

Appendix B: Business/Organisation Survey Data

1. Basic Details and Overview

1.1 Location

| | N | % |
|---------------|-----------|------------|
| Gauteng | 33 | 46 |
| Western Cape | 17 | 24 |
| Kwazulu Natal | 6 | 8 |
| Mpumalanga | 4 | 6 |
| Eastern Cape | 3 | 4 |
| Free State | 3 | 4 |
| North West | 3 | 4 |
| Limpopo | 1 | 1 |
| Northern Cape | 1 | 1 |
| TOTAL | 71 | 100 |

1.2 Age of Business Owner/Top Manager

| | |
|------|----|
| N | 65 |
| mean | 47 |
| p25 | 37 |
| p50 | 44 |
| min | 24 |
| max | 78 |

| | N | mean | p25 | p50 | min | max |
|---|-----------|-----------|-----------|-----------|-----------|-----------|
| Education, training and development | 15 | 46 | 36 | 44 | 27 | 71 |
| Materials and Technical Services | 15 | 45 | 35 | 40 | 29 | 72 |
| Distribution/presentation - primary market | 30 | 48 | 41 | 48 | 28 | 74 |
| Distribution/presentation - secondary market | 3 | 68 | 61 | 66 | 61 | 78 |
| Reception | 2 | 34 | 24 | 34 | 24 | 44 |
| TOTAL | 65 | 47 | 37 | 44 | 24 | 78 |

1.3 Gender: Business Owner/Top Manager

| | N | % |
|--------------|-----------|------------|
| Female | 33 | 47 |
| Male | 37 | 53 |
| TOTAL | 70 | 100 |

| | Male | Female | Male % | Female % |
|---|------|--------|--------|----------|
| Education, training and development | 7 | 10 | 41 | 59 |
| Materials and Technical Services | 5 | 10 | 33 | 67 |
| Distribution/presentation - primary market | 20 | 12 | 63 | 38 |
| Distribution/presentation - secondary market | 3 | 0 | 100 | 0 |

| | | | | |
|------------------|----|----|----|----|
| Reception | 2 | 1 | 67 | 33 |
| TOTAL | 37 | 33 | 53 | 47 |

1.4 Race: Business Owner/Top Manager

| | N | % |
|--------------|----------|----------|
| Black | 6 | 9 |
| Coloured | 1 | 1 |
| Indian_Asian | 1 | 1 |
| White | 62 | 89 |
| TOTAL | 70 | 100 |

| N | Black | White | Indian_Asian | Coloured |
|---|--------------|--------------|---------------------|-----------------|
| Education, training and development | 3 | 13 | 1 | 0 |
| Materials and Technical Services | 0 | 14 | 0 | 1 |
| Distribution/presentation - primary market | 3 | 29 | 0 | 0 |
| Distribution/presentation - secondary market | 0 | 3 | 0 | 0 |
| Reception | 0 | 3 | 0 | 0 |
| TOTAL | 6 | 62 | 1 | 1 |

| % | B % | W % | I % | C % |
|---|------------|------------|------------|------------|
| Education, training and development | 18 | 76 | 6 | 0 |
| Materials and Technical Services | 0 | 93 | 0 | 7 |
| Distribution/presentation - primary market | 9 | 91 | 0 | 0 |
| Distribution/presentation - secondary market | 0 | 100 | 0 | 0 |
| Reception | 0 | 100 | 0 | 0 |
| TOTAL | 9 | 89 | 1 | 1 |

1.5 Home Language: Business Owner/Top Manager

| Language | N | % |
|-----------------|----------|----------|
| Afrikaans | 17 | 25 |
| English | 44 | 65 |
| IsiXhosa | 0 | 0 |
| IsiZulu | 1 | 1 |
| Sesotho | 1 | 1 |
| Sepedi | 1 | 1 |
| Setswana | 1 | 1 |
| Other | 3 | 4 |
| TOTAL | 68 | 100 |

1.6 Nationality: Business Owner/Top Manager

| | N | % |
|---------------|----------|----------|
| South African | 66 | 96 |
| Scottish | 1 | 1 |
| Dutch | 1 | 1 |
| French | 1 | 1 |

| | | |
|--------------|-----------|------------|
| TOTAL | 69 | 100 |
|--------------|-----------|------------|

1.7 Survey Follow Up

Do you want to receive follow up information about this research project? (reports on findings etc)

| | N | % |
|--------------|-----------|------------|
| No | 4 | 6 |
| Yes | 67 | 94 |
| TOTAL | 71 | 100 |

1.8 Type of Business/Organisation

Which of the following best describes your organisation/business? (choose ONE)

| | N | % |
|--|-----------|------------|
| gallery - commercial/private | 25 | 35 |
| arts development organization (non-profit) | 9 | 13 |
| arts consultant/consultancy | 8 | 11 |
| artists/arts association | 6 | 8 |
| artist-run gallery/project space | 6 | 8 |
| art publisher | 2 | 3 |
| education and training provider – private | 2 | 3 |
| materials supplier | 2 | 3 |
| technical services provider | 2 | 3 |
| art collection/collector - corporate/private | 1 | 1 |
| art restorer/conservator | 1 | 1 |
| Auctioneer | 1 | 1 |
| community arts centre | 1 | 1 |
| Dealer | 1 | 1 |
| framer/framing supplier | 1 | 1 |
| arts media specialist/publicist | 1 | 1 |
| materials manufacturer | 1 | 1 |
| on-line artist portfolio or gallery | 1 | 1 |
| art journalist/critic | 0 | 0 |
| TOTAL | 71 | 100 |

The above business/organisational types were then organised into value chain components, in order to be able to disaggregate a range of information by value chain component:

| N | N | % |
|---|-----------|------------|
| Education, training and development | 18 | 25 |
| Materials and Technical Services | 15 | 21 |
| Distribution/presentation - primary market | 32 | 45 |
| Distribution/presentation - secondary market | 3 | 4 |
| Reception | 3 | 4 |
| TOTAL | 71 | 100 |

1.9 Primary Activities

Which of the following areas of activity are you/your business/organisation involved in within the visual arts sector (multiple response)

| | N | % |
|--|------------|----------|
| Selling artwork | 50 | 70 |
| Curating exhibitions/projects | 42 | 59 |
| Education and training services | 38 | 54 |
| Managing/promoting artists | 38 | 54 |
| Support services to artists | 33 | 46 |
| Designing/installing artworks/exhibitions | 29 | 41 |
| Production/project management, incl commissioning services | 24 | 34 |
| Producing artwork | 23 | 32 |
| Marketing and publicity services | 22 | 31 |
| Research | 21 | 30 |
| Framing services | 11 | 15 |
| Art publishing, incl writing, editorial services, design | 11 | 15 |
| Art media, incl writing, editorial services, design | 11 | 15 |
| Art materials supplier | 5 | 7 |
| Conservation/restoration services | 5 | 7 |
| Materials manufacture | 3 | 4 |
| Materials retail | 1 | 1 |
| Other | 1 | 1 |
| TOTAL | 370 | |

Other include art therapy, provider of insurance solutions

| N | Education | Materials | Prim mkt | Sec mkt | Reception |
|--|------------------|------------------|-----------------|----------------|------------------|
| Selling artwork | 12 | 6 | 28 | 3 | 1 |
| Curating exhibitions/projects | 12 | 7 | 21 | 1 | 1 |
| Education and training services | 16 | 7 | 14 | 1 | 0 |
| Managing/promoting artists | 11 | 3 | 21 | 1 | 2 |
| Support services to artists | 11 | 6 | 14 | 0 | 2 |
| Designing/installing artworks/exhibitions | 8 | 6 | 14 | 0 | 1 |
| Production/project management, incl commissioning services | 6 | 5 | 10 | 1 | 2 |
| Producing artwork | 8 | 4 | 10 | 0 | 1 |
| Marketing and publicity services | 4 | 2 | 13 | 1 | 2 |
| Research | 10 | 4 | 6 | 1 | 0 |
| Framing services | 1 | 1 | 8 | 0 | 1 |
| Art publishing, incl writing, editorial services, design | 4 | 1 | 4 | 0 | 2 |
| Art media, incl writing, editorial services, design | 4 | 2 | 3 | 0 | 2 |
| Art materials supplier | 1 | 2 | 1 | 0 | 1 |
| Conservation/restoration services | 0 | 2 | 2 | 1 | 0 |
| Materials manufacture | 0 | 2 | 1 | 0 | 0 |
| Materials retail | 0 | 1 | 0 | 0 | 0 |
| Other | 0 | 1 | 0 | 0 | 0 |
| TOTAL | 108 | 62 | 170 | 10 | 18 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception |
|----------|------------------|------------------|-----------------|----------------|------------------|
|----------|------------------|------------------|-----------------|----------------|------------------|

| | | | | | |
|--|----|----|----|-----|----|
| Selling artwork | 67 | 40 | 88 | 100 | 33 |
| Curating exhibitions/projects | 67 | 47 | 66 | 33 | 33 |
| Education and training services | 89 | 47 | 44 | 33 | 0 |
| Managing/promoting artists | 61 | 20 | 66 | 33 | 67 |
| Support services to artists | 61 | 40 | 44 | 0 | 67 |
| Designing/installing artworks/exhibitions | 44 | 40 | 44 | 0 | 33 |
| Production/project management, incl commissioning services | 33 | 33 | 31 | 33 | 67 |
| Producing artwork | 44 | 27 | 31 | 0 | 33 |
| Marketing and publicity services | 22 | 13 | 41 | 33 | 67 |
| Research | 56 | 27 | 19 | 33 | 0 |
| Framing services | 6 | 7 | 25 | 0 | 33 |
| Art publishing, incl writing, editorial services, design | 22 | 7 | 13 | 0 | 67 |
| Art media, incl writing, editorial services, design | 22 | 13 | 9 | 0 | 67 |
| Art materials supplier | 6 | 13 | 3 | 0 | 33 |
| Conservation/restoration services | 0 | 13 | 6 | 33 | 0 |
| Materials manufacture | 0 | 13 | 3 | 0 | 0 |
| Materials retail | 0 | 7 | 0 | 0 | 0 |
| Other | 0 | 7 | 0 | 0 | 0 |

1.10 Market Segment

Which area/s of visual arts practice do you primarily deal with in the course of the above activities? (you can choose more than one)

| | N | % |
|----------------------|------------|----|
| Contemporary, etc.. | 44 | 62 |
| Traditional artworks | 39 | 55 |
| Public art | 22 | 31 |
| Community arts | 19 | 27 |
| Craft art/fine craft | 18 | 25 |
| Other | 7 | 10 |
| TOTAL | 149 | |

| N | Education | Materials | Prim mkt | Sec mkt | Reception |
|----------------------|-----------|-----------|-----------|----------|-----------|
| Contemporary, etc.. | 10 | 7 | 22 | 2 | 3 |
| Traditional artworks | 9 | 6 | 19 | 3 | 2 |
| Public art | 6 | 8 | 8 | 0 | 0 |
| Community arts | 10 | 5 | 4 | 0 | 0 |
| Craft art/fine craft | 7 | 7 | 3 | 0 | 1 |
| Other | 5 | 1 | 1 | 0 | 0 |
| TOTAL | 47 | 34 | 57 | 5 | 6 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception |
|----------------------|-----------|-----------|----------|---------|-----------|
| Contemporary, etc.. | 56 | 47 | 69 | 67 | 100 |
| Traditional artworks | 50 | 40 | 59 | 100 | 67 |
| Public art | 33 | 53 | 25 | 0 | 0 |
| Community arts | 56 | 33 | 13 | 0 | 0 |

| | | | | | |
|----------------------|----|----|---|---|----|
| Craft art/fine craft | 39 | 47 | 9 | 0 | 33 |
| Other | 28 | 7 | 3 | 0 | 0 |

Other include selling old masters art, arts competitions

1.11 Premises

Where do you/your business/organisation operate from?

