

Institute for
Economic
Development

Center for **Community** and
Business Research
The University of Texas at San Antonio

**ECONOMIC
IMPACT**



**OF THE SAN ANTONIO
MISSIONS**

NATIONAL HISTORICAL PARK

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Economic Impact of the San Antonio Missions

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Executive Summary

The missions of San Antonio play an important part in defining the city's culture. Their presence also helps drive the city's hospitality and tourism industry. In 2009, over 1.7 million people visited Missions Concepción, San José, San Juan, and Espada in San Antonio. Collectively, these missions and associated features—including *acequias* (irrigation canals), *labores* (farm lands), dam and aqueduct, and the single remaining *rancho* (mission ranch)—comprise the San Antonio Missions National Historical Park. In 2009, park visitors, along with staffing, construction and maintenance activities, and other aspects of park operations, contributed nearly \$98.8 million to the local economy and sustained 1,116 jobs in the region.

A slate of new programs, new venues, and park funding upgrades – some underway, some proposed – could more than double the park's economic impact in 2016, expanding the park's role in the region's economy. This enhanced impact will likely result from a combination of three types of activity: 1) New construction activity such as the development of visitor facilities at Rancho de las Cabras near Floresville, and the creation of trails that will connect the missions to the enhanced system of river trails along the San Antonio River; 2) New programming such as the hands-on cultural activities in the proposed "A Day in the Life of the Missions" programming at Mission San José; and 3) Proposed enhancements to park operating budgets to address shortfalls in critical areas such as law enforcement and preservation of the park's historical resources.

This analysis assumes that these new venues, programming enhancements, and budget upgrades will be in place by 2016, the year of the centennial of the U.S. National Park Service. In 2016, these enhancements will draw an estimated 395,043 more visitors to the park¹ and more than double the park's economic impact. In 2016, some 2.6 million park visitors and money spent on operating and maintaining the park—including contributions by partner organizations—will contribute an estimated \$214.5 million to the local economy, and support 2,335 local jobs.

Between 2013 and 2015, one-time expenditures on construction projects within the park will support an additional 205 jobs and \$26 million in economic activity.

Several construction projects from the San Antonio River Improvements Project (SARIP) will also affect the park by restoring the river's natural features, approximating the historical San Antonio River that was the lifeblood of the missions located within easy reach of its banks. These improvements will increase visitation to the river corridor, and connect the missions with the river in a way that welcomes trail users to enjoy the national park. These projects will also re-create and preserve the natural ecosystem for the enjoyment of the area's residents. The impact of these construction projects is expected to exceed \$518 million, and support an average of 981 additional jobs per year over the four years from 2010 through 2013.

¹ This anticipated increase in visitation is *in addition to* the "natural" growth of more than 475,000 visitors projected by continuing the park's historic trend of increasing visitation. See page 8 for a discussion of visitation projections.

"...to promote and regulate the use of the...national parks...which purpose is to conserve the scenery and the natural and historic objects and the wild life therein and to provide for the enjoyment of the same in such manner and by such means as will leave them unimpaired for the enjoyment of future generations."

National Park Service Organic Act, 16 U.S.C. 1.

Introduction

Since the late 19th century, people have been visiting the San Antonio missions to gain a greater understanding and appreciation of their rich historical value and the period in history they represent. In 2009, over 1.7 million people visited the missions at San Antonio Missions National Historical Park (Missions Nuestra Señora de la Purísima Concepción de Acuña, San José y San Miguel de Aguayo, San Juan Capistrano, and San Francisco de la Espada). These four missions serve as a manifestation of the region's cultural identity and have a significant impact on San Antonio's tourism economy.

Today, these missions, which date to the early 1700s, are the largest concentration of Spanish colonial missions in the United States. They were established to expand the influence of Spain in the New World. In addition to serving as places of worship, these missions operated as social, cultural, and commercial centers. Situated along the historic banks of the San Antonio River, they continue to function as churches, serving active congregations.

In 1978, the United States Congress established San Antonio Missions National Historical Park (Missions NHP) to preserve, protect, restore, and interpret the four missions and their associated features. The park includes a total of 826 acres of land in Bexar and Wilson counties, spread out across numerous parcels.

This study estimates the current and future economic impacts of the San Antonio Missions National Historical Park on the San Antonio Metropolitan Statistical Area (MSA).² The impacts are calculated for several years with the emphasis on 2009 and 2016. The impacts for 2009 represent the most recent visitation numbers for the Missions NHP available when this analysis was begun. The 2016 impacts account for the completion of a slate of budget, boundary, and programming changes, as well as construction of new venues. Some of these changes are already underway, some are proposed. Each of these changes is separately reviewed in this study.

For the intervening years, 2010-2015, the impact of several construction projects are examined in relation to the Missions NHP and its environs. These include investments in expanded visitor facilities and other park infrastructure, as well as several projects in the "Mission Reach" section of the voter-approved, multi-agency San Antonio River Improvements Project. Including these construction projects helps to give a broader understanding of the economic importance of the presence of San Antonio Missions National Historical Park in the region.

² The San Antonio MSA is comprised of Bexar, Guadalupe, Comal, Medina, Atascosa, Wilson, Kendall and Bandera counties.

Technical Background

1. Economic Impact Analysis Methods

Impact studies typically utilize Input-Output modeling to connect industry sectors with each other and with outside demands, yielding estimates of the economic impact of spending. In the case of tourism-related facilities and activities, these models estimate the impact of expenditures in several broad categories including: 1) facilities operations and maintenance; 2) capital investments; and 3) visitor spending.

Most, though not all, of these expenditures will be made locally. The intent of this study is to quantify the expenditures made in each of the above categories for San Antonio Missions National Historical Park within the eight-county San Antonio Metropolitan Statistical Area, and estimate the additional economic impacts of that spending in this local region.

Economic impact studies typically measure both direct and secondary economic impacts. The direct impacts include the “first round” of expenditures made by park visitors, or by the National Park Service or its partner organizations to operate and maintain the park. Secondary impacts are additional expenditures that result when the initial direct expenditures, taken in as sales receipts, wages, or payments for services, are then “respent” in the local economy.³

In performing an economic impact analysis, it is important to start with a focus on “new” dollars, or dollars that originated outside the study area, and which are spent locally *because of the presence of* the site being analyzed – in this case, the Missions NHP. The importance of this focus can be illustrated by looking at visitor spending. In this study, only out-of-town visitor expenditures are counted and spending by local visitors is excluded. Out-of-town visitor expenditures are clearly “new” dollars, which would not have been spent locally otherwise.

Some studies argue that the mere presence of a tourist attraction such as the park has the effect of encouraging local visitor expenditures that might otherwise be spent in a similar destination outside the study area, and thus include local visitor expenditures in their impact analyses. These studies fail to recognize that there is no guarantee that these visitors would have visited a similar attraction in another area, if the local attraction did not exist. Though an analysis could be made to identify locals’ propensity to visit a historic or cultural site elsewhere, in the absence of such information we employ a more conservative estimate and look solely at the expenditures of out-of-area visitors.

