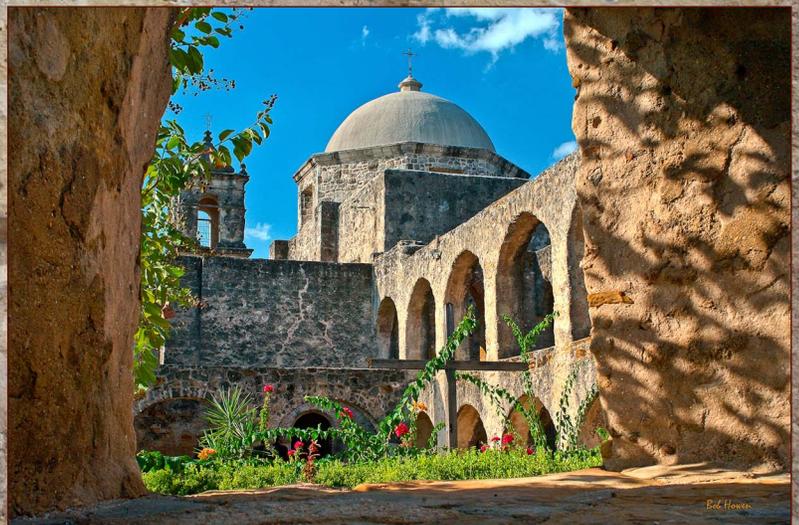
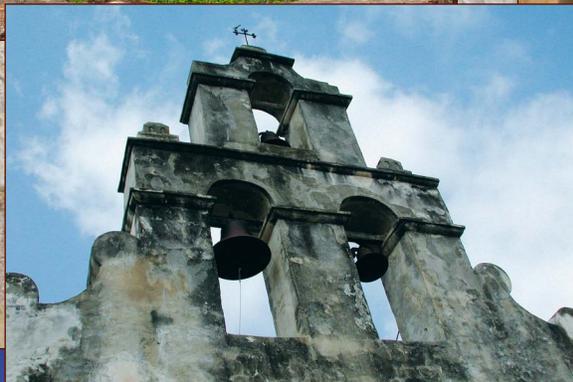
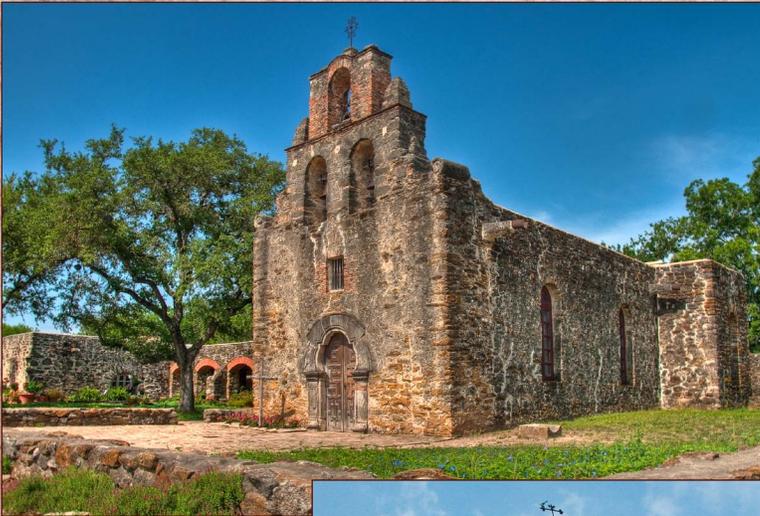


Building on a Strong Foundation

Potential Economic Impacts of World Heritage Site Designation for the San Antonio Missions



About this Report

In 2013, the Harbinger Consulting Group completed a study to evaluate potential economic impacts of World Heritage Site designation for the five Spanish missions in San Antonio. Funded by the Bexar County Commissioners Court and executed under the office of County Manager David Smith through the Facilities and Parks Department, the study built on a 2011 economic impact analysis of San Antonio Missions National Historical Park that Harbinger completed in collaboration with the University of Texas at San Antonio Center for Business and Economic Research. This report summarizes the new study's findings.

Understanding the Economic Impact Study

In this analysis, economic impacts were estimated using an “input-output” model. This type of model assumes that money spent locally—for example, by visitors paying for meals, lodging, fuel, and gifts—supports further local economic activity. Local businesses use this income to pay employees, purchase goods, and pay for rent, fuel, taxes, and other expenses. Employees, too, spend their income on goods and services. Some of these expenditures are made locally, where the money can then be spent “again” by the local businesses and persons who receive it, and so on.

