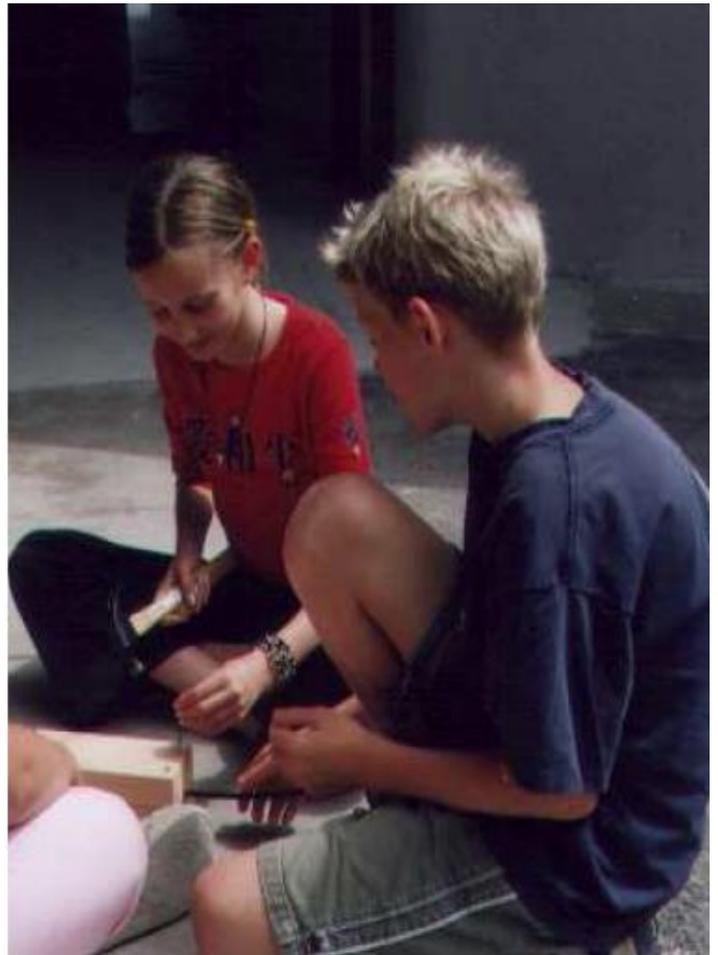


The Self Portrait: How Are We Doing in South Carolina?

*Summary of Responses
Mid 2010*



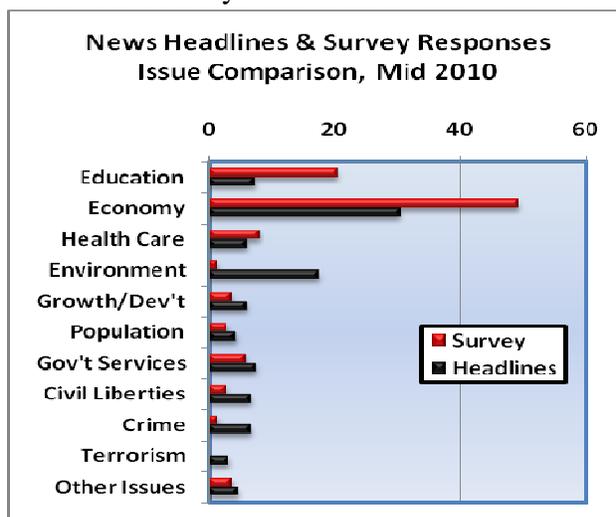
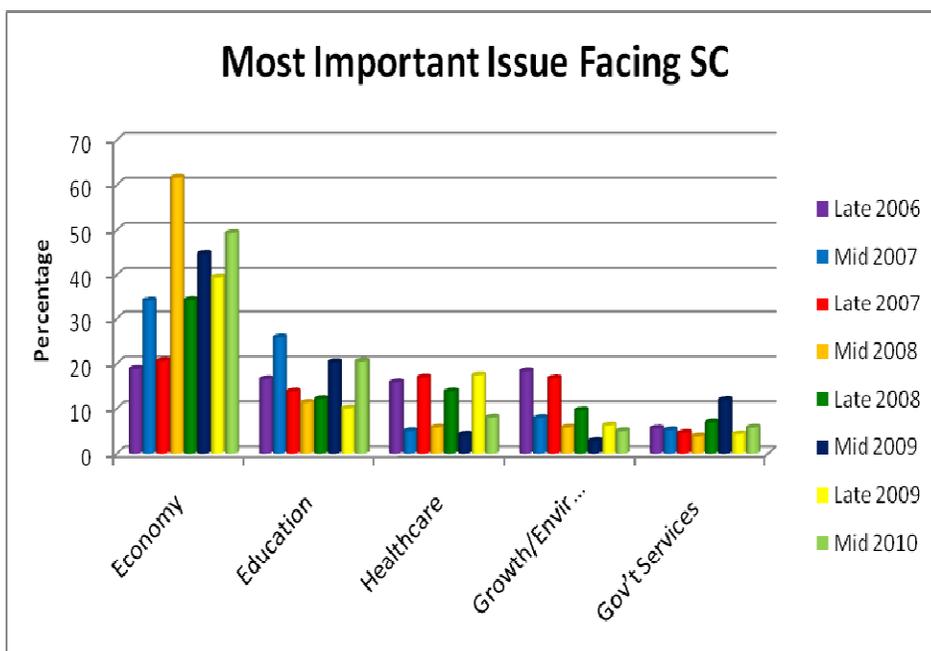
CLEMSON[®]
JIM SELF CENTER ON THE FUTURE