The ratio of total impact to direct spending is often referred to as the multiplier and can be expressed in terms of dollars and jobs. This multiplier is applied to estimate the secondary impacts, as money spent locally recirculates in the local economy. Applying the multiplier, then, estimates the resulting effects or

³ Secondary impacts include both indirect and induced impacts. Indirect impacts are the changes in spending as businesses purchase goods and services from other businesses in order to serve the needs of the park or its visitors. Induced impacts are the changes in economic activity from household spending of income earned directly or indirectly as a result of spending associated with the park or park visitors.

the changes in spending at the consumer level that result from the increases in expenditures related to the project or entity being analyzed.

Total secondary impacts are calculated for each one of the direct economic impacts using the IMPLAN Input/Output model. (IMPLAN stands for Impact Analysis for PLANing.) A widely used model first developed by the United States Forest Service in 1979, it is now marketed by Minnesota IMPLAN Group (MIG, Inc.). The model utilizes benchmark tables provided by the Bureau of Economic Analysis as well as other statistical data to model transactions occurring within a specific geographic area. IMPLAN is, in a sense, a general accounting system of the economic transactions taking place between industries, businesses, and consumers in an economy. It estimates the impacts on total output (sales), personal income, taxes, and employment. By expanding its analysis to include the secondary effects as dollars spent locally recirculate in the local economy, IMPLAN provides an in-depth picture of the economic effects of transactions.

To assess the current economic impact of the San Antonio Missions NHP, the direct and secondary impacts of annual operating expenses and employment for the park and closely related organizations, as well as the direct and secondary impacts of tourism that can reasonably be assigned to the presence of the park are estimated. The year 2009 serves as the base year for the current impact analysis. This is the most recent year for which complete visitation and expenditure information was available when this study began.

2. Components Used in Estimating Future Economic Impacts

Future economic impacts are estimated based on a slate of programming changes, construction of new venues, and budget expansion underway or proposed for completion before 2016. The impacts of increased park operating expenditures and park visitor spending due to these changes are estimated for the year 2016. Also, the impacts of related construction projects in and near the park are estimated for the years between 2010 and 2015. Included in the “future park” economic impact analysis are the following programming, facilities, and budget changes, some of which are underway, and others of which are in various stages of development:

- 1) Full funding for the park, which would enhance protection and preservation of park resources, provide more law enforcement coverage, and augment educational and interpretive services.
- 2) “A Day in the Life of the Missions” hands-on cultural demonstration programming at Mission San José;
- 3) A Spanish colonial demonstration farm on mission *labores* land at Mission San Juan, which will entail both new construction and new programming;
- 4) Development of visitor facilities and provision of basic visitor services at Rancho de las Cabras;
- 5) Construction of trails and interpretive exhibits that will connect the missions to the enhanced system of trails along the San Antonio River;

- 6) Building a new park headquarters and research center, and restoring the landscape around Mission San José; and
- 7) Expansion of park boundaries to include resources key to the integrity of the park and completing the original vision of a contiguous park along the river corridor.

In addition, an impact analysis of certain construction projects that are part of the Mission Reach segment of the San Antonio River Improvements Project is included, as some of these projects (e.g., construction of “portals” that will connect the missions with the riverside trail system) directly affect the park's appeal.

3. Projecting 2016 Visitation

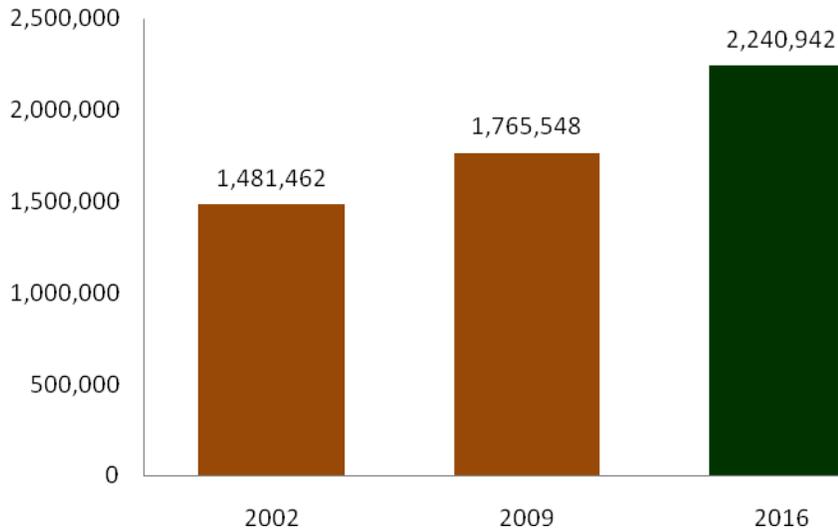
As directed in the National Park Service Organic Act of 1916, the National Park Service (NPS) protects and conserves the “scenery and the natural and historic objects” of parks for the “enjoyment of future generations.” In 2009, more than 1.7 million visitors came enjoy the Missions NHP in person.

Park visitors spend money in the local area, helping spur economic activity. The number of visitors is a key determinant in estimating the park’s total economic impact.

In calendar year 2009, the Missions NHP received 1,765,548 visitors. Using a time series statistical procedure⁴ based on NPS visitation data, we forecast that by the year 2016 there would be 2,240,942 visitors without the addition of any new programs or facilities, due solely to the continuation of historical growth trends. Based on information provided by San Antonio Missions NHP staff, we tie the park’s ability to adequately and safely accommodate this expected increased number of visitors to the “full-park funding” component of this analysis, described above.

⁴ From the ARIMA process in SAS 9.2 using visitation data from 07/1983 through 07/2010.

**HISTORICAL AND PROJECTED MISSIONS VISITATION
WITHOUT NEW PROGRAMS OR VENUES**

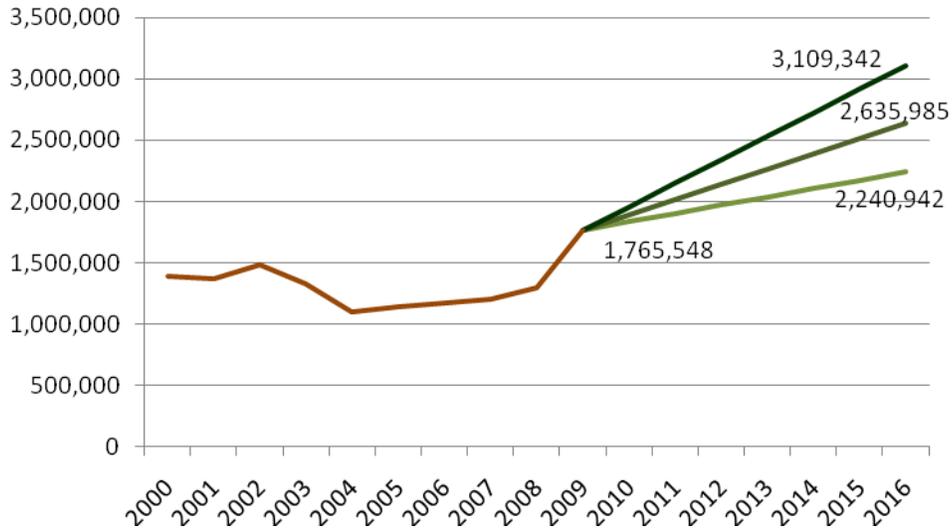


For the impact analyses, visitation forecasts for each of the anticipated programming or venue additions were compared to other similar sites or to appropriate averages from other parks. Also, using projections provided by staff from the Missions NHP, three possible scenarios were envisioned:

- a. A high visitation forecast increase over the historical trend, based on projections received from staff of the Missions NHP.
- b. A moderate visitation forecast increase over the historical trend, based on a revision of the information provided and comparison with other parks. A more conservative visitation projection than the Missions NHP staff forecast was calculated. This moderate forecast was utilized in calculating the projected economic impacts of the new programs and venues.
- c. A third visitation forecast, a low visitation scenario, assumes no changes beyond those forecast in the historical growth trend projection. This is the scenario depicted in the bar graph above.