Economic impact studies commonly measure both direct and total economic impacts. Direct impacts are estimated based on the “first round” of expenditures—for example, the spending of visitors to the missions—and the jobs, wages, and taxes this spending immediately supports. Total impacts include direct impacts and the local expenditures that follow them, as money is “respent” locally as described above.

For tourism-related facilities and activities, economic impact analyses may focus on several broad categories of expenditures including facilities operations and maintenance, capital investments, and visitor spending. This study of potential impacts of World Heritage status focuses solely on visitor spending for three reasons:

1. The five missions included in the WHS nomination are already managed as public historical sites and visitor attractions. World Heritage status is unlikely to change facilities operations and maintenance costs significantly.
2. Changes in visitation and visitor spending are likely to be the most easily quantified and by far the largest sources of economic impact for the site. In the 2011 impact study for San Antonio Missions NHP, operations and maintenance accounted for 20 percent of the total projected economic impact.
3. The scale of capital expenditures directly related to WHS status is likely to be small, and is difficult to anticipate in the absence of specific plans.

In this study, as in the 2011 National Historical Park study, economic impacts of visitor spending are estimated based on non-local visitor spending only. Their expenditures are “new” dollars that originated outside the study area and can be clearly linked to the presence of the missions. Spending by local visitors does have an economic impact, but it is difficult to determine how much of that money would not have been spent locally if the World Heritage Site did not exist. Given these difficulties, and the relatively small contribution of local visitor spending, this study takes a conservative approach to calculating the economic impact of visitor spending, based solely on the expenditures of out-of-area visitors.

Download the study, *Potential Economic Impact of World Heritage Site Designation for the San Antonio Missions* (The Harbinger Consulting Group, January 2013), at www.missionsofsanantonio.org or at bexar.org/whs.



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Interior of the church at Mission Espada. Photo: © Bob Howen

Executive Summary

In the 18th century, the Catholic Church and the Spanish government established five mission compounds and a small military base (or *presidio*) that gave birth to modern-day Bexar County and San Antonio, Texas.

For decades, the San Antonio missions flourished, creating a unique culture of mission communities that blended native traditions with newly adopted Spanish ways. These communities remain an influential part of the heritage of Bexar County and San Antonio.

The Proposed San Antonio Missions World Heritage Site

Since 2006, a local group has been working to gain recognition of the San Antonio Missions as a World Heritage Site (WHS). In 2015, the nomination is expected to be reviewed, and a decision made about its inclusion on this elite list of the best of the world's natural and cultural heritage. Recognition as a World Heritage Site would put the missions in the company of fewer than 1,000 places around the world that are recognized for outstanding historical, artistic, scientific, or natural value.

Economic Impact of World Heritage Status for the Missions

WHS status can bring with it a variety of benefits ranging from community pride and education to enhanced resources for conservation and additional funding and investment. Many World Heritage Sites and nearby communities benefit from increased visitation and tourist spending, and some sites have contributed to local economic development or revitalization.

This report examines potential economic impacts for Bexar County if the missions are recognized as a World Heritage Site. It finds that WHS designation could be both an outstanding promotional opportunity and a high-profile catalyst for developing more significant cultural and heritage tourism in the area. Economic benefits grow with greater levels of collaboration and adoption of World Heritage as part of the area's identity. Especially if a broad community partnership takes advantage of these opportunities, Bexar County could see significant economic benefits linked directly to WHS status.

Potential Economic Impact for Bexar County of World Heritage Status for the Missions (2025)

In 2025, ten years after presumed designation of the Missions WHS, annual economic benefits for Bexar County are expected to range from **11 to 26 percent above the impacts the Alamo and San Antonio Missions National Historical Park would generate** regardless of World Heritage status. The level of economic impact depends upon how the site is promoted and leveraged.

Economic benefits grow with collaboration, promotion, and use of the WHS to catalyze additional cultural tourism

2025 World Heritage Site economic impact
\$44-\$105 million additional economic activity
465-1,098 additional jobs
\$0.8-\$2.2 million additional local hotel tax revenue

The five San Antonio Missions are expected to SUPPORT \$397 MILLION IN ECONOMIC ACTIVITY IN 2025 regardless of World Heritage status.

