

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 HISTORIC PARKS**

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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 \$96.8 million to the local economy and sustained 1,116 jobs in the region.

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 Jose; 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 park<sup>1</sup> 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 \$209.5 million to the local economy, and support 2,335 local jobs.

Between 2012 and 2015, one-time expenditures on construction projects within the park will support an additional 155 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.

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<sup>1</sup> 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 19<sup>th</sup> 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 Concepción, 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)<sup>2</sup>. 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.

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<sup>2</sup> 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 various forms of 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, they 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 measure the direct expenditures of each component within the region surrounding the Missions NHP and estimate the additional economic impacts on this local region. Traditionally, economic impact studies measure economic impacts in terms of the direct impacts and secondary impacts. The direct impacts include those first round expenditures of the missions. Secondary impacts are those additional expenditures as a result of the initial direct expenditures<sup>3</sup>.

In performing an economic impact analysis it is important for researchers to look at new dollars, or dollars that originated outside the study area. The intent is to identify how much is “new” spending and to resist the temptation to look at all dollars spent, since a portion of those funds would have been spent locally anyway. One form this can take is out-of-town visitor expenditures. Some studies argue that the mere presence of a tourist attraction has the effect of encouraging local visitor expenditures that might otherwise be spent in a similar destination outside the study area, and thus count local visitor expenditures. They fail to recognize that there is no guarantee that these visitors would have partaken in visiting a similar site in another area. Though an analysis could be made to identify their 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 determine the portion of secondary spending circulating in the economy, and is used to determine the resulting effects or the changes in spending at the consumer level that result from the increases in expenditures related to the project or entity being analyzed.

The multiplier effect is calculated for each one of the direct economic impacts through the IMPLAN Input/Output model. (IMPLAN stands for IMpact Analysis for PLANning.) A widely used model first developed by the United States Forest Service in 1979, it is now marketed by Minnesota IMPLAN Group

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<sup>3</sup> Secondary impacts contain both indirect and induced impacts. Indirect impacts occur when businesses purchase goods and services from other businesses in order to serve the needs of the missions, while induced impacts occur when employees of these businesses use their earnings to make additional purchases in the community.

(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 region, a state, or the nation. 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 a more complete 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 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. 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 impact the appeal of the park.

### ***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.

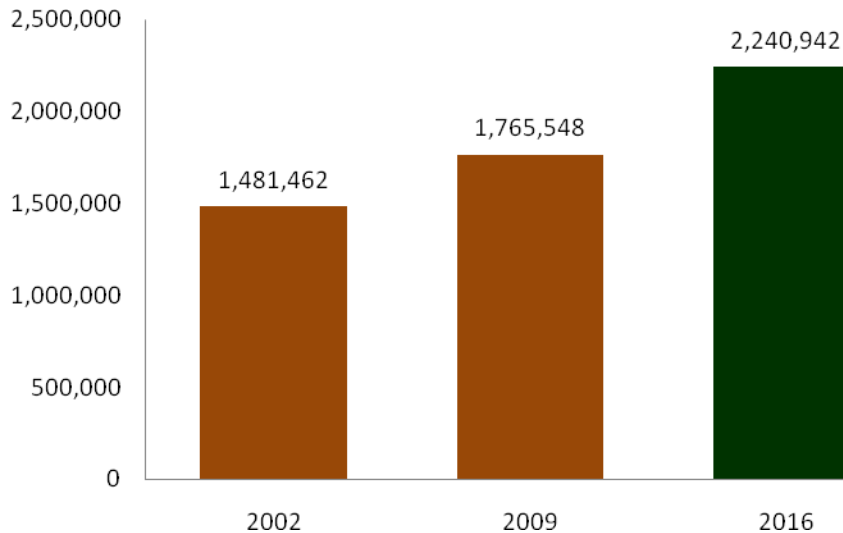
In calendar year 2009, the Missions NHP received 1,765,548 visitors. Using a time series statistical procedure<sup>4</sup> based on NPS visitation data, we forecast that by the year 2016 there would be 2,240,942 visitors without the addition of any new programs or facilities, due solely to the continuation 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.