THE SELF PORTRAIT: HOW ARE WE DOING IN SOUTH CAROLINA IN MID-2010?

Since late 2006, the Jim Self Center on the Future at Clemson University has collaborated with the Survey Research Laboratory at the University of South Carolina to conduct and compile the *Self Portrait: How Are We Doing In SC?* In its eighth season, the mid-2010 *Self Portrait* phone survey was conducted with over 800 SC residents. The information below provides a brief overview of the responses to questions posed in 2010 and how they compare to the earlier responses.

In mid-2010, 49.4% of survey participants said that the Economy is the most important issue that the state will face over the next ten years. Like the results of the 2008 and 2009 surveys, the relative strength of the 2008 recession worries have persisted into the first half of 2010, particularly in the areas of unemployment, taxes and job security. To understand the media's impact on response rates, the Self Center compiles newspaper headlines over the two months that the survey is in the field. Headlines are gathered from *The Greenville News*, *The State* in Columbia, *The Post and Courier* in Charleston, *The Beaufort Gazette* in Beaufort, *The Sun News* in Myrtle Beach, and the *Herald-Journal* in Spartanburg. Similar to the survey but at a lower rate, the mid-2010 newspaper headlines also reflect the Economy (30.3%) as the most important issue. In addition to the Economy, the top four most important issues identified by respondents were Education (20.5%), Health Care (8%), and Government Services (5.8%).

In the mid-2010 survey, the Environment (1.3%) was the lowest ranked

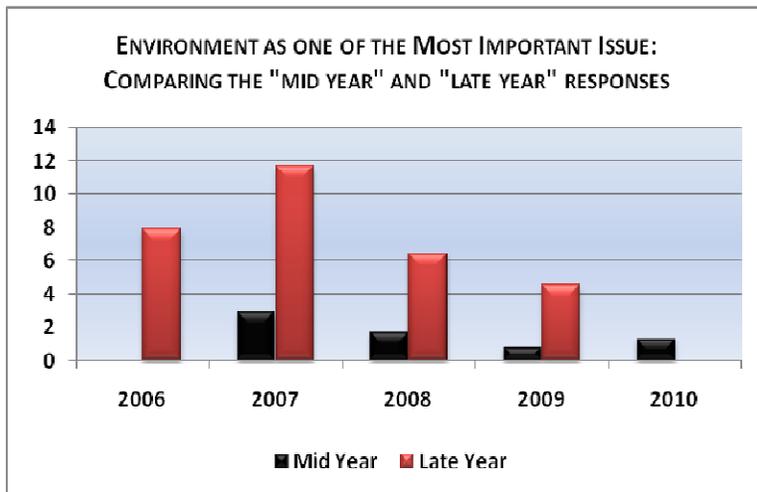
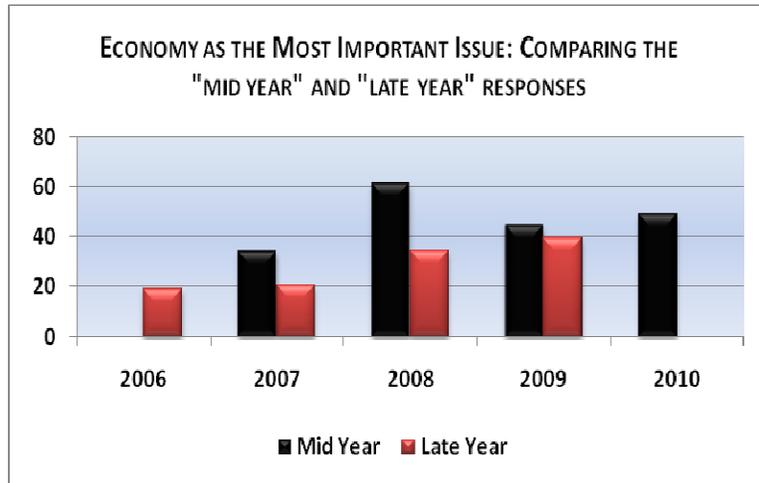