The Proposed San Antonio Missions World Heritage Site



The Long Barracks (convent) at Mission San Antonio de Valero. Photo: Courtesy The Alamo

In the 18th century, the Catholic Church and the Spanish government established five mission compounds and a small military base (or *presidio*) that gave birth to modern-day Bexar County and San Antonio, Texas. These were part of Spain's territorial expansion northward from Mexico.

Franciscan friars founded the missions to convert native Coahuiltecan and other indigenous groups to Spanish subjects. At the missions, native people were introduced to Catholicism, Spain's national religion, and learned trade, Spanish-language, and citizenship skills they would need to join Spanish society. On each mission's extensive farm fields and grazing lands, residents grew their own food.

For much of the 18th century, the San Antonio missions flourished, creating a unique culture of mission communities that blended native traditions with newly adopted Spanish ways. These communities remain an influential part of the region's heritage. Some area residents trace their ancestry to native mission families. And, though the Spanish government gave up the missions in 1793, four of the five are active Catholic parishes, still at the center of vibrant and lasting communities that grew up around them.

The Missions Today

The five missions were all located close to the San Antonio River, from the Alamo in what is now downtown San Antonio southward to Mission Espada near the city limit. All five are protected historic sites, hosting millions of local and out-of-town visitors each year.

Four of the five comprise San Antonio Missions National Historical Park. Church buildings, mission compounds, and mission lands are cared for by the National Park Service and the Archdiocese of San Antonio. These missions are: Nuestra Señora de la Purísima Concepción de Acuña (Mission Concepción), San José y San Miguel de Aguayo (Mission San José), San Juan Capistrano (Mission San Juan), and San Francisco de La Espada (Mission Espada).

After 1793, the earliest mission, Mission San Antonio de Valero, was converted to a military outpost known as the Alamo. As the site of perhaps the best-remembered battle in the campaign for Texas independence from Mexico, the Alamo is protected by the state of Texas, and managed by the General Land Office which contracts with the Daughters of the Republic of Texas.

Global Significance

The San Antonio missions helped spawn an ethnically diverse society that is still a hallmark of San Antonio and other nearby communities. The missions and the Spanish Colonial influence they represent also shaped Texas culture and influenced American heritage.

Globally, the missions are significant for the worldwide reach of Spanish colonial power that they evidence. With more than 80 structures surviving, the mission compounds are a tangible and well-preserved representation of the influence of Spain in the New World. From the 16th to 18th centuries, Catholic missions were integral to Spain's efforts to consolidate a global empire. A San Antonio Missions WHS would join a handful of important World Heritage Sites around the world—from the Canary Islands to the Philippines to Central America and the Caribbean—that reflect Spain's global influence.

“ The missions represent an important—and often overlooked—chapter of our nation's history. It is important that visitors from around the world know and celebrate the contributions of Latinos to the fabric of America, and these missions help tell that story in a very real way. ”

Ken Salazar
U.S. Interior Secretary

What is a World Heritage Site?

In the early 1970s, a Democratic congressman and the Republican head of the Environmental Protection Agency proposed creating a list of sites around the world with global cultural and natural significance. The United States was the first of 190 countries to sign the World Heritage Convention, the United Nations treaty that resulted.

Since then, 962 sites have been added to the list, which is akin to being named a “global national park.” Each site is already protected under local law, and continues to be

managed locally. World Heritage designation recognizes a site’s significance in the world’s diverse cultural and natural heritage.

If the San Antonio Missions are added to the WHS list, they will join the company of famous sites such as Stonehenge, the Great Wall of China, the Pyramids of Egypt, and Machu Picchu. In the United States, there are 21 World Heritage Sites including Independence Hall, Chaco Canyon, Everglades National Park, and La Fortaleza in San Juan, Puerto Rico.