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<sup>4</sup> 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**

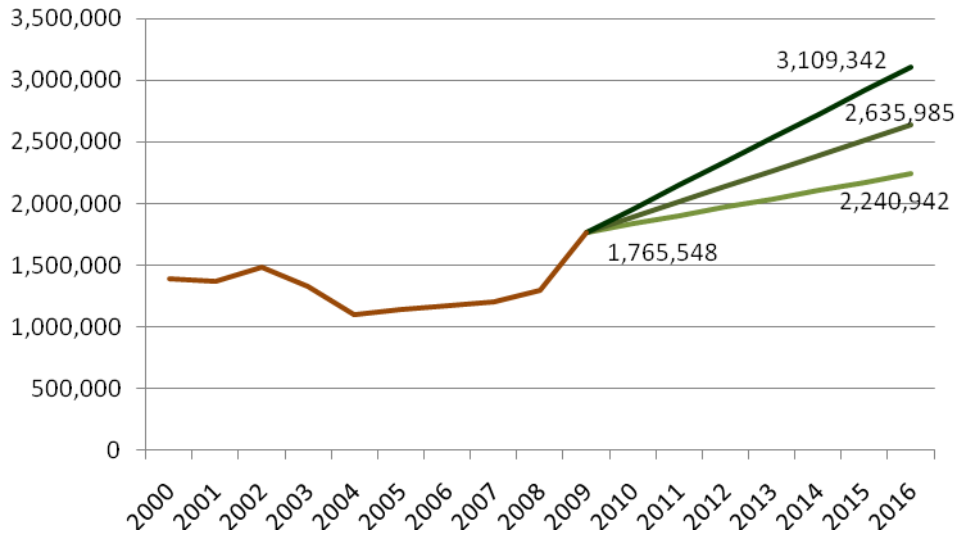


For the impact analyses, visitation forecasts for each of the anticipated programming or venue additions were compared to other similar sites or to appropriate averages from other parks. Also, using projections provided by staff from the Missions NHP, three possible scenarios were envisioned:

- 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 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 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. Based on a review of historical data from several national historic sites, the first year of operation attracted only 40 percent of the average visitor numbers for subsequent years. Based on this information, projected attendance figures provided by park staff were discounted to 40 percent for 2016.<sup>5</sup> (Note: As visitation increases over time at these new facilities and programs, the economic impact of the park will continue to grow.)

Unlike the majority of the national historical sites reviewed to obtain these estimates, the Missions NHP are part of an urban core. Being located in the nation’s seventh largest city and in an area where the tourism and hospitality industry had in economic impact of \$11 billion in 2008<sup>6</sup> is expected to contribute to slightly higher initial rate of attendance than in the compared sites.

Finally, considering that the San Antonio River Improvements Project is already in progress and expected to be finished by 2013, and will serve as a marketing tool for the Missions NHP and its new projects, it was determined that a factor higher than 0.4 should be used to finalize moderate visitation projection figures. The forecast for the river improvements is a result of a comparison with similar trends at the

<sup>5</sup> The national historic sites considered: Fort Point, Fort Vancouver, Salem Maritime, Ford’s Theatre, Martin Luther King Jr., Lincoln Home, Vanderbilt Mansion, Fort Raleigh, Herbert Hoover, and Andersonville, plus the heritage walking trails of Boston African American and Pennsylvania Avenue.

<sup>6</sup> *The Economic Impact of San Antonio’s Hospitality Industry, 2008* by Richard Butler and Mary Stefl of Trinity University

Hyland-Bush-Anderson Lakes Regional Park.<sup>7</sup> Taking all of these elements into consideration, it was determined that a factor of 0.455 should be used against the high projection figures to arrive at the moderate visitation projections that were used for this analysis.

