



Regional Economic Analysis Laboratory

The Economic Impact of the 2016 Greater Greenville Scottish Games & Highland Festival

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Summary of Findings

Survey Findings

Total Attendance	28,000
...From Other Upstate Counties	3,766
...From Outside of Upstate	9,906
Direct Spending by Visitors	\$ 3,893,953
Total Direct Spending (<i>incl. county residents*</i>)	\$ 5,773,557

Economic Impact

	<i>Low Estimate</i>	<i>High Estimate</i>
Jobs Supported	65	71
Total Compensation (Wages/Salaries)	\$ 1,850,988	\$ 2,027,436
Total Output (Total Sales)	\$ 4,999,009	\$ 5,433,009

Tax Impacts

	<i>Low Estimate</i>	<i>High Estimate</i>
General Sales Tax	\$ 143,318	\$ 153,732
Hospitality Tax	\$ 21,888	\$ 24,976
Accommodations Tax		\$ 25,114

* Not counted toward economic impact

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I. Introduction

This study estimates the economic impact that the 2016 Greater Greenville Scottish Games & Highland Festival had on Greenville County, South Carolina. The Games were held on May 22, Memorial Day weekend, and included both the festival held on the Furman University campus and the Great Scott parade, held downtown in the City of Greenville on the evening of May 21.

II. Methodology

Attendees were surveyed at the festival by volunteers using an electronic survey platform. They were asked their zip codes, for purposes of identifying out of town visitors. Respondents were also asked about their spending on lodging, dining, transportation, entertainment, and shopping.

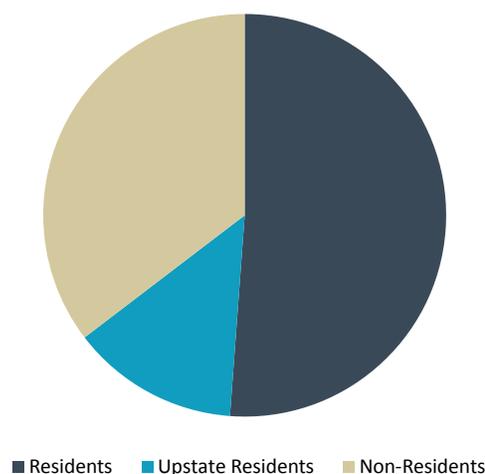
Spending by non-Greenville County residents was used to estimate the economic impact that visitor spending had on the county. Greenville County residents were excluded as a conservative measure, because those living within the county may have engaged in spending within the county regardless of their attendance of the games. Non-residents were further broken down between those who reside elsewhere within the Upstate region of South Carolina and those who do not. Results in the following section and in the tables in the Appendix are presented both with and without spending by Upstate residents. Upstate residents were treated separately due to Greenville’s central role in the Upstate economy; as with Greenville County residents, Upstate residents may have engaged in spending in Greenville County regardless of their attendance of the games, albeit this is less likely than for Greenville County residents.

Direct spending numbers reported in the survey were multiplied by the number of visitors within each of the two non-resident groups and entered into the IMPLAN input-output model. Results from the IMPLAN model were then used in calculating the revenue generated by general sales, hospitality, and accommodations taxes for the county.

III. Survey Findings

The Greenville Scottish Games hosted approximately 28,000 attendees. Of these, 3,766 (13.5 percent) were residents of other counties within the Upstate region, and 9,906 (35.4 percent) originated from outside of the Upstate. **Figure 1** shows the proportion of visitors by point of origin.

Fig. 1. Attendees by Visitor Segment



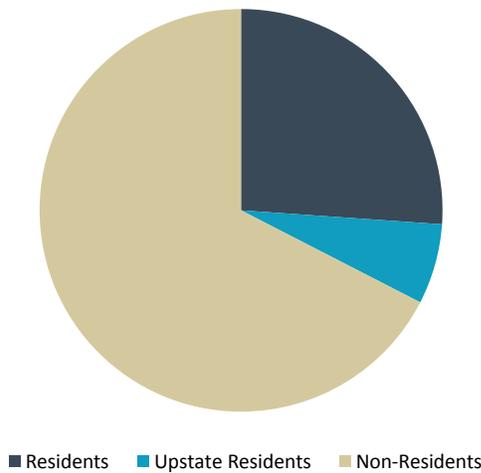
The most represented states among survey respondents were South Carolina (76 responses), North Carolina (37 responses), Georgia (15 responses), and Tennessee (9 responses). A small number of international visitors were also identified, originating from Scotland and Canada. Responses to this question and frequency of each response are presented in **Table 1** in the Appendix.

