

The image shows a close-up of a stone column and a niche in a mission building. The column on the left has a twisted shaft and a fluted base. To its right is a shell-shaped niche with a scalloped opening. The stone is light-colored and shows signs of weathering and repair. The background is a dark red vertical bar.

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

Technical Report

Prepared for Bexar County, Texas
Commissioners Court
Office of the County Manager
Facilities and Parks Department

by

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February 2013

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Cover photo: Courtesy of The Alamo

Executive Summary

Since 2006, a substantial and growing roster of individuals and organizations has supported the nomination of the San Antonio Missions for consideration by the UNESCO World Heritage Committee. By 2015, the Committee is expected to review the nomination, and decide whether to inscribe the five missions onto the list of World Heritage Sites. If inscribed, the Missions would join an elite group that currently includes 962 natural and cultural treasures in 157 countries around the world.

Designation of the missions as a World Heritage Site (WHS) could bring with it an array of potential benefits for Bexar County residents. In 2012, Bexar County contracted with The Harbinger Consulting Group to conduct an analysis of likely economic impacts associated with the designation, were it to happen.

Local interviews and working sessions, combined with the results of research into World Heritage Sites that share characteristics with the proposed San Antonio Missions site, suggest that World Heritage Site status could offer Bexar County and San Antonio an outstanding promotional opportunity, and a high-profile catalyst and underpinning for developing more significant cultural and heritage tourism.

If these opportunities are taken up through a robust set of actions and promotion largely controlled and managed by partner organizations (those involved in the core of the WHS working group and advisory committee), by 2025 the World Heritage Site is expected to:

- Attract five percent more out-of-town visitors, and
- Generate 11 percent more economic activity than it would simply through inscription onto the World Heritage Site list alone.¹

World Heritage Site visitors would spend \$290 million directly related to their WHS visit, support 4,606 jobs in Bexar County, and generate nearly \$21 million in state and local sales and hotel tax revenue. Most of these visitors would stay in San Antonio and the surrounding area longer, spending additional money and supporting more economic activity.

If recognition and promotion of the World Heritage Site is taken up more broadly throughout Bexar County and San Antonio, and the area embraces World Heritage as an important part of its identity, the economic impact of the San Antonio Missions World Heritage Site could expand 26 percent over the baseline of inscription alone.

¹ Designation alone is expected to result in negligible change in non-local visitation and no significant economic impact. “Designation alone” may include the usual array of small actions such as the inclusion of the WHS logo and description on partner websites, local media coverage, and local events such as an inscription celebration.

In this more ambitious scenario, World Heritage Site visitors would spend \$328 million directly related to their WHS visit, support 5,239 jobs in Bexar County, and generate \$24 million in state and local sales and hotel tax revenue.

Conservatively estimated, total spending in Bexar County by WHS visitors would be nearly \$706 million in 2025 (under Scenario #3). Visitors may spend even more in the larger region, and in Texas, during their stays.

To the extent that WHS designation is used as a catalyst for developing related businesses, events, and sites and as a “gateway” for channeling cultural travelers to other heritage sites and activities in the region, the economic impacts to San Antonio, Bexar County, and the larger region are expected to exceed those reported in these findings. This analysis focuses rather narrowly on impacts expected as a result of increased visitation to, and changes in visitor behavior at, the locations encompassed within the World Heritage Site itself.

Project Overview

Since 2006, a substantial and growing roster of individuals and organizations has supported the nomination of the San Antonio Missions for consideration by the UNESCO World Heritage Committee. By 2015, the Committee is expected to review the nomination, and decide whether to inscribe the five missions onto the list of World Heritage Sites.

If inscribed, the Missions would join an elite group that currently includes 962 natural and cultural treasures in 157 countries around the world.

Designation of the missions as a World Heritage Site (WHS) could bring with it an array of potential benefits for Bexar County residents. In 2012, Bexar County contracted with The Harbinger Consulting Group to conduct an analysis of likely economic impacts associated with the designation, were it to happen.

This study builds on the foundation laid by a 2011 evaluation of current and future economic impacts of San Antonio Missions National Historical Park conducted by Harbinger in collaboration with the Center for Community and Business Research at the University of Texas at San Antonio.² The National Historical Park (NHP), under the management of the National Park Service, encompasses four of the five missions included in the proposed World Heritage Site. The fifth mission, Mission San Antonio de Valero (The Alamo), is owned by the State of Texas and managed by the State of Texas General Land Office under contract with the Daughters of the Republic of Texas.

This report details the results of the evaluation of potential economic benefits of World Heritage Site designation for the San Antonio Missions.

² The Harbinger Consulting Group. *San Antonio Missions National Historical Park: Impact and Opportunity*. National Parks Conservation Association, 2011. See also the technical report: Center for Community and Business Research. *Economic Impact of the San Antonio Missions National Historical Park*. University of Texas at San Antonio, 2011. Both reports are available for download at <http://www.npca.org/news/reports/Mission-Economic-Impact.html>. Study funded by National Parks Conservation Association, Bexar County, Los Compadres de San Antonio Missions National Historical Park, and Western National Parks Association.