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.<sup>8</sup> 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 same day. Therefore, the visitation numbers for Rancho de Las Cabras stayed at the previously estimated value (in this case 22,500).

#### 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.

<sup>7</sup> See Appendix A, at the end of these notes, for a more detailed explanation of these calculations.

<sup>8</sup> In the study we used a factor of 0.55 which gives a slightly smaller number of adjusted visitors.

#### ***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 a park visitor study by the University of Idaho:<sup>9</sup>

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,<sup>10</sup> the NPS estimated that the average spending per visitor party per day in the missions was \$93.00. Using the same methodology as outlined in the National Park 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.<sup>11</sup> 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 follow the San Antonio tourism spending percentages reported by a Texas-specific study prepared for the Office of the Governor.<sup>12</sup> The final impacts were calculated using multipliers from IMPLAN.<sup>13</sup>

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<sup>9</sup> Survey from the University of Idaho: Visitor Services Project, 1994.

<sup>10</sup> 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.

<sup>11</sup> Ibid.

<sup>12</sup> From *Texas Destinations 2008-2009* prepared by D.K. Shifflet & Associates, Ltd.

<sup>13</sup> IMPLAN 2008 database uses SAM type multipliers giving additional interactions between households and businesses, on one hand, and governments, on the other.

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 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 NHP<sup>14</sup>:

**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
<b>Total</b>	<b>\$91.33</b>	<b>\$263.32</b>

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. Only 80 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.

***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. Only 80 percent of that projection (1,792,753) was considered non-local visitation.

Future visitors are also split between 1) those local visitors who will visit the Missions NHP, 2) those out-of-town visitors that spend less than a one-day visit, and 3) those that will stay several days and nights to enjoy the new programs and facilities that are planned for the future.

<sup>14</sup> 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.

As a direct result of new marketing efforts to attract visitors from outside the San Antonio area, the new venues and program enhancements are expected to attract 395,043 new 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 be overnight visitors. 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.<sup>15</sup>

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.

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<sup>15</sup> 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 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 Missions. 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 3<sup>16</sup> 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 budget of \$4,845,124 for the same year<sup>17</sup>. 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 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 as active congregations and as 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 \$94.7 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 \$2.7 million in expenditures.

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<sup>16</sup> IMPLAN v.3 is a product of the Minnesota IMPLAN Group (MIG).

<sup>17</sup> Because not all the parks operating budget goes to local producers, only \$3.9 million is used to estimate the impact of this budget on the local economy.

As the tables below show, in 2009, San Antonio Missions National Historical Park had a total economic impact of \$96.8 million, and supported 1,116 jobs.

**MISSIONS NHP JOB IMPACTS IN 2009**

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

**MISSIONS NHP EXPENDITURES IMPACTS IN 2009**

<b>Current Activity</b>	<b>Direct Impact Expenditures</b>	<b>Total Impact Expenditures</b>
Missions NHP**	\$54,225,963	\$94,693,917
Los Compadres	\$275,500	\$504,021
Western Association	\$268,357	\$554,210
SARA operations	\$218,279	\$380,326
City operations	\$410,556	\$727,821
<b>Total</b>	<b>\$55,398,655</b>	<b>\$96,860,295</b>

\* 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 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 pages 6-7. 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 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 (see page 7 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 visitation<sup>18</sup> and 2009 visitation.

2. “A Day in the Life of the Missions” hands-on cultural demonstration programming at Mission San Jose: Visitor spending based on projected visitation numbers for this venue,<sup>19</sup> 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 2013<sup>20</sup>) 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. Connecting Trails and Interpretive Exhibits: Visitor spending based on projected visitation numbers, and projected payroll and operating expenditures for 2016. Additionally, 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 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.

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<sup>18</sup> Using an ARIMA model from the SAS software and data from the National Park Service system.

<sup>19</sup> 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.