A graphical comparison of the three projection scenarios follows.

HISTORICAL VISITATION OF MISSIONS WITH THREE PROJECTION SCENARIOS THROUGH 2016



The moderate forecast of visitor activity is based on the assumption that the full visitation projections cannot be achieved during the first years of operation.⁵ We recognize that this study has certain limitations. In the absence of current visitor survey data specific to the Missions NHP, we rely on the assumptions outlined in related studies and on the past activities of similar parks. As a result, the travel activities and spending patterns may not accurately represent those of visitors to the Missions NHP. In recognition of this limitation, we have purposefully elected to make conservative assumptions of projected visitor activity.

The combined totals for the high and moderate visitation forecasts are 1,538,000 and 699,850 visitors, respectively. These numbers represent interim calculations, which will be subject to further decreases to adjust for potential double-counting of visitors who leave the park and return on the same day.

Visitation numbers at San Antonio Missions National Historical Park are collected from traffic counters in parking lots, hike and bike trails, and from door counters at contact stations. The numbers are multiplied by a factor (0.555) to avoid double-counting same-day reentries.⁶ For the purpose of the study, only the projected visitation counts for the River Trails and Mission Portals, the San Juan Demonstration Farm, and the San José “Day in the Life” programs and venues were affected by this factor. Since Rancho de Las Cabras is located 30 miles south of San Antonio, it is assumed that visitors to the site are not likely to have visited the other mission sites within the park on the same day. Therefore, the visitation numbers

⁵ See Appendix A for a detailed explanation of these forecasts.

⁶ In the study we used a factor of 0.55 which gives a slightly smaller adjusted number of visitors.

for Rancho de Las Cabras stayed at the previously estimated value (in this case 22,500). We used the moderate projections as the basis for analyzing the economic impact of these new projects.

ADJUSTED INCREASES IN VISITATION DUE TO NEW VENUES AND PROGRAMMING CHANGES

	Adjusted increases due to river improvements	Adjusted increases from San Juan Demonstration Farm	Adjusted increases from San Jose Mission "Day in the Life"	Adjusted increases from Rancho de las Cabras
High visitation forecast	59,400	302,500	456,500	50,000
Moderate visitation forecast	30,993	136,125	205,425	22,500
Low visitation forecast	0	0	0	0

After adjustment, the new combined total visitation increases for the high and moderate scenarios are 868,400 and 395,043, respectively. These values are allocated to four venues as shown in the table.

4. Estimating Current (2009) Visitor Expenditures

The economic impact of visitors is separated between current and future visitors. In estimating current visitor expenditures and impacts, only 20 percent of the visitors are considered overnight tourists. The balance of the visitors are split between local visitors and non-local day trip visitors as outlined in the 1994 Visitor Service Project: San Antonio Missions National Historical Park study by the University of Idaho:⁷

- Local visitors: 20%
- Non-local day trip visitors: 60%
- Non-local overnight visitors: 20%

It is important to note that only non-local visitors are considered in this economic impact study, as, unlike local visitors, they bring “new” money into the region. The same breakdown of non-local and local visitors was applied in estimating the impact of the increase in visitation from 2009 to 2016 due to the historical trend in visitation growth.

In order to estimate the economic impact of the Missions NHP, the visitation activity must be translated to a monetary value. From a 2003 study,⁸ the NPS estimated that the average spending per visitor party per day in San Antonio was \$93.00. Using the same methodology as outlined in the National Park

⁷ San Antonio Missions National Historic Park from the University of Idaho: Visitor Services Project, 1994. http://www.psu.uidaho.edu/files/vsp/reports/65_SAAN_rept.pdf

⁸ From the NPS web site at <http://web4.canr.msu.edu/mgm2/yayen/NPS/NPSSelect.cfm>, the average spending per party per day was \$93 in the San Antonio area.

Service’s Money Generation Model Version 2 (MGM2), in 2007, the expenditures of non-local visitor parties and overnight parties were \$88.98 and \$245.66, respectively. This equates to a weighted party average of \$108.36.⁹ This average spending per day was allocated following several of the spending categories from MGM2 for lodging, restaurants and meals, transportation and gas, among other categories. The default spending percentages for each category from MGM2 were modified to reflect tourist spending patterns reported by a Texas-specific study prepared for the Office of the Governor.¹⁰ The final impacts were calculated using multipliers from IMPLAN.

Based on this information, our study assumed that the average non-local day trip visitors and non-local overnight visitors to the Missions NHP in 2009 spent an average of \$91.33 and \$263.32, respectively. This translates to a weighted average of \$139 per party per day. The following table shows how non-local day trip and overnight visitors spent their money when visiting the Missions NHP¹¹:

CURRENT NON-LOCAL VISITORS SPENDING PER PARTY PER DAY (2009)

CATEGORY	Non-local day trip	Non-local overnight
Motel, hotel cabin or B&B	\$0.00	\$93.77
Camping fees	\$0.00	\$0.00
Restaurants & bars	\$14.37	\$44.13
Groceries, take-out food/drinks	\$4.72	\$9.25
Gas & oil	\$35.24	\$22.91
Other vehicle expenses	\$1.22	\$0.74
Local transportation	\$0.40	\$18.17
Admissions & fees	\$2.17	\$20.50
Clothing	\$0.87	\$1.98
Sporting goods	\$1.35	\$0.57
Entertainment	\$15.00	\$25.83
Souvenirs and other expenses	\$15.99	\$25.48
Total	\$91.33	\$263.32

With an estimated 2.43 visitors per party, this equates to roughly \$37.58 per day per non-local day trip visitor and \$108.36 per non-local overnight visitor.

In 2009 there were 1,765,548 visitors to the missions. Eighty percent of those (1,412,438) were non-local, split between non-local day trip and overnight visitors. Out of the 1.4 million non-local visitors, approximately 72 percent are day-trip visitors and 28 percent are overnight visitors. The overnight visitors are assumed to spend only one night in San Antonio directly connected with their park visit.

⁹ Ibid.

¹⁰ From *Texas Destinations 2008-2009* prepared by D.K. Shifflet & Associates, Ltd.

¹¹ Though the Missions NHP does not charge an entry fee, an “Admissions & fees” category is included to account for the average per party spending on admissions and fees at other area attractions.

5. Estimating 2016 Visitor Expenditures

In estimating the spending of future park visitors, the projected 2,240,942 visitors who would visit the park even if no new facilities or programming were put in place (estimated by continuing the park's historical growth trend) were assumed to follow the same visitation and spending patterns as current park visitors. Eighty percent of that projection (1,792,753) was considered non-local visitation.

