

# 2014 RBC Heritage Presented by Boeing

Spectator Profile  
and the  
Economic Impacts  
of Visitor, Player, Caddie, and Heritage Classic Foundation  
Spending

## Executive Summary



# Background

The Heritage Classic Foundation hired Clemson University's Department of Parks, Recreation, and Tourism Management to conduct a study to determine the economic impacts of the 2014 RBC Heritage presented by Boeing. The Department of Parks, Recreation, and Tourism Management partnered with the Regional Economic Analysis Laboratory in the Strom Thurmond Institute of Government and Public Affairs at Clemson and the Lowcountry and Resort Islands Tourism Institute at the University of South Carolina Beaufort on this project.

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# Project Team

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# Method

- A survey was developed using the isurvey platform and administered using iPads and Droid devices at the main entrance to Harbour Town Golf Links and in the Heritage Expo Area during the 2014 Tournament (Monday, April 14-Sunday, April 20, 2014) by students from USC Beaufort and Clemson University. Students were also positioned in high traffic areas around the course.
- To insure as random of a sample as possible at this event, students were instructed to approach every 10<sup>th</sup> individual crossing a line determined by the researchers until the devices in their area were full. When devices became available, the students continued the same sampling frame.
- Over 1600 individuals took the survey, yielding 1474 completed, useable surveys
- The overall response rate was 61%
- Heritage Classic Foundation staff distributed a survey developed by the project team to players and caddies to determine spending patterns
- The Heritage Classic Foundation provided its spending data
- In addition to spending data, questions about trip characteristics, satisfaction with the tournament and brand promises, marketing information, and demographics were also included in the survey.
- Economic impact analysis was done using IMPLAN

# Summary of Results

## **Age-Gender-Income-Residency**

Heritage spectators had an average age of 48.2 years old, 60.1% were male, 73.4% had a bachelor's degree or higher, and 63.4% reported incomes of \$100,000 per year or more with 22.4% of those respondents reporting incomes of \$200,000 per year or more.

Permanent residents of Beaufort County, SC made up 42.8% of tournament attendees. South Carolina residents made up 22.4% of attendees while 32.4% were from the US, outside of SC and 2.4% were international visitors. In all, 57.2% of attendees were visitors to the area.

## **Tournament Attendance & Length of Visit to Hilton Head Island/Beaufort County, SC**

Heritage visitors are loyal to the tournament and the area. While 20% of respondents indicated that the 2014 RBC Heritage presented by Boeing was the first time they had attended the tournament, 42.4% of respondents have attended 3-10 times and 23.4% have attended 11-30 times. 72.8% of respondents indicated that they are "highly likely" to return to Hilton Head Island another time of year.

Individuals who *attended the tournament 1 day* had an average trip length of: 4.32 days

Individuals who *attended the tournament 2 days* had an average trip length of: 4.87 days

Individuals who *attended the tournament 3 days* had an average trip length of: 5.39 days

Individuals who *attended the tournament 4+ days* had an average trip length of: 7.03 days

# Summary of Results - continued

## Advertising & Marketing

Word of mouth was, by far, the best form of advertisement with 55.6% of respondents indicated that Friends/Co-Workers/Family Members/Word of Mouth were extremely influential in their decision to attend the tournament. Television with 32.8% and newspaper with 21.9% were followed by internet with 19.7% and magazine with 15.8% indicated that those forms of media influenced their decision to attend.

Zip codes of ticket purchasers were provided by the Heritage Classic Foundation and used to determine which markets are generating spectators compared to Neilson, Arbitron, and Scarborough market shares in those DMA's.

- The top markets in order for 2014 were Columbia, Charleston, Augusta, Greenville-Spartanburg, Charlotte, Orangeburg, Richmond, Cincinnati, Myrtle Beach, Knoxville, and Atlanta
- New markets include Buffalo, Syracuse, Milwaukee, Cleveland, and Baltimore

## Satisfaction with Tournament/Tournament Attributes

2014 RBC Heritage presented Boeing spectators were highly satisfied with the tournament and tournament attributes.

- Badge Price 81.2% Very Satisfied or Satisfied
- Food and Beverage 73.7% Very Satisfied or Satisfied
- Tournament Transportation System 75.6% Very Satisfied or Satisfied
- Parking 67.6% Very Satisfied or Satisfied
- **Overall Satisfaction 91.6% Very Satisfied or Satisfied**

# Summary of Results - continued

## **Economic Impacts**

Visitor spending data was collected during the tournament using an iPad based survey. In addition to visitor spending, spending data was collected from players and caddies, the Heritage Classic Foundation, and several sponsors and local businesses. The Regional Economic Analysis Laboratory at Clemson University used this data as inputs to estimate the economic impacts or outputs of the tournament on the Beaufort County economy. Impacts/ outputs were calculated using the IMPLAN Economic Modeling System.

Spectators, players, and caddies were asked to provide the amount of money they spent on lodging, dining, retail, entertainment, transportation, and miscellaneous expenses during their trip to Hilton Head Island/Beaufort County. Portions of Heritage Classic Foundation's budget directly related to the tournament and tournament operations were also included in the model. Finally, three sponsors and local businesses provided spending and revenue data that was not captured in the spectator, player, caddie, or Foundation spending.

## Results

Spending associated with the 2014 RBC Heritage presented by Boeing generated **\$75.691 million in expenditures** resulting in:

- A **direct economic impact of \$64.375 million** and supporting **885 jobs** in the Beaufort County economy
- A **total economic impact (Including indirect and induced effects) of \$96.142 million**, supporting **1,178 jobs** in the Beaufort County economy, and generating **\$6.952 million in state and local tax revenues**