issue by South Carolina respondents. Over the same time period, 17.5% of the headlines related to the environment, only second to the economy, and primarily to news about the Gulf oil spill. The spill occurred in May and perhaps at this time, citizens did not know the extent of the damage or recognize the potential impacts. The dire economic ramifications of an environmental disaster may have bearing on the low environmental response rate but the relatively high economic issue response.

There are some cyclical trends to the response with higher responses rates occurring during the mid-year surveys than during late year surveys.

Possible explanations are that the late-year surveys are conducted between October and November leading into a major holiday and shopping season possibly requiring temporary seasonal workers. By mid-year, the concern about the economy is higher, bills have come due on holiday spending and tax season has just passed. In addition, legislators are in session and economic issues may get more attention at that time.

While at a low percentage rate, environmental issues also are raised in a cyclical fashion. In the late year surveys, respondents tend to rank Environment among the top five most important issues, but in the mid-year surveys, the environment has consistently ranked at the bottom of the ten most important issues. Perhaps the latter part of the year coincides with holiday education and fundraising events for environmental purposes and groups.

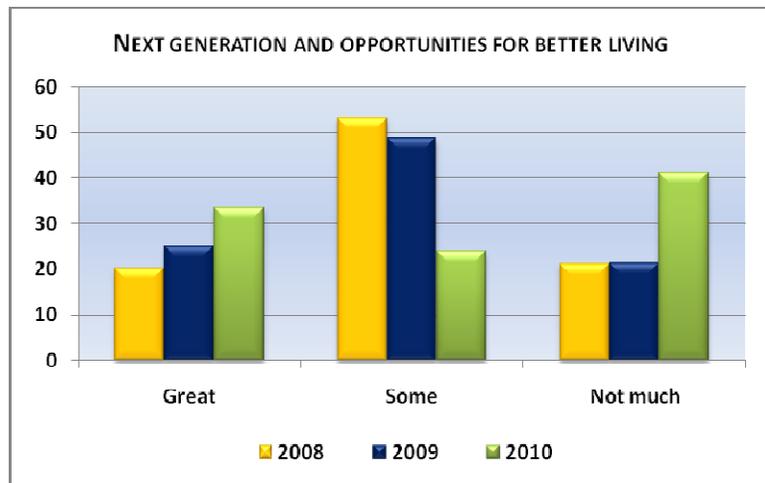


Further analysis of the responses according to the demographic characteristics revealed that both male and female respondents identified the same top four most important issues. For male respondents, however, the rankings were the Economy (53%), Education (15.5%), Government Services (7.9%), and Health Care (4.9%). For females, the rankings in order were the Economy (46%), Education (24.9%), Health Care (10.8%), and Government Services (3.9%). Female respondents indicated a higher level of concern about education and healthcare.

Other notable outcomes among demographic groups include the 18-29 age group who have little relative concern about government services compared to the over 65 group. From an educational attainment perspective, respondents with at least a college degree consider government service (9.8%) as the most important issue after education (24.1%) and the economy (46.1%). At 7.5%, white respondents were more inclined than black respondents (1.5%) to consider government services as the most important issue for the state over the next 10 years. Since 2006, the environment has been losing ground particularly among respondents with less than a high school degree and with incomes less than \$25,000.