Future visitors coming to enjoy the new programs and facilities planned the Missions NHP are also split between 1) local visitors, 2) out-of-town visitors that spend less than a day, and 3) out-of-town visitors that will stay overnight or longer.

The new venues and program enhancements are expected to attract 395,043 new out-of-town visitors in 2016. In principle, all of these new visitors could be assumed to be overnight visitors, however, since the possibility exists that day trip visitors will be attracted to the new venues, it is assumed that only 90 percent of the total new visitors will stay overnight . This increase in visitors is split between day-trip and overnight visitors as follows:

Non-local day trip visitors:	10%
Non-local overnight visitors:	90%

Average daily spending per party was kept constant at \$139 for the non-local visitors to the new venues and programs. However, because we are assuming that the overnight visitors spend more nights and days in the region, their economic impacts are relatively more important than previous overnight visitors. As a direct result of new facilities and programming improvements, these overnight visitors are assumed to stay approximately 2.5 nights in San Antonio, as opposed to the one-night stay presumed for current overnight visitors.¹²

In addition to attracting new visitors, park staff project that the new park programs and visitor facilities are likely to entice existing visitors (who would have visited the park whether or not these enhancements were in place) to stay in San Antonio longer because there is so much to do at the park. Day visitors may become overnight visitors, and overnight visitors may stay an extra night. This prospect was not directly addressed in estimating the economic impact of park visitors in 2016, but much of the increased benefit of extended park visitation is likely to be captured in the estimate of a 2.5 night stay for park visitors to the new venues and programs.

¹² From the *Texas Destinations 2008-2009* prepared by D.K. Shifflet and Associates, Ltd.

World Heritage Designation

The San Antonio Missions, including The Alamo (Mission San Antonio de Valero), are on the U.S. “tentative list” for inscription as a UNESCO World Heritage Site (WHS). The question has arisen: would this listing increase visitation and economic impact, and if so, by how much? Because the question is hypothetical, it is not addressed in this report. Nonetheless, the research team took available literature into consideration to see what the answer might be.

A 2009 study by Rebanks Consulting Ltd and Trends Business Research Ltd is useful in several regards. The Rebanks report includes an overview of several earlier studies. From these the researchers learned that, “if you ask questions about the generic economic or tourism impact of unfiltered samples of WHSs you will by definition get unimpressive or negligible impact results.” (Rebanks: 5) Inscription on the World Heritage list by itself, with no other action, does not guarantee an increase in visitation or economic gain.

The news is not all bad, though. The Rebanks report, as with other reports, cites many examples of productive socio-economic gain from World Heritage inscription. The gains come when the local population of site managers and business interests make specific and concerted efforts to realize gain from the inscription. The report states, “Attributing socio-economic impacts to the UNESCO World Heritage Site designation is complex and difficult. It is rarely the designation itself which achieves the impacts, and more normally the actions and investments of local stakeholders.” (Rebanks: 3)

A notable exception is at sites which were not considered destinations for heritage tourism prior to inscription. These do see notable increases, especially if they were places that one would not have thought of as a historic site, such as an industrial complex. This is attributable to the legitimacy conferred upon the site by the inscription, thus making it a place that people view as a heritage site when it was not previously. The Rancho de las Cabras could be within this category, because it is undiscovered and has not been developed or opened as a heritage tourism destination.

If inscribed as a UNESCO World Heritage Site, a marketing approach by the tourism industry and business community, in concert with the NPS, would likely produce measurable gains in visitation at the park and the missions more generally. Like any business endeavor, though, this cannot be guaranteed. Lacking any statistical analyses that demonstrate a clear correlation between inscription and higher visitation, the increases should not be assumed.

See: “World Heritage Status, Is there opportunity for economic gain? Research and analysis of the socio-economic impact potential of UNESCO World Heritage Site status.” Rebanks Consulting Ltd and Trends Business Research Ltd on behalf of the Lake District World Heritage Project, 2009. Retrieved 18 October 2009 from: <http://www.lakeswhs.co.uk/documents/WHSTheEconomicGainFinalReport.pdf>

Economic Impacts

The economic impacts of visitor expenditures were estimated using the input-output model IMPLAN version 3¹³ for the San Antonio MSA. This software calculates the direct and secondary impacts of the different expenditures analyzed in the study.

1. Current (2009) Impacts

Current impacts are based on the 2009 visitation number of 1,765,548 and a park operating and project budget of \$4,845,124 for the same year.¹⁴ Visitor expenditures and park operations, payroll, and construction expenditures translate into jobs and revenues for local firms and households in the San Antonio Metropolitan Statistical Area MSA. Most of the park budget covers wages and benefits for local employees. In 2009, the Missions NHP directly employed 72 permanent and seasonal workers. Further, approximately 60 percent of some of the park purchases of goods and services are from local firms.

Due to their commitment and important contribution to the activities of the Missions NHP, the expenditures of Los Compadres de San Antonio Missions National Historical Park (Los Compadres) and the Western National Parks Association are included in this analysis, as are operations of the San Antonio River Authority (SARA) and the City of San Antonio that particularly affected the immediate environs of the missions.

In addition to the above-mentioned partner organizations that contribute to the impact of the park, the Catholic Church operates and maintains the parts of the mission buildings used for religious services. Each mission serves an active congregation and is a cultural anchor for the congregants. Although not a part of these economic impact estimates, it is important to note that in 2009, the Archdiocese of San Antonio spent over \$1.3 million to restore and maintain the parts of the mission church buildings in its care.

By itself, the San Antonio Missions National Historical Park (without the contributions of any partner organizations) and its visitors supported 1,097 jobs in 2009, with a total impact of \$96.6 million.

The activities of its supporting organizations, Los Compadres and Western National Parks Association, plus operations and maintenance by the City of San Antonio and SARA supported 19 additional jobs and \$2.2 million in expenditures.

¹³ IMPLAN v.3 is a product of the Minnesota IMPLAN Group (MIG).

¹⁴ Based on San Antonio Missions National Historical Park Fiscal Year 2009 Annual Report, page 32.

As the tables below show, in 2009, San Antonio Missions National Historical Park had a total economic impact of \$98.8 million, and supported 1,116 jobs.

MISSIONS NHP JOB IMPACTS IN 2009

Current Activity	Direct Impact Jobs	Total Impact Jobs
Missions NHP*	775	1,097
Los Compadres	3	6
Western Association	2	4
SARA operations	2	3
City operations	3	6
Total	785	1,116

MISSIONS NHP EXPENDITURES IMPACTS IN 2009

Current Activity	Direct Impact Expenditures	Total Impact Expenditures
Missions NHP**	\$54,923,360	\$96,574,612
Los Compadres	\$275,500	\$533,088
Western Association	\$268,357	\$607,261
SARA operations	\$218,279	\$380,326
City operations	\$410,556	\$727,821
Total	\$56,096,052	\$98,823,108

* Includes operations and payroll information provided by the National Park Service: 42 permanent and 19 seasonal workers.