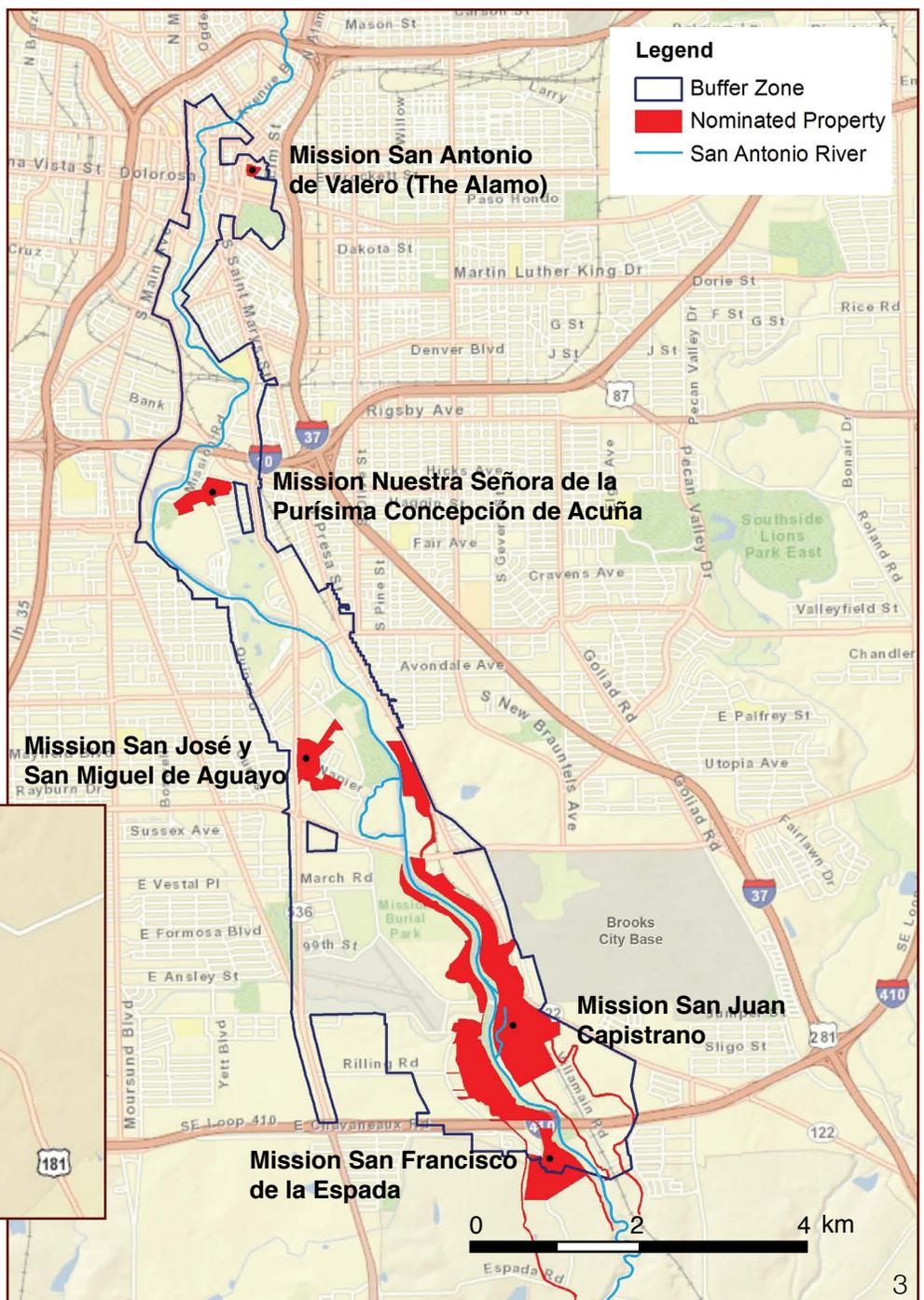
The Proposed San Antonio Missions World Heritage Site

The proposed San Antonio Missions World Heritage Site encompasses the five missions and related lands and structures such as the Mission San Juan dam, *acequia* (irrigation ditch), and *labores* (farm fields). Also included are Mission Espada’s *acequia* system, *labores*, and grazing ranch, Rancho de las Cabras, near Floresville in Wilson County.