Research Components

Three categories of research helped lay the groundwork for understanding the potential impact of WHS designation for Bexar County. The first is a series of interviews and working sessions with parties in San Antonio and Bexar County who are involved in tourism, business and economic development, recreation, and management of the Alamo and San Antonio Missions NHP. The second is research into the experience of other World Heritage Sites. The third is research into tourism development, marketing, and promotion.

Local interviews and working sessions helped Harbinger to establish an understanding of:

1. Primary goals for WHS designation;
2. The Alamo and San Antonio Missions NHP as visitor attractions;
3. Visitor characteristics and visitation trends, and projects and initiatives that might affect visitation to these sites regardless of WHS status;
4. Management implications for The Alamo and San Antonio Missions NHP;
5. Existing programs, efforts, and plans that might influence how San Antonio and Bexar County are able to take advantage of WHS status;
6. Opportunities to leverage WHS status for greater benefit.

Research into other World Heritage Sites focused on a small number of similar sites in the United States, and a handful of peer sites in other countries where achieving socio-economic benefits from WHS status is important goal. This research helped Harbinger understand:

1. Types of socio-economic benefits that are commonly hoped for in conjunction with WHS status;
2. The experience of some representative WHS communities that have tried to use designation to achieve socio-economic aims;
3. The magnitude and nature of measurable gains such as increased visitation that might be expected with WHS designation.

Research into tourism development, marketing, and promotion helped Harbinger understand the potential impacts of heritage tourism development initiatives and collaborative advertising and other promotional efforts that could be associated with the World Heritage Site.

Goals for World Heritage Site Designation

Following an analysis of studies of social and economic values associated with World Heritage Site status, Rebanks Consulting Ltd. has identified twelve types of socio-economic benefits that might be achieved or sought.³ We used these as a framework for interpreting and evaluating local goals for designation, and how they, put into action, might affect the economic impact of a San Antonio Missions WHS. The twelve types of values are:

1. New identity/destination image
2. Civic pride, quality of life
3. Coordinating investment through strategy
4. Media value
5. Cultural “glue”/new interpretation
6. Better/new services
7. Culture and creativity
8. Regeneration
9. Business
10. Education
11. Preservation of heritage unique selling proposition
12. Quality infrastructure.

Using this framework as a starting point, we have identified four primary goals that emerged in interviews and working sessions with partners and key players in the San Antonio Missions nomination effort and other local stakeholders and experts. These are:

³ Rebanks Consulting Ltd. and Trends Business Research Ltd. World Heritage Status: Is there opportunity for economic gain? Lakes District World Heritage Project, 2009.

1. Preservation and enhancement of heritage unique selling proposition

The five missions are all under protective management already. WHS status is seen as a way to enhance their value by elevating their profile internationally and emphasizing the common history of the sites.

2. Identity/destination image

San Antonio prides itself on being a unique city with a rich cultural heritage. Its “Deep. In the Heart.” branding focuses on authenticity, passion, and pride. Though the nomination encompasses a small portion of the city, the opportunity to position San Antonio as a “World Heritage City,” with the WHS as the core around which this identity is built, is seen as significant. This benefit and branding could extend to a larger area encompassing other Bexar County and regional communities.

3. Civic pride, quality of life

For the city and county as a whole, and especially for San Antonio’s south side and downtown, designation is seen as a way to bring more attention to the rich cultural core of this area. WHS status would be a clear symbol of the renewal underway in that part of the community, and perhaps a catalyst for further action.

4. Business

The proposed World Heritage Site straddles two areas that are receiving a lot of development and redevelopment attention—downtown and the south side. The investment in pursuing WHS status goes hand-in-hand with those efforts and is expected to yield tangible business opportunities and benefits.

Two other values from the Rebanks Consulting list deserve mention in the context of these priorities: regeneration and education. As mentioned above, WHS status could reinforce current efforts at community and economic development. The designation could also provide a focal point for broader and deeper interpretation and education about this part of the area’s history, and how it shaped the San Antonio and Bexar County of today. WHS status would provide opportunities that reinforce current and planned efforts such as new programming and facilities at San Antonio Missions NHP, new interpretive efforts at the Alamo, potential changes at Alamo Plaza, and the access and interpretation provided as part of the San Antonio River Improvements Project.

The goals for World Heritage Site nomination mesh well with goals and priorities put forth by numerous county, city, and area-wide efforts such as San Antonio 2020,

the Destination San Antonio strategic vision for the visitor industry, the multi-agency River South Area coordinated management plan, and others.

The 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.

In many ways, the San Antonio Missions WHS nomination is made possible by the largest of these public investments—the \$245.7 million “Mission Reach” segment of the San Antonio River Improvements Project. A year from completion, the Mission Reach Ecosystem Restoration and Recreation Project is an ecosystem restoration project that involves eight miles of the previously channelized San Antonio River. In addition to restoring the riparian and aquatic ecosystems, the project is creating 15 miles of hike/bike trails, a new paddling trail, and numerous picnic and rest areas. Through trails, interpretive exhibits and art spaces, and the restoration of historic remnants of the San Antonio River, the project is also reconnecting the river with the missions that historically relied on it. Along with the Mission Trail driving route, the Mission Reach project helps to connect the missions that are a part of the proposed World Heritage Site. More broadly, it is arguable that the Mission Reach project provides the backbone for the renewal of San Antonio’s south side.