HOW MUCH OF AN OPPORTUNITY DO YOU THINK THE NEXT GENERATION OF SOUTH CAROLINIANS HAS TO LIVE BETTER THAN THEIR PARENTS?

In the three years that SC residents have been asked about the opportunities for the next generation, there has been an increase of 13.3 percentage points in participants who believe there is great opportunity. On the flip side, respondents who believe there is some opportunity has decreased by 29.1 percentage points and the 41.1% of 2010 respondents who believe there is ‘not much’ opportunity has more than doubled over this past year. Respondents attribute this gloomy prospect to the Economy (58.8%), Global Competition (9.5%) and Delinquency (8.1%).



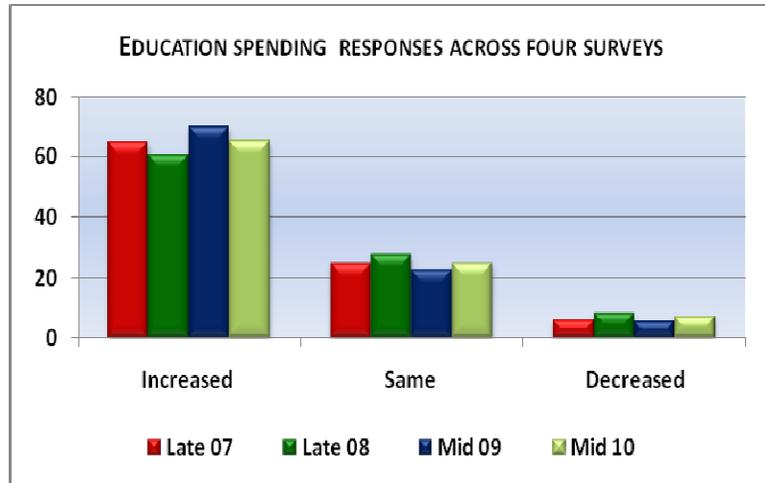
Meanwhile, the combined respondents who are somewhat optimistic about the opportunities of the next generation (great or some) continue to drop from 73.3 % in mid-2008 to 67.5 % in mid-2010. Among the respondents who think the next generation of South Carolinians will have ‘more opportunity’, an Improved Economy (26.7%), Technology Innovations (19.9%) and Education Opportunities (16.7%) are cited as the reasons.

DO YOU THINK SPENDING ON EDUCATION SHOULD BE DECREASED, KEPT ABOUT THE SAME, OR INCREASED, EVEN IF IT MEANS RAISING TAXES?

The question about whether education spending should be decreased, stay the same, or increased, has been asked in four of the eight *Self Portrait* surveys. The mid-2010 responses were consistent among the late 2007, late 2008, and mid-2009 surveys. Overall, about two-thirds of the 809 respondents (64.9%) said education spending should be ‘increased.’ While about a

quarter of the respondents (24.8%) indicated that education spending should stay the same, only 7.2% of respondents say that spending should be decreased.

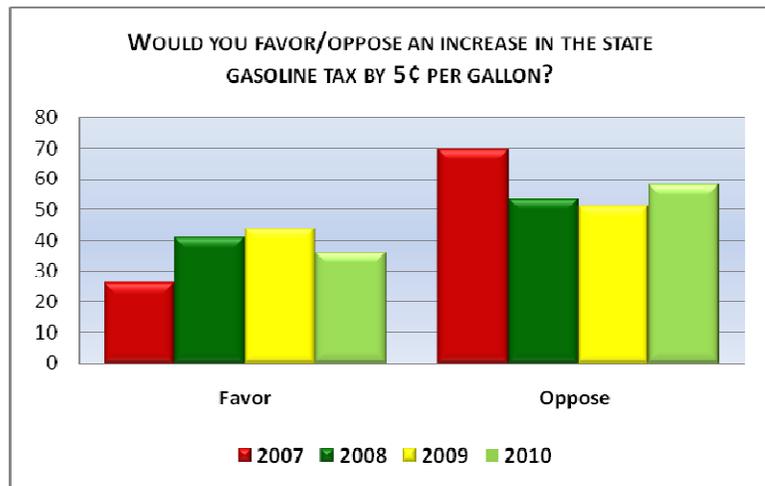
Of respondents who say that spending should be decreased, at 30.3%, male respondents were more likely to say education spending should be decreased (30.3% vs. 19.9% for females) or stay at present levels (8.5% for males compared to 5.9% for females). Female respondents, however, were more likely (71.1% vs. 58%) to indicate that education spending should be increased.