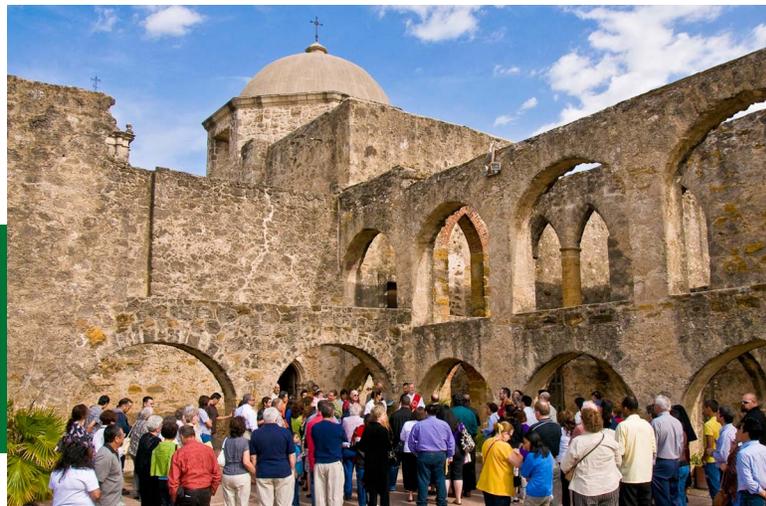
In Bexar County, the proposed World Heritage Site is surrounded by a buffer zone. This buffer zone corresponds with the area in which the City of San Antonio has already put in place special guidelines to ensure that development is compatible with the missions.



Maps: Courtesy National Park Service



Projected Economic Impacts



Mission San José. Photo: © Bob Howen

Studies of social and economic benefits associated with World Heritage Sites have pointed to a common conclusion. Simply put, in the words of one such report: “World Heritage Site status is what you make of it.”

Lessons from Other World Heritage Sites

A comprehensive review of World Heritage Sites conducted in 2009 found that WHS status does not automatically translate into increased visitation and economic gain. Without additional efforts, sites and their host communities may see a zero-to-three-percent increase in visitation. At established sites such as those comprising the proposed San Antonio Missions WHS, visitation is likely to grow very little, if at all.

The news is different from a small but growing number of World Heritage Sites around the globe that have been trying to “make something” of their status, and succeeding. WHS status has been a powerful catalyst for socio-economic change in some places—the result of highly site-specific interventions that share some common characteristics.

Rather than providing a roadmap for the San Antonio Missions site, with a clear trajectory for economic gain, other World Heritage Sites offer some ideas about the potential magnitude and nature of economic benefits. For example:

Town of Bamberg (Germany)

Marketing officials believe WHS status helps attract visitors from other countries. In Bamberg, 20 percent of visitors are foreign, compared to ten percent for other historical cities nearby. Visitation grew by about two-thirds in the 15 years following WHS designation in 1993.

Blaenavon Industrial Landscape (Wales)

Visitation at this small site doubled to 200,000 in the first ten years following its WHS designation, with promotion and upgraded and expanded visitor facilities and program-

ming. The World Heritage Site is seen as a gateway to the wider heritage of South Wales.

Dorset and East Devon (Jurassic) Coast (Wales)

Ten years after WHS designation, business owners and others in the region widely believe World Heritage status is a benefit. A survey shows that most believe it attracts new visitors and customers, and around half think it lends the area international credibility and is a useful tool for marketing and promotion.

Old and New Towns of Edinburgh (Scotland)

In a recent survey, 17 percent of visitors reported that Edinburgh’s WHS status influenced their decision to visit.

Three Scenarios for the San Antonio Missions World Heritage Site

Because WHS status “is what you make of it,” the economic impact analysis was conducted using three scenarios for leveraging WHS status for economic gain.