Bexar County has invested more than \$176 million in this project. Other funders include the City of San Antonio (\$6.5 million), the U.S. Army Corps of Engineers (\$51.9 million), and private donors through the San Antonio River Foundation (\$4.7 million).

Findings from World Heritage Site Research

The Rebanks study of World Heritage Sites around the world found that WHS status does not automatically translate into increased visitation. Without additional efforts, sites and their host communities may see a zero-to-three-percent increase in visitation from inscription alone, with more established sites seeing increases on the lower end of that range.⁴

According to this comprehensive review, some benefits are relatively well documented for some sites, including the role of WHS status as a catalyst for conservation, working in partnership, civic pride, social capital, learning and education, and funding and investment.⁵ But both this study and individuals familiar with World Heritage Sites whom we interviewed say that existing research is scant and scattered regarding the tourism and economic development impacts of WHS status.

After reviewing the existing studies and other evidence, Rebanks concluded that motivation matters. In other words, as one study stated, “WHS status is what you make of it.”⁶ As the Rebanks study aptly summarized:

“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. In short, sites 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.”

The Rebanks study found that only a small proportion—perhaps five to ten percent—of sites view WHS status as a tool for achieving socio-economic goals. These sites tend to be more recently designated (mostly since the mid-1990s) and heavily concentrated in Europe, North America, and Australasia.

Importantly, this comprehensive analysis found that WHS status has been a “powerful catalyst” for socio-economic change in some places, and that changes resulted from “highly site-specific” interventions. Further, our research suggests that the “interventions” are frequently not well documented.

⁴ *ibid.*

⁵ *ibid.*

⁶ Department of Culture, Media and Sport. “World Heritage for the Nation: Identifying, Protecting and Promoting our World Heritage” (background paper for public consultation process). UK Government, December 2008.

Rather than looking to other World Heritage Sites to provide a roadmap for the San Antonio Missions WHS to follow, with a clear trajectory and clear projections for economic gain, we have looked at other sites primarily to gauge the potential magnitude and nature of economic benefits, and to garner general ideas about how they were achieved. An overview of our findings follows, and Appendix B contains a list of documents that may be helpful in delving further into the actions and results realized at peer sites.

U.S. World Heritage Sites

We identified three World Heritage Sites in the United States that share characteristics in common with the proposed San Antonio Missions site (see list below). Among these sites, the WHS designation is not seen an important draw for visitors, though it is seen as a point of pride for staff (Independence Hall) and for locals (La Fortaleza). Tourism marketing organizations have not tried to leverage World Heritage status, and sites themselves have not been able to make much of the designation.

La Fortaleza and San Juan (Puerto Rico) inscribed 1983

This site encompasses several fortifications in and near the city of San Juan, constructed from the 16th to 19th centuries. Part of the site is a National Park Service National Historical Site.

Independence Hall (Philadelphia, Pennsylvania) inscribed 1979

This is the site of the signing of the Declaration of Independence and the U.S. Constitution in Philadelphia. What makes this WHS an interesting peer for the San Antonio Missions is not so much the WHS itself, but the mosaic of other historical sites and attractions nearby, including Independence National Historical Park, which encompasses Independence Hall.

Monticello and the University of Virginia (Charlottesville, Virginia) inscribed 1987

This site comprises prime examples of Thomas Jefferson's architectural works – the estate at Monticello and the University of Virginia at Charlottesville. The two sites are administered by different entities.

Elsewhere in the world, some researchers have found a “surge” of visitation that follows inscription, but falls off unless skilled product development and marketing takes place. For World Heritage sites in the United States, visitation seems to change independent of WHS designation/status, and no such “surge” is evident.

This may be in large part explained by the fact that, while World Heritage seems to be a valuable “brand” outside the United States, it is not well known in the country. A 2012 symposium involving representatives from U.S. World Heritage Sites, the travel industry, and other organizations with an interest in cultural and heritage travel characterized the situation as follows:

“Most of the U.S. sites are units of the National Park System, and are much better known as National Parks rather than as World Heritage Sites. While their World Heritage designation is made known to the public through plaques and signage at the sites, this acknowledgment is quite understated. Most visitors are unaware that they are visiting a World Heritage Site. World Heritage status is often not highlighted in guidebooks or used in marketing or promotional materials by Convention and Visitors Bureaus (CVBs), tour operators, concessioners, and other partners.... From a public awareness and marketing standpoint, the World Heritage label has not been used to maximum advantage in the U.S.”⁷

National efforts such as the National Travel and Tourism Strategy, which aims to significantly increase international visitation to the United States, and the emergence of the non-profit Brand USA as a leader in overseas promotion, may draw more attention to U.S. World Heritage Sites from international visitors. WHS-focused efforts such as the University of Virginia Symposium and the development of a booklet about World Heritage Sites in the United States with a “passport” section that can be stamped for each site visited (similar to the National Parks passport program), may also gradually increase the profile of these sites domestically.