<sup>20</sup> 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.)

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 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 improvement project 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.<sup>21</sup> (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 jobs impacts and spending impacts. 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.

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

<sup>21</sup> SARIP web site at [http://www.sanantonioriver.org/mission\\_reach/restoring\\_historical\\_connections.php](http://www.sanantonioriver.org/mission_reach/restoring_historical_connections.php).

<b>Future Activity</b>	<b>Direct Impact Spending</b>	<b>Total Impact Spending</b>
Full park funding	\$17,672,942	\$31,586,373
San José Day in the Life	\$20,299,637	\$35,584,244
San Juan Demonstration Farm	\$13,596,495	\$23,848,544
Rancho de las Cabras	\$2,694,020	\$4,766,717
River Trails and Portals	\$3,979,118	\$6,989,863
New Headquarters and Cultural Landscape Restoration	\$240,993	\$441,251
Boundary Expansion	\$0	\$0
<b>Total Visitation &amp; Operations Impacts</b>	<b>\$58,483,205</b>	<b>\$103,216,992</b>

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 \$200 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 \$209.5 million and support 2,335 local jobs.

#### **2016 SARA IMPACTS**

<b>Other Future Activity in 2016</b>	<b>Direct Impact Jobs</b>	<b>Total Impact Jobs</b>
SARA operations	40	73

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

### ***3. Impacts of One-Time Investments (2010-2015)***

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 155 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)**

<b>Future Activity</b>	<b>Direct Impact Jobs</b>	<b>Total Impact Jobs</b>
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
<b>Total Construction Impacts</b>	<b>119</b>	<b>205</b>

<b>Future Activity</b>	<b>Direct Impact Spending</b>	<b>Total Impact Spending</b>
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
<b>Total Construction Impacts</b>	<b>\$15,094,930</b>	<b>\$26,053,218</b>

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.<sup>22</sup> 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.)

## Conclusion

Heritage tourism visitation to the missions began in the late 19<sup>th</sup> 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 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 \$96.8 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

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<sup>22</sup> 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).



to the Missions NHP,<sup>23</sup> contributing to a total estimated economic impact of nearly \$209.5 million and supporting 2,335 jobs<sup>24</sup>.

In the intervening years, one-time investments in construction and infrastructure improvement will support 155 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 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.<sup>25</sup>

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.

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<sup>23</sup> 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.

<sup>24</sup> Includes 2016 impacts attributed to SARA operations

<sup>25</sup> Retrieved from [http://www.sanantonioriver.org/proj\\_facts/facts.php](http://www.sanantonioriver.org/proj_facts/facts.php) on January 12, 2011

## APPENDIX A: Visitor Projections for Future Projects

Visitation projections for future projects were built off of current 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. The comments from the park staff are indicated below as SAAN Comments. Comments from the research team are listed as CCBR Comments. The projections for future projects are as follow:

### 1. San Antonio River Improvements Project, River Trails, and Mission Portals

- a. Current Visitation: 575,000
- b. SAAN Comments:<sup>26</sup> *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*
- c. SAAN Projected Increase: no figure provided
- d. CCBR Comments: 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.<sup>27</sup> Using this model 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.
- e. Attendance reports for the Museum Reach segment of the San Antonio River suggest some 9,000 monthly visitors to the area, or 108,000 visitors a year, following completion of San Antonio River Improvements Project efforts along that part of the river.<sup>28</sup>
- f. CCBR Moderate Projected Increase by 2016: 56,350 visitors.