** Some maintenance and construction activities funded by Los Compadres were added here.

2. Future Impacts of San Antonio Missions NHP

Future economic impacts are estimated based on a slate of programming changes, construction of new venues, and budget expansion - all underway or proposed for completion before 2016. The impacts of increased park operations expenditures and park visitor spending due to these changes are estimated for the year 2016. Also, the impacts of related construction projects in and near the park are estimated for the years between 2010 and 2015.

The programming, facilities, and budget changes included in the “future park” economic impact analysis are described on page 7. Below, the analyzed components of each project are explained.

1. Full-park funding: Represents the additional budget needed by the park to operate at full functional capacity that will enable park staff to adequately maintain and protect park resources, and safely and effectively accommodate the increasing levels of visitation anticipated *without* any programming or facilities changes (see page 8 for an explanation of the “natural” growth in park visitation based on historical trends). The number of additional non-local visitors is measured as the difference between a projected natural trend of visitation¹⁵ and 2009 visitation.
2. “A Day in the Life of the Missions” hands-on cultural demonstration programming at Mission San José: Visitor spending based on projected visitation numbers for this venue,¹⁶ and projected payroll and operating expenditures for 2016.
3. Mission San Juan Spanish colonial demonstration farm: Visitor spending based on projected visitation numbers for the venue, and projected payroll and operating expenditures for 2016. Additionally, impacts of construction activities (tentatively slated for 2013¹⁷) are analyzed.
4. Rancho de Las Cabras: Visitor spending based on projected visitation numbers for the venue, and projected payroll and operating expenditures for 2016. Additionally, impacts of construction activities (tentatively slated for 2014) are analyzed.
5. River trail connections and interpretive exhibits: Visitor spending based on projected visitation numbers, and projected payroll and operating expenditures for 2016. Additionally,

¹⁵ Using an ARIMA model from the SAS software and data from the National Park Service system.

¹⁶ Projected visitation numbers have been adjusted to avoid double counting using a percentage drawn from National Park Service methodology. The same adjustment has been made to visitor projections for the other programs and new venues, with the exception of Rancho de las Cabras.

¹⁷ For purposes of this analysis, construction of each new park venue is tentatively slated for a single year between 2013 and 2015. These construction schedules are hypothetical, and created for the purpose of this analysis only. (Construction schedules for the San Antonio River Improvements Project are based on actual project construction plans and progress to date.)

impacts of construction activities (tentatively slated for 2013) are analyzed. Note: These are largely National Park Service expenditures. Related expenditures made by Bexar County, San Antonio River Authority, and other entities under the auspices of the San Antonio River Improvements Project are not included here (see #8 below for detail on these investments).

6. New park headquarters and cultural landscape restoration: No effect on the number of non-local visitors is anticipated. Included in the analysis are projected payroll and operating expenditures for 2016. Additionally, impacts of construction activities (tentatively slated for 2013) are analyzed.
7. Boundary expansion: No significant impact on non-local visitation is expected, except as relates to specific projects outlined above. Impacts of construction and maintenance activities (tentatively slated for 2015) are analyzed.
8. Related expenditures by local institutions and governments: Several construction projects that are part of the Mission Reach segment of the San Antonio River Improvements Project (SARIP) are included, as some of these projects (e.g., construction of “portals” that will connect the missions with the riverside trail system) directly affect the appeal of the park. The SARIP is transforming the river corridor into a more appealing place for visitors and residents. The focus is a restored ecosystem evocative of the San Antonio River during the Spanish colonial period, during which the river was the lifeblood of the missions.¹⁸ (These expenditures and impacts are detailed in Appendix C.)

The estimated future economic impact of these distinct components is outlined in two parts:

- First, the future impacts of visitation and operations are detailed in terms of jobs and spending. These are considered ongoing impacts, which are expected to grow as the new venues and programming become established, further increasing park visitation.
- Second, the future impacts of construction are detailed separately in terms of jobs and spending impacts. These are separated from the other impacts because they are considered to be one-time impacts, which will not be replicated over time.

¹⁸ SARIP web site at http://www.sanantonioriver.org/mission_reach/restoring_historical_connections.php.

While visitation and operations are considered jointly here, Appendix D carries a detailed table and discussion of visitation impacts alone.

**2016 IMPACTS FOR MISSIONS NHP PROJECTS:
VISITORS, PAYROLL, AND OPERATIONS EXPENDITURES ONLY**

Future Activity	Direct Impact Jobs	Total Impact Jobs
Full-park funding	250	361
San José Day in the Life	271	392
San Juan Demonstration Farm	184	265
Rancho de las Cabras	40	56
River Trails and Portals	45	69
New Headquarters and Cultural Landscape Restoration	3	3
Boundary Expansion	0	0
Total Visitation & Operations Impacts	793	1,146

Future Activity	Direct Impact Spending	Total Impact Spending
Full-park funding	\$17,969,715	\$32,306,773
San José Day in the Life	\$20,299,652	\$35,738,244
San Juan Demonstration Farm	\$13,602,228	\$24,044,544
Rancho de las Cabras	\$2,734,657	\$4,829,211
River Trails and Portals	\$4,570,515	\$8,659,953
New Headquarters and Cultural Landscape Restoration	\$241,000	\$507,251
Boundary Expansion	\$0	\$0
Total Visitation & Operation Impacts	\$59,417,767	\$106,085,976

To arrive at a total estimate of the economic impact of San Antonio Missions NHP, the impacts due to the programming, facilities, and budget changes included in the “future park” analysis must be ADDED to the current estimated economic impact of the Missions NHP (2009). In 2016, with these new venues, programs, budget, and boundary changes in place, the park’s total economic impact will be an estimated \$205 million (reported in 2009 dollars) and 2,262 jobs in 2016. This is more than double the park’s impact in 2009.

Additionally, the San Antonio River Authority (SARA) will be spending \$5.5 million to maintain the river improvements in the Missions Reach segment. These activities have a total impact of 73 jobs and close to \$9.6 million in expenditures. (See tables below.) Together with the previous impact, the total for 2016 reaches \$214.5 million and support 2,335 local jobs.

2016 SARA IMPACTS

Other Future Activity in 2016	Direct Impact Jobs	Total Impact Jobs
SARA operations	40	73

Other Future Activity in 2016	Direct Impact Expenditures	Total Impact Expenditures
SARA operations	\$5,500,000	\$9,579,707

3. Impacts of One-Time Investments (2013-2015)

Helping lay the foundation for doubling the park’s economic impact between 2009 and 2016 is a series of park construction projects slated for completion between 2013 and 2015. These projects will support a total of 205 jobs over the course of those three years (see detail in the table below), and add \$26 million in economic impact.

