) Visitors Profile

Figure 4. Household Income for SC (not Charleston) Respondents



For respondents from places in South Carolina but not Charleston, just under half (45 percent) completing the survey are female, and 97 percent report a "white" ethnic background. Other ethinic backgrounds (all at 1 percent or less of the total) include African American, Hispanic, American Indian, Asian, and Polish. The mean age of respondents is 45 years; 15 percent are under 30 years old, and 12 percent are 60 years old or older. As Figure 4 shows, only 12 percent of respondents are from households that earn less than $40,000 a year, but more than a quarter are from households that earn $125,000 or more a year.

Survey Responses

In indicating what prompted respondents to attend SEWE 2001, previous attendance at SEWE was the most often cited prompt (see Figure 5). Magazine was cited least among the alternatives shown.

Twelve percent of Other South Carolina respondents report 2001 as the first year attending SEWE, and less than 1 percent report attending from its beginning. The mean number of years attending SEWE 6 years. These respondents report they will stay at the event 1.9 days, though half report they are staying only one day, and 1 percent report staying all the days of the exhibition. Although 19 percent of Other South Carolina respondents report they will attend all or most events, the average number of events to attend for all respondents is nine.

Figure 5. Prompt for Visit to SEWE, SC (not Charleston) Respondents

Prompt	Rank
Previous Attendance	1
Newspaper	3
Magazine	9
Word of Mouth	2
Web Site	8
Billboard	5
Television	6.5
Radio	6.5
Mail Brochure	4

NR = Not Ranked

Almost half of Other South Carolina respondents (46 percent) report two people traveling together in their party. About 15 percent report traveling with large (more than 5) parties, and the average among all Other South Carolina respondents is three.

SEWE visitors from other places in South Carolina were asked to report dollars they had or would spend at the 2001 exhibition. These results shown below reflect the amount spent for a party of 2 (mean for all respondents). Note this is different from the mean of three in the travel party.

	South Carolina (not Charleston) Respondents	*% of Total*
Lodging	$185.33	*28.6*
Parking & Local Transportation	$9.69	*1.5*
Food & Beverages	$124.77	*19.2*
Event tickets	$40.53	6.2
Art	$215.37	33.2
Entertainment	$16.83	*2.6*
Crafts	$30.23	*4.7*
Other Expenses	$26.27	4.0
Totals	$649.02	

Visitors Not From South Carolina Profile

For respondents from places outside South Carolina, just under half (47 percent) completing the survey are female, and 98 percent report a "white" ethnic background. Other ethinic backgrounds (all at 1 percent or less of the total) include African American, Hispanic, American Indian, Asian, and Irish. The mean age of respondents is 49 years; 10 percent are under 30 years old, and 15 percent are 60 years old or older. As Figure 5 shows, less than 10 percent of respondents are from households that earn less than $40,000 a year, but more than a third are from households that earn $125,000 or more a year.

Figure 6. Household Income for Respondents From Outside SC

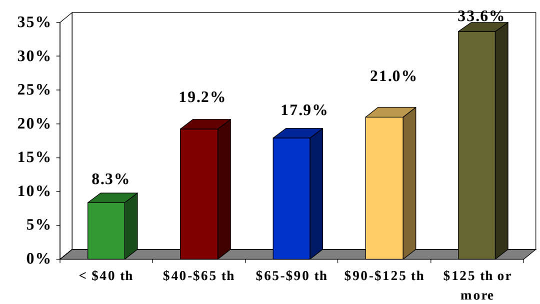


Figure 7. Prompt for Visit to SEWE, Respondents From Outside SC

Prompt	Rank
Previous Attendance	1
Newspaper	6
Magazine	4
Word of Mouth	2
Web Site	5
Billboard	7.5
Television	7.5
Radio	NR
Mail Brochure	3

NR = Not Ranked

Survey Responses

In indicating what prompted respondents to attend SEWE 2001, previous attendance at SEWE was the most often cited prompt (see Figure 7). Radio was not ranked by this group of respondents, and billboard and television are tied for last place (rank of 7.5).

Nineteen percent of Outside South Carolina respondents report 2001 as the first year attending SEWE, and less than 1 percent report attending from its beginning. The mean number of years attending SEWE 5 years. These respondents report they will stay at the event 2.2 days, though one-third report they are staying only one day, and 1 percent report staying all the days of the exhibition. Although 23 percent of Outside South Carolina respondents report they will attend all or most events, the average number of events to attend for all respondents is nine.

More than half of Outside South Carolina respondents (54 percent) report two people traveling together in their party. About 11 percent report traveling with large (more than 5) parties, and the average among all Other South Carolina respondents is three.

SEWE visitors from other places in South Carolina were asked to report dollars they had or would spend at the 2001 exhibition. These results shown below reflect the amount spent for a party of 2 (mean for all respondents). Note this is different from the mean of three in the travel party.

	South Carolina (not Charleston) Respondents	*% of Total*
Lodging	$306.30	*33.6*
Parking & Local Transportation	$11.52	*1.3*
Food & Beverages	$180.53	*19.8*
Event tickets	$45.04	4.9
Art	$252.11	27.6
Entertainment	$14.83	*1.6*
Crafts	$50.97	*5.6*
Other Expenses	$51.37	5.6
Totals	$912.67	

Comparisons

Some of these numbers differ significantly when residence location is considered. As these data have shown, Visitors from Charleston tend to have lower household incomes than do Visitors from Other South Carolina Places. The latter tend to have lower household incomes than do Visitors from Outside South Carolina. The average age is approximately the same as is the average number of years attending SEWE.

As Figure 8 shows, all respondents report that past attendance is the top prompt for their current visit to SEWE. In fact, all respondents report "word-of-mouth" as the second in importance. Beyond positions one and two, however, differences are evident, though broadcast media generally is ranked toward the bottom.

Figure 8. Prompt for Visit to SEWE, Comparison

Prompt	Chas.	Other SC	Not SC
Previous Attendance	1	1	1
Newspaper	3	3	6
Magazine	8	9	4
Word of Mouth	2	2	2
Web Site	NR	8	5
Billboard	7	5	7.5
Television	5	6.5	7.5
Radio	5	6.5	NR
Mail Brochure	5	4	3

NR = Not Ranked

The greatest differences among SEWE visitors by location are expenses. Clearly, SEWE visitors from Charleston spend substantially less on lodging than do other visitors. This relationship holds for almost all expenditure categories. While this is expected for items such as lodging and food and beverages, it is somewhat surprising to see that SEWE visitors from outside South Carolina spent almost twice as much on art as do SEWE visitors from Charleston. Only expenditures for event tickets are not statistically different among SEWE visitors by location.

Results of the Artists Survey

Surveys were mailed in Summer 2001 to almost 8,000 potential respondents. The list provided by the S.C. Arts Commission included artists as well as those interested in artists activities and programs. As a consequence, non-artists were asked to indicate they were not an artists and return the survey to us. This permitted us to reduce the total in the list by about 10 percent for projecting population totals. Artists who responded were asked a wide variety of questions and, for reporting purposes, are grouped by broad classification as Visual Artist (except painting); Painting, Music Artist, Theatre Artist, and Literary Artist. Because of low numbers of responses, remaining respondents were grouped as “other artist.” The survey results for each of these groups is detailed below.

Visual Artist (Except Painting)

Visual artists in South Carolina number an estimated 1,750. The following table breaks down visual artist respondents:

visual arts, general	16.2%
film	7.5%
photography	16.2%
crafts	18.4%
graphics	7.5%
sculpture	11.8%
other visual art	22.4%

On average, these respondents have been in their artistic field 22 years. Forty percent of these artists have masters degrees (Figure V-1). Respondent age categories are shown in Figure V-2. Figure V-3 shows ethnicity as reported by visual artists. The percentages do not sum to 100 as respondents were permitted to choose more than one category (consistent with

Figure V-1. Education Level
Visual Artists (not painting)

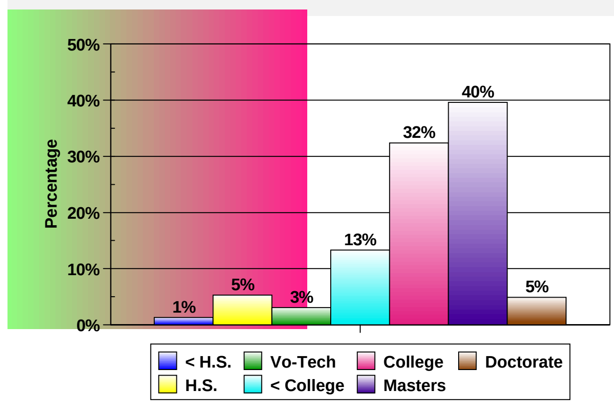
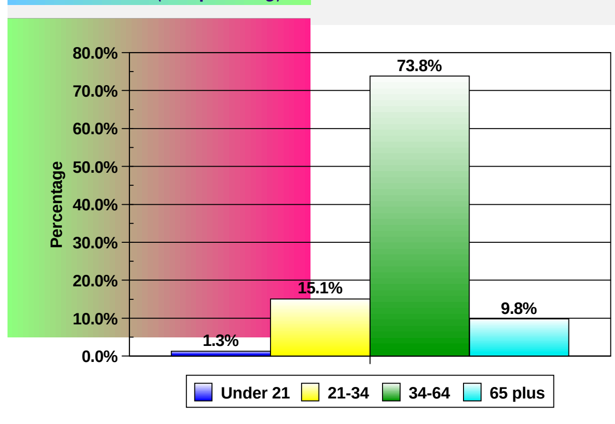


Figure V-2. Respondent Age
Visual Artists (not painting)