### 2. Mission San Juan Demonstration Farm

- a. Current Visitation: 72,000
- b. SAAN Comments: *The Farm is expected to draw 500,000 visitors and 50,000 school children to the park annually.*<sup>29</sup> *Visitation at similar demonstration farms (see Farm or Ranch Visitation 110210.xls) is much lower, but though urban, these sites are not connected with a park that draws such high annual visitation.*<sup>30</sup>
- c. SAAN Projected Increase: 550,000 (500,000 visitors and 50,000 school children)

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<sup>26</sup> Visitation Data Summary (provided by NPS staff)

<sup>27</sup> 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](http://www.ci.bloomington.mn.us/cityhall/dept/commserv/parkrec/parks/hylandplan/hba_master_plan_final.pdf)>

<sup>28</sup> In Krista Sherwood's e-mail on 10/25/10, the Rio San Antonio company reports close to 59,000 people using its services and that easily doubling that number would give a conservative estimate of visitors by foot to the Museum Reach. We assumed that a 9,000 monthly number with a yearly total of 108,000 would be an initial projection of those visiting the Mission Reach segment on foot.

<sup>29</sup> Park OFS Priority 9.pdf

<sup>30</sup> Visitation Data Summary (provided by NPS staff)

- d. CCBR Comments: The Ardenwood Historic Farm estimates that 12.6 percent<sup>31</sup> of its park's total visitors visit the actual farm. Current San Juan visitation is about 4 percent of total visitation. If the San Antonio Missions Park is able to reach this benchmark as an *increase* in total visitation through the new farm, the projected increase is at least 172,150.<sup>32</sup>
- e. On the other hand, based on a sample of National Historic Sites, a 45 percent (of the 550,000 visitor number suggested by NPS staff) was considered appropriate: 247,500.
- f. CCBR Moderate Projected Increase by 2016: 247,500 visitors.

### 3. Mission San José – New Headquarters and Events Venue

- a. Current Visitation: n/a
- b. SAAN Comments: *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... At one major new event per month, visitation may increase by more than 12,000 in a year.*<sup>33</sup>
- c. SAAN Projected Increases: 12,000
- d. CCBR Comments: SAAN estimates are reasonable by 2016, assuming that the necessary event programming needs are met to generate this level of visitation.
- e. CCBR Moderate Projected Increase: 0

### 4. Mission San José – Day in the Life programming

- a. Current Visitation: n/a
- b. SAAN Comments: *Park staff anticipate that the main effects of this programming will be extended visitation times and more repeat visits (similar effect expected for the demonstration farm and rancho)*
- c. SAAN Projected Increases: 830,000 (750,000 visitors and 80,000 school children)
- d. CCBR Comments: For a more conservative estimate, we can assume that all non-school increases in visitation from Mission San José will overlap with existing visitation or will exist as crossover visitation from existing visitation estimates of Rancho de las Cabras, Mission San José, Mission San Juan, and the River Improvements and include only the 80,000 school children. This may underestimate visitation increases for this exhibit; however, any underestimate will hopefully compensate for any overestimates in other areas where a greater proportion of visitation increases will be realized as crossover from existing visitation.
- e. Similar to the San Juan Demonstration Farm case, a 45 percent of the 830,000 projection by the NPS staff was considered: 373,500 visitors.
- f. CCBR Moderate Projected Increase: 373,500 visitors.

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<sup>31</sup> Data pulled from file provided by the Harbinger Consulting Group (HCG) titled "Farm or Ranch Visitation 110210.xls" on 11/10/2010 – 44,000 visitors from "comments" out of total 175,000 visitors from "visitation stats"

<sup>32</sup>  $(72000 + \text{visitation increase}) = (\text{San Juan future visitation})$   
 $0.126(\text{visitation increase} + 1,765,548) = (\text{San Juan future visitation})$ , therefore  
 $(72000 + \text{visitation increase}) = 0.126(\text{visitation increase} + 1,765,548)$   
 Visitation increase = 172,150