FUTURE IMPACTS FOR MISSIONS NHP CONSTRUCTION PROJECTS (2013-2015)

Future Activity	Direct Impact Jobs	Total Impact Jobs
Full-park funding	0	0
San José Day in the Life	0	0
San Juan Demonstration Farm (2013)	34	59
Rancho de las Cabras (2014)	33	57
River Trails and Portals (2013)	16	29
New Headquarters and Cultural Landscape Restoration (2013)	26	43
Boundary Expansion (2015)	10	17
Total Construction Impacts	119	205

Future Activity	Direct Impact Spending	Total Impact Spending
Full-park funding	\$0	\$0
San José Day in the Life	\$0	\$0
San Juan Demonstration Farm (2013)	\$5,096,844	\$8,587,984
Rancho de las Cabras (2014)	\$3,938,882	\$6,863,622
River Trails and Portals (2013)	\$2,217,447	\$3,862,271
New Headquarters and Cultural Landscape Restoration (2013)	\$2,817,089	\$4,943,719
Boundary Expansion (2015)	\$1,024,669	\$1,795,622
Total Construction Impacts	\$15,094,930	\$26,053,218

The National Park Service is not the only entity making substantial one-time investments in the missions and their associated lands and facilities. Between 2010 and 2012 the Catholic Archdiocese of San Antonio will spend a projected \$6.6 million restoring and maintaining the churches and non-secular buildings. (These investments are not included in this economic impact analysis.)

As part of the comprehensive San Antonio River Improvements Project, between 2010 and 2013, the San Antonio River Authority, the City of San Antonio, Bexar County, U.S. Army Corps of Engineers and other entities are scheduled to invest roughly \$295 million in infrastructure improvements, ecosystem restorations and recreational enhancements in the “Mission Reach” segment of the river, in south San Antonio. Over the next four years, these activities will have a total economic impact of \$518 million and support an average of 981 jobs per year.¹⁹ This is *in addition* to the previously outlined impact of the operations and construction projects and non-local visitation associated with the San Antonio Missions NHP. SARIP impacts are treated separately, since the possibility exists that a portion of those funds could have been redirected to other projects in the region, and while the total project will dramatically increase the visibility and attractiveness of the Missions NHP, some portions of the project are more directly tied to the missions and the park than others. (See Appendix C.)

¹⁹ See Appendix C for the annual impacts from construction projects implemented by the City of San Antonio, the County of Bexar, and SARIP (from 2010 through 2013).

Conclusion

Heritage tourism visitation to the missions began in the late 19th century and the interest in their history has not abated since. The value that this intact grouping of historic resources holds for the San Antonio region is far greater than the economic impact assessed by this report. These sites are a physical manifestation of the region's cultural identity. Below is a brief list of intangible values that any discussion of the value of the San Antonio Missions National Historical Park would be remiss not to mention.

Intangible values of the San Antonio Missions:

- cultural identity of the region's people;
- spiritual centers for worship and memory;
- familiarity of place for the local population and repeat visitors;
- aesthetic beauty of landscape and buildings;
- recreational enjoyment of open space;
- differentiation of San Antonio from any other place;
- surviving integrity of tangible remains as evidence of past events; and
- higher quality of life engendered by proximity to resources of outstanding historical significance.

This study looks solely at the economic impacts of the San Antonio Missions National Historical Park and estimates their current economic impact (2009) to be \$98.8 million in the eight-county San Antonio metropolitan area. The vast majority of the direct impacts are attributed to the over 1.7 million people that visited the park in 2009. The remainder comes from park and park partner organizations' operations, construction activity, and personnel expenditures.

By 2016, a slate of construction projects, programming enhancements, budget upgrades, and additions of key tracts of land to complete the park are expected to attract an additional 395,043 annual visitors to the Missions NHP,²⁰ contributing to a total estimated economic impact of nearly \$214.5 million and supporting 2,335 jobs.²¹

In the intervening years, one-time investments in construction and infrastructure improvement will support 205 jobs and \$26 million in economic impact for park-based projects alone (2013-2015). The agencies and organizations funding the San Antonio River Improvements Project will invest an additional \$295 million in the Mission Reach, yielding a total economic impact from this investment of \$518 million that in turn will support an average of 981 jobs per year over the four years from 2010 through 2013.

We recognize that a small percentage of the future SARIP funding may have been redirected to other local investments and perhaps should not have been included in estimating the total economic impact. However, given that in May 2008, the voters of Bexar County approved a proposition to direct \$113.3

²⁰ The 395,043 annual visitors are in addition to an increase of more than 475,000 visitors expected between 2009 and 2016 with no programming or facilities changes, using historical trends in park visitation growth to project this baseline growth in visitation.

²¹ Includes 2016 impacts attributed to SARA operations

million in support of the San Antonio River Improvements Project and that there exists a total federal obligation of \$115.2 million, we believe a separate analysis of the projected impact of these funds was warranted.²²

The expansion of programming, visitor facilities, included lands, and budget at the San Antonio Missions National Historical Park is estimated to have a significant economic impact on the San Antonio region's economy, particularly related to tourism. But perhaps the greatest impact of investing in the Missions NHP is the continued ability to preserve and share the historic and cultural assets of a city that so closely identifies with the essence of the missions that are under the park's stewardship.

²² Retrieved from http://www.sanantonioriver.org/proj_facts/facts.php on January 12, 2011

APPENDIX A: Visitor Projections for Future Projects

Visitation estimates for future venues were built off of comparable visitation numbers for each planned project. These projections were based upon a review of comparable facilities and were adjusted based on comments received from the park staff. Additionally, for most of the venues, using a review of historical data from several national historic sites suggests that the first year of operation attracts about 40 percent of the average visitor numbers expected for subsequent years. In this approach, Missions NHP staff estimates are considered expected values of future attendance. Only in one case, the River Trails and Mission Portals, the visitation forecast is the result of a comparison with similar trends at the Hyland-Bush-Anderson Lakes Regional Park.

Unlike the majority of the national historical sites reviewed to obtain these estimates, the Missions NHP is part of an urban core. Being located in an established national park, in the nation's seventh largest city and in an area where the tourism and hospitality industry had an economic impact of \$11 billion in 2008,²³ it is expected that improvements to the Missions NHP will contribute to a slightly higher initial rate of attendance than in the compared sites. Taking all of these elements into consideration, it was determined that a factor of 0.45 should be used against the high projection figures to arrive at the moderate visitation projections that were used for these analyses.

River Trails and Mission Portals

It seems reasonable to anticipate some increase in visitation as the river's natural features are restored, trails are improved, the mission portals are completed, and parks and other facilities along the trails are improved and completed. One park with total attendance similar to the missions, the Hyland-Bush-Anderson Lakes Regional Park, released a master plan for trails improvements which predict a 25 percent increase in visitation over 22 years, and average annual increase of 1.14 percent.²⁴ Using this information and isolating only the trails visitation portion of San Antonio's park visitation, a conservative estimate of visitation increases due to river improvements is possible: close to 56,350 visitors.

This estimate is close to half of the attendance reports for the Museum Reach segment of the San Antonio River with 9,000 monthly visitors accessing the area on foot, or 108,000 visitors a year.

²³ *The Economic Impact of San Antonio's Hospitality Industry, 2008* by Richard Butler and Mary Stefl from Trinity University

²⁴ Hyland-Bush-Anderson Lakes Regional Park Reserve Master Plan.
<http://www.ci.bloomington.mn.us/cityhall/dept/commserv/parkrec/parks/hylandplan/hba_master_plan_final.pdf>

Mission San Juan Demonstration Farm

The Farm is expected to draw 500,000 visitors and 50,000 school children to the park annually (for a total of 550,000) according to estimates by Missions staff.²⁵ Visitation at similar demonstration farms is much lower, but though urban, these sites are not connected with a park that draws such high annual visitation. Considering projections of a similar park, The Ardenwood Historic Farm, it is possible to project visitation increases of at least 172,150. On the other hand, based on the sample of National Historic Sites, 45 percent (of the 550,000 visitor number suggested by NPS staff) was considered appropriate: 247,500 visitors.