| | N | % |
|--|-----------|------------|
| Home workshop, studio or office (rented) | 7 | 10 |
| Home workshop, studio or office (owned) | 14 | 20 |
| Studio away from home (rented) | 30 | 42 |
| Studio away from home (owned) | 14 | 20 |
| Currently have no work premises | 1 | 1 |
| Other (specify) | 5 | 7 |
| TOTAL | 71 | 100 |

| N | Education | Materials | Prim mkt | Sec mkt | Reception |
|--|-----------|-----------|-----------|----------|-----------|
| Home workshop, studio or office (rented) | 1 | 3 | 3 | 0 | 0 |
| Home workshop, studio or office (owned) | 1 | 6 | 6 | 1 | 0 |
| Studio away from home (rented) | 9 | 4 | 14 | 2 | 1 |
| Studio away from home (owned) | 2 | 1 | 9 | 0 | 2 |
| Currently have no work premises | 0 | 1 | 0 | 0 | 0 |
| Other (specify) | 5 | 0 | 0 | 0 | 0 |
| TOTAL | 18 | 15 | 32 | 3 | 3 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception |
|--|-----------|-----------|----------|---------|-----------|
| Home workshop, studio or office (rented) | 6 | 20 | 9 | 0 | 0 |
| Home workshop, studio or office (owned) | 6 | 40 | 19 | 33 | 0 |
| Studio away from home (rented) | 50 | 27 | 44 | 67 | 33 |
| Studio away from home (owned) | 11 | 7 | 28 | 0 | 67 |
| Currently have no work premises | 0 | 7 | 0 | 0 | 0 |
| Other (specify) | 0 | 7 | 0 | 0 | 0 |

2. Legal Structure and Governance

2.1 Legal Status

Please indicate whether you/your business or organisation is constituted as a:

| | N | % |
|--|---|----|
| Freelance/independent contractor/self-employed | 4 | 6 |
| Sole trader | 7 | 10 |
| Partnership | 1 | 1 |
| Co-operative | 1 | 1 |

| | | |
|-------------------------|-----------|------------|
| Closed Corporation (cc) | 30 | 42 |
| PTY Ltd | 9 | 13 |
| Voluntary Association | 5 | 7 |
| Section 21 company | 8 | 11 |
| Trust | 6 | 8 |
| TOTAL | 71 | 100 |

| N | Education | Materials | Prim mkt | Sec mkt | Reception |
|--|------------------|------------------|-----------------|----------------|------------------|
| Freelance/independent contractor/self-employed | 0 | 1 | 2 | 1 | 0 |
| Sole trader | 0 | 2 | 4 | 0 | 1 |
| Partnership | 0 | 0 | 1 | 0 | 0 |
| Co-operative | 0 | 0 | 1 | 0 | 0 |
| Closed Corporation (cc) | 1 | 11 | 15 | 1 | 2 |
| PTY Ltd | 2 | 1 | 5 | 1 | 0 |
| Voluntary Association | 5 | 0 | 0 | 0 | 0 |
| Section 21 company | 8 | 0 | 0 | 0 | 0 |
| Trust | 2 | 0 | 4 | 0 | 0 |
| TOTAL | 18 | 15 | 32 | 3 | 3 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception |
|--|------------------|------------------|-----------------|----------------|------------------|
| Freelance/independent contractor/self-employed | 0 | 7 | 6 | 33 | 0 |
| Sole trader | 0 | 13 | 13 | 0 | 33 |
| Partnership | 0 | 0 | 3 | 0 | 0 |
| Co-operative | 0 | 0 | 3 | 0 | 0 |
| Closed Corporation (cc) | 6 | 73 | 47 | 33 | 67 |
| PTY Ltd | 11 | 7 | 16 | 33 | 0 |
| Voluntary Association | 28 | 0 | 0 | 0 | 0 |
| Section 21 company | 44 | 0 | 0 | 0 | 0 |
| Trust | 11 | 0 | 13 | 0 | 0 |

2.2 How long have you traded/operated in this form?

| | N | % |
|---------------|-----------|------------|
| 0 to 5 year | 27 | 39 |
| 6 to 10 year | 24 | 34 |
| 11 to 20 year | 12 | 17 |
| > 20 years | 7 | 10 |
| TOTAL | 70 | 100 |

| N | 0 to 5 year | 6 to 10 year | 11 to 20 year | > 20 years |
|---|--------------------|---------------------|----------------------|----------------------|
| Education, training and development | 4 | 5 | 4 | 5 |
| Materials and Technical Services | 4 | 6 | 4 | 0 |
| Distribution/presentation - primary market | 16 | 10 | 4 | 2 |
| Distribution/presentation - secondary market | 2 | 1 | 0 | 0 |
| Reception | 1 | 2 | 0 | 0 |
| TOTAL | 27 | 24 | 12 | 7 |

| N | 0 to 5 year | 6 to 10 year | 11 to 20 year | > 20 years |
|--|--------------------|---------------------|----------------------|----------------------|
| Education, training and development | 22 | 28 | 22 | 28 |
| Materials and Technical Services | 29 | 43 | 29 | 0 |

| | | | | |
|---|----|----|----|----|
| Distribution/presentation - primary market | 50 | 31 | 13 | 6 |
| Distribution/presentation - secondary market | 67 | 33 | 0 | 0 |
| Reception | 33 | 67 | 0 | 0 |
| TOTAL | 39 | 34 | 17 | 10 |

2.3 NPO registration

If you are a section 21, voluntary association or a Trust, are you registered as a non-profit organisation? (if NO, goto 2.5)

| NPO | N | % |
|--------------|-----------|------------|
| No | 4 | 21 |
| Yes | 15 | 79 |
| TOTAL | 19 | 100 |

2.4 Board Demographics (non-profit organizations)

If you are a section 21, voluntary association or a Trust, could you indicate the demographics of your Board of Directors/Trustees?

| N | Female | Male | Under 35 | Over 35 |
|--------------|-----------|-----------|-----------|-----------|
| Black | 15 | 15 | 6 | 16 |
| Coloured | 1 | 7 | 0 | 7 |
| Indian_Asian | 0 | 6 | 0 | 6 |
| White | 34 | 29 | 4 | 42 |
| TOTAL | 50 | 57 | 10 | 71 |

2.5 Ownership/shareholding demographics (for-profit organizations)

If you are a business entity (self-employed, sole trader, independent contractors, cc, PTY (Ltd), could you indicate the demographic profile of the principal/majority owners of your business?

| N | Female | Male | Under 35 | Over 35 |
|--------------|-----------|-----------|-----------|-----------|
| Black | 3 | 4 | 4 | 10 |
| Coloured | 7 | 0 | 4 | 3 |
| Indian_Asian | 0 | 0 | 0 | 0 |
| White | 36 | 40 | 14 | 52 |
| TOTAL | 46 | 44 | 22 | 65 |

2.5 Governance Meetings (frequency)

If you have either a Board of Trustees, Board of Directors or similar governance structure, please indicate how often this board meets:

| | N | % |
|--------------|----------|----------|
| Once a year | 2 | 8 |
| Twice a year | 4 | 15 |

| | | |
|--------------|-----------|------------|
| Quarterly | 9 | 35 |
| Monthly | 8 | 31 |
| Other | 3 | 12 |
| TOTAL | 26 | 100 |

Other included weekly

3. Staffing

3.1 Number of Organisations that are Employers

Do you employ anyone on either a part-time, full-time or occasional basis to assist you with any aspect of your work?

| | N | % |
|--------------|-----------|------------|
| No | 9 | 13 |
| Yes | 62 | 87 |
| TOTAL | 71 | 100 |

| | No | Yes | No % | Yes % |
|---|-----------|------------|-------------|--------------|
| Education, training and development | 1 | 17 | 6 | 94 |
| Materials and Technical Services | 4 | 11 | 27 | 73 |
| Distribution/presentation - primary market | 4 | 28 | 13 | 88 |
| Distribution/presentation - secondary market | 0 | 3 | 0 | 100 |
| Reception | 0 | 3 | 0 | 100 |
| TOTAL | 9 | 62 | 13 | 87 |

3.2 Staff numbers

3.2.1 Senior Management

How many people does your business/organisation employ in senior management positions?

| | N | AVG | TOTAL | Population |
|---------------------|----------|--------------|--------------|-------------------|
| Full time | 71 | 1.070 | 76 | 1071 |
| Part-time | 71 | 0.282 | 20 | 282 |
| Short term contract | 71 | 0.056 | 4 | 56 |

3.2.2 Middle Management

How many people does your business/organisation employ in specialist middle management positions?

| | N | AVG | TOTAL | Population |
|---------------------|----------|--------------|--------------|-------------------|
| Full time | 71 | 0.577 | 41 | 578 |
| Part-time | 71 | 0.423 | 30 | 423 |
| Short term contract | 71 | 0.070 | 5 | 70 |

3.2.3 Specialist/Technical Staff

How many people does your business/organisation employ in specialist technical positions?

| | N | AVG | TOTAL | Population |
|---------------------|----------|--------------|--------------|-------------------|
| Full time | 71 | 0.761 | 54 | 762 |
| Part-time | 71 | 0.972 | 69 | 973 |
| Short term contract | 71 | 1.268 | 90 | 1269 |

3.2.4 Ancillary/Support Staff

How many people does your business/organisation employ in ancillary and support positions?

| | N | AVG | TOTAL | Population |
|---------------------|----------|--------------|--------------|-------------------|
| Full time | 71 | 0.831 | 59 | 832 |
| Part-time | 71 | 0.958 | 68 | 959 |
| Short term contract | 71 | 0.211 | 15 | 211 |

3.2.5 Volunteers

Number of volunteers that work for your organisation (if applicable)?

| | N | AVG | TOTAL | Population |
|------------|----------|--------------|--------------|-------------------|
| Volunteers | 71 | 1.521 | 108 | 1523 |

3.3 Staff Profile

3.3.1 Demographics

Please complete the following demographic table to the best of your ability, indicating the number of staff members in each category:

| Total | Black Male | Black Female | Coloured Male | Coloured Female | Indian Male | Indian Female | White Male | White Female |
|-----------------------|-------------------|---------------------|----------------------|------------------------|--------------------|----------------------|-------------------|---------------------|
| Senior Management | 11 | 5 | 3 | 1 | 1 | 0 | 33 | 41 |
| Middle Management | 11 | 15 | 0 | 2 | 1 | 0 | 8 | 27 |
| Specialist Technical | 49 | 31 | 6 | 2 | 0 | 6 | 18 | 40 |
| Ancillary and Support | 53 | 50 | 3 | 12 | 0 | 0 | 2 | 9 |
| Volunteers | 41 | 33 | 0 | 5 | 1 | 1 | 8 | 15 |
| TOTAL | 165 | 134 | 12 | 22 | 3 | 7 | 69 | 132 |

| AVG | Black Male | Black Female | Coloured Male | Coloured Female | Indian Male | Indian Female | White Male | White Female |
|-----------------------|------------|--------------|---------------|-----------------|-------------|---------------|------------|--------------|
| Senior Management | 0.155 | 0.070 | 0.042 | 0.014 | 0.014 | 0.000 | 0.465 | 0.577 |
| Middle Management | 0.155 | 0.211 | 0.000 | 0.028 | 0.014 | 0.000 | 0.113 | 0.380 |
| Specialist Technical | 0.690 | 0.437 | 0.085 | 0.028 | 0.000 | 0.085 | 0.254 | 0.563 |
| Ancillary and Support | 0.746 | 0.704 | 0.042 | 0.169 | 0.000 | 0.000 | 0.028 | 0.127 |
| Volunteers | 0.577 | 0.465 | 0.000 | 0.070 | 0.014 | 0.014 | 0.113 | 0.211 |

| Population | Black Male | Black Female | Coloured Male | Coloured Female | Indian Male | Indian Female | White Male | White Female |
|-----------------------|------------|--------------|---------------|-----------------|-------------|---------------|------------|--------------|
| Senior Management | 155 | 70 | 42 | 14 | 14 | 0 | 465 | 578 |
| Middle Management | 155 | 211 | 0 | 28 | 14 | 0 | 113 | 381 |
| Specialist Technical | 691 | 437 | 85 | 28 | 0 | 85 | 254 | 564 |
| Ancillary and Support | 747 | 705 | 42 | 169 | 0 | 0 | 28 | 127 |
| Volunteers | 578 | 465 | 0 | 70 | 14 | 14 | 113 | 211 |