While Greenville County residents constituted a slight majority in the number of attendees to the festival, visitors originating from outside of the Upstate region of South Carolina spent substantially more, far exceeding spending levels by Upstate and Greenville County residents combined. While non-resident spending is greater in every category, a major contributor to this difference is spending on lodging, in which visitors from within the Upstate and local residents reported no spending. Non-residents lodged in Greenville on average 2.27 nights.

Spending by visitor segment in each spending category is presented in **Figure 2** and in **Table 2** in the Appendix. **Figure 3** compares total spending by each visitor segment. Total estimated spending by all attendees, including residents, was \$5.8 million; of this, Greenville County residents spent over \$1.5 million, and \$4.3 million was spent by non-residents, including \$3.9 million of spending by those originating from outside of the Upstate. The large component of spending originating from non-residents is a positive finding with regards to the economic impact that the festival brings to the region, as spending by non-residents represents a true export, i.e., a net inflow of funds to the region.

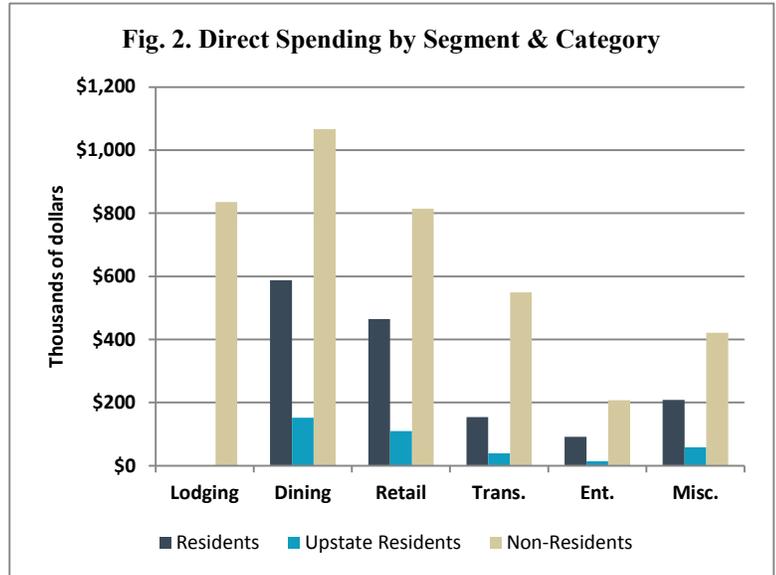
In addition to spending patterns, respondents

Fig. 3. Total Direct Spending by Segment



were asked how they learned about the Scottish Games. Responses for this question are shown in **Table 3** in the Appendix. The single largest response was “word of mouth or returning visitor”, which was given by 57.9 percent of respondents. The second most common response was “other” (18.1 percent), followed by “website” (8.5 percent) and “social media” (8.2 percent).

Finally, Scottish clans represented at the festival were identified. **Table 4** in the Appendix lists the clans identified along with their frequency. The clans



most represented were Campbell, MacPherson, and MacLean.

IV. Economic Impact

Reported spending by non-Greenville County residents was entered into the IMPLAN economic model. Spending by Upstate residents and those originating from outside of the Upstate were modeled separately; the results are presented both separately and combined in the following. Results from the IMPLAN model include direct, indirect, and induced impacts. Direct impact is the direct spending by visitors and the jobs that it directly creates. Indirect impacts are the effects on local suppliers to the industries directly effected by visitor spending. Induced effects are the jobs and output generated by consumer spending of wage income by those employed through the direct and indirect impacts. These results are presented in detail in **Table 5** in the Appendix.

Given the possibility that Upstate attendees may have engaged in spending in Greenville County regardless of their attendance of the games, the estimated impact of non-resident attendees can be seen as the lower bound of the impact of the games on the county economy. Non-resident attendees contributed the largest share of direct spending and therefore had the largest economic impact. Non-resident visitor spending associated with the games supported an estimated

65 jobs in Greenville County, which entailed approximately \$1.85 million in total compensation (wages and salaries) and \$5 million in output (total sales).

As seen in the previous section, spending by attendees originating from other Upstate counties was small relative to that of non-resident attendees. Nonetheless, Upstate attendees supported an estimated seven total jobs in Greenville County, resulting in approximately \$176,000 in total compensation and \$434,000 in output (total sales).

Combining Upstate and non-resident attendees' estimated impact provides the upper bound of the impact of the games on the county economy. Together, this impact is estimated to be 71 jobs, \$2.03 million in total compensation, and \$5.43 million in output (total sales).