New Headquarters and Cultural Landscape Restoration

New headquarters is not expected to increase visitation by much. New facilities will attract researchers, and perhaps some additional locals wandering over from the public library next door, but no significant increase expected. For the impact study, no increase in visitation numbers was assumed.

Mission San José: Day in the Life of the Missions

Park staff anticipates that the main effects of this venue will be extended visitation times and more repeat visits (similar effect expected for the other venues) with an estimated 830,000 visitors.

Similar to the San Juan Demonstration Farm case, 45 percent of the 830,000 projection by the Missions staff was used for the moderate scenario: 373,500 visitors.

Rancho de las Cabras

Park staff expect visitation to be around 50,000 annually, similar to attendance at smaller archeological parks. Advertising and building cultural programming and links to nearby Floresville and San Antonio will further build visitation. Similar to previous cases, a 45 percent of the 50,000 projection by the Missions staff was used for the moderate scenario: 22,500 visitors.

²⁵ National Park Service "Operations Formulations System" funding request, 01/29/10.

APPENDIX B: Current and Future Impacts by Project

Current Missions NHP impacts (2009)

For 2009, the Missions NHP operations, payroll and maintenance impacts are shown in the following table:

Missions NHP 2009	Direct Impact Jobs	Total Impact Jobs
Missions NHP payroll and operations	72	99
Missions NHP construction and maintenance	2	3
	74	101
Missions NHP 2009	Direct Impact Spending	Total Impact Spending
Missions NHP payroll and operations	\$4,471,544	\$8,592,551
Missions NHP construction and maintenance	\$373,580	\$735,297
	\$4,845,124	\$9,327,848

The addition of operations, payroll, and construction and maintenance expenditures is equal to \$4,845,124.

For 2009, based on information from the Mission staff, some expenditures on goods and services were assumed to be 60 percent from local providers, and in other cases they were assumed to be the software IMPLAN's average percentages for the local area. Furthermore, for most of the 2016 projects the IMPLAN's percentages were used. Given the relatively low importance of these expenditures when compared to salaries, the main results of the impacts are not significantly affected by these assumptions.

Full-park funding (2016)

Full-park funding includes the additional budget needed by the park to operate at full functional capacity that will enable park staff to adequately maintain and protect park resources, and safely and effectively accommodate increasing levels of visitation anticipated without any programming or facilities changes. The number of additional non-local visitors is measured as the difference between a projected natural trend of visitation and 2009 visitation. Full-park funding also includes the expenditures of these additional non-local visitors.

2016

Full-park funding	Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending	183	266
Operations and payroll *	67	95
Construction	na	na
Total	250	361

* From different OFS Priority information sheets

Full-park funding	Direct Impact Spending	Total Impact Spending
Non-local visitors spending	\$13,449,315	\$23,927,370
Operations and payroll *	\$4,520,400	\$8,379,403
Construction	na	na
Total	\$17,969,715	\$32,306,773

* From different OFS Priority information sheets and adjusted to exclude non-local expenditures

San José: Day in the Life (2016)

The impacts for the “San José Day in the Life” include a moderate projected visitation number, and projected operating expenditures including wages and salaries associated with the project in 2016.²⁶

San José: Day in the Life	Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending	251	365
Operations and payroll *	20	27
Construction	na	na
Total	271	392

* Based on information provided: 14 permanent and 4 seasonal plus other operations related jobs

San José: Day in the Life	Direct Impact Spending	Total Impact Spending
Non-local visitors spending	\$19,224,652	\$33,616,180
Operations and payroll *	\$1,075,000	\$2,122,064
Construction	na	na
Total	\$20,299,652	\$35,738,244

* Based on information provided: 14 permanent and 4 seasonal plus other operations related jobs

²⁶ These visitation numbers have been adjusted to avoid double counting using a percentage according to the National Park Service methodology.

San Juan: Demonstration Farm (2016)

The impacts for the “San Juan Demonstration Farm” include a moderate projected visitation number, and projected operating expenditures, including wages and salaries, associated with the project in the year 2016.²⁷

San Juan: Demonstration Farm	Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending	167	242
Operations and payroll *	17	23
Construction **	34	59
Total	218	324

* Based on information provided: 10 permanent and 4 seasonal plus other operations related jobs

** For year 2013

San Juan: Demonstration Farm	Direct Impact Spending	Total Impact Spending
Non-local visitors spending	\$12,739,228	\$22,275,784
Operations and payroll *	\$863,000	\$1,768,759
Construction **	\$5,096,844	\$8,587,984
Total	\$18,699,072	\$32,632,528

* Based on information provided: 10 permanent and 4 seasonal plus other operations related jobs

** For year 2013

²⁷ Ibid.

Rancho de Las Cabras (2016)

The impacts for “Rancho de Las Cabras” include a moderate projected visitation number, and projected operating expenditures, including wages and salaries, associated with the project in 2016.²⁸

Rancho de Las Cabras	Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending	28	40
Operations and payroll *	12	16
Construction **	33	57
Total	73	113

* Based on information provided: 7 permanent and 4 seasonal

** For year 2014

Rancho de Las Cabras	Direct Impact Spending	Total Impact Spending
Non-local visitors spending	\$2,105,657	\$3,681,947
Operations and payroll *	\$629,000	\$1,147,265
Construction **	\$3,938,882	\$6,863,622
Total	\$6,673,539	\$11,692,834

* Based on information provided: 7 permanent and 4 seasonal

** For year 2014

²⁸ Ibid.

River Trails and Portals (2016)

The impacts for “River Trails and Mission Portals” include moderate projected visitation numbers, and projected operating expenditures, including wages and salaries, associated with the project in 2016.²⁹

River Trails and Portals	Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending	38	55
Operations and payroll	7	14
Construction *	16	29
Total	61	98

* For year 2013

River Trails and Portals	Direct Impact Spending	Total Impact Spending
Non-local visitors spending	\$2,900,425	\$5,071,677
Operations and payroll	\$1,670,090	\$3,588,276
Construction *	\$2,217,447	\$3,862,271
Total	\$6,787,962	\$12,522,224

* For year 2013

²⁹ Ibid.

New Headquarters and Cultural Landscape Restoration (2016)

The impacts for “New Headquarters and Event Venue” assume that there will be no significant change in the number of non-local visitors. Included are projected operating expenditures, including wages and salaries, associated with the facilities in 2016. Projected construction activities are included (tentatively slated for 2013).

New Headquarters and Cultural Landscape Restoration		Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending		0	0
Operations and payroll		3	3
Construction *		26	44
Total		29	47

* For year 2013

New Headquarters and Cultural Landscape Restoration		Direct Impact Spending	Total Impact Spending
Non-local visitors spending		0	0
Operations and payroll		\$241,000	\$507,251
Construction		\$2,817,089	\$4,943,719
Total		\$3,058,089	\$5,450,970

* For year 2013

Boundary Expansion (2016)

The impacts for “Boundary Expansion” include projected construction activities tentatively slated for the year 2015.