3.3.2 Overall numbers of employees by Organisation

| Employment category | N | % |
|---------------------|----|----|
| 1 to 5 | 33 | 65 |
| 6-10 | 11 | 22 |
| 11 -20 | 5 | 10 |
| 20-50 | 2 | 4 |
| > 50 | 0 | 0 |

3.3.3 Age and Disability

Please indicate numbers of staff by age and disability:

| Total | Disabled Male | Disabled Female | younger than 36 | 36+ |
|-----------------------|---------------|-----------------|-----------------|-----|
| Senior Management | 0 | 1 | 14 | 57 |
| Middle Management | 0 | 0 | 33 | 30 |
| Specialist Technical | 0 | 0 | 87 | 50 |
| Ancillary and Support | 1 | 0 | 64 | 49 |
| Volunteers | 1 | 0 | 88 | 25 |
| TOTAL | 2 | 1 | 286 | 211 |

| % | Disabled Male | Disabled Female |
|---|---------------|-----------------|
| | | |

| | | |
|-----------------------|-------|-------|
| Senior Management | 0.000 | 0.021 |
| Middle Management | 0.000 | 0.000 |
| Specialist Technical | 0.000 | 0.000 |
| Ancillary and Support | 0.017 | 0.000 |
| Volunteers | 0.020 | 0.000 |

| % | younger than 36 | 36+ |
|-----------------------|-----------------|-----------|
| Senior Management | 20 | 80 |
| Middle Management | 52 | 48 |
| Specialist Technical | 64 | 36 |
| Ancillary and Support | 57 | 43 |
| Volunteers | 78 | 22 |
| TOTAL | 58 | 42 |

| AVG | Disabled Male | Disabled Female | younger than 36 | 36+ |
|-----------------------|---------------|-----------------|-----------------|-------|
| Senior Management | 0.000 | 0.014 | 0.197 | 0.803 |
| Middle Management | 0.000 | 0.000 | 0.465 | 0.423 |
| Specialist Technical | 0.000 | 0.000 | 1.225 | 0.704 |
| Ancillary and Support | 0.014 | 0.000 | 0.901 | 0.690 |
| Volunteers | 0.014 | 0.000 | 1.239 | 0.352 |

3.3.4 Education Levels of Employees

Indicate or estimate how many people you employ fall into each of the following categories?

| | Total | % | AVG |
|--|--------------|----------|------------|
| Tertiary education graduates (postgraduate) | 83 | 19 | 1.317 |
| Tertiary education graduates (undergraduate) | 127 | 29 | 1.984 |
| High school/college graduates? | 161 | 36 | 2.477 |
| Primary school graduates? | 32 | 7 | .525 |
| Informally trained/no formal education? | 40 | 9 | .656 |
| TOTAL | 443 | | |

3.3.5 Level of Education of Business-Owner/Top Manager

What is the highest level of education of the top manager or principal owner of your organisation?

| | N | % |
|-----------------------------------|----------|----------|
| No formal education | 0 | 0 |
| Up to Grade 9 | 0 | 0 |
| Up to Grade 12 | 5 | 8 |
| Vocational training with Grade 9 | 0 | 0 |
| Vocational training with Grade 12 | 1 | 2 |
| Diploma with Grade 9 | 2 | 3 |
| Diploma with Grade 12 | 5 | 8 |

| | | |
|----------------------------------|-----------|------------|
| Completed a university degree | 24 | 38 |
| Completed a post-graduate degree | 25 | 40 |
| Other (specify) | 1 | 2 |
| TOTAL | 63 | 100 |

3.4 Staff Benefits

3.4.1 Employee Benefits

Are you/your business able to provide employees with any benefits? If yes, indicate which of the following:

| | N | % | Multiple % (71) |
|----------------------|-----------|------------|-----------------|
| Pension Fund | 4 | 7 | 6 |
| Provident Fund | 1 | 2 | 1 |
| Retirement Annuity | 24 | 39 | 34 |
| Investment in stocks | 4 | 7 | 6 |
| Savings | 1 | 2 | 1 |
| None of the above | 27 | 44 | 38 |
| TOTAL | 61 | 100 | |

3.4.2 Reasons for Non-Provision of Employee Benefits

If not, indicate which of the following most accurately describes why this is the case:

| | N | % |
|---------------|-----------|------------|
| Too costly | 19 | 51 |
| Own decisions | 16 | 43 |
| Not aware | 2 | 5 |
| TOTAL | 37 | 100 |

4. Funding

4.1 Number of Businesses/Organisation Applied for Funding

During the last three years have you APPLIED FOR funding from a governmental or private source?

| | N | % |
|--------------|-----------|------------|
| No | 35 | 49 |
| Yes | 36 | 51 |
| TOTAL | 71 | 100 |

| | No | Yes | No % | Yes % |
|--|-----------|-----------|-----------|-----------|
| Education, training and development | 4 | 14 | 22 | 78 |
| Materials and Technical Services | 7 | 8 | 47 | 53 |
| Distribution/presentation - primary market | 20 | 12 | 63 | 38 |
| Distribution/presentation - secondary market | 2 | 1 | 67 | 33 |
| Reception | 2 | 1 | 67 | 33 |
| TOTAL | 35 | 36 | 49 | 51 |

4.2 Reasons for Not Applying for Funding

If NO, what was the MAIN reason for not applying for funding? (choose ONE and then go to 4.6.1)

| | N | % |
|--|-----------|------------|
| No experience in writing proposals | 3 | 9 |
| My writing skills are poor | 0 | 0 |
| It is pointless, I would fail to get it | 6 | 18 |
| the available grants are inadequate for my needs | 1 | 3 |
| It depends on whom you know | 0 | 0 |
| Admin compliance requirements of funders | 2 | 6 |
| Do not need funding for my work | 17 | 52 |
| Other (specify) | 4 | 12 |
| TOTAL | 33 | 100 |

Others include never considered, still looking for the best possible sponsors to approach for our specific needs and high interest rates

4.3 Funders Applied to

If YES, which of the following have you applied to?:

| | N | % (71) | % (36) |
|---------------------------------|------------|---------------|---------------|
| National Arts Council | 19 | 27 | 53 |
| National Lottery | 12 | 17 | 33 |
| Department of Arts and Culture | 16 | 23 | 44 |
| Provincial government | 13 | 18 | 36 |
| Local government | 7 | 10 | 19 |
| Business Arts South Africa | 15 | 21 | 42 |
| Arts and Culture Trust | 11 | 15 | 31 |
| International Arts Funding Body | 18 | 25 | 50 |
| Private Foundation | 9 | 13 | 25 |
| Corporate sponsorship | 15 | 21 | 42 |
| Corporate funding | 6 | 8 | 17 |
| Patron | 6 | 8 | 17 |
| Arts organisation | 4 | 6 | 11 |
| TOTAL | 151 | | |

4.4 Success Rates of Funding Applications, by Funder

Did you receive funding from any of these sources?

| | N | Success % (71) | % (4.3) |
|--------------------------------|----------|-----------------------|----------------|
| National Arts Council | 10 | 14 | 53 |
| National Lottery | 7 | 10 | 58 |
| Department of Arts and Culture | 9 | 13 | 56 |
| Provincial government | 9 | 13 | 69 |
| Local government | 3 | 4 | 43 |
| Business Arts South Africa | 7 | 10 | 47 |
| Arts and Culture Trust | 3 | 4 | 27 |

| | | | |
|---------------------------------|-----------|----|----|
| International Arts Funding Body | 15 | 21 | 83 |
| Private Foundation | 5 | 7 | 56 |
| Corporate sponsorship | 10 | 14 | 67 |
| Corporate funding | 4 | 6 | 67 |
| Patron | 5 | 7 | 83 |
| Arts organisation | 2 | 3 | 50 |
| Did not receive any funding | 5 | 7 | |
| TOTAL | 94 | | |

4.5 Funders Regarded as Being Most Responsive to Needs of Visual Arts Sector

Of those funding sources that you have applied to, which do you regard as being the most responsive to the needs of the visual arts sector? (choose ONE)

| | N | % |
|----------------------------|-----------|------------|
| National Arts Council | 6 | 17 |
| National Lottery | 2 | 6 |
| National Government | 2 | 6 |
| Provincial Government | 1 | 3 |
| Local Government | 1 | 3 |
| Business Arts South Africa | 2 | 6 |
| Arts and Culture Trust | 1 | 3 |
| International Funding Body | 13 | 37 |
| Private Foundation | 1 | 3 |
| Corporate sponsorship | 5 | 14 |
| Corporate funding | 0 | 0 |
| Patron | 0 | 0 |
| Arts organisation | 0 | 0 |
| TOTAL | 35 | 100 |

4.6 Views on Most Important Purposes for Arts Funding

What do you regard as the MOST important purpose for arts funding in general? (choose ONE)

| | N | % |
|-----------------------|-----------|------------|
| Supporting artists to | 28 | 41 |
| Promoting capacity-bu | 8 | 11 |
| Building new audience | 2 | 3 |
| Developing new market | 8 | 11 |
| Enabling internation | 7 | 10 |
| Developing new talent | 3 | 4 |
| Broadening access to | 10 | 14 |
| Subsidizing innovativ | 2 | 3 |
| Research | 1 | 1 |
| TOTAL | 70 | 100 |

What do you regard as the SECOND MOST important purpose for arts funding in general? (choose ONE)

| | N | % |
|-----------------------|----------|----------|
| Supporting artists to | 11 | 16 |
| Promoting capacity-bu | 14 | 20 |

| | | |
|-----------------------|-----------|------------|
| Building new audience | 9 | 13 |
| Developing new market | 10 | 14 |
| Enabling internation | 4 | 6 |
| Developing new talent | 11 | 16 |
| Broadening access to | 7 | 10 |
| Subsidizing innovativ | 1 | 1 |
| Research | 2 | 3 |
| TOTAL | 69 | 100 |

4.7 No of Businesses/Organisations Applying for Loan Finance

Have you applied for loan finance from a bank during the course of the last three years?

| | N | % |
|--------------|-----------|------------|
| No | 56 | 79 |
| Yes | 15 | 21 |
| TOTAL | 71 | 100 |

4.8 Reasons for Not Applying for Loan Finance

If NO, what was the reason for not applying?

| | N | % |
|---|-----------|------------|
| No need for loan finance | 36 | 69 |
| No experience in dealing with banks | 1 | 2 |
| It is pointless, I would fail to get it | 0 | 0 |
| It depends on whom you know | 0 | 0 |
| Admin compliance requirements of banks | 3 | 6 |
| Other (specify) | 12 | 23 |
| TOTAL | 52 | 100 |

Others include debt avoidance, financed by shareholders, can't afford, overdraft facility, costs incurred would be too high for sustained small business growth, constitutional decision

4.9 Success Rates of Finance Applications

If YES, was your application successful?

| | N | % |
|--------------|-----------|----------|
| No | 2 | |
| Yes | 13 | 87 |
| TOTAL | 15 | |

Loan Finance from Informal Sources

During the course of the last three years, have you obtained a loan from an informal source such a money-lender, friend or relative?

| | N | % |
|----|----------|----------|
| No | 57 | 80 |

| | | |
|--------------|-----------|------------|
| Yes | 14 | 20 |
| TOTAL | 71 | 100 |

5. Business Position and Market-related Issues

5.1 Extent to Which Business and Organisations Have to Supplement Visual Arts Related Work with Work Outside the Sector

Do you have to spend time engaged in work/business outside of the visual arts to sustain your work in the visual arts?