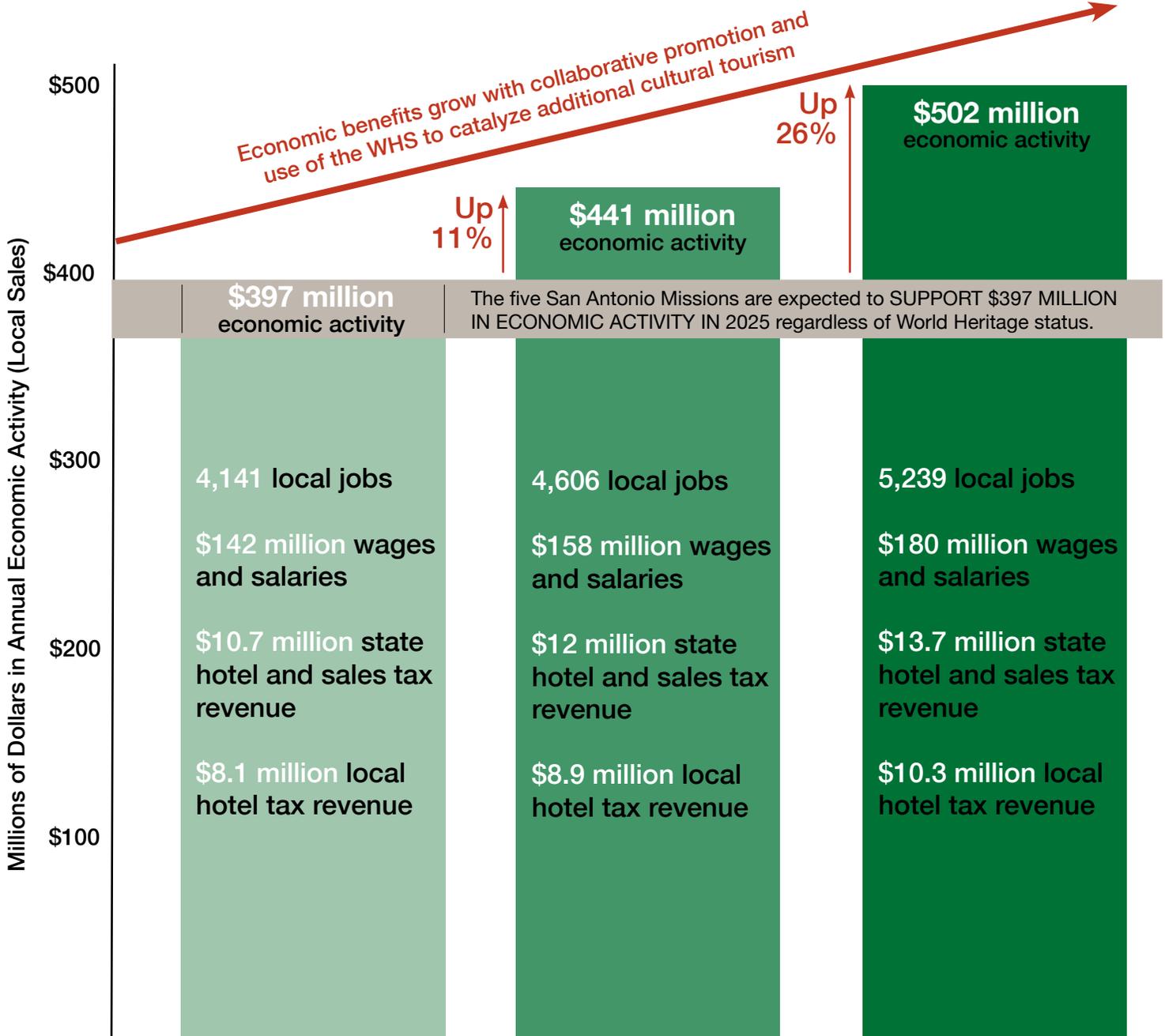
Scenario #1: No significant actions are taken to promote the WHS or use it to catalyze more cultural tourism.

Scenario #2: The organizations closely involved with the WHS take responsibility for promotion and small-scale outreach to enhance cultural tourism opportunities at and related to the site.

Scenario #3: The whole community gets involved and incorporates World Heritage and the WHS into its branding, promotion, and development of area-wide cultural tourism opportunities and businesses.

2025 Projected Economic Benefits of WHS Status for the San Antonio Missions

Assuming the San Antonio Missions are named a World Heritage Site in 2015, the study projected changes in visitation and economic impacts in 2025, ten years after inscription onto the WHS list. The study found that WHS designation could be both an outstanding promotional opportunity and a high-profile catalyst for developing more significant cultural and heritage tourism in the area. Economic benefits grow with greater levels of collaboration and adoption of World Heritage as part of the area's identity. Especially if a broad community partnership takes advantage of these opportunities, Bexar County could see significant economic benefits linked directly to WHS status.



Scenario #1

WHS designation with no additional action.

- same impact as -

Continued operation as separate sites.

Scenario #2

Promotion of the World Heritage Site and outreach conducted mainly by partner organizations closely involved with the WHS.

Scenario #3

County-wide embrace and promotion of the WHS, World Heritage, and heritage/cultural tourism as an important part of the area's identity.

WHS Status Pathways to Benefiting



Mission San Juan. Photo: © Bob Howen

In Bexar County, World Heritage status could be both an outstanding promotional opportunity, and a high-profile catalyst and underpinning for developing significant cultural and heritage tourism.