\*this model assumes isolation from all other impacts of other projects

<sup>33</sup> *Ibid.*

## 5. Rancho de las Cabras:

- a. Current Visitation: n/a
- b. SAAN Comments: *In OFS Priority 8.pdf, the park conservatively estimates the Rancho will serve 35,000 visitors and 1,700 school children annually... The Rancho will certainly benefit from immediate crossover visitation directed to it from the park's existing visitor base. Park staff expect visitation to be 50,000-60,000 annually by opening in any form, similar to attendance at smaller archeological parks. Advertising and building cultural programming and links to nearby Floresville and San Antonio will further build visitation.*
- c. SAAN Projected Increases: 36,700 (35,000 visitors and 1,700 school children)
- d. CCBR Comments: Providing a lower, more conservative estimate in addition to the SAAN estimate, based on visitation of the example of the Barrington Living History Museum.<sup>34</sup>
- e. Similar to previous cases, a 45 percent of the 50,000 projection by the NPS staff was considered: 22,500 visitors.
- f. CCBR Moderate Projected Increase: 22,500 visitors.

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<sup>34</sup> HCG file "Farm or Ranch Visitation 110210.xls"

## APPENDIX B: Future Impacts by Project

Full park funding includes the additional budget needed by the park to operate at full 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. It also includes expenditures by future visitors unrelated to the new venues and programming changes. This number of additional non-local visitors is measured as the difference between a projected natural trend of visitation<sup>35</sup> and 2009 visitation.

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 *	\$4,223,627	\$7,659,003
construction	na	na
Total	\$17,672,942	\$31,586,373

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

<sup>35</sup> Using an ARIMA model from the SAS software and data from the National Park Service system.

The impacts for the “San José Day in the Life” include a moderate projected visitation number,<sup>36</sup> projected operation expenditures, and salaries paid for the project for the year 2016.

<b>San José: Day in the Life</b>	<b>Direct Impact Jobs</b>	<b>Total Impact Jobs</b>
Non-local visitors spending	251	365
operations and payroll *	20	27
construction	na	na
<b>Total</b>	<b>271</b>	<b>392</b>

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

<b>San José: Day in the Life</b>	<b>Direct Impact Spending</b>	<b>Total Impact Spending</b>
Non-local visitors spending	\$19,224,652	\$33,616,180
operations and payroll *	\$1,074,985	\$1,968,064
construction	na	na
<b>Total</b>	<b>\$20,299,637</b>	<b>\$35,584,244</b>

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

<sup>36</sup> These visitation numbers have been adjusted to avoid double counting using a percentage according to the National Park Service methodology.

The impacts for the “San Juan Demonstration Farm” include a moderate projected visitation number,<sup>37</sup> projected operation expenditures, salaries paid for the year 2016. Additionally, projected construction activities tentatively slated for 2013 are included.

<b>San Juan: Demonstration Farm</b>	<b>Direct Impact Jobs</b>	<b>Total Impact Jobs</b>
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

<b>San Juan: Demonstration Farm</b>	<b>Direct Impact Spending</b>	<b>Total Impact Spending</b>
Non-local visitors spending	\$12,739,228	\$22,275,784
operations and payroll *	\$857,267	\$1,572,759
construction **	\$5,096,844	\$8,587,984
Total	\$18,693,339	\$32,436,528

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

\*\* For year 2013

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<sup>37</sup> Ibid.



The impacts for “Rancho de Las Cabras” include a moderate projected visitation number, <sup>38</sup> projected operation expenditures, salaries paid for the year 2016. Additionally, projected construction activities tentatively slated for 2014 are included.

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 *	\$588,363	\$1,084,771
construction **	\$3,938,882	\$6,863,622
Total	\$6,632,902	\$11,630,339

\* Based on information provided: 7 permanent and 4 seasonal

\*\* For year 2014

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<sup>38</sup> Ibid.

The impacts for “River Trails and Mission Portals” include moderate projected visitation number,<sup>39</sup> operations and payroll for 2016, and projected construction activities in the park (tentatively slated for 2013).

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	\$1,078,693	\$1,918,186
construction *	\$2,217,447	\$3,862,271
Total	\$6,196,564	\$10,852,134

\* For year 2013

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<sup>39</sup> Ibid.