It is perceived by most artists (visual artists) that most of the funding and resources are for the performing arts. Would like to see a stronger voice for the visual artists in the Charleston area.
Artist Comment

Figure V-3. Ethnicity
Visual Artists (not painting)

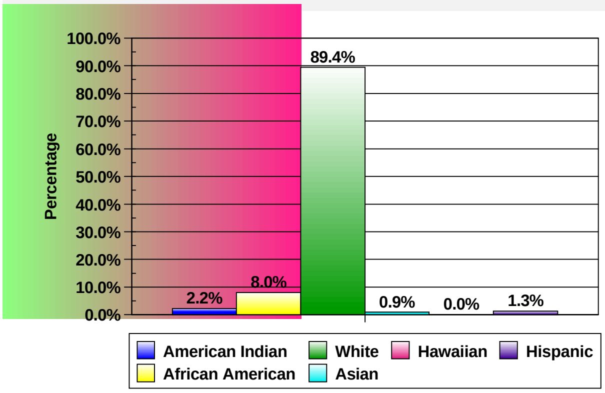
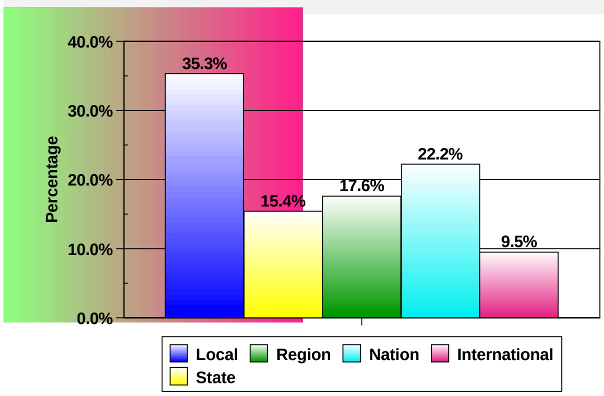


Figure V-4. Level of Professional Activity
Visual Artists (not painting)



the latest Population Census). The majority of visual artists are white, and 60 percent are female.

More than one-third of visual artists report their professional activity to be local, and about one-fourth have a national perspective (Figure V-4). When asked to identify the source of the artists first interest in the arts, about one-third cite family, and one-fourth cite school (Figure V-5). Note that 5 percent had their beginnings in the "Artists in Schools" program.

Visual artists were asked to describe their art and life by responding to a series of questions. The first question asked artists to indicate how many days they spent outside South Carolina in pursuit of their artistic work in an average year. While one-third report no days outside South Carolina, and one artist

Figure V-5. Sparked Interest in Arts
Visual Artists (not painting)

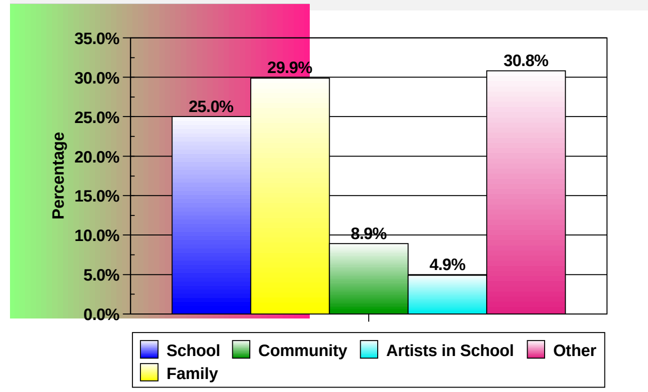
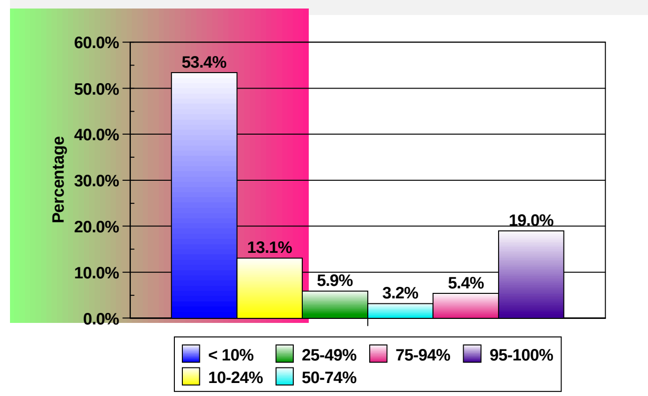


Figure V-6. Artistic Earnings as Percentage of Total
Visual Artists (not painting)



reports spending the entire year away from South Carolina, the average number of days is 20. As Figure V-6 shows, for more than half of visual artists, their artistic endeavors provide less than 10 percent of their total earnings.

The following table shows the estimated total revenue for all visual artists in South Carolina. As seen, the bulk of the visual artist's revenue comes from contractual services and sales of goods.

> *I'd like to see the "untitled" publication really expand in its coverage and consolidation of important arts/funding/contest events—I don't have the time I'd like to research opportunities . . . and it is a great idea to pull together that info at the commission. Thank you for this opportunity.*
> *Artist Comment*

Total revenue from	*Amount*	*Percentage of Total*
contractual services	*$13,210,463*	*47.5%*
art investment	*$336,229*	*1.2%*
sales of goods	*$6,124,205*	*22.0%*
corporate support	*$102,322*	*0.4%*
foundation support	*$97,206*	*0.3%*
government support	*$191,263*	*0.7%*
private grants	*$326,446*	*1.2%*
other income	*$7,443,181*	*26.7%*
total revenue	***$27,831,315***	***100.0%***

Estimated total expenditures by category for all S.C. visual artists are shown in the following table. Note that this is only spending in South Carolina. Spending on personnel and materials and supplies comprise the largest proportions of total expenditures for visual artists. Property is more than 10 percent of total expenditures.

Total expenditures on	*Amount*	*Percentage of Total*
personnel expenditures	*$2,519,377*	*22.3%*
outside fees & services	*$672,498*	*5.9%*
space rental	*$994,592*	*8.8%*
travel	*$790,372*	*7.0%*
marketing	*$608,987*	*5.4%*
materials & supplies	*$2,242,193*	*19.8%*
fund raising	*$14,242*	*0.1%*
debt interest	*$275,422*	*2.4%*
utilities	*$426,206*	*3.8%*
telephone	*$324,169*	*2.9%*
other operations	*$866,623*	*7.7%*
cultural works	*$211,394*	*1.9%*
property	*$1,365,913*	*12.1%*
total expenditures	***$11,311,988***	*100.0%*

Only one-third of visual artists report full time employment in visual arts, that is, in their artistic field. Visual artists go further to explain that earnings in the field are insufficient (reported by 37 percent of respondents), and about 12 percent report that full time work in their artistic field is not available. Sixteen percent report they do not wish to work full time.

Buying art is the most effective way to support artists. Grants enable artists to survive without trying to sell their work.
Artist Comment

More than 40 percent of respondents teach visual arts. Among all visual artists responding to the survey, teaching comprises 48 percent of the work effort in the artistic field.

Visual artists were asked to rank specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Respondents were instructed to rank the information sources (on a scale of 1 to 12, with 12 being the lowest) in terms of their effectiveness in generating information useful to the visual artist (shown in Figure V-7).

Figure V-7. Rank of Effectiveness of Information Sources
Visual Artists (not painting)

1	Invitations and flyers
2	SC Arts Commission Newsletter
3	Newspaper
4	Word of mouth
5	Magazines
6	Other newsletters
7	Local arts agency
8	E-mail/Listserves
9	Web sites
10	Radio
11	Television
12	Professional manager/agent

These results confirm that, for visual artists, invitations and flyers are the most effective source of information, closely followed by the S.C. Arts Commission Newsletter. Least effective are broadcast media and a professional agent or manager.

Paint Artist

There are an estimated 450 paint artists in South Carolina. One hundred fifty respondents classified themselves as paint artists. Painters are a part of visual artists; however, owing to the substantial response rate, their responses were assessed separately from other visual artists.

On average, these respondents have been in their artistic field 28 years. Forty percent of these artists have completed college (Figure P-1). Age categories are shown in Figure P-2. Figure P-3 shows ethnicity as reported by painters. The percentages do not sum to 100 as respondents were permitted to choose more than one category (consistent with the latest Population Census). The majority of paint artists are white, and two-thirds are female.

About one-third of paint artists report their professional activity to be local, and one-fifth have a national perspective (Figure P-4). When asked to identify the source of the artists first interest in the arts, about one-third cite family, and more than one-fourth cite school (Figure P-5). Note that 3 percent had their beginnings in the "Artists in Schools" program.