V. Tax Revenue Impacts

IMPLAN estimates the impact of visitor spending on general sales tax. Given the low and high estimates for economic impact presented in the previous section, the total (direct, indirect, and induced) impact on general sales tax generated within the county is estimated to be between \$143,318 and \$153,732.

Hospitality and Accommodations taxes (HTAX and ATAX) can be estimated from the results generated by the IMPLAN model. The total impact on HTAX in the county is estimated to be between \$21,888 and \$24,976. The ATAX impact is estimated to be \$25,114 (there is not upper bound due to Upstate attendees reporting no spending on lodging).

VI. Conclusion

Findings indicate that the Greenville Scottish Games drew a large amount of visitors from outside of Greenville County and even from outside of the Upstate region, including numerous from out of state and a few from out of country. The largest amount of spending by visitors occurred on behalf of those originating from outside of the Upstate, which constitutes a net inflow of funds to the region.

In addition, direct spending by visitors to the county generated “spillover” effects to the local economy, supporting between 65 to 71 total jobs in Greenville County, along with the total sales and worker compensation that goes along with those jobs. From these results we estimate that every dollar of visitor spending (i.e., spending by attendees who were not residents of Greenville County) generated a total impact on total sales in the county of between \$1.17 and \$1.27.

Table 1. Survey Results: Point of Origin

Zip Code	Frequency	Location	Zip Code	Frequency	Location	Zip Code	Frequency	Location	Zip Code	Frequency	Location
01564	1	Sterling, MA	28723	1	Cullowhee, NC	29550	1	Hartsville, SC	30259	1	Moreland, GA
11103	1	Long Island, NY	28782	3	Tryon, NC	29556	1	Kingstree, SC	30269	1	Peachtree City, GA
14120	1	N. Tonawanda, NY	28786	1	Waynesville, NC	29572	1	Myrtle Beach, SC	30305	1	Atlanta, GA
21113	1	Odenton, MD	28791	1	Hendersonville, NC	29576	1	Murrells Inlet, SC	30318	1	Atlanta, GA
21144	1	Severn, MD	28792	1	Hendersonville, NC	29620	1	Abbeville, SC	30350	2	Atlanta, GA
22902	1	Charlottesville, VA	28803	1	Asheville, NC	29621	2	Anderson, SC	30605	1	Athens, GA
23505	1	Norfolk, VA	28806	1	Asheville, NC	29625	2	Anderson, SC	30666	2	Statham, GA
27023	2	Lewisville, NC	29006	1	Batesburg, SC	29630	2	Central, SC	30906	1	Augusta, GA
27030	1	Mt. Airy, NC	29036	2	Chapin, SC	29631	1	Clemson, SC	30907	1	Augusta, GA
27312	1	Pittsboro, NC	29063	3	Irmo, SC	29640	2	Easley, SC	31548	1	Kingland, GA
27406	1	Greensboro, NC	29069	1	Lamar, SC	29642	3	Easley, SC	32225	1	Jacksonville, FL
27410	1	Greensboro, NC	29072	1	Lexington, SC	29643	1	Fair Play, SC	32257	1	Jacksonville, FL
27526	1	Fuquay Varina, NC	29073	1	Lexington, SC	29645	1	Gray Court, SC	33647	1	Tampa, FL
27587	1	Wake Forest, NC	29108	1	Newberry, SC	29646	2	Greenwood, SC	36303	1	Dothan, AL
28001	1	Albemarle, NC	29180	1	Winnsboro, SC	29651	1	Greer, SC	37347	1	Jasper, TN
28012	1	Belmont, NC	29223	1	Columbia, SC	29657	2	Liberty, SC	37650	1	Erwin, TN
28052	1	Gastonia, NC	29301	5	Spartanburg, SC	29670	2	Pendleton, SC	37756	1	Huntsville, TN
28078	2	Huntersville, NC	29302	1	Spartanburg, SC	29671	2	Pickens, SC	37769	1	Lake City, TN
28088	1	Landis NC	29316	3	Boiling Springs, SC	29672	1	Seneca, SC	37876	1	Sevierville, TN
28139	2	Rutherfordton, NC	29320	1	Arcadia, SC	29673	1	Piedmont, SC	37931	1	Knoxville, TN
28152	1	Shelby, NC	29323	2	Chesnee, SC	29676	3	Salem, SC	38017	2	Collierville, TN
28210	1	Charlotte, NC	29325	1	Clinton, SC	29678	1	Seneca, SC	38018	1	Cordova, TN
28212	1	Charlotte, NC	29360	1	Laurens, SC	29697	2	Williamston, SC	43554	1	Pioneer, OH
28216	1	Charlotte, NC	29369	3	Moore, SC	29732	1	Rock Hill, SC	45107	1	Blanchester, OH
28227	3	Charlotte, NC	29388	1	Woodruff, SC	29803	1	Aiken, SC	80524	1	Fort Collins CO
28352	1	Laurinburg, NC	29403	1	Charleston, SC	29851	1	Warrenville, SC	-	1	Edinburgh
28609	1	Catawba, NC	29410	1	Hanahan, SC	29926	1	Hilton Head, SC	-	1	London, Canada
28645	1	Lenior, NC	29414	2	Charleston, SC	30043	1	Lawrenceville, GA	-	1	Mississauga, Ontario
28711	1	Black Mountain, NC	29481	1	Smoaks, SC	30075	1	Roswell, GA	-	2	Scotland
28715	1	Candler, NC	29526	1	Conway, SC	30120	1	Cartersville, GA	-	2	Toronto