Likely Visitation Changes

Research conducted during the course of this study suggests that, with targeted efforts, World Heritage Site status is likely to prompt specific types of changes in visitation—and accompanying economic impacts:

- Longer stays at the WHS (and potentially in downtown and South Side neighborhoods) to visit multiple missions;
- Increased visitation from higher-spending international and cultural travelers;
- More repeat visits to the WHS and the area; and
- New visitors drawn to events, to cultural programming, or to visit the WHS during a trip to the area.

Leveraging World Heritage Status

In most places that choose to use World Heritage status as a tool for socio-economic change, the international significance of the designation seems to figure heavily in the site's ability to serve as a catalyst for progress. Outside the United States, particularly in Europe, "World Heritage Site" is a powerful name brand, denoting a level of quality in both the site and its management.

After a comprehensive review of World Heritage Sites—including the few dozen sites for which socio-economic benefit is an important goal—Rebanks Consulting concluded that achieving significant impacts from WHS status is the result of clear planning and follow-through.

Research for the San Antonio Missions study revealed five core categories of action likely to help the area leverage

World Heritage status for the San Antonio Missions into the kinds of economic gains that are possible from this designation.

1. Promote

Almost universally, tourism professionals recommend collaborating with destination marketing organizations such as the San Antonio Convention and Visitors Bureau (CVB) and Texas Tourism to provide content for their marketing and promotional campaigns. These organizations can provide direct access to domestic and international markets through their own efforts and those of national organizations such as Brand USA.

The San Antonio CVB already uses heritage and culture as central themes for its tourism marketing efforts. World Heritage status would give the CVB a new angle for these efforts and give heritage-specific advertising campaigns a strong anchor.

“The impacts of World Heritage Site status are rarely accidental or unintended – they are overwhelmingly the result of coordinated and well thought through efforts to achieve targeted change.... [S]ites that have achieved significant impacts have had a clear logic chain from the identification of the issues and problems they wished to address, a clear understanding of how WHS status could be used to catalyse change, following through to investing in the resources, activities and processes to deliver the impacts desired.”

Rebanks Consulting Ltd.
in *World Heritage Status: Is there Opportunity for Economic Gain?*

Many visitors use Internet research, websites of specific visitor attractions, city websites, and the state tourism website in planning their visits. A strong, dynamic, visitor-friendly, multi-pronged, and well connected web and social media presence for the WHS is an important promotional tool.

2. Develop

Cultural travelers, whether domestic or international, look for experiences that are unique to a place. The World Heritage Site can be used to capture the attention of these potential visitors, but they will be looking for other high-quality, engaging, authentic cultural experiences to augment their WHS visit. Use WHS designation as a catalyst for developing and connecting other heritage tourism opportunities and local businesses.

Programs to enhance cultural offerings at and related to the WHS might include a cultural guide certification, heritage maps, more neighborhood culture tours, a South Side farmers market, and neighborhood-level support for local businesses, festivals, and events. These types of programs will help retain the local culture that heritage tourists seek. Reaching out to stimulate organic growth of small, local businesses is an important key to strengthening both the local cultural fabric and the ability to experience it. This is as important to residents as it is to visitors.

In some places, the World Heritage Site is used as a gateway to the heritage of a larger region. Developing cultural

tours and itineraries that use the San Antonio Missions WHS as an entry point to a heritage-rich region beyond the bounds of Bexar County can help extend the benefits of WHS status.

3. Connect

The more easily visitors can find information about the World Heritage Site, “bump into” the WHS when they are in the area for other reasons, navigate their way from one mission to another, learn about the area’s cultural heritage, and connect with other activities, the better. In addition to interpretive and directional signage at the Alamo and San Antonio Missions National Historical Park, one or more WHS gateway kiosks could help visitors navigate the missions and serve portals to other area cultural offerings.

“ I would be very bullish on the promotional value of World Heritage inscription for the San Antonio missions. ”

Randy Durband
Senior Partner, Robin Tauck
and Partners

World Heritage Site designation could be used as a high-profile catalyst for developing a more robust cultural tourism business for Bexar County.

Photos (left to right): Bicyclist uses the trails in the Mission Reach of the Riverwalk (courtesy San Antonio River Authority); Visitors and locals mingle in Market Square, San Fernando Cathedral (courtesy San Antonio Convention and Visitors Bureau)



4. Educate and Involve

World Heritage Sites have a much higher profile internationally than they do in the United States. Building awareness and pride locally and in Texas should be a top priority.