The impacts for “New Headquarters and Event Venue” assumes that there will be no significant change in the number of non-local visitors, and include projected operation expenditures and salaries paid for 2016, and projected construction activities (tentatively slated for 2013).

<b>New Headquarters and Cultural Landscape Restoration</b>		<b>Direct Impact Jobs</b>	<b>Total Impact Jobs</b>
Non-local visitors spending		0	0
operations and payroll		3	3
construction *		26	44
	<b>Total</b>	<b>29</b>	<b>47</b>

\* For year 2013

<b>New Headquarters and Cultural Landscape Restoration</b>		<b>Direct Impact Spending</b>	<b>Total Impact Spending</b>
Non-local visitors spending		0	0
operations and payroll		\$240,993	\$441,251
construction		\$2,817,089	\$4,943,719
	<b>Total</b>	<b>\$3,058,083</b>	<b>\$5,384,970</b>

\* For year 2013

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	<u>10</u>	<u>17</u>

\* 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	<u>\$1,024,669</u>	<u>\$1,795,622</u>

\* For year 2015

## APPENDIX C: Impact of Related Construction Activities, 2010-2013

Based on the information provided, by 2010, the SARIP will spend close to \$46.6 million in construction 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.

<b>SEVERAL CONSTRUCTION PROJECTS 2010</b>		
	<b>Direct Impact</b>	<b>Total Impact</b>
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 projects around the river with close to \$45.6 million, and the County of Bexar will continue with enhancements with \$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.

<b>SEVERAL CONSTRUCTION PROJECTS 2011</b>		
	<b>Direct Impact</b>	<b>Total Impact</b>
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 with \$7.2 million but also will build a new County sports complex with \$6.1 million. Bexar County, additionally, will improve drainage facilities in different areas around the river (VFW Blvd., Conception Creek, and Six Mile Creek). On the other hand, SARIP continues with different projects for \$58.3 million. The total impacts translate into 1,692 jobs and \$223.2 million.

<b>SEVERAL CONSTRUCTION PROJECTS 2012</b>		
	<b>Direct Impact</b>	<b>Total Impact</b>
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.

<b>SEVERAL CONSTRUCTION PROJECTS 2013</b>		
	<b>Direct Impact</b>	<b>Total Impact</b>
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' reports on the visitor's spending impact for the Missions NHP for 2003<sup>40</sup>, visitation forecasts were further adjusted to avoid double counting, particularly for those staying overnight. The following outlines impact of the adjusted increase in non-local visitors on area jobs and total spending.

By 2016, the adjusted increase in non-local visitors of 395,043 represents close to an 18 percent increase with respect to the historic trend. 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. Considering only the non-local visitors' expenditures, the new venues will have a substantial impact in 2016. 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.

### 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

<sup>40</sup> 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.

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





## About the Center for Community and Business Research

The Center for Community and Business Research (CCBR) is one of ten centers within the University of Texas at San Antonio's Institute for Economic Development. Each center is specifically designed to address different economic, community, and small to medium sized business development needs. CCBR conducts regional evaluation, assessment, and long-term applied research on issues related to community and business development.

CCBR serves the needs of economic development agencies, workforce development boards, businesses, associations, city, state and federal governments and other community stakeholders in search of information to make better informed decisions.

CCBR develops, conducts, and reports on research projects that shed light on how organizations, communities, or the economy work. This is done through the use of various techniques including, but not limited to:

- Economic impact analyses
- Feasibility studies
- Surveys of business and community organizations
- Analysis of secondary data
- Report writing and presentation

For more information about CCBR or the Institute for Economic Development, please contact (210) 458-2020.

The mission of the Institute for Economic Development is to provide ongoing consulting, training, technical, research and information services in tandem with University-based assets and resources and other state, federal and local agencies, to facilitate economic, community and business development throughout South Texas and the Border Region.

*Working together to build the economy one business at a time.*

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