WOULD YOU FAVOR OR OPPOSE AN INCREASE IN THE STATE GASOLINE TAX OF FIVE CENTS PER GALLON IF THESE FUNDS WERE USED TO IMPROVE THE STATE'S TRANSPORTATION SYSTEM?

In 2010, opposition increased to raising the state gasoline tax by five cents per gallon for the purpose of improving the state's transportation systems. The mid-2010 survey showed an increase in those who indicated they would 'oppose' (58.1%) the measure compared to the previous two years. Still, there was less opposition than when the question was first posed in 2007. At that time, approximately 69.5% were opposed to the measure.

Additionally, fewer respondents (36%) in the mid-2010 survey than the previous two conducted in late 2009 (43.6%) and late 2008 (41%) stated that they were in 'favor' of any measure to increase the state gas tax by up to five cents for improving public transportation systems in South Carolina.

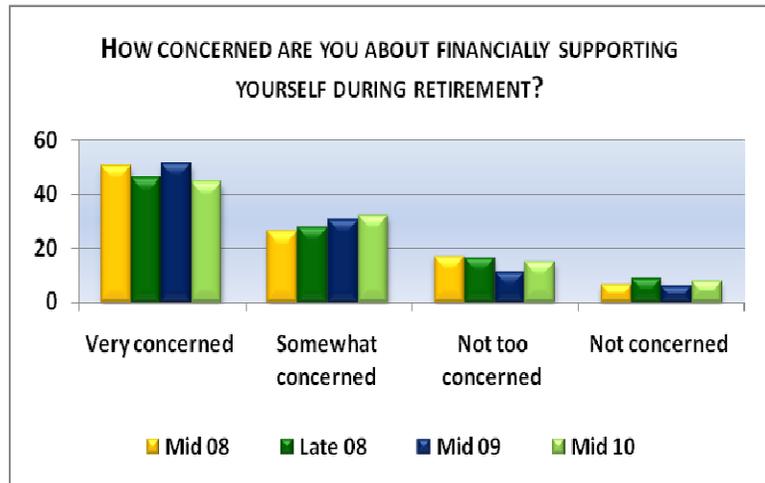


Female respondents are slightly more likely than male respondents to be in favor of a gas tax increase. While differences in age, education and income did not yield significant results, race and party identification accounted for some noted differences. On one hand, Black respondents and /or those who identified themselves as Democrats were more likely to be in favor of the proposed gas tax increase. White respondents and respondents identified with the

Republican Party were more likely to oppose a proposed gas tax to improve public transportation in South Carolina.

HOW CONCERNED ARE YOU ABOUT FINANCIALLY SUPPORTING YOURSELF DURING RETIREMENT?

Since 2008, respondents have indicated their concern about financially supporting themselves during retirement. The responses have been fairly consistent across all four surveys with the highest number of very concerned or somewhat concerned responses occurring in mid-2009 (81.6%) when unemployment had accelerated to 11.9%.

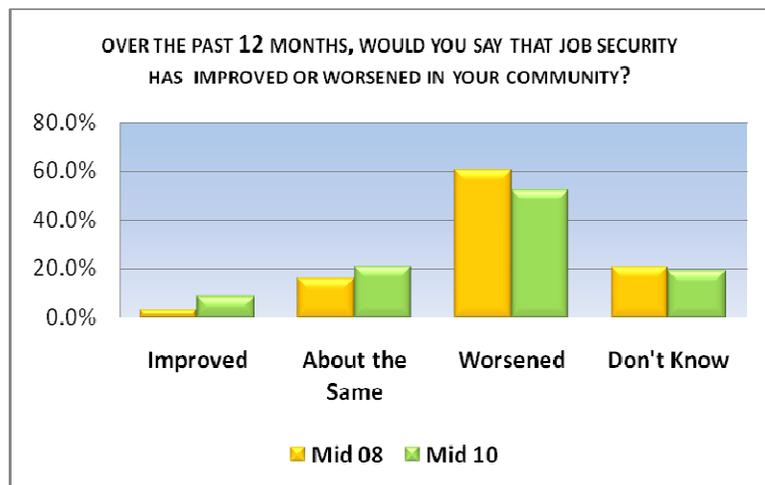


In the current (mid-2010)