Figure P-1. Education Level
Paint Artists

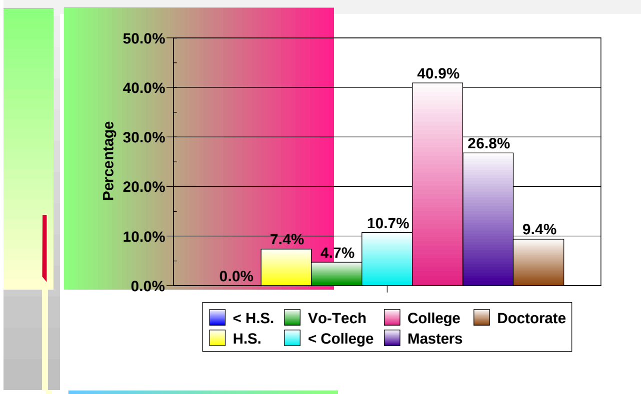


Figure P-2. Respondent Age
Paint Artists

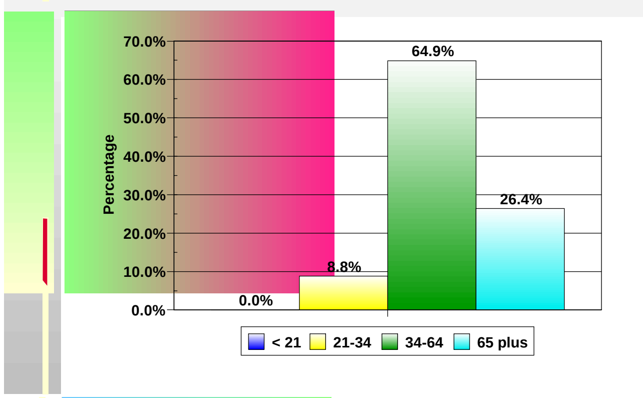


Figure P-3. Ethnicity
Paint Artists

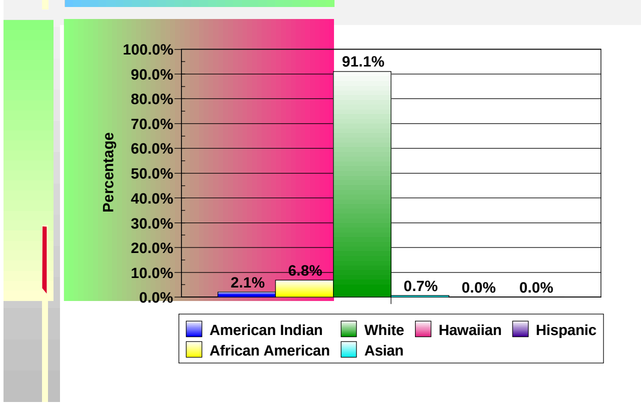


Figure P-4. Level of Professional Activity
Paint Artists

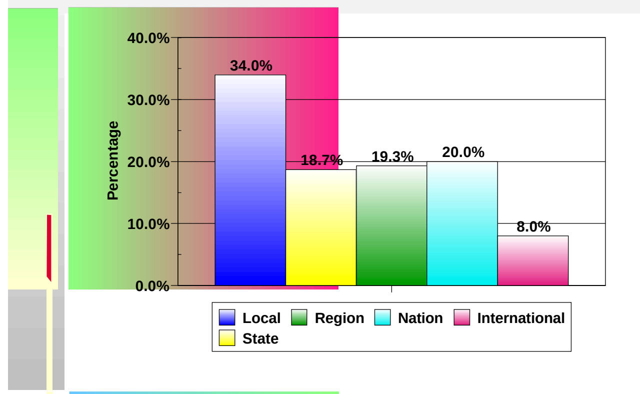
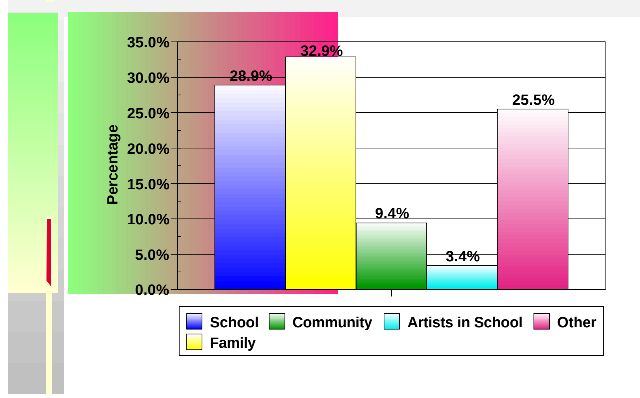


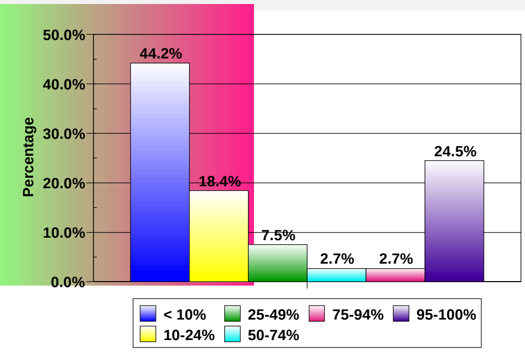
Figure P-5. Sparked Interest in Arts
Paint Artists



Paint artists were asked to describe their art and life by responding to a series of questions. The first question asked artists to indicate how many days they spent outside South Carolina in pursuit of their artistic work in an average year. Similar to visual artists, one-third report no days outside South Carolina. The average number of days is 15. As Figure P-6

Figure P-6. Artistic Earnings as Percentage of Total

Paint Artists



shows, for 44 percent of paint artists, their artistic endeavors provide less than 10 percent of their total earnings. A notable 25 percent report their artistic endeavors provide between 95 and 100 percent of their total earnings.

The following table shows the estimated total revenue for all paint artists in South Carolina. As with visual artists, contractual services and sales of goods contribute most (approximately equal proportions) to paint artists' revenue.

Total revenue from	***Amount***	***Percentage of Total***
contractual services	*$5,168,430*	*33.1%*
art investment	*$1,179,304*	*7.5%*
sales of goods	*$5,606,663*	*35.9%*
corporate support	*$0*	*0.0%*
foundation support	*$84,764*	*0.5%*
government support	*$84,534*	*0.5%*
private grants	*$65,389*	*0.4%*
other income	*$3,438,897*	*22.0%*
total revenue	***$15,627,981***	***100.0%***

Estimated total expenditures by category for all S.C. paint artists are shown in the following table. Note this is only the portion of total expenditures made in South Carolina. One-fifth of total expenditures for painters is for personnel. The next largest share is for other operations (other than those specifically listed). Materials and supplies and property each comprise more than 10 percent of total expenditures.

Total expenditures on	***Amount***	***Percentage of Total***
personnel expenditures	*$2,997,636*	*20.9%*
outside fees & services	*$477,051*	*3.3%*
space rental	*$1,483,956*	*10.4%*
travel	*$931,676*	*6.5%*
marketing	*$821,634*	*5.7%*
materials & supplies	*$1,984,134*	*13.8%*
fund raising	*$28,149*	*0.2%*
debt interest	*$176,356*	*1.2%*
utilities	*$741,845*	*5.2%*
telephone	*$572,799*	*4.0%*
other operations	*$2,401,478*	*16.8%*
cultural works	*$152,927*	*1.1%*
property	*$1,561,002*	*10.9%*
total expenditures	***$14,330,643***	***100.0%***

More than 40 percent of paint artists report full time employment in paint arts, that is, in their artistic field. Paint artists go further to explain that earnings in the field are insufficient (reported by 24 percent of respondents), and 8 percent report that full time work in their artistic field is not available. Thirty percent report they do not wish to work full time.

Almost 50 percent of respondents teach paint arts. Among all paint artists responding to the survey, teaching comprises 36 percent of the work effort in the artistic field.

Paint artists were asked to rank specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Respondents were instructed to rank the information sources (on a scale of 1 to 12, with 12 being the lowest) in terms of their effectiveness in generating information useful to the paint artist (shown in Figure P-7).

These results confirm that, as for paint artists, invitations and flyers are the most effective source of

I use the web more and more often than indicated. I paint portraits of people and dogs, cats, and horses lately. I have approximately 7 commissions to paint by the end of the year. Teaching art in public school consumes 95% of my time and I find time to paint on weekends, vacations, and during the summer.

Artist Comment

Figure P-7. Rank of Effectiveness of Information Sources
Paint Artists

1	Invitations and flyers
2	Word of mouth
3	SC Arts Commission Newsletter
4	Newspaper
5	Other newsletters
6	Local arts agency
7	Magazines
8	Web sites
9	E-mail/Listserves
10	Television
11	Radio
12	Professional manager/agent

information. Though the S.C. Arts Commission Newsletter is in the top three, the second position is taken by word-of-mouth. Least effective are broadcast media and a professional agent or manager.

South Carolina has an estimated 425 artists who are classified as music artists. The following table breaks down respondents in this classification:

music, general	22.0%
composition	8.5%
vocal musician	22.0%
instrumental musician	40.7%
other music artist	6.8%

On average, these respondents have been in their artistic field 33 years. Musicians appear well educated, with almost 80 percent having earned a college degree or higher (Figure M-1). Figure M-2 shows the age categories of the respondent group. Figure M-3 shows ethnicity as reported by visual artists. The percentages do not sum to 100 as respondents were permitted to choose more than one category (consistent with the latest Population Census). While the majority of music artists are white, African-Americans comprise almost one-fourth of this group. In contrast with artist groups reported earlier, 60 percent are male.