Peer Sites in Other Countries

We identified a handful of peer World Heritage Sites in other countries, which share characteristics in common with the proposed San Antonio Missions site *and* aim for some kind of socio-economic impact from WHS designation. The four about which we have been able to glean the most relevant information are:

Town of Bamberg (Germany) inscribed 1993

This German town, built around a largely intact Middle Ages core, is an apparently successful example of using WHS status as the key focus of its tourism brand. WHS status is also an important point of pride for residents in this city where there seems to be a degree of consensus about the importance of preserving and celebrating what makes Bamberg unique.

⁷ World Heritage—Tapping the Potential. Report of a Symposium Held June 13-14, 2012, Charlottesville, Virginia. Sponsored by the Advisory Council on Historic Preservation, National Park Service, and U.S. National Commission on UNESCO.

Dorset and East Devon (also known as the Jurassic Coast) (U.K.) inscribed 2001

This is a natural WHS site encompassing the Dorset and East Devon coastline in England. While not a good match for the historic and geographic context of the San Antonio Missions, this site could provide some ideas and interesting lessons for leveraging WHS status, and there is fairly detailed reporting on some of its activities and their impact.

Blaenavon Industrial Landscape (South Wales) inscribed 2000

This is a well-regarded example of heritage driving economic development. A wide-ranging local partnership pursued WHS designation as a socio-economic catalyst, and implemented an overall cultural tourism and community renewal strategy that included directing existing funds and garnering additional funds on the strength of WHS status.

Old and New Towns of Edinburgh (Scotland) inscribed 1995

Edinburgh has been a visitor attraction since the advent of rail travel, and it is difficult to isolate the effect of WHS status. The site managers have provided detailed visitor survey data, which may help in our projections. The key focus in Edinburgh has been to enhance quality of life for residents to make the community a “liveable,” desirable place that will retain population and attract new people to live and work.

As noted above, we have looked at other sites primarily to gauge the potential magnitude and nature of economic benefits, and to garner general ideas about how they were achieved. Following are some key points from our findings, which suggest that WHS status can, indeed, be used for economic gain, particularly in attracting visitors.

Old and New Towns of Edinburgh (Scotland)

In a 2009-2010 visitor survey, 17 percent of visitors report that Edinburgh’s WHS status influenced their decision to visit. History (71%) is an important draw for Edinburgh visitors, as is its main historical castle (52%) and museums (21%).⁸ This was the first time an Edinburgh visitor survey had included a question about the influence of WHS status.

Interestingly, even after the historical core of Edinburgh had been a World Heritage Site for more than 15 years, awareness of the WHS and its global significance varied dramatically throughout the city. Awareness was highest

⁸ Lynn Jones Research. Edinburgh Visitor Survey, October 2009 to September 2010.

among those living within the WHS (81%) and those living in more affluent parts of the city (70%). But between five and seven kilometers away from the site, no respondents knew about the WHS, and among those living in less-affluent parts of the city, the awareness rate ranged between 40 and 54 percent.⁹

Town of Bamberg (Germany)

Marketing officers in the city of Bamberg believe that WHS status gives them an edge in attracting visitors from other countries, especially those with a high degree of “WHS literacy,” which stems from a concentration of World Heritage Sites in the visitors’ home countries. In addition, Bamberg sees 20% foreign visitors, compared to 10% for other non-WHS cities around it.¹⁰ Here and in some other sites, WHS status is perceived as a tool for attracting higher-spending cultural visitors. Visitation grew 64% from 1993 to 2008, and is now in the neighborhood of 300,000 per year.¹¹

Dorset and East Devon (Jurassic) Coast (United Kingdom)

Along the Jurassic Coast, which receives some 5 million visitors each year, the direct influence of World Heritage status is difficult to pick out. However, a wide range of stakeholders believe strongly that it is a clear benefit. For example:

WHS has positive impact on “profile” of the area	87%
Attracts new visitors/customers	59%
Attracts higher value visitors and customers	25%
Lends international credibility	56%

⁹ The Old and New Towns of Edinburgh World Heritage Site Management Plan 2011-2016. Historic Scotland, City of Edinburgh Council and Edinburgh World Heritage, 2011.

¹⁰ Rebanks Consulting Ltd.

¹¹ Town of Bamberg website, and personal communication with WHS management staff.

Is a useful tool for marketing and promotion	49%
Enhances the coast as a positive place to invest, work, live	40%
Has directly improved my quality of life	17% ¹²

A key factor in the successful use of WHS status as the backbone of a new public identity for this region is the WHS management team, which has been very active in translating the value of this landscape into tourism, educational, cultural and environmental products, and civic ownership messages that the private sector has been able to market.¹³

Blaenavon Industrial Landscape (United Kingdom)

In the Blaenavon Industrial Landscape, visitation doubled in approximately ten years following inscription, to over 200,000, due to successful promotion and upgraded visitor facilities. Visitation has increased at all of the sites and facilities measured. Marketing has intensified now that facilities have been upgraded.

The WHS designation is used as an overarching brand and the World Heritage Site is seen as a gateway to the wider heritage of South Wales. The number of visitors to the broader landscape beyond the main attractions has increased greatly after creation of a network of way-marked tracks, improved parking, guided walks, and other programming.¹⁴

¹² An Economic, Social, and Cultural Study of the Jurassic Coast: A Summary of Findings. Jurassic Coast Dorset and East Devon World Heritage Site, 2009.