Self Portrait survey, over three-fourths of respondents indicated they were either ‘very concerned’ (44.5%) or ‘somewhat concerned’ (32.1%). In terms of other demographic characteristics, respondents with higher education or higher annual incomes were more likely to indicate that they were either ‘not too concerned’ or ‘not at all concerned’ about their finances during retirement. Black respondents (58.1%) were more likely than Whites (39.8%) to be ‘very concerned’ about financially supporting themselves during retirement.

THINKING ABOUT THE COMMUNITY YOU LIVE IN, WOULD YOU SAY THAT IN THE PAST 12 MONTHS JOB SECURITY IN GENERAL HAS IMPROVED OR WORSENE?

Respondents again in the mid-2010 Self Portrait survey expressed genuine concerns about job security over the past year with 52% of all respondents indicating that job security has deteriorated in their communities. This figure is higher than that recorded for the same group of respondents in the mid-2008 survey when 49.4 % stated job security had worsened. In the same vein, respondents who thought job security in their communities had improved (8.9%)

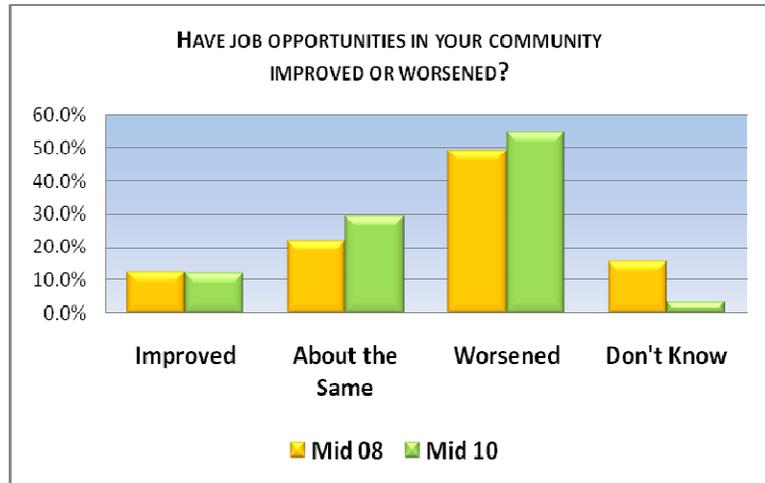


in the past 12 months were about 30% fewer than the same group of mid-2008 respondents (12.7%). None of the variables of age, education, income, race, party affiliation or area of residence accounted for differences in how respondents answered the question.

THINKING ABOUT THE COMMUNITY YOU LIVE IN, WOULD YOU SAY THAT IN THE PAST 12 MONTHS JOB OPPORTUNITIES IN GENERAL HAVE IMPROVED OR WORSENE?

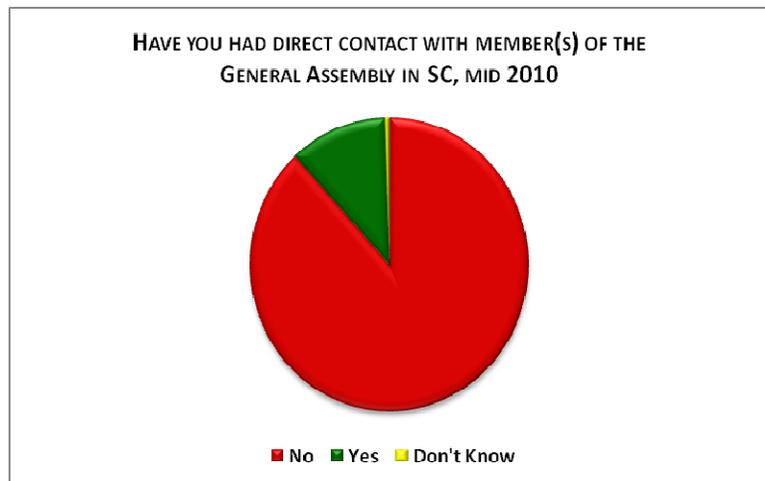
A majority of respondents stated that the situation with job opportunities in their community over the past 12 months has deteriorated (54.7%) with only 12.4% indicating that job opportunity has improved over the period under consideration.