Boundary Expansion	Direct Impact Jobs	Total Impact Jobs
Non-local visitors spending	na	na
Operations and payroll	na	na
Construction *	10	17
Total	10	17

* For year 2015

Boundary Expansion	Direct Impact Spending	Total Impact Spending
Non-local visitors spending	na	na
Operations and payroll	na	na
Construction *	\$1,024,669	\$1,795,622
Total	\$1,024,669	\$1,795,622

* For year 2015

APPENDIX C: Impact of Related Construction Activities, San Antonio River Improvements Project, 2010-2013

Based on the information provided, in 2010, the SARIP will spend close to \$46.6 million in construction on the Mission Reach of the San Antonio River around the river. These construction activities will help restore the ecosystem, create recreational spaces, and relocate some San Antonio Water System (SAWS) services, among other improvements. Bexar County will spend close to \$1.2 million in enhancements and betterments in the area. The total impacts translate into 655 jobs and \$84.7 million.

SEVERAL CONSTRUCTION PROJECTS 2010		
	Direct Impact	Total Impact
1 Jobs impacts by SARIP construction 2010	349	639
2 Jobs impacts by County betterments and enhancements 2010	9	16
	358	655
1 Spending impacts by SARIP construction 2010	\$46,562,933	\$82,657,002
2 Spending impacts by County betterments and enhancements 2010	\$1,200,000	\$2,083,888
	\$47,762,933	\$84,740,890

In 2011, SARIP will continue with construction projects around the river with close to \$45.6 million, and the County of Bexar will continue with enhancements costing \$6.4 million. A combination of sources (Bexar County, CPS, San Antonio Parks Foundation, a Texas Parks and Wildlife grant, and a private donor) for a total of \$5.6 million will remodel the Mission County Park. The total impacts translate into 784 jobs and \$102.1 million.

SEVERAL CONSTRUCTION PROJECTS 2011		
	Direct Impact	Total Impact
1 Jobs impacts by Mission County Park remodeling 2011	40	73
2 Jobs impacts by SARIP construction 2011	341	628
3 Jobs impacts by County betterments and enhancements 2011	46	83
	427	784
1 Jobs impacts by Mission County Park remodeling 2011	\$5,618,000	\$9,726,557
2 Spending impacts by SARIP construction 2011	\$45,636,070	\$81,312,932
3 Spending impacts by County betterments and enhancements 2011	\$6,400,000	\$11,080,449
	\$57,654,071	\$102,119,937

In 2012, the County not only will continue with enhancements totaling \$7.2 million but also will build a new county sports complex costing \$6.1 million. Bexar County, additionally, will improve drainage facilities in different areas around the river (VFW Blvd., Conception Creek, and Six Mile Creek). SARIP continues with construction projects totaling \$58.3 million. The total impacts translate into 1,692 jobs and \$223.2 million.

SEVERAL CONSTRUCTION PROJECTS 2012		
	Direct Impact	Total Impact
1 Jobs impacts by County sports complex 2012	114	206
2 Jobs impacts by County miscellaneous drainage projects 2012	321	582
3 Jobs impacts by SARIP construction 2012	437	811
4 Jobs impacts by County betterments and enhancements 2012	51	92
	922	1,692
1 Spending impacts by County sports complex 2012	\$16,100,000	\$27,788,872
2 Spending impacts by County miscellaneous drainage projects 2012	\$45,419,759	\$78,395,271
3 Spending impacts by SARIP construction 2012	\$58,276,789	\$104,619,684
4 Spending impacts by County betterments and enhancements 2012	\$7,200,000	\$12,427,322
	\$126,996,548	\$223,231,149

In 2013, SARIP spends \$58.3 million and the County spends \$ 4.4 million for enhancements and betterments. The total impacts translate into 792 jobs and \$107.8 million.

SEVERAL CONSTRUCTION PROJECTS 2013		
	Direct Impact	Total Impact
1 Jobs impacts by SARIP construction 2013	404	737
2 Jobs impacts by County betterments and enhancements 2013	30	56
	434	792
1 Spending impacts by SARIP construction 2013	\$58,276,791	\$100,275,518
2 Spending impacts by County betterments and enhancements 2013	\$4,395,702	\$7,563,582
	\$62,672,493	\$107,839,100

APPENDIX D: Visitor Expenditures Impacts

Following Dr. Stynes' report on visitor spending impact for the Missions NHP for 2003,³⁰ visitation forecasts were further adjusted to avoid double counting, particularly for those staying overnight. The following outlines the impact of the adjusted increase in non-local visitors on area jobs and total spending.

For 2009, the Missions NHP impacts by nonlocal visitors are presented in the following table:

2009

Missions NHP	Direct Impact Jobs	Total Impact Jobs
Missions NHP Nonlocal visitors spending	701	995

Missions NHP	Direct Impact Spending	Total Impact Spending
Missions NHP Nonlocal visitors spending	\$50,078,236	\$87,246,764

By 2016, the adjusted increase in non-local visitors of 395,043 represents close to an 18 percent increase over the increased visitation expected by continuing the historic trend of growth in visitation, with no new programming or venues. However, because most of these visitors are projected to stay overnight, the total dollar impacts from non-local visitors' expenditures increases by close to 102 percent. In 2016, their first year of operations, the new venues and programs will have a substantial impact. By the first year of operations the new venues will add 968 to the 995 jobs attributable to the non-local visitor spending in 2009—an increase of nearly 100 percent.

³⁰ Styne, D. J. (2003). Visitor Spending and Economic Impacts For National Park Units. MGM@ NPS Money Generation Model. Taken from the web site at <http://web4.canr.msu.edu/mgm2/> for the San Antonio Missions NHP.

ONLY NON-LOCAL VISITORS' EXPENDITURES IMPACTS (JOBS)

Future Activity	Direct Impact Jobs	Total Impact Jobs
Full-park funding	183	266
San Jose Day in the Life	251	365
San Juan Demonstration Farm	167	242
Rancho de las Cabras	28	40
River Trails and Portals	38	55
New Headquarters and Cultural Landscape Restoration	0	0
Boundary Expansion	na	na
Total	667	968

The total direct spending is also expected to increase. By 2016, these expenditures will have an additional \$88.5 million impact over the 2009 impacts, constituting roughly 74 percent of the estimated new total economic impacts of the Missions NHP in 2016.

ONLY NON-LOCAL VISITORS' EXPENDITURES IMPACTS (DOLLARS)

Future Activity	Direct Impact Spending	Total Impact Spending
Full-park funding	\$13,449,315	\$23,927,370
San Jose Day in the Life	\$19,224,652	\$33,616,180
San Juan Demonstration Farm	\$12,739,228	\$22,275,784
Rancho de las Cabras	\$2,105,657	\$3,681,947
River Trails and Portals	\$2,900,425	\$5,071,677
New Headquarters and Cultural Landscape Restoration	\$0	\$0
Boundary Expansion	na	na
Total	\$50,419,277	\$88,572,957

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Los Compadres de San Antonio Missions