| | N | % |
|--------------|-----------|------------|
| No | 38 | 54 |
| Yes | 33 | 46 |
| TOTAL | 71 | 100 |

| N | No | Yes |
|--|-----------|------------|
| Education, training and development | 14 | 4 |
| Materials and Technical Services | 4 | 11 |
| Distribution/presentation - primary market | 19 | 13 |
| Distribution/presentation - secondary market | 1 | 2 |
| Reception | 1 | 3 |
| TOTAL | 38 | 33 |

| % | No | Yes |
|--|-----------|------------|
| Education, training and development | 78 | 22 |
| Materials and Technical Services | 27 | 73 |
| Distribution/presentation - primary market | 59 | 41 |
| Distribution/presentation - secondary market | 33 | 67 |
| Reception | 25 | 75 |
| TOTAL | 54 | 46 |

5.2 Reasons for Involvement in Supplementary Activities

If YES, why are you involved in other activities to support your "creative" activity (choose one or more)?

| | N | % |
|----------------------------|-----------|----------|
| Subsidise Visual Arts work | 15 | 21 |
| Market is too small | 12 | 17 |
| Risk reduction | 9 | 13 |
| Expansion | 12 | 17 |
| Other | 4 | 6 |
| TOTAL | 52 | |

| N | Subsidise | Market is too small | Risk reduction | Expansion | Other |
|--|-----------|---------------------|----------------|-----------|-------|
| Education, training and development | 4 | 1 | 0 | 0 | 0 |
| Materials and Technical Services | 4 | 3 | 4 | 4 | 3 |
| Distribution/presentation - primary market | 6 | 7 | 5 | 4 | 1 |

| | | | | | |
|---|-----------|-----------|----------|-----------|----------|
| Distribution/presentation - secondary market | 0 | 0 | 0 | 2 | 0 |
| Reception | 1 | 1 | 0 | 2 | 0 |
| TOTAL | 15 | 12 | 9 | 12 | 4 |

| % | Subsidise | Market is too small | Risk reduction | Expansion | Other |
|---|-----------|---------------------|----------------|-----------|-------|
| Education, training and development | 22 | 6 | 0 | 0 | 0 |
| Materials and Technical Services | 27 | 20 | 27 | 27 | 20 |
| Distribution/presentation - primary market | 19 | 22 | 16 | 13 | 3 |
| Distribution/presentation - secondary market | 0 | 0 | 0 | 67 | 0 |
| Reception | 33 | 33 | 0 | 67 | 0 |

Other include network and make ends meet

5.3 Nature of Location

How would you describe where you live and work? (choose ONE)

| | N | % |
|-----------------------------------|-----------|------------|
| Urban – Major City - Suburban/CBD | 54 | 77 |
| Urban – Major Ciy - Township | 1 | 1 |
| Urban - town | 5 | 7 |
| Semi rural, small town | 8 | 11 |
| Deep rural/remote | 2 | 3 |
| TOTAL | 70 | 100 |

| N | Urban – Major City - Suburban/CBD | Urban – Major Ciy - Township | Urban - town | Semi rural, small town | Deep rural/remote |
|---|-----------------------------------|------------------------------|--------------|------------------------|-------------------|
| Education, training and development | 14 | 0 | 1 | 1 | 1 |
| Materials and Technical Services | 11 | 0 | 2 | 1 | 1 |
| Distribution/presentation - primary market | 24 | 1 | 1 | 6 | 0 |
| Distribution/presentation - secondary market | 2 | 0 | 1 | 0 | 0 |
| Reception | 3 | 0 | 0 | 0 | 0 |
| TOTAL | 54 | 1 | 5 | 8 | 2 |

| % | Urban – Major City - Suburban/CBD | Urban – Major Ciy - Township | Urban - town | Semi rural, small town | Deep rural/remote |
|---|-----------------------------------|------------------------------|--------------|------------------------|-------------------|
| Education, training and development | 82 | 0 | 6 | 6 | 6 |
| Materials and Technical Services | 73 | 0 | 13 | 7 | 7 |
| Distribution/presentation - primary market | 75 | 3 | 3 | 19 | 0 |
| Distribution/presentation - secondary market | 67 | 0 | 33 | 0 | 0 |
| Reception | 100 | 0 | 0 | 0 | 0 |
| TOTAL | 77 | 1 | 7 | 11 | 3 |

5.4 Impact of Location on Market Access

How does your current location impact on your market access/ability to sell your work?

| | N | % |
|---------------------------|-----------|------------|
| Positively | 54 | 77 |
| Negatively | 9 | 13 |
| Does not affect it at all | 7 | 10 |
| TOTAL | 70 | 100 |

| N | Urban – Major City - Suburban/CBD | Urban – Major City - Township | Urban - town | Semi rural, small town | Deep rural/remot e |
|---------------------------|-----------------------------------|-------------------------------|--------------|------------------------|--------------------|
| Positively | 44 | 1 | 3 | 5 | 1 |
| Negatively | 4 | 0 | 2 | 2 | 1 |
| Does not affect it at all | 6 | 0 | 0 | 1 | 0 |
| TOTAL | 54 | 1 | 5 | 8 | 2 |

| % | Urban – Major City - Suburban/CBD | Urban – Major City - Township | Urban - town | Semi rural, small town | Deep rural/remot e | Total |
|---------------------------|-----------------------------------|-------------------------------|--------------|------------------------|--------------------|--------------|
| Positively | 81 | 100 | 60 | 63 | 50 | 77 |
| Negatively | 7 | 0 | 40 | 25 | 50 | 13 |
| Does not affect it at all | 11 | 0 | 0 | 13 | 0 | 10 |

5.5 Nature of Market for Products and Services

Are your products or services sold or delivered primarily.... (choose ONE)

| | N | % |
|------------------------------------|-----------|------------|
| Directly to consumers/users? | 47 | 67 |
| To other businesses/organisations? | 3 | 4 |
| Both equally | 20 | 29 |
| TOTAL | 70 | 100 |

| N | Directly | To other businesses | Both equally |
|---|-----------|---------------------|--------------|
| Education, training and development | 13 | 0 | 4 |
| Materials and Technical Services | 6 | 2 | 7 |
| Distribution/presentation - primary market | 24 | 0 | 8 |
| Distribution/presentation - secondary market | 3 | 0 | 0 |
| Reception | 1 | 1 | 1 |
| TOTAL | 67 | 4 | 29 |

| % | Directly | To other businesses | Both equally |
|---|-----------|---------------------|--------------|
| Education, training and development | 76 | 0 | 24 |
| Materials and Technical Services | 40 | 13 | 47 |
| Distribution/presentation - primary market | 75 | 0 | 25 |
| Distribution/presentation - secondary market | 100 | 0 | 0 |
| Reception | 33 | 33 | 33 |
| TOTAL | 70 | 0 | 30 |

5.6 Most Financially Significant Markets (Geographical Reach)

At the moment, the MOST financially significant market for your work is...

| | N | % |
|----------------------|-----------|------------|
| Local? | 29 | 41 |
| Regional? | 7 | 10 |
| National? | 23 | 33 |
| Continental/African? | 2 | 3 |
| International? | 9 | 13 |
| TOTAL | 70 | 100 |

| N | Local? | Regional? | National? | Continental/African? | International? |
|---|-----------|-----------|-----------|----------------------|----------------|
| Education, training and development | 9 | 3 | 2 | 1 | 2 |
| Materials and Technical Services | 6 | 2 | 7 | 0 | 0 |
| Distribution/presentation - primary market | 14 | 1 | 9 | 1 | 7 |
| Distribution/presentation - secondary market | 0 | 0 | 3 | 0 | 0 |
| Reception | 0 | 1 | 2 | 0 | 0 |
| TOTAL | 29 | 7 | 23 | 2 | 9 |

| % | Local? | Regional? | National? | Continental/African? | International? |
|---|-----------|-----------|-----------|----------------------|----------------|
| Education, training and development | 53 | 18 | 12 | 6 | 12 |
| Materials and Technical Services | 40 | 13 | 47 | 0 | 0 |
| Distribution/presentation - primary market | 44 | 3 | 28 | 3 | 22 |
| Distribution/presentation - secondary market | 0 | 0 | 100 | 0 | 0 |
| Reception | 0 | 33 | 67 | 0 | 0 |
| TOTAL | 41 | 10 | 33 | 3 | 13 |

At the moment, the SECOND MOST financially significant market for your work is...

| | N | % |
|----------------------|-----------|------------|
| Local? | 13 | 19 |
| Regional? | 15 | 21 |
| National? | 14 | 20 |
| Continental/African? | 4 | 6 |
| International? | 24 | 34 |
| TOTAL | 70 | 100 |

| N | Local? | Regional? | National? | Continental/African? | International? |
|---|-----------|-----------|-----------|----------------------|----------------|
| Education, training and development | 2 | 5 | 3 | 2 | 5 |
| Materials and Technical Services | 5 | 2 | 2 | 2 | 4 |
| Distribution/presentation - primary market | 5 | 6 | 8 | 0 | 13 |
| Distribution/presentation - secondary market | 1 | 0 | 0 | 0 | 2 |
| Reception | 0 | 2 | 1 | 0 | 0 |
| TOTAL | 13 | 15 | 14 | 4 | 24 |

| % | Local? | Regional? | National? | Continental/African? | International? |
|----------|--------|-----------|-----------|----------------------|----------------|
|----------|--------|-----------|-----------|----------------------|----------------|

| | | | | | |
|---|----|----|----|----|----|
| Education, training and development | 12 | 29 | 18 | 12 | 29 |
| Materials and Technical Services | 33 | 13 | 13 | 13 | 27 |
| Distribution/presentation - primary market | 16 | 19 | 25 | 0 | 41 |
| Distribution/presentation - secondary market | 33 | 0 | 0 | 0 | 67 |
| Reception | 0 | 67 | 33 | 0 | 0 |
| TOTAL | 19 | 21 | 20 | 6 | 34 |

5.7 Extent to Which Tourists Are Significant Target Market

Do tourists form a significant part of your target market/buyers of your work?

| | N | % |
|--------------|-----------|------------|
| No | 41 | 58 |
| Yes | 30 | 42 |
| TOTAL | 71 | 100 |

| N | No | Yes |
|---|-----------|------------|
| Education, training and development | 10 | 8 |
| Materials and Technical Services | 10 | 5 |
| Distribution/presentation - primary market | 15 | 17 |
| Distribution/presentation - secondary market | 3 | 0 |
| Reception | 3 | 0 |
| TOTAL | 41 | 30 |

| % | No | Yes |
|---|-----------|------------|
| Education, training and development | 56 | 44 |
| Materials and Technical Services | 67 | 33 |
| Distribution/presentation - primary market | 47 | 53 |
| Distribution/presentation - secondary market | 100 | 0 |
| Reception | 100 | 0 |
| TOTAL | 58 | 42 |

5.8 Methods of Marketing Products and Services

Please indicate which of the following which is the MOST important method of marketing/promoting your products/services?

| | N | % |
|-----------------------|-----------|------------|
| The physical position | 13 | 19 |
| Networks | 37 | 53 |
| On-line presence | 15 | 21 |
| Local media | 2 | 3 |
| National media | 2 | 3 |
| Other | 1 | 1 |
| TOTAL | 70 | 100 |

| N | Education | Materials | Prim mkt | Sec mkt | Reception | TOTAL |
|-----------------------|------------------|------------------|-----------------|----------------|------------------|--------------|
| The physical position | 4 | 1 | 7 | 1 | 0 | 13 |
| Networks | 7 | 12 | 16 | 0 | 2 | 37 |

| | | | | | | |
|------------------|---|---|---|---|---|----|
| On-line presence | 5 | 1 | 7 | 1 | 1 | 15 |
| Local media | 1 | 0 | 1 | 0 | 0 | 2 |
| National media | 0 | 0 | 1 | 1 | 0 | 2 |
| Other | 0 | 1 | 0 | 0 | 0 | 1 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception | TOTAL |
|-----------------------|-----------|-----------|----------|---------|-----------|-------|
| The physical position | 24 | 7 | 22 | 33 | 0 | 19 |
| Networks | 41 | 80 | 50 | 0 | 67 | 53 |
| On-line presence | 29 | 7 | 22 | 33 | 33 | 21 |
| Local media | 6 | 0 | 3 | 0 | 0 | 3 |
| National media | 0 | 0 | 3 | 33 | 0 | 3 |
| Other | 0 | 7 | 0 | 0 | 0 | 1 |