Figure M-1. Education Level
Music Artists

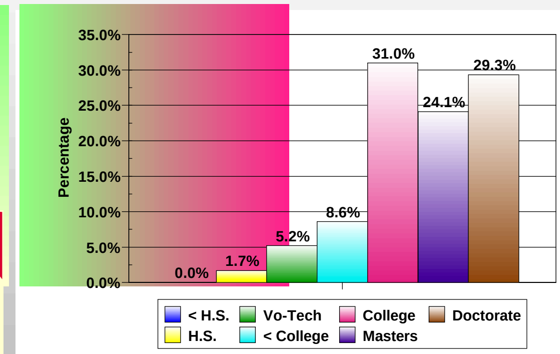


Figure M-2. Respondent Age
Music Artists

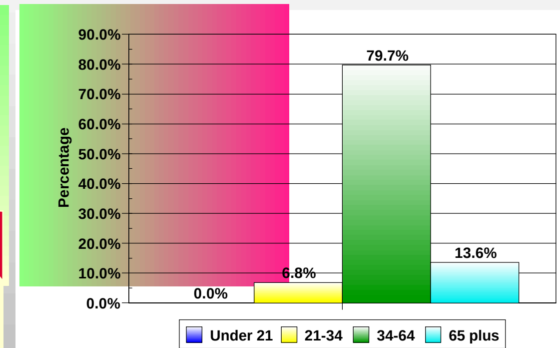
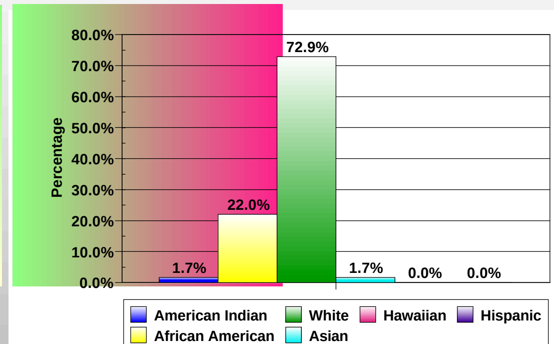


Figure M-3. Ethnicity
Music Artists



More than one-third of music artists report their professional activity to be local, about one-fourth have a regional perspective, and a sizeable 22 percent have an international forum (Figure M-4). The family is a strong force in sparking music artists' interest in the arts: more than 50 percent of music artists cite their

Figure M-4. Level of Professional Activity
Music Artists

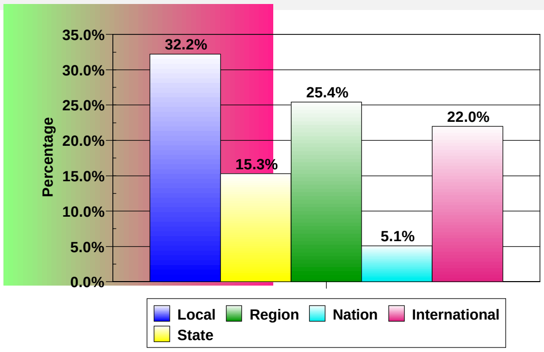


Figure M-6. Artistic Earnings as Percentage of Total
Music Artists

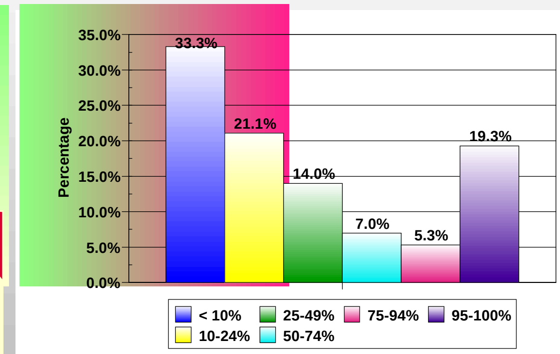
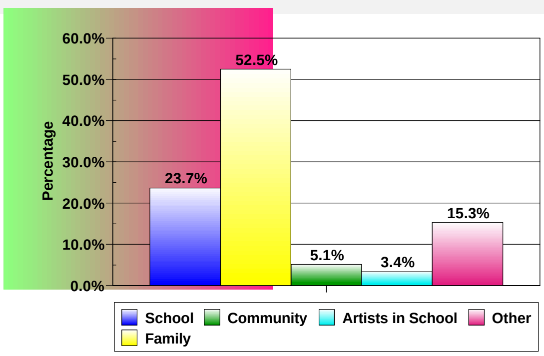


Figure M-5. Sparked Interest in Arts
Music Artists



families (Figure M-5). Note that less than 5 percent had their beginnings in the "Artists in Schools" program.

Music artists were asked to describe their art and life by responding to a series of questions. The first question asked artists to indicate how many days they spent outside South Carolina in pursuit of their artistic work in an average year. About one-fourth report no days outside South Carolina though the average number of days is 20. As Figure M-6 shows, for a third of music artists, their artistic endeavors provide less than 10 percent of their total earnings. Twenty percent of these artists earn almost all their income from their artistic endeavors.

[SCAC needs] Grants specifically for cultural awareness plays/programs geared to support black artists who do poetry, performing arts and musical artists.
Artist Comment

The following table shows the estimated total revenue for all music artists in South Carolina. As seen, more than half of the music artist's revenue comes from contractual services.

Total revenue from	***Amount***	***Percentage of Total***
contractual services	*$4,508,519*	*59.4%*
art investment	*$66,476*	*0.9%*
sales of goods	*$130,367*	*1.7%*
corporate support	*$25,852*	*0.3%*
foundation support	*$0*	*0.0%*
government support	*$465,331*	*6.1%*
private grants	*$43,579*	*0.6%*
other income	*$2,354,353*	*31.0%*
total revenue	***$7,594,476***	***100.0%***

Estimated total expenditures by category for all S.C. music artists are shown in the following table. Note that only the portion of total expenditures spent in South Carolina is shown. Spending on personnel comprises the largest proportion of total expenditures for music artists. Materials and supplies constitute 15 percent, and travel is more than 10 percent of total expenditures.

Total expenditures on	***Amount***	***Percentage of Total***
personnel expenditures	*$1,042,184*	*40.0%*
outside fees & services	*$131,623*	*5.0%*
space rental	*$73,737*	*2.8%*
travel	*$307,800*	*11.8%*
marketing	*$134,297*	*5.2%*
materials & supplies	*$400,746*	*15.4%*

fund raising	*$369*	*0.0%*
debt interest	*$37,598*	*1.4%*
utilities	*$54,484*	*2.1%*
telephone	*$77,293*	*3.0%*
other operations	*$81,438*	*3.1%*
cultural works	*$332*	*0.0%*
property	*$265,196*	*10.2%*
total expenditures	***$2,607,098***	***100.0%***

About 40 percent of music artists report full time employment in visual arts, that is, in their artistic field. Music artists go further to explain that the three prime reasons they do not work fulltime in their artistic field are *(i)* earnings are not sufficient (29 percent); *(ii)* fulltime work is not available (27 percent); and *(iii)* the artist does not want to work fulltime (21 percent).

I do quite a bit of cultural work for which I am unpaid - for instance, I am the choir director at my church, where I conduct and arrange vocal and instrumental music.
Artist Comment

More than half (58 percent) of respondents teach music arts. Among all music artists responding to the survey, teaching comprises 48 percent of the work effort in the artistic field.

Music artists were asked to rank specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Respondents were instructed to rank the information sources (on a scale of 1 to 12, with 12 being the lowest) in terms of their effectiveness in generating information useful to the music artist (shown in Figure M-7).

These results confirm that, for music artists, newspapers are the most effective source of information, closely followed by word-of-mouth. Least effective are the local arts agency and a professional agent or manager.

Figure M-7. Rank of Effectiveness of Information Sources
Music Artists

1	Newspaper
2	Word of mouth
3	Invitations and flyers
4	SC Arts Commission Newsletter
5	Radio
6	Magazines
7	Web sites
8	E-mail/Listserves
9	Television
10	Other newsletters
11	Local arts agency
12	Professional manager/agent

Theatre Artist

Theatre artists in South Carolina are estimated to number 250. The following table breaks down theatre artists who responded to the survey:

theatre, general	5.7%
directing	20.2%
acting	34.3%
other theatre	40.0%

On average, these respondents have been in their artistic field 21 years. The majority of responding theatre artists have college degrees (Figure T-1), with many having postgraduate degrees. The age categories shown in Figure T-2 are relatively consistent with the artist groups already reported. Figure T-3 shows ethnicity as reported by theatre artists. The percentages do not sum to 100 as respondents were