¹³ Dorset and East Devon Coast Management Plan 2009-2014. Dorset and East Devon Coast World Heritage Site Steering Group, 2009.

¹⁴ Blaenavon World Heritage Site Management Plan 2011-2016. Prepared by the Torfaen County Borough Council on behalf of the Blaenavon World Heritage Site Partnership, 2011.

Strategies for Leveraging World Heritage Status

The research overwhelmingly suggests that visitation increases and economic benefits can be achieved for World Heritage Sites around which purposeful action is taken to promote these benefits. A core of five categories of action emerged from reviews of other World Heritage Sites, U.S. efforts to promote international tourism including to its World Heritage Sites, and other background research conducted for this economic impact study.

1. Promote the WHS and related visitor experiences

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 international markets through their own efforts and those of national organizations such as Brand USA. The San Antonio CVB already relies strongly on culture and history in its promotional efforts. A World Heritage Site designation could offer additional leverage in attracting the higher-spending cultural travelers and international visitors.

Many visitors use Internet research, websites of specific visitor attractions, city and community websites, and the state tourism website in planning their visits, so a strong, dynamic, visitor-friendly, and multi-pronged web and social media presence is key.

2. Develop cultural offerings at, near, and related to, the WHS

Cultural travelers, whether domestic or international, look for experiences that are unique to a place. The World Heritage Site can be used to “hook” these 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, cultural map, 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.

3. Connect visitors with the WHS

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 gateways could help visitors navigate the missions and serve portals to other cultural offerings.

4. Educate and involve locals and Texans in the WHS

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 half of Texas visitors are here to see friends and relatives,¹⁵ and the recommendations of friends and family are reported to play an important role in travelers’ decisions.

5. Provide staff for WHS-specific activities

Many World Heritage Sites have staff dedicated to outreach, promotion, event coordination, program development and support, management research, and other activities that may not be adequately covered by WHS management organizations.

¹⁵ D.K. Shifflet and Associates. 2008-2010 Overnight Leisure Travel in Texas. Texas Tourism, 2011.

Target Visitor Segments

Our research suggests that World Heritage status is of particular appeal to two categories of visitors that are desirable because they tend to stay longer and spend more money during their travel than other types of visitors—international visitors and “cultural” travelers primarily interested in history and culture.

In 2010, the United States hosted 15.4 million overseas visitors, of whom 71 percent participated in cultural heritage activities during their stays. More than half of these international cultural travelers were from Western Europe, with the United Kingdom and Germany being the largest contributors.¹⁶

A 2011 lodging industry profile suggests that international visitors are potentially lucrative guests. Hotel stays averaged 8.5 nights (compared with about two nights for domestic travelers). International visitors also tend to be mobile, visiting an average of 1.7 states while in the country.¹⁷

In Texas, international visitors accounted for just over nine percent of all visitor spending in 2011, spending \$4.8 billion in Texas.¹⁸ Because international visitors tend to stay longer and spend more money than their domestic counterparts, it is likely that international visitors comprise less than nine percent of all visitors to Texas.

Among domestic leisure travelers in Texas, visitors whose primary activity was culturally oriented spent the most per party of any other category of visitor. At \$1,106 per party, they outspent the Texas average of \$724 by over 50 percent.¹⁹

In 2001, nearly 30 million domestic travelers whose trips included at least one cultural activity lengthened their trips because of a cultural, arts, heritage, or historical activity or event. That is about a third of all travelers who participated in cultural activities while traveling. Of those who lengthened their stays:

¹⁶ Office of Travel and Tourism Industries. 2010 Cultural Heritage Traveler. U.S. Department of Commerce. Visitation from Mexico and Canada is not included.

¹⁷ 2011 Lodging Industry Profile compiled by the American Hotel and Lodging Association (<http://www.ahla.com/content.aspx?id=32567> accessed January 17, 2013). International visitors include those from Mexico, Canada, and overseas.

¹⁸ Dean Runyan Associates. The Economic Impact of Travel on Texas 1990-2011p. Texas Economic Development & Tourism, June 2012.

¹⁹ D.K. Shifflet and Associates.

- 43 percent added part of one day,
- 31 percent added one extra night,
- 19 percent added two extra nights, and
- 7 percent added three or more extra nights because of this activity or event.²⁰

Compared to the average U.S. traveler, U.S. cultural travelers:

- Spend more: \$623 vs. \$457
- Are older: 49 vs. 47
- Are more likely to be retired -- 20 percent vs. 16 percent
- Are more likely to have a graduate degree: 21 percent vs. 19 percent
- Are more likely to use a hotel, motel or B&B -- 62 percent vs. 55 percent
- Are more likely to spend \$1,000 or more: 19 percent vs. 12 percent
- Travel longer: 5.2 nights vs. 3.4 nights
- Travel by air: 19 percent vs. 16 percent

Although overall, cultural travelers tend to be a bit older than the average American traveler, the 2002 survey suggests that younger travelers (ages 18-34) report the highest agreement of any age segment that trips on which they can learn something new are more memorable to them. And, though more cultural travelers, on average, are retired, households headed by Baby Boomers are most likely (41 percent) to participate in cultural activities.²¹

World Heritage status provides a logical link for attracting these “high-quality” international and cultural visitors.