Please indicate which of the following which is the SECOND MOST important method of marketing/promoting your products/services?

| | N | % |
|-----------------------|-----------|------------|
| The physical position | 12 | 18 |
| Networks | 18 | 26 |
| On-line presence | 26 | 38 |
| Local media | 7 | 10 |
| National media | 3 | 4 |
| International media | 1 | 1 |
| Other | 1 | 1 |
| TOTAL | 68 | 100 |

| N | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|-----------------------|-----------|-----------|----------|---------|-----------|-------|
| The physical position | 2 | 3 | 5 | 0 | 2 | 12 |
| Networks | 7 | 4 | 6 | 1 | 0 | 18 |
| On-line presence | 5 | 3 | 16 | 1 | 1 | 26 |
| Local media | 1 | 1 | 4 | 1 | 0 | 7 |
| National media | 2 | 1 | 0 | 0 | 0 | 3 |
| International media | 0 | 0 | 1 | 0 | 0 | 1 |
| Other | 0 | 1 | 0 | 0 | 0 | 1 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|-----------------------|-----------|-----------|----------|---------|-----------|-------|
| The physical position | 12 | 23 | 16 | 0 | 67 | 18 |
| Networks | 41 | 31 | 19 | 33 | 0 | 26 |
| On-line presence | 29 | 23 | 50 | 33 | 33 | 38 |
| Local media | 6 | 8 | 13 | 33 | 0 | 10 |
| National media | 12 | 8 | 0 | 0 | 0 | 4 |
| International media | 0 | 0 | 3 | 0 | 0 | 1 |
| Other | 0 | 8 | 0 | 0 | 0 | 1 |

5.9 Perception of Market for Products/Services

How would you characterise the market for the products and services that you/your business provides?

| | N | % |
|------------------|----|----|
| Healthy, growing | 21 | 30 |

| | | |
|---------------------|-----------|------------|
| Gradual improvement | 31 | 44 |
| Stagnant | 12 | 17 |
| In decline | 5 | 7 |
| In sharp decline | 1 | 1 |
| TOTAL | 70 | 100 |

| N | Healthy | Gradual improve | Stagnant | Decline | Sharp decline |
|---|-----------|-----------------|-----------|----------|---------------|
| Education, training and development | 6 | 5 | 6 | 0 | 0 |
| Materials and Technical Services | 5 | 4 | 3 | 3 | 0 |
| Distribution/presentation - primary market | 8 | 18 | 3 | 2 | 1 |
| Distribution/presentation - secondary market | 1 | 2 | 0 | 0 | 0 |
| Reception | 1 | 2 | 0 | 0 | 0 |
| TOTAL | 21 | 31 | 12 | 3 | 1 |

| % | Healthy | Gradual improve | Stagnant | Decline | Sharp decline |
|---|-----------|-----------------|-----------|----------|---------------|
| Education, training and development | 35 | 29 | 35 | 0 | 0 |
| Materials and Technical Services | 33 | 27 | 20 | 20 | 0 |
| Distribution/presentation - primary market | 25 | 56 | 9 | 6 | 3 |
| Distribution/presentation - secondary market | 33 | 67 | 0 | 0 | 0 |
| Reception | 33 | 67 | 0 | 0 | 0 |
| TOTAL | 31 | 46 | 18 | 4 | 1 |

5.10 Perception of Most Critical Obstacles to Development of Business/Organisation

Which of the following issues represent critical obstacles to the development of your work/business/organisation? Rank them as follows: 1 = major; 2 = moderate; 3 = minor; 4 = not significant

[first table shows average of all ranked responses; second table shows number of responses in each ranking for each issue]

| | AVG |
|--|------------|
| The high cost of... | 2.2 |
| Materials and Supplies | 2.0 |
| Space/Business premises | 2.0 |
| Utilities (electricity, etc) | 2.4 |
| Telecommunication | 1.9 |
| Publicity | 2.1 |
| Publishing | 2.2 |
| Transport/freighting | 2.3 |
| Legal advice | 2.4 |
| Labour | 2.1 |
| Market Conditions | 2.2 |
| Weaknesses in Supply of Product | 2.2 |
| Weaknesses in Demand for Product | 2.0 |
| Level of competition in the industry | 2.3 |
| Exchange rate | 2.5 |
| Tax rate | 2.2 |
| Interest Rates | 2.2 |
| Changing trends which influence demand | 2.0 |

| | |
|---|------------|
| Lack of Access to... | 2.2 |
| Skilled labour/workforce | 2.1 |
| Finance | 2.1 |
| Funding | 1.6 |
| Raw Materials | 2.6 |
| Business support/advice | 2.5 |
| Marketing opportunities | 2.3 |
| Regulatory and industry environment | 2.2 |
| SARS compliance | 2.2 |
| Customs/trade regulations | 2.2 |
| Labour regulations | 2.3 |
| Business licensing requirements | 2.3 |
| Lack of professionalism within the industry | 2.3 |
| Lack of internal regulation within the industry | 2.4 |
| Lack of industry promotion from government | 1.6 |
| Issues related to the freedom of expression | 2.4 |
| Socio-economic conditions | 2.4 |
| Crime | 2.1 |
| Corruption | 2.3 |
| Substance Abuse | 2.7 |
| Race Discrimination | 2.3 |
| Gender Discrimination | 2.4 |
| | |
| Other (Please specify)... | 0.0 |

| % | Major | Moderate | Minor | Irrelevant | TOTAL |
|--|-------|----------|-------|------------|------------|
| The high cost of... | 9 | 35 | 24 | 32 | |
| Materials and Supplies | 16 | 37 | 18 | 29 | 100 |
| Space/Business premises | 14 | 35 | 16 | 35 | 100 |
| Utilities (electricity, etc) | 4 | 32 | 33 | 30 | 100 |
| Telecommunication | 3 | 39 | 33 | 25 | 100 |
| Publicity | 16 | 41 | 25 | 19 | 100 |
| Publishing | 7 | 43 | 26 | 23 | 100 |
| Transport/freighting | 7 | 30 | 23 | 39 | 100 |
| Legal advice | 3 | 20 | 22 | 55 | 100 |
| Labour | 12 | 35 | 19 | 35 | 100 |
| Market Conditions | 6 | 33 | 24 | 40 | |
| Weaknesses in Supply of Product | 3 | 28 | 25 | 44 | 100 |
| Weaknesses in Demand for Product | 21 | 40 | 22 | 18 | 100 |
| Level of competition in the industry | 5 | 43 | 28 | 41 | 100 |
| Exchange rate | 3 | 16 | 29 | 51 | 100 |
| Tax rate | 6 | 32 | 19 | 43 | 100 |
| Interest Rates | 3 | 37 | 15 | 46 | 100 |
| Changing trends which influence demand | 3 | 32 | 28 | 37 | 100 |
| Lack of Access to... | 10 | 33 | 19 | 38 | |
| Skilled labour/workforce | 4 | 37 | 10 | 49 | 100 |
| Finance | 10 | 46 | 19 | 25 | 100 |
| Funding | 35 | 35 | 7 | 22 | 100 |

| | | | | | |
|---|----------|-----------|-----------|-----------|------------|
| Raw Materials | 0 | 13 | 16 | 71 | 100 |
| Business support/advice | 4 | 24 | 35 | 37 | 100 |
| Marketing opportunities | 6 | 43 | 25 | 25 | 100 |
| Regulatory and industry environment | 8 | 24 | 16 | 52 | |
| SARS compliance | 9 | 18 | 18 | 55 | 100 |
| Customs/trade regulations | 12 | 18 | 21 | 50 | 100 |
| Labour regulations | 1 | 18 | 12 | 69 | 100 |
| Business licensing requirements | 3 | 18 | 13 | 66 | 100 |
| Lack of professionalism within the industry | 6 | 31 | 25 | 38 | 100 |
| Lack of internal regulation within the industry | 0 | 31 | 21 | 48 | 100 |
| Lack of industry promotion from government | 37 | 34 | 6 | 24 | 100 |
| Issues related to the freedom of expression | 0 | 22 | 15 | 63 | 100 |
| Socio-economic conditions | 4 | 21 | 18 | 57 | |
| Crime | 13 | 32 | 24 | 31 | 100 |
| Corruption | 3 | 28 | 21 | 49 | 100 |
| Substance Abuse | 0 | 12 | 24 | 65 | 100 |
| Race Discrimination | 3 | 18 | 12 | 68 | 100 |
| Gender Discrimination | 0 | 15 | 12 | 73 | 100 |
| | | | | | |
| Other (Please specify)... | 0 | 0 | 0 | 0 | |

| COMMERCIAL | AVG |
|--|------------|
| The high cost of... | 2.1 |
| Materials and Supplies | 2.0 |
| Space/Business premises | 2.1 |
| Utilities (electricity, etc) | 2.5 |
| Telecommunication | 1.7 |
| Publicity | 2.1 |
| Publishing | 2.3 |
| Transport/freighting | 2.2 |
| Legal advice | 2.3 |
| Labour | 2.0 |
| Market Conditions | 2.2 |
| Weaknesses in Supply of Product | 2.2 |
| Weaknesses in Demand for Product | 2.0 |
| Level of competition in the industry | 2.2 |
| Exchange rate | 2.5 |
| Tax rate | 2.2 |
| Interest Rates | 2.2 |
| Changing trends which influence demand | 1.9 |
| Lack of Access to... | 2.2 |
| Skilled labour/workforce | 2.0 |
| Finance | 2.1 |
| Funding | 1.8 |
| Raw Materials | 2.5 |
| Business support/advice | 2.5 |
| Marketing opportunities | 2.3 |
| Regulatory and industry environment | 2.2 |

| | |
|---|------------|
| SARS compliance | 2.2 |
| Customs/trade regulations | 2.3 |
| Labour regulations | 2.4 |
| Business licensing requirements | 2.3 |
| Lack of professionalism within the industry | 2.4 |
| Lack of internal regulation within the industry | 2.4 |
| Lack of industry promotion from government | 1.7 |
| Issues related to the freedom of expression | 2.3 |
| Socio-economic conditions | 2.4 |
| Crime | 2.2 |
| Corruption | 2.3 |
| Substance Abuse | 2.8 |
| Race Discrimination | 2.2 |
| Gender Discrimination | 2.6 |
| | |
| Other (Please specify)... | 0.0 |

| % (COMMERCIAL) | Major | Moderate | Minor | Irrelevant | TOTAL |
|--|--------------|-----------------|--------------|-------------------|--------------|
| The high cost of.... | 9 | 37 | 25 | 28 | |
| Materials and Supplies | 18 | 35 | 20 | 27 | 100 |
| Space/Business premises | 12 | 40 | 19 | 29 | 100 |
| Utilities (electricity, etc) | 4 | 35 | 38 | 23 | 100 |
| Telecommunication | 2 | 46 | 38 | 13 | 100 |
| Publicity | 15 | 40 | 25 | 19 | 100 |
| Publishing | 8 | 42 | 27 | 23 | 100 |
| Transport/freighting | 8 | 35 | 23 | 35 | 100 |
| Legal advice | 4 | 23 | 19 | 54 | 100 |
| Labour | 13 | 38 | 15 | 33 | 100 |
| Market Conditions | 7 | 36 | 23 | 34 | |
| Weaknesses in Supply of Product | 4 | 27 | 25 | 43 | 100 |
| Weaknesses in Demand for Product | 22 | 39 | 25 | 14 | 100 |
| Level of competition in the industry | 4 | 43 | 20 | 33 | 100 |
| Exchange rate | 4 | 18 | 31 | 47 | 100 |
| Tax rate | 8 | 39 | 20 | 33 | 100 |
| Interest Rates | 4 | 43 | 14 | 39 | 100 |
| Changing trends which influence demand | 4 | 39 | 25 | 31 | 100 |
| Lack of Access to... | 9 | 33 | 20 | 38 | |
| Skilled labour/workforce | 6 | 41 | 4 | 49 | 100 |
| Finance | 14 | 39 | 24 | 24 | 100 |
| Funding | 27 | 35 | 10 | 27 | 100 |
| Raw Materials | 0 | 16 | 16 | 69 | 100 |
| Business support/advice | 4 | 24 | 37 | 35 | 100 |
| Marketing opportunities | 6 | 42 | 30 | 22 | 100 |
| Regulatory and industry environment | 8 | 24 | 17 | 51 | |
| SARS compliance | 10 | 16 | 18 | 55 | 100 |
| Customs/trade regulations | 8 | 20 | 25 | 47 | 100 |
| Labour regulations | 2 | 18 | 14 | 67 | 100 |
| Business licensing requirements | 4 | 18 | 14 | 65 | 100 |

| | | | | | |
|---|----------|-----------|-----------|-----------|------------|
| Lack of professionalism within the industry | 4 | 31 | 25 | 39 | 100 |
| Lack of internal regulation within the industry | 0 | 31 | 20 | 49 | 100 |
| Lack of industry promotion from government | 33 | 35 | 8 | 24 | 100 |
| Issues related to the freedom of expression | 0 | 24 | 10 | 67 | 100 |
| Socio-economic conditions | 4 | 17 | 19 | 55 | |
| Crime | 14 | 29 | 27 | 29 | 100 |
| Corruption | 4 | 27 | 22 | 47 | 100 |
| Substance Abuse | 0 | 8 | 25 | 67 | 100 |
| Race Discrimination | 3 | 9 | 6 | 57 | 100 |
| Gender Discrimination | 0 | 10 | 14 | 76 | 100 |
| | | | | | |
| Other (Please specify)... | 0 | 0 | 0 | 0 | |