When compared to the responses of the previous mid-2008 survey, we find a 5.3 percentage point increase in the respondents who indicate that job opportunities in their communities have deteriorated over the past 12 months. Once again, differences in the demographic variables were not enough to account for variations in the responses reported.



DURING THE LAST 12 MONTHS, HAVE YOU HAD ANY DIRECT CONTACT WITH ANY MEMBERS OF THE GENERAL ASSEMBLY TO DISCUSS ISSUES THAT ARE OF CONCERN TO YOU?

Respondents in the mid-2010 Self Portrait survey were asked whether they have had direct contact with members of the South Carolina General Assembly in the 12 months preceding the mid-2010 survey. This is the first time that respondents have been asked this question in the *Self Portrait: How Are We Doing In SC?* surveys. Overall, 88.2% indicated they have not had any direct contact with General Assembly members. Only 11.3% indicated that they have had direct contact with public

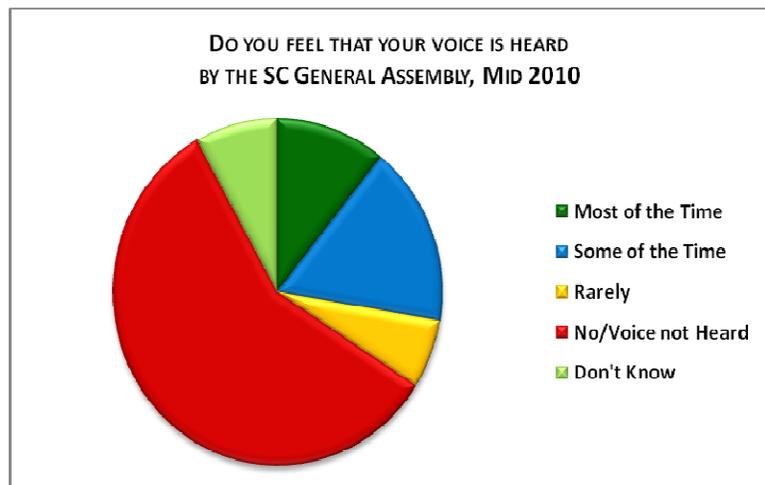


officials in South Carolina. Female respondents were more likely than males (92.2% vs. 83.7%) to report that they had not had direct contact with legislative members.

Meanwhile, older respondents with at least some college and a reported income of at least \$50,000 were more likely to have direct contacts with members of the South Carolina General Assembly. In terms of race and party affiliations, too, respondents who said they are affiliated with the Republican Party and Whites were more likely than Blacks and Democrats to have had contacts with state policymakers. There were minimal differences related to respondents' region or area of residence.

DO YOU FEEL AS THOUGH YOUR VOICE IS HEARD BY THE SOUTH CAROLINA GENERAL ASSEMBLY?

As a follow up to the question above, respondents were asked to indicate the extent to which they felt their voices were heard by the General Assembly. A majority of the respondents (57.9%) indicated that their voices are not heard by the General Assembly in South Carolina. A little over a quarter of the respondents said they felt their voices were heard either 'most of the time' (10.8%) or 'some of the time' (16.9%).



On closer examination, demographic variables reveal that, male respondents (59.6%) were more likely than female respondents (56.3%) to feel that their voice is not heard by members of the General Assembly. While not overly significant, this sentiment is interesting given that according to the previous question about whether there has been more contact with the General Assembly, males are more likely to have had contact with the General Assembly. Additionally, younger respondents, the less educated and people who reported lower incomes were more likely to feel that their voices were not heard by South Carolina's General Assembly. Similarly, Blacks, Democrats and respondents who indicated an independent political affiliation more frequently suggested that their voices are not heard by the General Assembly. Likewise, Rural and Lowcountry respondents generally feel that they are not heard by state representatives.

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