Table 2. Survey Results: Direct Spending by Visitor Segment

Spending Category	Greenville County Residents*		Upstate Residents		Non-Residents		Total (Incl. Residents*)
	Average Per Day	Total	Average Per Day	Total	Average Per Day	Total	Total
Lodging	\$ -	\$ -	\$ -	\$ -	\$ 37.17	\$ 835,864	\$ 835,864
Dining	\$ 41.04	\$ 588,000	\$ 40.29	\$ 151,735	\$ 47.41	\$ 1,066,137	\$ 1,805,873
Retail	\$ 32.43	\$ 464,640	\$ 29.09	\$ 109,555	\$ 36.21	\$ 814,276	\$ 1,388,472
Transportation	\$ 10.76	\$ 154,164	\$ 10.41	\$ 39,205	\$ 24.43	\$ 549,372	\$ 742,741
Entertainment	\$ 6.41	\$ 91,839	\$ 3.58	\$ 13,483	\$ 9.22	\$ 207,336	\$ 312,657
Miscellaneous	\$ 14.56	\$ 208,608	\$ 15.50	\$ 58,374	\$ 18.72	\$ 420,968	\$ 687,950
Total	\$ 105.20	\$ 1,507,251	\$ 98.87	\$ 372,353	\$ 173.16	\$ 3,893,953	\$ 5,773,557

* Not counted toward economic impact

Table 3. Survey Results: Learned About Games Via...

	Frequency	Percent
Word of Mouth/Returning Visitor	198	57.9
Website	29	8.5
Social Media	28	8.2
Newspaper	22	6.4
Radio	16	4.7
Television	10	2.9
Magazine	9	2.6
Other	62	18.1

Table 4. Survey Results: Scottish Clan Representation

Clan Name	Frequency	Clan Name	Frequency	Clan Name	Frequency
Campbell	9	Macdonald	2	Lane	1
MacPherson	7	MacLeod	2	Lawrence	1
MacLean	6	Malcolm	2	Leslie	1
MacGreggor	5	McAllister	2	Lindsay	1
MacNab	5	McBean	2	Macalister	1
Nesbit	4	Murray	2	Macbean	1
Stewart	4	Ramsey	2	Macintosh	1
Anderson	3	Rose	2	MacLennen	1
Bruce	3	Scott	2	MacNicol	1
Davidson	3	Sinclair	2	Mannicol	1
Donald	3	Wallace	2	Maxwell	1
Douglas	3	Wood	2	Mccall	1
Elliot	3	Armstrong	1	Mccuen	1
Graham	3	Baird	1	Mcdonald	1
Grant	3	Boys	1	Montgomery	1
Gunn	3	Bryant	1	Morrison	1
Johnson	3	Clark	1	Na	1
Cameron	2	Dure	1	Robertson	1
Craig	2	Forbes	1	Ross	1
Donahaidh	2	Forrester	1	Scottish American military society	1
Duncan	2	Forsythe	1	Seaton	1
Galbraith	2	Fraser	1	Stuart	1
Gordon	2	Glenn	1	Sutherland	1
Gregor	2	Hamilton	1	Thompson	1
House of Gorden	2	Henderson	1	Trotter	1
Keith	2	Landrum	1		

Table 5. Estimated Economic Impact (Greenville County)

Concept*	Non-Residents (Low Estimate)	Upstate Residents	Total (High Estimate)
Employment (Jobs)	65	7	71
Total Compensation	\$ 1,850,988	\$ 176,448	\$ 2,027,436
Value Added (GDP)	\$ 2,819,852	\$ 242,332	\$ 3,062,184
Output (Total Sales)	\$ 4,999,009	\$ 434,000	\$ 5,433,009

* Totals may not sum due to rounding