5.11 Outlook

How do you generally feel about your future in the sector? (choose ONE)

| | N | % |
|---------------|-----------|------------|
| Very positive | 37 | 54 |
| Positive | 21 | 30 |
| Neutral | 4 | 6 |
| Negative | 2 | 3 |
| Very negative | 2 | 3 |
| Uncertain | 3 | 4 |
| TOTAL | 69 | 100 |

| N | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|---------------|------------------|------------------|-----------------|----------------|------------------|--------------|
| Very positive | 9 | 7 | 15 | 3 | 3 | 37 |
| Positive | 5 | 3 | 13 | 0 | 0 | 21 |
| Neutral | 1 | 2 | 1 | 0 | 0 | 4 |
| Negative | 1 | 1 | 0 | 0 | 0 | 2 |
| Very negative | 0 | 1 | 1 | 0 | 0 | 2 |
| Uncertain | 1 | 0 | 2 | 0 | 0 | 3 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|---------------|------------------|------------------|-----------------|----------------|------------------|--------------|
| Very positive | 53 | 50 | 47 | 100 | 100 | 54 |
| Positive | 29 | 21 | 41 | 0 | 0 | 30 |
| Neutral | 6 | 14 | 3 | 0 | 0 | 6 |
| Negative | 6 | 7 | 0 | 0 | 0 | 3 |
| Very negative | 0 | 7 | 3 | 0 | 0 | 3 |
| Uncertain | 6 | 0 | 6 | 0 | 0 | 4 |

5.12 Most Important Needs for Company Development

What do you see as your MOST important need in terms of company development? (choose ONE)

| | N | % |
|--|----------|----------|
| Staff training | 9 | 13 |
| Help with strategy and business planning | 4 | 6 |

| | | |
|--|-----------|------------|
| Help with developing new ideas for cash generation | 10 | 14 |
| Help with improving processes and efficiency | 5 | 7 |
| Help with marketing | 7 | 10 |
| Help obtaining external commercial funding | 7 | 10 |
| Help obtaining external government funding | 13 | 19 |
| Help with international expansion | 8 | 11 |
| Increased web presence (marketing, distribution ...) | 4 | 6 |
| Other (specify) | 3 | 4 |
| TOTAL | 70 | 100 |

Others include no help needed, supporting young artists and owning premises

| N | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|--|------------------|------------------|-----------------|----------------|------------------|--------------|
| Staff training | 4 | 1 | 3 | 1 | 0 | 9 |
| Help with strategy and business planning | 2 | 0 | 1 | 1 | 0 | 4 |
| Help with developing new ideas for cash generation | 1 | 4 | 2 | 1 | 2 | 10 |
| Help with improving processes and efficiency | 0 | 2 | 3 | 0 | 0 | 5 |
| Help with marketing | 2 | 3 | 2 | 0 | 0 | 7 |
| Help obtaining external commercial funding | 2 | 2 | 3 | 0 | 0 | 7 |
| Help obtaining external government funding | 4 | 1 | 7 | 0 | 1 | 13 |
| Help with international expansion | 0 | 2 | 6 | 0 | 0 | 8 |
| Increased web presence (marketing, distribution ...) | 1 | 0 | 3 | 0 | 0 | 4 |
| Other (specify) | 1 | 0 | 2 | 0 | 0 | 3 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|--|------------------|------------------|-----------------|----------------|------------------|--------------|
| Staff training | 17 | 15 | 32 | 3 | 3 | 70 |
| Help with strategy and business planning | 24 | 7 | 9 | 33 | 0 | 13 |
| Help with developing new ideas for cash generation | 12 | 0 | 3 | 33 | 0 | 6 |
| Help with improving processes and efficiency | 6 | 27 | 6 | 33 | 67 | 14 |
| Help with marketing | 0 | 13 | 9 | 0 | 0 | 7 |
| Help obtaining external commercial funding | 12 | 20 | 6 | 0 | 0 | 10 |
| Help obtaining external government funding | 12 | 13 | 9 | 0 | 0 | 10 |
| Help with international expansion | 24 | 7 | 22 | 0 | 33 | 19 |
| Increased web presence (marketing, distribution ...) | 0 | 13 | 19 | 0 | 0 | 11 |
| Other (specify) | 6 | 0 | 9 | 0 | 0 | 6 |

What do you see as being your *SECOND MOST* important need in terms of company development? (choose *ONE*)

| | | |
|--|----------|----------|
| | N | % |
|--|----------|----------|

| | | |
|--|-----------|------------|
| Staff training | 5 | 8 |
| Help with strategy and business planning | 10 | 15 |
| Help with developing new ideas for cash generation | 2 | 3 |
| Help with improving processes and efficiency | 4 | 6 |
| Help with marketing | 11 | 17 |
| Help obtaining external commercial funding | 12 | 18 |
| Help obtaining external government funding | 6 | 9 |
| Help with international expansion | 6 | 9 |
| Increased web presence (marketing, distribution ...) | 8 | 12 |
| Other (specify) | 2 | 3 |
| TOTAL | 66 | 100 |

Others include no help needed and rebuilding premises

| N | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|--|------------------|------------------|-----------------|----------------|------------------|--------------|
| Staff training | 2 | 0 | 2 | 1 | 0 | 5 |
| Help with strategy and business planning | 3 | 2 | 5 | 0 | 0 | 10 |
| Help with developing new ideas for cash generation | 0 | 2 | 0 | 0 | 0 | 2 |
| Help with improving processes and efficiency | 1 | 1 | 0 | 2 | 0 | 4 |
| Help with marketing | 2 | 1 | 8 | 0 | 0 | 11 |
| Help obtaining external commercial funding | 6 | 2 | 4 | 0 | 0 | 12 |
| Help obtaining external government funding | 0 | 1 | 4 | 0 | 1 | 6 |
| Help with international expansion | 0 | 1 | 4 | 0 | 1 | 6 |
| Increased web presence (marketing, distribution ...) | 1 | 4 | 2 | 0 | 1 | 8 |
| Other (specify) | 1 | 0 | 1 | 0 | 0 | 2 |

| % | Education | Materials | Prim mkt | Sec mkt | Reception | Total |
|--|------------------|------------------|-----------------|----------------|------------------|--------------|
| Staff training | 16 | 14 | 30 | 3 | 3 | 66 |
| Help with strategy and business planning | 13 | 0 | 7 | 33 | 0 | 8 |
| Help with developing new ideas for cash generation | 19 | 14 | 17 | 0 | 0 | 15 |
| Help with improving processes and efficiency | 0 | 14 | 0 | 0 | 0 | 3 |
| Help with marketing | 6 | 7 | 0 | 67 | 0 | 6 |
| Help obtaining external commercial funding | 13 | 7 | 27 | 0 | 0 | 17 |
| Help obtaining external government funding | 38 | 14 | 13 | 0 | 0 | 18 |
| Help with international expansion | 0 | 7 | 13 | 0 | 33 | 9 |
| Increased web presence (marketing, distribution ...) | 0 | 7 | 13 | 0 | 33 | 9 |
| Other (specify) | 6 | 29 | 7 | 0 | 33 | 12 |

5.13 Membership of industry organizations/associations

Are you a member of an industry organisation or association? (eg Ceramics SA, SANAVA and affiliates, VANSA)

| | N | % |
|--------------|-----------|------------|
| No | 40 | 56 |
| Yes | 31 | 44 |
| TOTAL | 71 | 100 |

| N | No | Yes |
|--|-----------|-----------|
| Education, training and development | 4 | 14 |
| Materials and Technical Services | 10 | 5 |
| Distribution/presentation - primary market | 21 | 11 |
| Distribution/presentation - secondary market | 2 | 1 |
| Reception | 3 | 0 |
| TOTAL | 40 | 31 |

| % | No | Yes |
|--|-----------|-----------|
| Education, training and development | 22 | 78 |
| Materials and Technical Services | 67 | 33 |
| Distribution/presentation - primary market | 66 | 34 |
| Distribution/presentation - secondary market | 67 | 33 |
| Reception | 100 | 0 |
| TOTAL | 56 | 44 |

5.14 Reasons for Not Being a Member

If NO, which of the following most accurately describes the reasons for not being a member? (can choose one)

| | N | % |
|----------------------------------|-----------|------------|
| Not aware | 4 | 11 |
| Not interested | 19 | 50 |
| Don't believe any real benefits | 8 | 21 |
| Don't know what the benefits are | 7 | 18 |
| TOTAL | 38 | 100 |

5.15 Perception of Most Significant Benefits Obtained from Association/Organisation Membership

If YES, what do you see as being the MOST significant benefit you obtain from this membership (choose ONE)

| | N | % |
|-----------------------------------|----|----|
| Information | 8 | 22 |
| Advice | 2 | 5 |
| Networking | 18 | 49 |
| Marketing Opportunities | 5 | 14 |
| Training/Professional Development | 0 | 0 |
| Access to funding opportunities | 1 | 3 |

| | | |
|----------------|-----------|------------|
| Peer Support | 2 | 5 |
| Other, specify | 1 | 3 |
| TOTAL | 37 | 100 |

5.16 Use of Computers

6. Galleries

Data specific to those organizations having a gallery space

6.1 Size of Gallery

What is the approximate size of your gallery?

| | Commercial | Non-commercial | Total |
|------|------------|----------------|------------|
| N | 25 | 11 | 36 |
| mean | 245 | 239 | 243 |
| p25 | 50 | 63 | 60 |
| p50 | 100 | 120 | 120 |
| min | 13 | 60 | 13 |
| max | 2000 | 1000 | 2000 |

6.2 Gallery Space Ownership vs Lease

Is this space owned or rented?

| | N | % |
|--------------|-----------|------------|
| Owned | 11 | 26 |
| Rented | 32 | 74 |
| TOTAL | 43 | 100 |

| N | Commercial | Non-commercial |
|--------------|------------|----------------|
| Owned | 8 | 3 |
| Rented | 20 | 12 |
| TOTAL | 28 | 15 |

| % | Commercial | Non-commercial |
|--------------|------------|----------------|
| Owned | 29 | 20 |
| Rented | 71 | 80 |
| TOTAL | 100 | 100 |

6.3 Monthly Costs Associated with Space

What is the approximate monthly cost associated with the space (rental or mortgage/bond payment)?