Figure T-1. Education Level
Theatre Artists

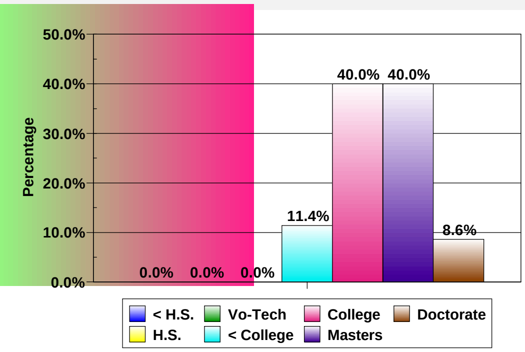


Figure T-2. Respondent Age
Theatre Artists

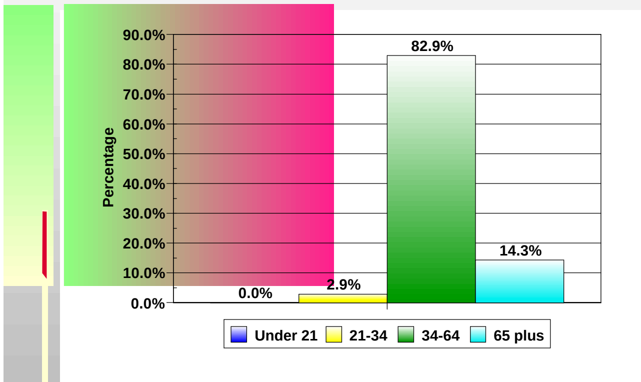


Figure T-3. Ethnicity
Theatre Artists

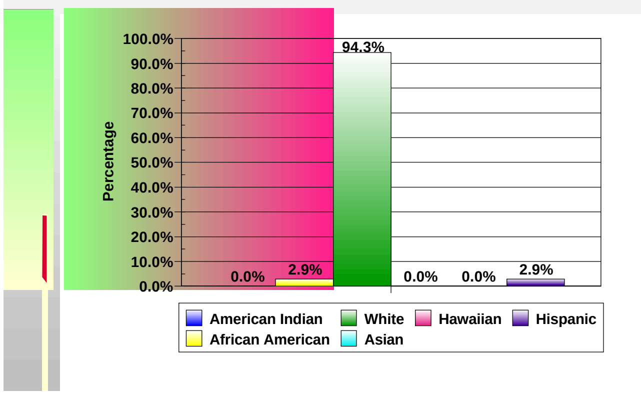


Figure T-4. Level of Professional Activity
Theatre Artists

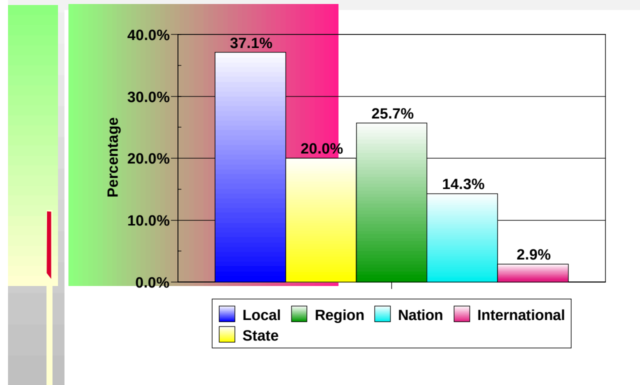
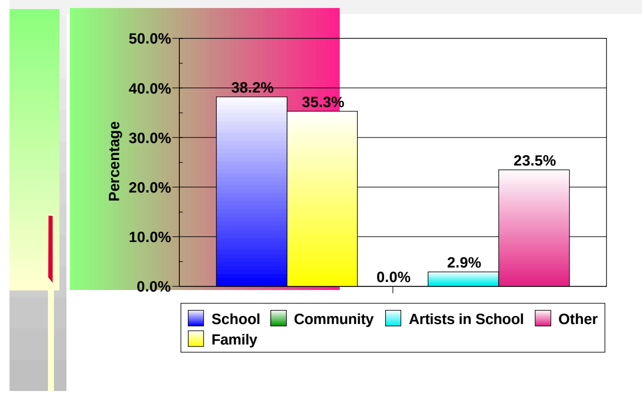


Figure T-5. Sparked Interest in Arts
Theatre Artists



permitted to choose more than one category (consistent with the latest Population Census). The majority of theatre artists are white, and 54 percent are female.

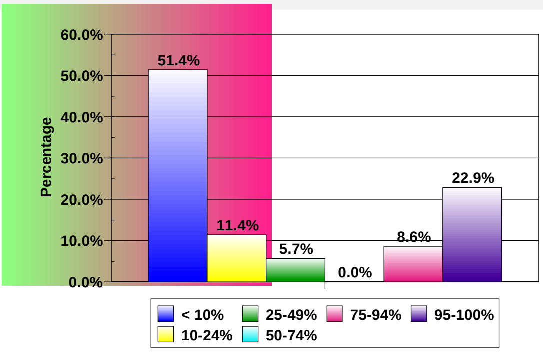
More than one-third of theatre artists report their professional activity to be local, and about one-fourth have a regional perspective (Figure T-4). When asked to identify the source of the artists first interest in the arts, families and schools are most often cited (Figure T-5). Less than 5 percent had their beginnings in the "Artists in Schools" program.

Theatre artists were asked to describe their art and life by responding to a series of questions. The first question asked artists to indicate how many days they spent outside South Carolina in pursuit of their artistic work in an average year. While 29 percent report no days outside South Carolina, and one artist reports spending the two-thirds of the year away from South Carolina, the average number of days is 27. As Figure T-6 shows, for more than half of theatre artists, their artistic endeavors provide less than 10 percent of their total earnings.

> *. . . SCAC needs to work more on encouraging young people to be performers in all ways rather than . . . being viewers and spongers.*
> Artist Comment

The following table shows the estimated total revenue for all theatre artists in South Carolina. As seen, the source of the theatre artist's revenue is about evenly split between contractual services and other (unspecified) income.

Figure T-6. Artistic Earnings as Percentage of Total
Theatre Artists



Total revenue from	*Amount*	*Percentage of Total*
contractual services	*$1,540,771*	*50.2%*
art investment	*$2,520*	*0.1%*
sales of goods	*$31,500*	*1.0%*
corporate support	*$22,680*	*0.7%*
foundation support	*$30,240*	*1.0%*
government support	*$37,800*	*1.2%*
private grants	*$15,750*	*0.5%*
other income	*$1,386,000*	*45.2%*
total revenue	***$3,067,261***	***100.0%***

Estimated total expenditures by category for all S.C. theatre artists are shown in the following table. Note that this is only the portion of total expenditures spent in South Carolina. Spending on personnel and travel comprise the largest proportions of total expenditures for theatre artists. In contrast to expenditures for artists reported above, property is less than 5 percent of total expenditures.

Total expenditures on	*Amount*	*Percentage of Total*
personnel expenditures	*$1,042,184*	*49.0%*
outside fees & services	*$78,498*	*3.7%*
space rental	*$16,380*	*0.8%*
travel	*$281,887*	*13.3%*
marketing	*$110,565*	*5.2%*
materials & supplies	*$223,205*	*10.5%*
fund raising	*$12,600*	*0.6%*
debt interest	*$5,040*	*0.2%*
utilities	*$54,432*	*2.6%*
telephone	*$113,362*	*5.3%*
other operations	*$136,028*	*6.4%*
cultural works	*$11,025*	*0.5%*
property	*$41,983*	*2.0%*
total expenditures	***$2,127,189***	***100.0%***

Slightly more than one-third of theatre artists report full time employment in theatre arts, that is, in their artistic field. Theatre artists go further to explain that there are primarily two reasons for not working fulltime in their field: (i) fulltime work is not available (cited by 41 percent of respondents) and (ii) earnings in the field are insufficient (cited by 32 percent of respondents). Fourteen percent report they do not wish to work full time.

Almost two-thirds of respondents teach theatre arts. Among all theatre artists responding to the survey, teaching comprises 50 percent of the work effort in the artistic field.

Theatre artists were asked to rank specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Respondents were instructed to rank the information sources (on a scale of 1 to 12, with 12 being the lowest) in terms of their effectiveness in generating information useful to the visual artist (shown in Figure T-7).

Figure T-7. Rank of Effectiveness of Information Sources
Theatre Artists

1	Word of mouth
2	Newspaper
3	Invitations and flyers
4	Other newsletters
5	SC Arts Commission Newsletter
6	E-mail/Listserves
7	Local arts agency
8	Magazines
9	Web sites
10	Television
11	Professional manager/agent
12	Radio

These results confirm that, for theatre artists, word-of-mouth and newspapers are the most effective sources of information, closely followed by invitations and flyers. Least effective are broadcast media and a professional agent or manager.

I enjoy writing short stories but, due to my full-time, very demanding job and family obligations, I don't have time to write now. I like to keep up, however, with what is going on in S.C. concerning the arts.
Artist Comment

Literary Artists

There are more than 3,500 (estimated) literary artists in South Carolina. The following table classifies the literary artist respondents:

literary, general	32.5%
fiction prose	27.9%
poetry	22.7%
nonfiction prose	13.6%
script writer	1.9%
other literary	1.3%

On average, these respondents have been in their artistic field 23 years. Three-fourths of these artists have college degrees or more (Figure L-1). Age categories of literary artist respondents are shown in Figure L-2. Figure L-3 shows ethnicity as reported by literary artists. The percentages do not sum to 100 as respondents were permitted to choose more than one category (consistent with the latest Population Census). The majority of literary artists are white, and 62 percent are female.

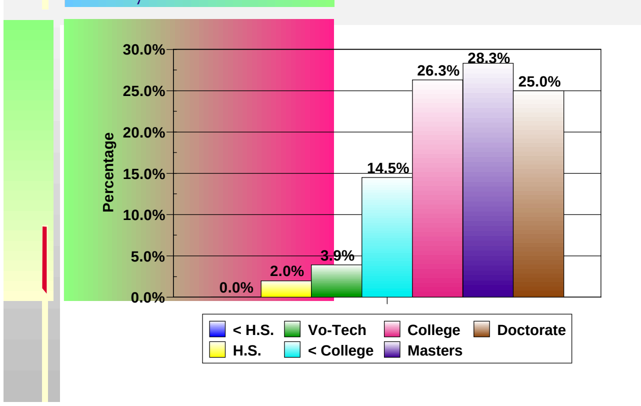


Figure L-1. Education Level
Literary Artists

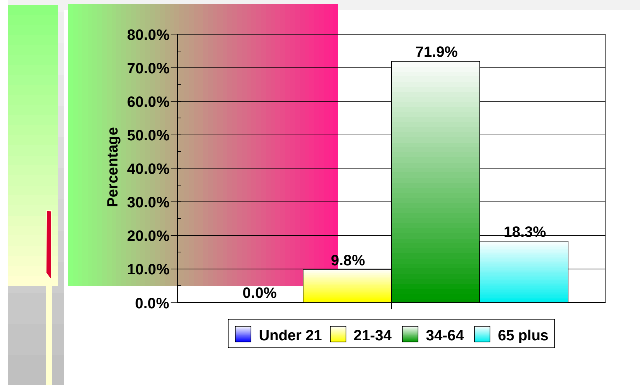


Figure L-2. Respondent Age
Literary Artists

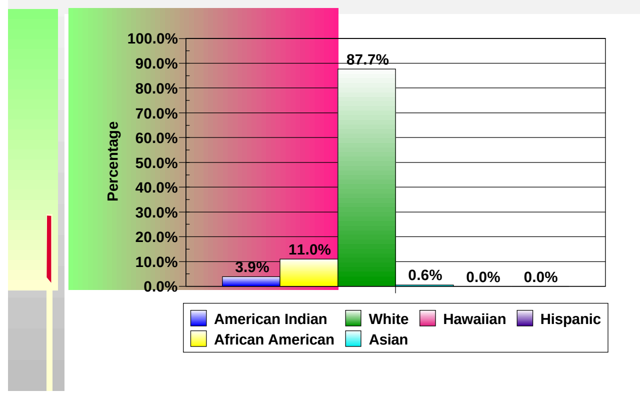


Figure L-3. Ethnicity
Literary Artists

About a third of literary artists report their professional activity to be local, and another third report a national perspective (Figure L-4). When asked to identify the source of the artists first interest in the arts, schools top the list at 40 percent of respondents (Figure L-5). Note that less than 1 percent had their beginnings in the "Artists in Schools" program.