About a third of San Antonio visitors and half of Texas visitors are traveling to see friends and relatives, and the recommendations of friends and family have more influence over travelers' decisions than any other source. A WHS-aware and engaged local population will contribute to word-of-mouth promotion of the site.

Making community engagement a priority has paid off for the United Kingdom's Jurassic Coast. There, the management team has worked hard to translate the value of the landscape into tourism, educational, cultural and environmental products, and civic ownership messages that the private sector has been able to market. Eight years after it was designated a WHS, two in five business owners and other area residents surveyed believed World Heritage status had made the area a more attractive place to live, work, and invest. Nearly one in five believed it had directly improved their quality of life.

5. Staff

Many World Heritage Sites have staff responsible for outreach, promotion, event coordination, program development and support, management research, and other

activities that may not be adequately covered by the organizationst that manage the site.

The San Antonio Missions WHS could benefit from an active outreach team that includes some dedicated staff to augment National Park, Alamo, and other partner staff capacity.

Building on a Strong Foundation

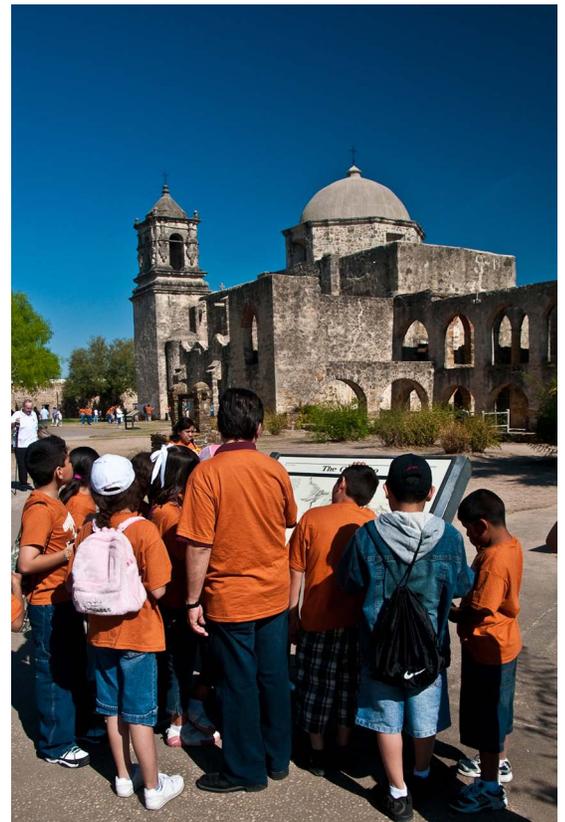
The San Antonio Missions World Heritage Site nomination rests on the foundation of significant investments made over many years, not only by the agencies that manage the mission sites, but also by the Bexar County and San Antonio communities. Building on decades of grassroots efforts, new initiatives focus on renewing downtown and southside neighborhoods around the missions.

Examples of collaboration and concerted action are plentiful: the San Antonio River Improvements Project, the River South area management plan, development of the Mission Trail, and the partnership management model of the National Historical Park are a few prominent examples.

If economic gains from World Heritage status result from clear planning and follow-through, there is much to suggest that citizens and businesses of Bexar County and San Antonio would see significant benefits from a San Antonio Missions World Heritage Site.

“There’s an enormous amount of enthusiasm about the potential for the historic missions of San Antonio to be a World Heritage Site. These were the original settlements of the city, and they are as important to the future as they are to the past. The missions symbolize the confluence of cultures in the Americas over time. It’s that blending that has created this beautiful community with a wonderful character that is captured so clearly in the missions.”

Julián Castro
San Antonio Mayor



Mission San José. Photo: © Bob Howen

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Cover photos

Front cover, clockwise from top right: The Alamo (courtesy San Antonio Convention and Visitors Bureau); Mission San José, Mission Concepción, Mission Espada (© Bob Howen, *bobhowenphotography.com*); Center: Mission San Juan (courtesy San Antonio Convention and Visitors Bureau)

Back cover: Newly preserved interior of the church at Mission Concepción (R. Espinosa photo, courtesy National Park Service)

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“ Bexar County has invested \$175 million to create pathways from the San Antonio River going south to the missions. We made that investment to restore the connections because of the unified historic value of the missions and the river to the development of this county and city. While the missions are invaluable to this community, obtaining a World Heritage designation would provide economic benefits for San Antonio. ”

Nelson W. Wolff
Bexar County Judge



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