| Per month | Commercial | Non-commercial | Total |
|-----------|------------|----------------|--------|
| N | 23 | 8 | 31 |
| mean | 12,403 | 10,441 | 11,897 |
| p25 | 4,000 | 3,063 | 4,000 |

| | | | |
|-----|--------|--------|--------|
| p50 | 7,000 | 6,750 | 7,000 |
| min | 750 | 384 | 384 |
| max | 50,965 | 33,000 | 50,965 |

| Per m ² | Commercial | Non-commercial | Total |
|--------------------|------------|----------------|-------|
| N | 23 | 8 | 31 |
| mean | 114 | 101 | 111 |
| p25 | 30 | 32 | 30 |
| p50 | 63 | 79 | 66 |
| min | 5 | 1 | 1 |
| max | 378 | 367 | 378 |

6.4 Source of Artwork (Geography)

What proportion of artworks that you sell are sourced from... (indicate percentage)

| Mean | Commercial | Non-commercial | TOTAL |
|---|------------|----------------|-------|
| Local artists? | 87 | 76 | 84 |
| Artists from other countries in Africa? | 22 | 18 | 21 |
| International, outside of Africa? | 9 | 20 | 14 |

6.5 Average Price of Artworks Sold

What is the average price of artworks sold in your gallery? (choose ONE)

| N | Commercial | Non-commercial | TOTAL |
|---------------------|------------|----------------|-----------|
| Less than R1000 | 1 | 1 | 2 |
| R1000 - R5000 | 11 | 3 | 14 |
| R5000 - R20000 | 14 | 7 | 21 |
| R20 000 - R50 000 | 4 | 0 | 4 |
| R50 000 - R100 000 | 1 | 1 | 2 |
| R100 000 – R250 000 | 3 | 0 | 3 |
| More than R250 000 | 0 | 1 | 1 |
| TOTAL | 34 | 13 | 47 |

| % | Commercial | Non-commercial | TOTAL |
|---------------------|------------|----------------|------------|
| Less than R1000 | 3 | 8 | 4 |
| R1000 - R5000 | 32 | 23 | 30 |
| R5000 - R20000 | 41 | 54 | 45 |
| R20 000 - R50 000 | 12 | 0 | 9 |
| R50 000 - R100 000 | 3 | 8 | 4 |
| R100 000 – R250 000 | 9 | 0 | 6 |
| More than R250 000 | 0 | 8 | 2 |
| TOTAL | 100 | 100 | 100 |

6.6 Commission Charged on Sale of Artwork

What commission and associated costs do you generally charge on the sale of work? (choose ONE)

| N | Commercial | Non-commercial | TOTAL |
|---------------|------------|----------------|-----------|
| No commission | 1 | 4 | 5 |
| 0-10% | 3 | 2 | 5 |
| 10-20% | 3 | 0 | 3 |
| 20-30% | 5 | 2 | 7 |
| 30-40% | 14 | 4 | 19 |
| 40-50% | 4 | 1 | 5 |
| 50-60% | 1 | 0 | 1 |
| 60-70% | 0 | 0 | 0 |
| More than 70% | 1 | 0 | 1 |
| TOTAL | 32 | 13 | 46 |

| % | Commercial | Non-commercial | TOTAL |
|---------------|------------|----------------|------------|
| No commission | 3 | 31 | 11 |
| 0-10% | 9 | 15 | 11 |
| 10-20% | 9 | 0 | 7 |
| 20-30% | 16 | 15 | 15 |
| 30-40% | 44 | 31 | 41 |
| 40-50% | 13 | 8 | 11 |
| 50-60% | 3 | 0 | 2 |
| 60-70% | 0 | 0 | 0 |
| More than 70% | 3 | 0 | 2 |
| TOTAL | 100 | 100 | 100 |

6.7 Target Consumers

What kind/s of consumer/s does your gallery mainly target? (choose ONE)

| N | Commercial | Non-commercial | TOTAL |
|-----------------------------|------------|----------------|-----------|
| low income earners | 0 | 2 | 2 |
| middle income earners | 7 | 4 | 11 |
| upper-middle income earners | 12 | 5 | 17 |
| high income earners | 12 | 1 | 13 |
| the very wealthy | 3 | 1 | 4 |
| TOTAL | 34 | 13 | 47 |

| % | Commercial | Non-commercial | TOTAL |
|-----------------------------|------------|----------------|------------|
| low income earners | 0 | 15 | 4 |
| middle income earners | 21 | 31 | 23 |
| upper-middle income earners | 35 | 38 | 36 |
| high income earners | 35 | 8 | 28 |
| the very wealthy | 9 | 8 | 9 |
| TOTAL | 100 | 100 | 100 |

6.8 Perception of Most Important Opportunity for Making Sales

What do you regard as the MOST important opportunity for making sales? (choose ONE)

| N | Commercial | Non-commercial | TOTAL |
|---|------------|----------------|-------|
|---|------------|----------------|-------|

| | | | |
|-------------------------|-----------|-----------|-----------|
| exhibition openings | 15 | 5 | 20 |
| casual daytime visitors | 11 | 2 | 13 |
| special viewings | 6 | 4 | 10 |
| other, specify | 2 | 2 | 4 |
| TOTAL | 34 | 13 | 47 |

| % | Commercial | Non-commercial | TOTAL |
|-------------------------|------------|----------------|------------|
| exhibition openings | 44 | 38 | 43 |
| casual daytime visitors | 32 | 15 | 28 |
| special viewings | 18 | 31 | 21 |
| other, specify | 6 | 15 | 9 |
| TOTAL | 100 | 100 | 100 |

Other include art fairs overseas and consultation

6.9 Perception of Most Significant Constraint/Challenge

What would you regard as the MOST significant constraint/challenge that you face as a gallerist?

| N | Commercial | Non-commercial | TOTAL |
|--|------------|----------------|-----------|
| insufficient/inadequate space | 3 | 4 | 7 |
| physical location of gallery | 4 | 1 | 5 |
| too much competition | 2 | 0 | 2 |
| poor levels of professionalism among artists | 1 | 3 | 4 |
| market downturn | 23 | 5 | 28 |
| TOTAL | 33 | 13 | 46 |

| % | Commercial | Non-commercial | TOTAL |
|--|------------|----------------|------------|
| insufficient/inadequate space | 9 | 31 | 15 |
| physical location of gallery | 12 | 8 | 11 |
| too much competition | 6 | 0 | 4 |
| poor levels of professionalism among artists | 3 | 23 | 9 |
| market downturn | 70 | 38 | 61 |
| TOTAL | 100 | 100 | 100 |

What would you regard as the SECOND MOST significant constraint/challenge that you face as a gallerist?

| N | Commercial | Non-commercial | TOTAL |
|--|------------|----------------|-----------|
| insufficient/inadequate space | 3 | 0 | 3 |
| physical location of gallery | 8 | 4 | 12 |
| too much competition | 5 | 1 | 6 |
| poor levels of professionalism among artists | 9 | 0 | 9 |
| market downturn | 6 | 6 | 12 |
| TOTAL | 31 | 11 | 42 |

| % | Commercial | Non-commercial | TOTAL |
|-------------------------------|------------|----------------|-------|
| insufficient/inadequate space | 10 | 0 | 7 |
| physical location of gallery | 26 | 36 | 29 |
| too much competition | 16 | 9 | 14 |

| | | | |
|--|------------|------------|------------|
| poor levels of professionalism among artists | 29 | 0 | 21 |
| market downturn | 19 | 55 | 29 |
| TOTAL | 100 | 100 | 100 |

7. Finances

7.1 Annual Income

Please indicate or estimate (even very roughly) your total income for 2008, from ALL sources (both arts-related and non-arts related)

| Income | N | mean | p50 | min | max |
|--|-----------|------------------|----------------|---------------|-------------------|
| Education, training and development | 16 | 2,433,768 | 1,194,257 | 10,000 | 14,900,000 |
| Materials and Technical Services | 14 | 553,250 | 435,000 | 120,000 | 1,785,467 |
| Distribution/presentation - primary market | 25 | 2,862,680 | 500,000 | 60,000 | 24,000,000 |
| Distribution/presentation - secondary market | 2 | 855,000 | 855,000 | 210,000 | 1,500,000 |
| Reception | 2 | 195,000 | 195,000 | 150,000 | 240,000 |
| TOTAL | 59 | 2,006,880 | 580,000 | 10,000 | 24,000,000 |

| Income range | Freq. | Percent |
|-----------------------|-----------|------------|
| 10 000 – 50 000 | 1 | 2 |
| 50 000 – 100 000 | 2 | 3 |
| 100 000 – 250 000 | 10 | 17 |
| 250 000 – 500 000 | 11 | 18 |
| 500 000 – 1000 000 | 13 | 22 |
| 1000 000 – 5000 000 | 16 | 27 |
| 5000 000 – 10 000 000 | 3 | 5 |
| 10 000 000 + | 3 | 5 |
| Total | 59 | 100 |

7.2 Income Breakdown

Please indicate or estimate (however roughly) what amount of this annual income was earned through:

| Full sample | R (TOTAL) | N | R Mean | R Median |
|---|------------|----|-----------|----------|
| Product Sales | 64,600,000 | 41 | 1,575,439 | 360,000 |
| Provision of Services | 25,200,000 | 31 | 812,126 | 85,000 |
| Income from royalties | 14,500 | 2 | 7,250 | 7,250 |
| Income from investments | 102,631 | 1 | 102,631 | 102,631 |
| Subletting space | 1,370,677 | 11 | 124,607 | 77,635 |
| Funding agency grant - local source | 4,634,898 | 12 | 386,242 | 300,000 |
| Funding agency grant - international source | 6,101,707 | 14 | 435,836 | 290,000 |
| Government grant (non arts funding agency) | 8,323,800 | 6 | 1,387,300 | 450,000 |
| Corporate Sponsorship | 813,005 | 9 | 90,334 | 45,000 |
| Other (specify) | 1,126,662 | 8 | 140,833 | 115,000 |

| Education, training and development | R (TOTAL) | N | R Mean | R Median |
|-------------------------------------|-----------|---|---------|----------|
| Product Sales | 4,053,853 | 9 | 450,428 | 299,230 |

| | | | | |
|---|------------|----|-----------|---------|
| Provision of Services | 15,453,900 | 6 | 2,575,650 | 20,947 |
| Income from royalties | 4,000 | 1 | 4,000 | 4,000 |
| Income from investments | 102,631 | 1 | 102,631 | 102,631 |
| Subletting space | 1,088,677 | 6 | 181,446 | 83,818 |
| Funding agency grant - local source | 4,077,598 | 10 | 407,760 | 349,022 |
| Funding agency grant - international source | 4,418,707 | 8 | 552,338 | 358,068 |
| Government grant (non arts funding agency) | 8,311,800 | 5 | 1,662,360 | 500,000 |
| Corporate Sponsorship | 721,005 | 5 | 144,201 | 134,819 |
| Other (specify) | 878,115 | 6 | 146,353 | 500,000 |

| Materials and Technical Services | R (TOTAL) | N | R Mean | R Median |
|---|------------------|----------|---------------|-----------------|
| Product Sales | 2,356,730 | 6 | 392,788 | 290,000 |
| Provision of Services | 4,522,420 | 9 | 502,491 | 374,500 |
| Income from royalties | 10,500 | 1 | 10,500 | 10,500 |
| Income from investments | 0 | | | |
| Subletting space | 10,000 | 1 | 10,000 | 10,000 |
| Funding agency grant - local source | 257,300 | 1 | 257,300 | 257,300 |
| Funding agency grant - international source | 298,000 | 2 | 149,000 | 149,000 |
| Government grant (non arts funding agency) | 12,000 | 1 | 12,000 | 12,000 |
| Corporate Sponsorship | 30,000 | 1 | 30,000 | 30,000 |
| Other (specify) | 248,547 | 2 | 124,274 | 12,000 |

| Distribution/presentation - primary market | R (TOTAL) | N | R Mean | R Median |
|---|------------------|----------|---------------|-----------------|
| Product Sales | 56,387,398 | 23 | 2,451,626 | 420,000 |
| Provision of Services | 4,894,600 | 13 | 376,508 | 60,000 |
| Income from royalties | 0 | | | |
| Income from investments | 272,000 | 4 | 68,000 | 46,000 |
| Subletting space | 300,000 | 1 | 300,000 | 300,000 |
| Funding agency grant - local source | 1,385,000 | 4 | 346,250 | 325,000 |
| Funding agency grant - international source | 0 | | | |
| Government grant (non arts funding agency) | 0 | | | |
| Corporate Sponsorship | 62,000 | 3 | 20,667 | 14,000 |
| Other (specify) | 0 | | | |

| Distribution/presentation - secondary market | R (TOTAL) | N | R Mean | R Median |
|---|------------------|----------|---------------|-----------------|
| Product Sales | 1,660,000 | 2 | 830,000 | 830,000 |
| Provision of Services | 50,000 | 1 | 50,000 | 50,000 |
| Income from royalties | | | | |
| Income from investments | | | | |
| Subletting space | | | | |
| Funding agency grant - local source | | | | |
| Funding agency grant - international source | | | | |
| Government grant (non arts funding agency) | | | | |
| Corporate Sponsorship | | | | |
| Other (specify) | | | | |

| Reception | R (TOTAL) | N | R Mean | R Median |
|------------------|------------------|----------|---------------|-----------------|
|------------------|------------------|----------|---------------|-----------------|

| | | | | |
|---|---------|---|---------|---------|
| Product Sales | 135,000 | 1 | 135,000 | 135,000 |
| Provision of Services | 255,000 | 2 | 127,500 | 127,500 |
| Income from royalties | | | | |
| Income from investments | | | | |
| Subletting space | | | | |
| Funding agency grant - local source | | | | |
| Funding agency grant - international source | | | | |
| Government grant (non arts funding agency) | | | | |
| Corporate Sponsorship | | | | |
| Other (specify) | | | | |