Literary artists were asked to describe their art and life by responding to a series of questions. The first question asked artists to indicate how many days they spent outside South Carolina in pursuit of their artistic work in an average year. Almost 50 percent report no days outside South Carolina in an average year, and the average number of days for all respondents is 7. As Figure L-6 shows, for 85 percent of

Figure L-4. Level of Professional Activity
Literary Artists

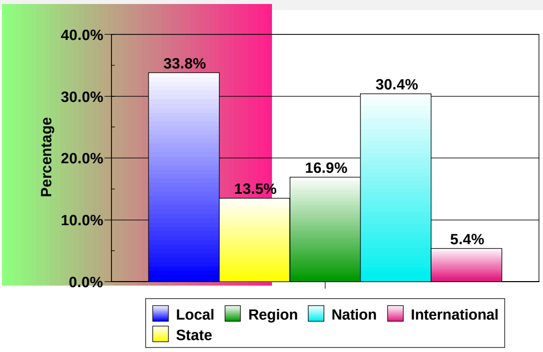


Figure L-5. Sparked Interest in Arts
Literary Artists

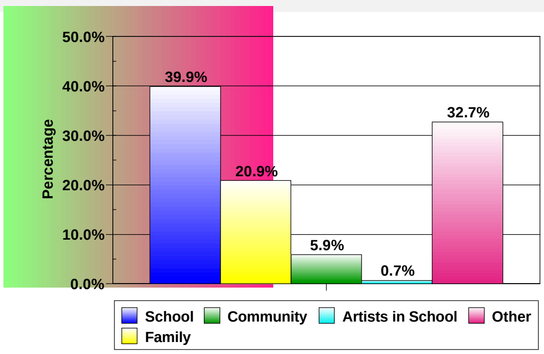
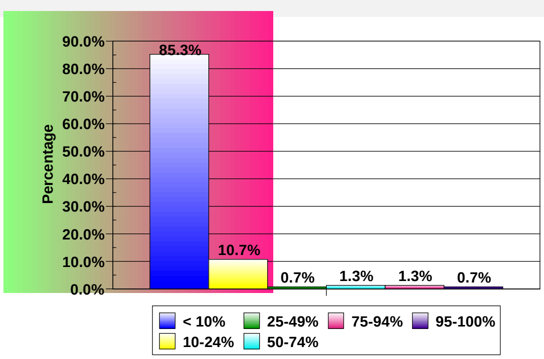


Figure L-6. Artistic Earnings as Percentage of Total
Literary Artists



literary artists, their artistic endeavors provide less than 10 percent of their total earnings.

The following table shows the estimated total revenue for all literary artists in South Carolina. As seen, more than 80 percent of the literary artist's revenue comes from contractual services.

Total revenue from	***Amount***	***Percentage of Total***
contractual services	*$4,114,745*	*81.7%*
art investment	*$15,747*	*0.3%*
sales of goods	*$106,311*	*2.1%*
corporate support	*$0*	*0.0%*
foundation support	*$16,250*	*0.3%*
government support	*$147,429*	*2.9%*
private grants	*$6,131*	*0.1%*
other income	*$628,977*	*12.5%*
total revenue	***$5,035,590***	***100.0%***

> SCAC devotes too much time, energy, and money to "crafts" and . . . too little to literary arts.
> Artist Comment

Estimated total expenditures for all S.C. literary artists by category are shown in the following table. Note that this is the portion of total expenditures spent in South Carolina. Relative to other artists, literary artists spend relatively little on personnel, with the greatest proportion of spending being for other operations. Property is 6 percent of total expenditures.

Total expenditures on	***Amount***	***Percentage of Total***
personnel expenditures	*$167,132*	*13.4%*
outside fees & services	*$124,939*	*10.0%*
space rental	*$15,968*	*1.3%*
travel	*$138,384*	*11.1%*
marketing	*$58,721*	*4.7%*
materials & supplies	*$146,704*	*11.8%*
fund raising	*$0*	*0.0%*
debt interest	*$3,235*	*0.3%*
utilities	*$49,182*	*4.0%*
telephone	*$83,646*	*6.7%*
other operations	*$369,476*	*29.7%*
cultural works	*$14,293*	*1.1%*
property	*$72,812*	*5.9%*
total expenditures	***$1,244,493***	***100.0%***

Only 8 percent of literary artists report full time employment in visual arts, that is, in their artistic field. The primary reason literary artists do not work fulltime in their field is that earnings in the field are insufficient (reported by 48 percent of respondents). Sixteen percent report that full time work is simply not available, and 10 percent report they do not wish to work full time.

About 35 percent of respondents teach literary arts. Among all literary artists responding to the survey, teaching comprises 58 percent of the work effort in the artistic field.

Literary artists were asked to rank specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Respondents were instructed to rank the information sources (on a scale of 1 to 12, with 12 being the lowest) in terms of their effectiveness in generating information useful to the literary artist (shown in Figure L-7).

Figure L-7. Rank of Effectiveness of Information Sources
Literary Artists

1	SC Arts Commission Newsletter
2	Magazines
3	Newspaper
4	Word of mouth
5	Invitations and flyers
6	Other newsletters
7	Web sites
8	E-mail/Listserves
9	Radio
10	Local arts agency
11	Television
12	Professional manager/agent

These results confirm that, for literary artists, the S.C. Arts Commission Newsletter is the most effective, followed relatively closely by magazines. Least effective are broadcast media, a professional agent or manager, and the local arts agency.

Other Artists

The last category of artists is simply the collection of those artists who did not fit into the previously reported groups. These include creative support artists, media artists, and dance artists. South Carolina number is estimated to have about 700 of these artists.

On average, these respondents have been in their artistic field 25 years. Abut a third of these artists have masters degrees (Figure O-1). Figure O-2 provides the age categories for other artist respondents. Figure O-3 shows ethnicity as reported by visual

Figure O-1. Education Level
Other Artists

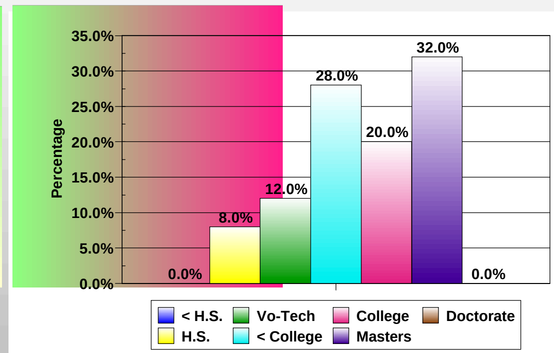


Figure O-2. Respondent Age
Other Artists

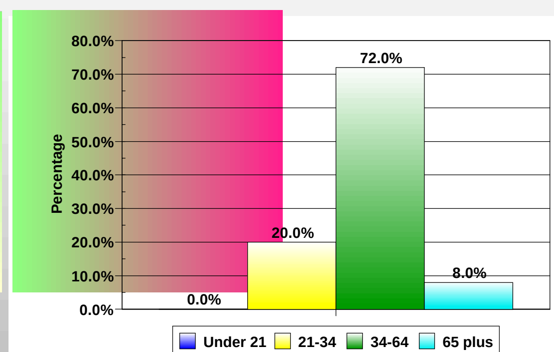
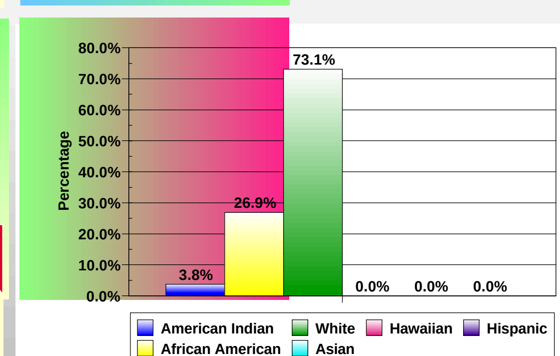


Figure O-3. Ethnicity
Other Artists



artists. The percentages do not sum to 100 as respondents were permitted to choose more than one category (consistent with the latest Population Census). The majority of other artists are white, and 72 percent are female.

. . . the Arts Commission should take on an aggressive education outreach program to secure alliances and relationships will all education institutions, non-conditionally.
Artist Comment

More than half of other artists report their professional activity to be state or local (Figure O-4). When asked to identify the source of the artists first interest in the arts, More than half cite family, and schools, cited by 11 percent of respondents, follow in second place (Figure O-5). Note that less than 5 percent had their beginnings in the "Artists in Schools" program.