²⁰ Americans for the Arts. *30 Million U.S. Travelers Lengthen their Trips because of Culture*. 2002.

²¹ Travel Industry Association of America TravelScope Survey 2003 as reported in *The Historic/Cultural Traveler, 2003*, Travel Industry Association of America and *Smithsonian Magazine*.

Future Scenarios for the San Antonio Missions WHS

Our research suggests that World Heritage Site status would be a significant opportunity for Bexar County and San Antonio. Although the goals held locally for the WHS designation of the San Antonio Missions are not all strictly economic in nature, focusing on tangible changes to and benefits from visitation and tourism is one way to quantify achievement of aspects of these goals.

In most places that choose to use World Heritage status as a tool for socio-economic change, the international significance of the designation seemed to figure heavily in its 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.

Some sites have chosen to broadly engage residents and organizations in the host community, if not during the process of developing the nomination and recognizing and describing the site’s outstanding universal value, then certainly after designation.

In Bexar County—and the broader region—World Heritage status could be both an outstanding promotional opportunity, and a high-profile catalyst and underpinning for developing significant cultural and heritage tourism. Our local interviews suggest that cultural and heritage tourism is an underdeveloped part of the area’s visitor offerings (and local scene). As one interviewee noted, “everyone knows we should support” cultural tourism, but serious and sustained efforts to do so have had a hard time getting legs.

Based on these opportunities and research into the kinds of activities that might be used to take advantage of them, we developed three scenarios to ground the economic impact projections. Each scenario encompasses a different level and type of action, and is projected to prompt different changes in visitor numbers, visitor behavior, and visitor characteristics. The economic impact model assumes that the San Antonio Missions are designated a World Heritage Site in 2015, and the impact of each of the three scenarios is estimated in 2025, ten years after designation.

Anticipated Types of Changes in Visitation

Given the specific situation in Bexar County and San Antonio, and the composition of the proposed World Heritage Site, World Heritage status appears most likely to prompt changes in visitor behavior and characteristics in the following categories:

Longer visits at, or because of, the WHS

1. Longer time on-site (attracting visitors who would otherwise visit only the Alamo or only one or two of the missions in the Park to the other sites/locations in the WHS; programming changes; physical and recreational connections).
2. Longer time (and more expenditures) in downtown and South Side neighborhoods.
3. Longer time (and more expenditures) in the area.

Increased visitation from higher-spending travelers

1. Increase in international visitation, particularly from Canada, Mexico, and Europe.

The Alamo attracts about three percent international visitors (75,000 per year)²²; the NHP attracts about eight percent international visitors (120,000 per year)²³. San Antonio does not attempt to measure international visitation. Across Texas, international visitors account for about nine percent of visitor spending,²⁴ and likely a smaller percentage of total visitors.

2. Increase in visitation from travelers primarily interested in history and culture, including “World Heritage” tourists, who travel specifically to visit World Heritage Sites.

²² Thomas F. Cannon. The Alamo Visitor Intercept Study, 2010. College of Business, University of Texas at San Antonio, 2010.

²³ Margaret Littlejohn. San Antonio Missions National Historical Park (Visitor Service Project report #65). Cooperative Park Studies Unit, University of Idaho, 1994.

²⁴ Dean Runyan Associates. The Economic Impact of Travel on Texas 2009-2011p. Texas Tourism, Office of the Governor, 2012.

More repeat visits to the WHS and Bexar County

1. Richer opportunities and connections may lead to more repeat visitation, especially to San Antonio Missions NHP and Bexar County overall.

The NHP attracts about 18 percent repeat visitors²⁵; the Alamo draws about 47 percent repeat visitors.²⁶ (As one point of comparison, Edinburgh has a 27 percent repeat visitation rate.²⁷)

New visitors

1. New visitors to the area (WHS event attendees, cultural programming participants, WHS visitors as noted above).
2. New visitors to the WHS (drawn from visitors who are in the area for other reasons).

Future WHS Scenarios

Based on research into other World Heritage Sites, particularly in Europe, and on interviews and working sessions with San Antonio Missions WHS advisory committee members and others with local insight, we have developed three scenarios for visitation and economic impact in 2025 (ten years following inscription). These scenarios are:

1. Inscription only, no additional actions;
2. Partner-controlled actions and promotion; and
3. County-wide embrace and promotion of WHS and World Heritage or “world-class heritage” as an important part of the area’s identity.

All scenarios include basic actions associated with inscription such as reorientations of interpretive signage to highlight global significance, but they differ significantly in other details. The three scenarios build upon each other, thus the actions taken in Scenario #1 are assumed in Scenario #2, and the actions in both #1 and #2 are included in Scenario #3.

²⁵ Littlejohn

²⁶ Cannon

²⁷ Lynn Jones Research

2025 Scenario #1: Inscription only, no additional actions

This scenario may include small actions such as inclusion of the WHS logo and description on partner websites, local media coverage, and local events such as an inscription celebration.