7.3 Income Outlook

Do you expect your total income to be higher, lower or about the same this year? (single response)

| | N | % |
|----------------|-----------|------------|
| Higher | 27 | 41 |
| Lower | 20 | 30 |
| About the same | 19 | 29 |
| TOTAL | 66 | 100 |

| N | Higher | Lower | Same |
|---|-----------|-----------|-----------|
| Education, training and development | 5 | 5 | 7 |
| Materials and Technical Services | 5 | 5 | 5 |
| Distribution/presentation - primary market | 16 | 7 | 6 |
| Distribution/presentation - secondary market | 0 | 1 | 1 |
| Reception | 1 | 2 | 0 |
| TOTAL | 27 | 20 | 19 |

| % | Higher | Lower | Same |
|---|-----------|-----------|-----------|
| Education, training and development | 29 | 29 | 41 |
| Materials and Technical Services | 33 | 33 | 33 |
| Distribution/presentation - primary market | 55 | 24 | 21 |
| Distribution/presentation - secondary market | 0 | 50 | 50 |
| Reception | 33 | 67 | 0 |
| TOTAL | 41 | 30 | 29 |

7.4 Annual Expenditure

Please indicate or estimate your total work-related expenditure in the financial year ending in 2008

| Expenditure | N | mean | p50 | min | max |
|---|-----------|------------------|----------------|---------------|-------------------|
| Education, training and development | 15 | 2,051,898 | 900,797 | 12,000 | 10,000,000 |
| Materials and Technical Services | 13 | 479,918 | 400,000 | 20,000 | 1,200,000 |
| Distribution/presentation - primary market | 26 | 2,567,490 | 365,000 | 38,000 | 24,000,000 |
| Distribution/presentation - secondary market | 2 | 633,500 | 633,500 | 267,000 | 1,000,000 |
| Reception | 2 | 200,000 | 200,000 | 180,000 | 220,000 |
| TOTAL | 58 | 1,817,916 | 485,000 | 12,000 | 24,000,000 |

7.5 Expenditure Breakdown

Please estimate what amount or percentage of this work-related expenditure was incurred through:

| Full sample | R (TOTAL) | N | R Mean | R Median |
|--------------------------------------|------------------|----------|---------------|-----------------|
| Wages and salaries and related costs | 40,013,290 | 50 | 800,266 | 195,967 |
| Materials and Equipment | 13,232,173 | 44 | 300,731 | 67,000 |
| Publicity costs | 3,465,134 | 31 | 111,779 | 24,000 |
| Exhibition costs | 5,291,429 | 28 | 188,980 | 34,000 |
| Premises (rental or mortgage/bond) | 10,879,709 | 37 | 294,046 | 81,200 |
| Utilities costs and overheads | 6,886,675 | 39 | 176,581 | 30,700 |
| Communication costs | 3,915,276 | 40 | 97,882 | 33,455 |
| Travel costs | 5,752,535 | 38 | 151,383 | 26,750 |
| Transport and Freightage | 9,258,405 | 26 | 356,093 | 18,345 |
| Insurance | 2,704,447 | 30 | 90,148 | 20,125 |
| Other (specify) | 2,866,954 | 12 | 238,913 | 48,173 |

| Education, training and development | R (TOTAL) | N | R Mean | R Median |
|--|------------------|----------|---------------|-----------------|
| Wages and salaries and related costs | 16,111,979 | 13 | 1,239,383 | 606,110 |
| Materials and Equipment | 3,211,168 | 10 | 321,117 | 228,832 |
| Publicity costs | 718,608 | 7 | 102,658 | 26,000 |
| Exhibition costs | 897,849 | 7 | 128,264 | 90,000 |
| Premises (rental or mortgage/bond) | 664,089 | 7 | 94,870 | 81,200 |
| Utilities costs and overheads | 2,680,084 | 11 | 243,644 | 53,000 |
| Communication costs | 1,508,092 | 12 | 125,674 | 42,200 |
| Travel costs | 1,075,084 | 11 | 97,735 | 26,500 |
| Transport and Freightage | 1,081,823 | 7 | 154,546 | 31,450 |
| Insurance | 638,014 | 11 | 58,001 | 21,216 |
| Other (specify) | 2,207,081 | 5 | 441,416 | 366,912 |

| Materials and Technical Services | R (TOTAL) | N | R Mean | R Median |
|---|------------------|----------|---------------|-----------------|
| Wages and salaries and related costs | 2,688,001 | 12 | 224,000 | 200,000 |
| Materials and Equipment | 1,685,732 | 11 | 153,248 | 74,000 |
| Publicity costs | 82,265 | 4 | 20,566 | 19,008 |
| Exhibition costs | 23,470 | 3 | 7,823 | 10,770 |
| Premises (rental or mortgage/bond) | 618,940 | 11 | 56,267 | 44,000 |
| Utilities costs and overheads | 256,700 | 8 | 32,088 | 25,000 |
| Communication costs | 286,416 | 11 | 26,038 | 22,000 |
| Travel costs | 424,688 | 9 | 47,188 | 37,500 |
| Transport and Freightage | 10,900 | 1 | 10,900 | 10,900 |
| Insurance | 88,984 | 6 | 14,831 | 12,500 |
| Other (specify) | 72,826 | 3 | 24,275 | 30,000 |

| Distribution/presentation - primary market | R (TOTAL) | N | R Mean | R Median |
|---|------------------|----------|---------------|-----------------|
| Wages and salaries and related costs | 20,904,616 | 21 | 995,458 | 150,000 |
| Materials and Equipment | 7,510,685 | 19 | 395,299 | 24,000 |
| Publicity costs | 2,629,920 | 17 | 154,701 | 30,000 |

| | | | | |
|------------------------------------|-----------|----|---------|---------|
| Exhibition costs | 4,320,110 | 17 | 254,124 | 38,000 |
| Premises (rental or mortgage/bond) | 9,225,679 | 17 | 542,687 | 120,000 |
| Utilities costs and overheads | 3,929,890 | 18 | 218,327 | 48,000 |
| Communication costs | 2,115,429 | 16 | 132,214 | 12,500 |
| Travel costs | 4,219,415 | 15 | 281,294 | 20,000 |
| Transport and Freightng | 8,146,003 | 16 | 509,125 | 23,452 |
| Insurance | 1,977,450 | 13 | 152,112 | 30,000 |
| Other (specify) | 587,046 | 4 | 146,762 | 35,523 |

| Distribution/presentation - secondary market | R (TOTAL) | N | R Mean | R Median |
|---|------------------|----------|---------------|-----------------|
| Wages and salaries and related costs | 96,700 | 2 | 48,350 | 48,350 |
| Materials and Equipment | 705,590 | 2 | 352,795 | 352,795 |
| Publicity costs | 25,340 | 2 | 12,670 | 12,670 |
| Exhibition costs | 50,000 | 1 | 50,000 | 50,000 |
| Premises (rental or mortgage/bond) | 360,000 | 1 | 360,000 | 360,000 |
| Utilities costs and overheads | | 0 | . | . |
| Communication costs | 5,340 | 1 | 5,340 | 5,340 |
| Travel costs | 13,350 | 1 | 13,350 | 13,350 |
| Transport and Freightng | 10,680 | 1 | 10,680 | 10,680 |
| Insurance | | | | |
| Other (specify) | | | | |

| Reception | R (TOTAL) | N | R Mean | R Median |
|--------------------------------------|------------------|----------|---------------|-----------------|
| Wages and salaries and related costs | 212,000 | 2 | 106,000 | 106,000 |
| Materials and Equipment | 119,000 | 2 | 59,500 | 59,500 |
| Publicity costs | 9,000 | 1 | 9,000 | 9,000 |
| Exhibition costs | 0 | | | |
| Premises (rental or mortgage/bond) | 11,000 | 1 | 11,000 | 11,000 |
| Utilities costs and overheads | 20,000 | 2 | 10,000 | 10,000 |
| Communication costs | | 0 | . | . |
| Travel costs | 20,000 | 2 | 10,000 | 10,000 |
| Transport and Freightng | 9,000 | 1 | 9,000 | 9,000 |
| Insurance | | | | |
| Other (specify) | | | | |

7.6 Replacement Value of Assets

What is the estimated replacement value of your work-related assets/things that you require to conduct your work?

| Asset replacement | |
|--------------------------|------------|
| N | 57 |
| mean | 1,815,789 |
| p25 | 100,000 |
| p50 | 250,000 |
| min | 10,000 |
| max | 30,000,000 |

7.7 Debts/Liabilities

What is the estimated size of your debts/liabilities?

| Debt | |
|------|-----------|
| N | 57 |
| mean | 185,586 |
| p25 | 50,000 |
| p50 | 100,000 |
| min | 10,000 |
| max | 3,300,000 |

7.8 Income/Company Tax Registration

Are you registered for income or company tax?

| | N | % |
|--------------|-----------|------------|
| No | 9 | 13 |
| Yes | 62 | 87 |
| TOTAL | 71 | 100 |

7.9 Reasons for Not Being Registered for Tax

If NO, why: (choose ONE)

| | N | % |
|---|----------|------------|
| Not aware | 2 | 29 |
| I think I earn too little | 1 | 14 |
| Haven't found the time | 0 | 0 |
| Fall below current income/company tax threshold | 3 | 57 |
| Too much trouble/admin | 0 | 0 |
| Other, specify: | 0 | 0 |
| TOTAL | 7 | 100 |

7.10 VAT registration

Are you registered as a VAT vendor through SARS?

| | N | % |
|--------------|-----------|------------|
| No | 34 | 48 |
| Yes | 37 | 52 |
| TOTAL | 71 | 100 |

7.11 Reasons for Not Being Registered as a VAT vendor

If NO, why

| | N | % |
|--------------------|---|---|
| Don't know how VAT | 2 | 6 |

| | | |
|---|-----------|------------|
| Not applicable | 10 | 31 |
| Fall below current taxable income threshold | 19 | 59 |
| Too much trouble/admin | 1 | 3 |
| TOTAL | 32 | 100 |

7.12 Insurance

Have you ever taken out any of the following types of insurance related to your business/work?

| | N | % |
|----------------------------------|------------|----------|
| Accident Insurance | 21 | 30 |
| Vehicle insurance | 25 | 35 |
| Travel insurance | 15 | 21 |
| Professional Indemnity insurance | 15 | 21 |
| Freight Insurance | 22 | 31 |
| Office/Studio Contents Insurance | 11 | 15 |
| Income Protection Plan | 33 | 46 |
| None of the above | 9 | 13 |
| TOTAL | 151 | |