Figure O-4. Level of Professional Activity
Other Artists

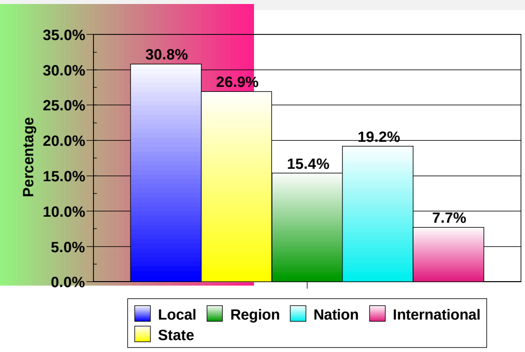
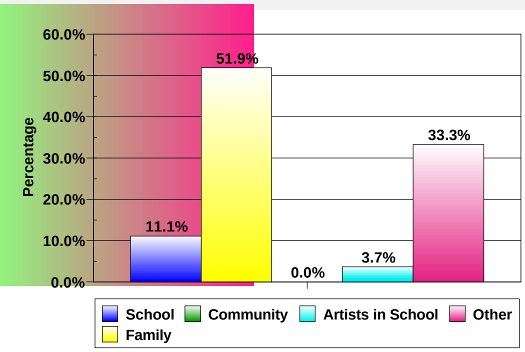
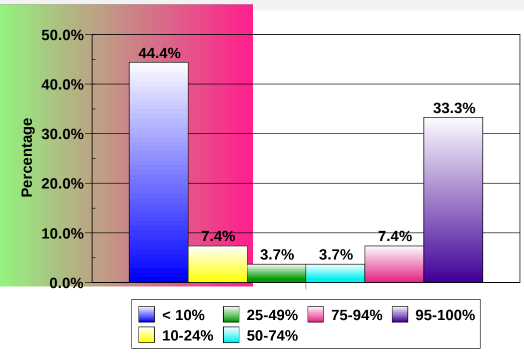


Figure O-5. Sparked Interest in Arts
Other Artists



Other artists were asked to describe their art and life by responding to a series of questions. The first question asked artists to indicate how many days they spent outside South Carolina in pursuit of their artistic work in an average year. Almost half (42 percent) report no days outside South Carolina, and the average number of days among all these artists is 14. As Figure O-6 shows, for 44 percent of other artists, their artistic endeavors provide less than 10 percent of their total earnings.

Figure O-6. Artistic Earnings as Percentage of Total
Other Artists



The following table shows the estimated total revenue for all other artists in South Carolina. As seen, the bulk of the other artist's revenue comes from contractual services and sales of goods.

Total revenue from	*Amount*	*Percentage of Total*
contractual services	*$8,002,755*	*78.8%*
art investment	*$267,923*	*2.6%*
sales of goods	*$217,018*	*2.1%*
corporate support	*$0*	*0.0%*
foundation support	*$20,094*	*0.2%*
government support	*$0*	*0.0%*
private grants	*$0*	*0.0%*
other income	*$1,644,807*	*16.2%*
total revenue	***$10,152,597***	***100.0%***

Estimated total expenditures by category for all S.C. other artists are shown in the following table. Note that this is only the portion of total expenditures made in South Carolina. Spending on space rental is the largest share of total expenditures for other artists.

Property is more than 10 percent of total expenditures.

Total expenditures on	*Amount*	*Percentage of Total*
personnel expenditures	*$566,754*	*11.8%*
outside fees & services	*$365,959*	*7.6%*
space rental	*$1,022,609*	*21.3%*
travel	*$527,952*	*11.0%*
marketing	*$411,263*	*8.6%*
materials & supplies	*$527,063*	*11.0%*
fund raising	*$0*	*0.0%*
debt interest	*$35,109*	*0.7%*
utilities	*$234,789*	*4.9%*
telephone	*$242,036*	*5.1%*
other operations	*$220,829*	*4.6%*
cultural works	*$114,242*	*2.4%*
property	*$521,726*	*10.9%*
total expenditures	***$4,790,329***	***100.0%***

About 40 percent of other artists report full time employment in in their artistic field. Though 13 percent of these artists indicate they do not want to work fulltime, 60 percent say fulltime work is simply not available.

More than half of respondents (56 percent) teach in their artistic field. Among all other artists responding to the survey, teaching comprises 69 percent of the work effort in the artistic field.

Need more funding of performance art out of the ordinary dance and performance. Need a comprehensive newsletter of upcoming visual and performance art listing auditions and opportunities from studios theatres and galleries.
Artist Comment

These artists were asked to rank specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Respondents were instructed to rank the information sources (on a scale of 1 to 12, with 12 being the lowest) in terms of their effectiveness in generating information useful to the other artist (shown in Figure O-7).

These results confirm that, for other artists, newspapers are the most effective source of information,

Figure O-7. Rank of Effectiveness of Information Sources
Other Artists

1	Newspaper
2	Invitations and flyers
3	Word of mouth
4	Magazines
5	Other newsletters
6	SC Arts Commission Newsletter
7	Local arts agency
8	Web sites
9	Television
10	Radio
11	E-mail/Listserves
12	Professional manager/agent

closely followed by invitations and flyers. Least effective are broadcast media, a professional agent or manager, and e-mail or listserves.

Summary

The final portion of this appendix summarizes the results of the survey of South Carolina artists that has been presented by artist group above. The purpose of this summary is to show how artists differ from each other. The following table classifies respondents:

visual arts	34.9%
painting	23.0%
music	9.0%
theatre	5.4%
literary	23.6%
other	4.0%

On average, these respondents have been in their artistic field 25 years. Looking only at education level from some college to doctorate, proportionately more musicians and literary artists have doctorates (Figure S-1). Figure S-2 shows that painters and literary artists tend to be older, while visual and other artists tend to be younger. Figure S-3 looks only at African-American and White composition of different artist groups. Here we see that proportionately more musicians and other artists are African-American.

When level of professional activity is examined, it becomes clear that musicians tend to operate on an

Figure S-1. Education Level, Abbreviated Results
Summary

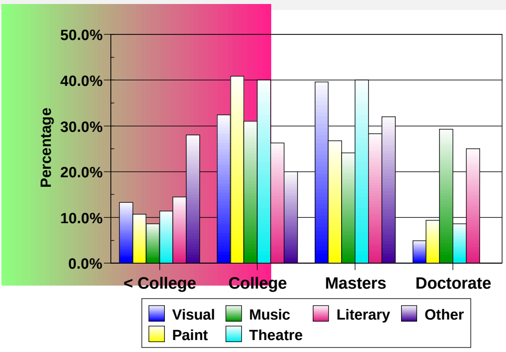


Figure S-2. Respondent Age
Summary

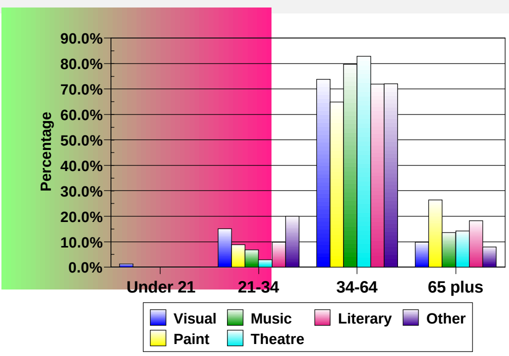
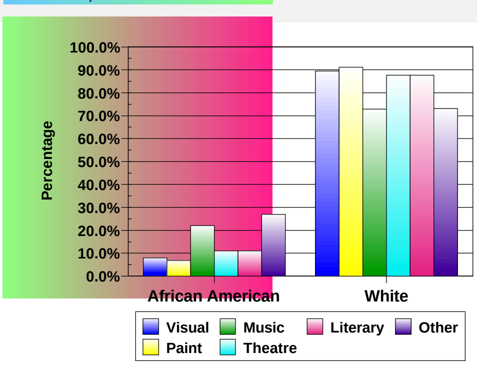


Figure S-3. Ethnicity, Abbreviated Results
Summary



international level, literary artists on a national level, and other artists at the state level (Figure S-4). Looking at the source of the artists first interest in the arts, Figure S-5 shows that schools had a greater influence on theatre and literary artists while schools had a larger influence on music artists and other artists.

Figure S-4. Level of Professional Activity
Summary

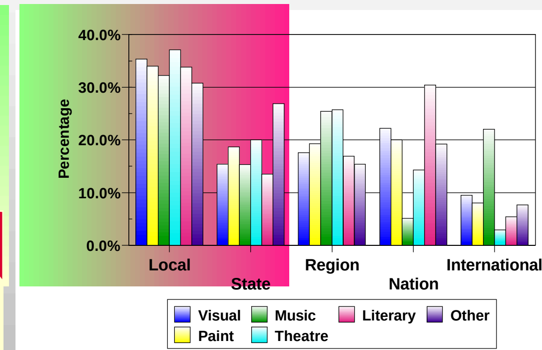
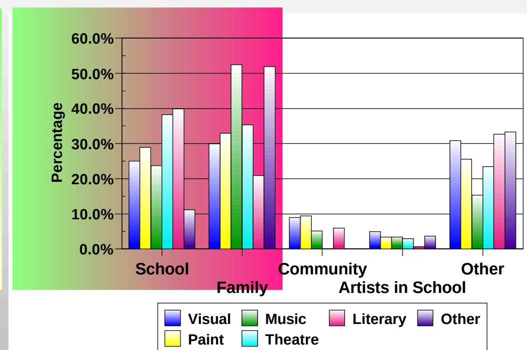


Figure S-5. Sparked Interest in Arts, Abbreviated Results
Summary



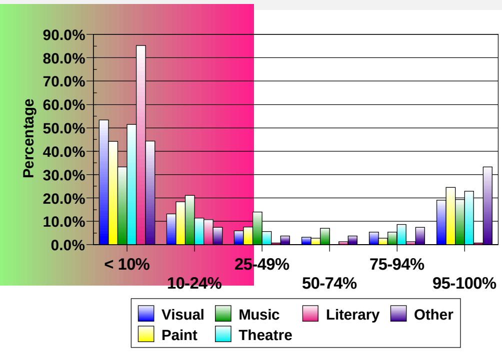
For all South Carolina artists, the average number of days spent outside South Carolina is 16. As Figure S-6 shows, proportionately more literary artists earn less than 10 percent of their total earnings from their artistic efforts, and proportionately more paint artists earn 95-100 percent of their total earnings from their artistic efforts..