2025 Scenario #2: Partner-controlled actions and promotion

This scenario includes a robust set of actions and promotion largely controlled and managed by partner organizations (those involved in the core of the working group and advisory committee). These might include, but are not limited to:

1. A well promoted, well linked WHS-specific website that is also a repository of information about other cultural organizations, sites, and events in the area. This website could include a trip/itinerary planner and social media/sharing functions. It would be accessible from both the San Antonio CVB website and the Texas Tourism site, among others, and provide return links to those destination sites. The site should be available in English, Spanish, and German. Over time, it could be available in other languages, as well.
2. An active and ongoing media promotion campaign for the WHS site, related events and festivals, and other cultural/heritage experiences, sites, and services.
3. Neighborhood-level outreach and support to develop heritage tourism opportunities (including tours, events, and festivals) and local businesses.
4. Small-scale programs that enhance cultural offerings at and related to the WHS, such as a cultural guide certification, Bexar County or regional cultural map, neighborhood culture tours, and South Side farmers market.
5. WHS interpretive and directional signage at the Alamo and the Park.
6. An active WHS outreach team that includes at least some dedicated staff to augment Park, Alamo, and other partner staff capacities for such ongoing activities as:
 - a. Promoting the site and related activities;
 - b. Maintaining and promoting the website (see below);
 - c. Promoting research and education about the site;
 - d. Education, interpretation, and producing materials for a variety of audiences;
 - e. Coordinating visitor and other research aimed at enhancing site management, visitor experience, and program improvement;

- f. Coordinating partnerships with other organizations;
- g. Community outreach and engagement.

2025 Scenario #3: County-wide embrace and promotion of WHS and World Heritage or “world-class heritage” as important part of the area’s identity

This scenario encompasses the activities in Scenario #2, and adds some more ambitious activities requiring participation outside the existing group of partner organizations. These might include, but are not limited to:

1. The adoption of a city-wide brand, or at least a significant identity around the World Heritage Site, the area’s “world-class heritage,” and San Antonio as a globally significant World Heritage City;
2. Promotion around WHS and the cultural city to international markets with high WHS literacy such as in Europe, North American markets, domestic cultural travelers, and other major markets as appropriate;
3. Creation of one or more WHS gateways to inform visitors already in Bexar County about the WHS, how to get there and get around, and what to do when they are onsite. This gateway could also serve as a central source for information about cultural sites, events, businesses, and services.
4. Area-wide effort at heritage tourism development, perhaps focused within existing cultural corridors within San Antonio, and around a variety of itineraries or themes that link the city with other area communities.

The visitation projections and findings of the economic impact analysis associated with each scenario are reported in later sections of this report (see Technical Background beginning on page 28 and Economic Impact Projections beginning on page 39).

Supporting Research for Future Scenarios Visitation Projections

In addition to activities and visitation changes at peer World Heritage Sites, we identified further reference points to use in projecting visitation changes under the future scenarios for the San Antonio Missions WHS. These reference points are linked to specific actions contemplated in the future scenarios.

1. Website

Action: Produce and maintain a high-quality, interactive, dynamic WHS website that also provides information about other cultural organizations, sites, and events.

Research findings

We have not seen studies that directly link destination websites and decisions to visit an area (except for bookings made on DMO websites, for example). However, a study of TravelPortland.com suggests that while that site does not necessarily convert site visitors to Portland visitors, it reaches a highly qualified audience (over 50 percent of site visitors later visit Portland).²⁸

Search engine optimization is the most important ongoing investment for a destination or attraction website. The majority of site visitors are likely to find the site through online searches. A 2011 survey of hoteliers found they rank website optimization as producing the greatest return on investment in digital marketing. (Using social media to engage customers ranked second.)²⁹ A well-done, well-promoted website would provide reach to domestic and international markets.

In our research, every website for major tourist attractions, heritage areas, historic sites, and World Heritage Sites that we reviewed appear to have strong ties with the local destination marketing organization. Discussions with San Antonio Convention and Visitors Bureau staff suggest that links from and to key destination websites, especially the San Antonio CVB and Texas Tourism, are assured if the WHS is designated, and that the relationship between the WHS and these tourism marketing organizations will go well beyond this baseline.

²⁸ TNS. Website Evaluation and ROI Project for Western Association of Convention and Visitors Bureaus Members.

²⁹ Kurt Scholle. Top Hotel Marketing Strategies. <http://website-roi-guy.com/tag/tourism/> accessed January 18, 2013.

2. Media outreach/promotion

Action: Ongoing promotion of WHS, related events and activities, and other cultural/heritage experiences, sites, and services.

Research findings

The return on investment (ROI) for media relations can be great, but is measured in dollar value of unpaid editorial coverage, with no way to translate into changes in visitation. ROI, for example, in British Columbia: \$1 million spent on media relations in North America yielded \$140 million in unpaid editorial coverage; in Europe, the yield was \$15.5 million.³⁰

While it is challenging to calculate ROI for the kinds of nontraditional marketing techniques such as word of mouth, blogging, social and media buzz, that could play an important role in this scenario, research into what influences visitors' decisions about where to travel consistently points to the experiences and advice of friends and relatives as a key factor. This holds true for visitors to single sites such as the Alamo, as well as for destination decisions made by domestic and international travelers.