> *Many opportunities are closed to seniors. We are the ones with the greatest amount of experience and time. Our talents should be used. A small salary would be helpful since many of us are living on fixed incomes.*
> *Artist Comment*

The table on the next page shows estimated revenue and expenditures for artists in South Carolina. The table details the proportions each component of revenue or expenditure comprises. The table arrows

Figure S-6. Artistic Earnings as Percentage of Total

Summary



point to percentages that are noticeably different from those of other artist categories. Highlights from this table are:

- → Literary and other artists earn proportionately more of their income from contractual services.
- → Painters earn proportionately more from the sale of goods.
- → Theatre artists depend most on other income.
- → Personnel expenditures are proportionately highest for theatre and literary artists.
- → Visual artists spend proportionately more for materials and supplies.
- → Literary artists spend proportionately more for operating expenses different from those elsewhere

Summary of Revenues and Expenditures by Category

Revenue

	Visual	Paint	Music	Theatre	Literary	Other
total revenue coming from contractual services	47.5%	33.1%	59.4%	50.2%	81.7%	78.8%
total art investment income	1.2%	7.5%	0.9%	0.1%	0.3%	2.6%
total revenue in sales of goods	22.0%	35.9%	1.7%	1.0%	2.1%	2.1%
total revenue from corporate support	0.4%	0.0%	0.3%	0.7%	0.0%	0.0%
total revenue from foundation support	0.3%	0.5%	0.0%	1.0%	0.3%	0.2%
total revenue from government support	0.7%	0.5%	6.1%	1.2%	2.9%	0.0%
total revenue from private grants	1.2%	0.4%	0.6%	0.5%	0.1%	0.0%
other income	26.7%	22.0%	31.0%	45.2%	12.5%	16.2%
total revenue	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Expenditures

	Visual	Paint	Music	Theatre	Literary	Other
total personnel expenditures	22.3%	20.9%	40.0%	49.0%	13.4%	11.8%
total outside fee and service expenditures	5.9%	3.3%	5.0%	3.7%	10.0%	7.6%
total space rental expenditure	8.8%	10.4%	2.8%	0.8%	1.3%	21.3%
total expenditure on travel	7.0%	6.5%	11.8%	13.3%	11.1%	11.0%
total expenditure on marketing	5.4%	5.7%	5.2%	5.2%	4.7%	8.6%
total expenditure on materials and supplies	19.8%	13.8%	15.4%	10.5%	11.8%	11.0%
total expense on fund raising	0.1%	0.2%	0.0%	0.6%	0.0%	0.0%
total expense on debt interest	2.4%	1.2%	1.4%	0.2%	0.3%	0.7%
total expense on utilities	3.8%	5.2%	2.1%	2.6%	4.0%	4.9%
total telephone bill expenses	2.9%	4.0%	3.0%	5.3%	6.7%	5.1%
total on other operating expenses	7.7%	16.8%	3.1%	6.4%	29.7%	4.6%
total cultural works expenses	1.9%	1.1%	0.0%	0.5%	1.1%	2.4%
total property expenses	12.1%	10.9%	10.2%	2.0%	5.9%	10.9%
total expenditures	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Note: The arrows point to percentages that are noticeably different from the percentages for other categories of artists.

listed in the table.

→ Space rental is a hefty expenditure for other artists.

For all artists, less than one-third report full time employment in their artistic field, citing insufficient earnings as the primary reason. Almost 20 percent they do not wish to work full time.

About half of all artists teach. Among these, teaching comprises 49 percent of the work effort in the artistic field.

Figure S-7 compares the ranks of specific information sources that may have been used to garner information concerning events, funding sources, grants, festivals, and other things. Note: Yellow cells represent the three most effective sources while pink cells represent the three least effective. These results clearly show that different sources of information vary in effectiveness by type of artist, broadcast media and a manager are unproductive for all artists.

Figure S-7. Rank of Effectiveness of Information Sources

Summary

V	P	M	T	L	O	
3	4	1	2	2	1	Newspaper
1	1	3	3	5	2	Invitations and flyers
4	2	2	1	4	3	Word of mouth
5	7	6	8	2	4	Magazines
6	5	10	4	6	5	Other newsletters
2	3	4	5	1	6	SC Arts Commission Newsletter
7	6	11	7	10	7	Local arts agency
9	8	7	9	7	8	Web sites
11	10	9	10	11	9	Television
10	11	5	12	9	10	Radio
8	9	8	6	8	11	E-mail/Listserves
12	12	12	11	12	12	Professional manager/agent

Note: Yellow cells represent the three most effective sources while pink cells represent the three least effective.

South Carolina Arts Commission deserves a lot of credit for all the great impact and service the staff devotes in promoting, educating and improving all the Arts in South Carolina. They are such a dedicated group of people. Personally, I am very indebted to these people for all the help they generously bestowed on me.
Artist Comment

Report on the Survey of For Profit Organizations

Introduction

An important component of the cultural industry is the cluster of retail businesses that serve the industry—for example, selling instruments or using one's artistic talents in an organization such as interior design or dance instruction. Surveys were mailed to "for profit" organizations including landscape artists, art galleries and dealers, potters, architects, graphic designers, and so forth. This report focuses primarily on the average (mean) response of "for profit" organizations. Estimated total expenditures for this group (used to develop the economic impact statement) are conservative as some "for profit" organizations, such as department stores selling artists' supplies, were not included.

Profile

On average, "for profit" organizations in South Carolina have operated 12 years. These stores report about 260 people served in an average week. Of these, 18 percent are from outside South Carolina. Two-thirds are from the county in which the store is located, and more of these are from the local community.

Revenue/Income & Expenditures

The following table shows the total estimated revenue as well as expenditures by category for the typical "for profit" organization in South Carolina. The percentage of the total is shown in parentheses.

Revenue

admissions	$131 (0.0%)
contractual services	$158,300 (57.6%)
investment income	$2,013 (0.7%)
sales of goods	$68,252 (24.8%)
other income	$56,416 (20.5%)
total amount of revenue/income	*$274,696 (100%)*

Expenditure in South Carolina

administrative salaries	$61,260 (38.4%)
artistic personnel salaries	$13,058 (8.2%)
technical/production personnel salaries	$6,615 (4.2%)
artistic fees and services	$438 (0.3%)
other professionanl services	$14,527 (9.1%)
space rental	$10,187 (6.4%)
travel	$1,903 (1.2%)
marketing	$2,397 (1.5%)
materials and supplies	$6,561 (4.1%)
debt interest	$2,820 (1.8%)
utilities	$2,293 (1.4%)

telephone $2,293 (1.4%)
other expense $18,545 (11.6%)
acquisition of all kinds of cultural works $696 (0.4%)
property $15,923 (10.0%)
total expenditures $159,383 (100%)

Not surprisingly, the majority of income of "for profit" organizations is from contractual services and sale of goods. For expenditures, administrative personnel comprise the lion's share at nearly 40 percent of total expenditures. Each of property and other (unspecified) expense comprise more than 10 percent of the total. Note these are expenditures *in South Carolina*.

Other Information

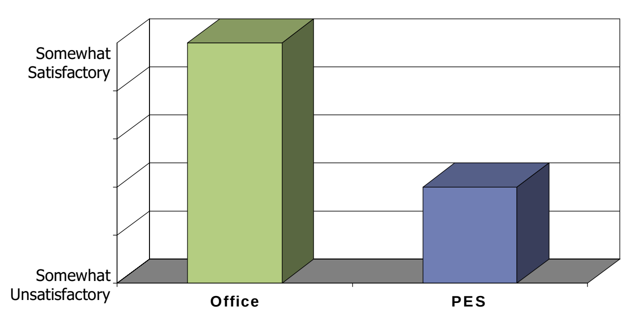
Each "for profit" organization employs, on average, 3 fulltime equivalents and has 6 volunteers donating 195 hours in the most recent year of operations. Each organization also employs an average of two professional artists and serves 25 professional artists.

"For profit" organization personnel were asked to rank ten activities in terms of their importance to the company. As would be expected, identifying customers is most important (figure to the right), followed by community attitude and cost of supplies and materials. Least important are proximity to artists and support of local arts organizations.

Importance Rank of Issues by "For Profit" Organizations

Identifying customers	1
Community attitude toward arts/culture	2
Cost of supplies/materials	3
Advertising/promotion	4
Startup money/funding	5
Identifying service providers	6
Publicity	7
Cost of artistic personnel & services	8
Support of local arts/cultural organizations	8
Proximity to high concentrations of artists and arts organizations	10

Assessment of Adequacy of Office and PES space



Suppliers were also asked to assess office as well as performance or exhibition or service (PES) space. The typical supplier reports 950 square feet of office space and 2,400 square feet of PES space. Nearly half of "for profit" organizations own their office and their PES space. Only 5 percent share their office space, while almost 15 percent share their PES space. Using a scale of "very satisfactory to "very unsatisfactory", suppliers rated the adequacy of office and PES space. As seen in the figure to the left, "for profit" organizations are more satisfied with the adequacy of their office space than with their PES space.