3. Expand heritage tourism opportunities and businesses.

Action: Expand heritage tourism opportunities and businesses with efforts that may range from small-scale, localized programs to broader-scale ,area-wide efforts. Expansion may include additional programming at the WHS.

Research findings

At a small scale, heritage tourism development is likely to enhance the experience of existing visitors, or add to the pool of reasons for visitors' travel decisions, rather than attracting significant numbers of new visitors. However, small festivals and special events might attract new visitors to the WHS, probably in the tens of thousands per year.

We have seen no studies that suggest the magnitude or type of visitation changes that could be expected by such an effort. Again, as above, new festivals and special events could attract new visitors. In Maryland, for example, Ocean City's four-day Springfest attracts about 107,000 visitors each year. About 40 percent are from out of town, and either made the trip specifically for Springfest or extended their stay for the festival. Average

³⁰ TNS. Ontario Mix of Tourism Marketing and Promotion Research Study; Final Report. Ontario Ministry of Tourism, 2009.

length of stay for these travelers is two nights.³¹ A large festival with World Heritage as a main focus could have a similar effect, or an even greater draw given the large population of Bexar County, the surrounding region, and other large cities within a day's drive.

Attendance at events that are part of the 11-day Fiesta San Antonio may provide another point of reference into the likely mix of locals and out-of-town visitors at new cultural events associated with World Heritage. In 2007, a study of six of the Fiesta's many events found that 21 percent were visitors who came from more than 50 miles away, and 79 percent were local residents.³²

4. WHS, interpretive, and wayfinding signage

Action: Construct interpretive and directional signage at sites within the WHS, and one or more WHS or World Heritage City "gateway" kiosks or exhibits to capture more on-the-ground traffic and extend visits to the WHS and other cultural sites, events, and offerings.

Research findings

No studies link signage to visitation changes, but signage and wayfinding aids have been noted as critical to increasing and managing visitation at other World Heritage Sites (e.g., the pedestrian wayfinding system in Bamberg, Germany, and signage linking dispersed sites in the Blaenavon Industrial Landscape).

³¹ John L. Crompton, Seokho Lee, and Thomas J. Shuster. A Guide for Undertaking Economic Impact Studies: The Springfest Example. *Journal of Travel Research*, August 2001.

³² Birchhill Enterprises. *Economic Impact of Fiesta San Antonio*, April 2007.

5. Education, community partnerships and engagement

Action: Promote community participation and pride in, and understanding of, the World Heritage Site.

Research findings

About 30 percent of overnight visitors travel to San Antonio to see friends and relatives.³³ Across Texas as a whole, 48 percent of overnight visitors travel to their destination to visit friends or family.³⁴ As noted above, the experiences and advice of friends and family have a great deal of influence over travelers' decisions. A WHS-aware and engaged local population will contribute to the word-of-mouth promotion of the site.

6. Promotion

Action: Promote the World Heritage Site and World Heritage City status to select international markets and domestic cultural travelers.

Research findings

Incorporating the World Heritage Site, the area's world-class heritage, and San Antonio's status as a World Heritage City into the base activities of the Convention and Visitors Bureau would result in a return on investment of funds spent on promotion that would likely be in the range of 15:1 to 25:1.³⁵

WHS-related advertising and promotion campaigns would likely reap significant return, as well. In San Diego, a fall 2010 multi-media campaign in Los Angeles generated 517,000 visitors (1.7 percent of all 2010 visits). A spring 2011 multi-market campaign generated 1.6 million visitors (5.4 percent of all 2011 visitors).³⁶ In Philadelphia, a \$1.2-\$1.9 million media

³³ San Antonio Convention and Visitors Bureau. Data from D.K. Shifflet and Associates.

³⁴ D.K. Shifflet and Associates

³⁵ TNS. Ontario Mix of Tourism Marketing and Promotion Research Study. Also *Tourism Powers Cities; Annual Report 2011*. San Diego Tourism Marketing District.

³⁶ Robert R. Redwitz and Co. San Diego Tourism Marketing District; Agreed-upon Procedures Program Recipient Return on Investment Calculations, Fiscal Year Ended June 30, 2011. San Diego Tourism Marketing District, 2012.

budget targeted at areas within a day's drive generated 1-1.4 million trips (4 percent of annual visitation to Philadelphia region).³⁷

Return on investment for international marketing campaigns ranges from 11:1 to 26:1, typically lower for markets that are further away, and higher for nearer neighbors. A \$5.5 million British Columbia domestic/U.S. campaign yielded approximately 345,000 visitors and \$100,000,000 in tourism revenues.³⁸

³⁷ Longwoods International. The Power of Destination Marketing. U.S. Travel Association and Longwoods International, July 2011.

³⁸ TNS. Ontario Mix of Tourism Marketing and Promotion Research Study.

Technical Background

I. Analytical Methods

Economic impact analyses typically use “input-output” modeling. Simply described, input-output modeling assumes that money spent locally—whether by visitors paying for meals, lodging, fuel, and gifts, or by a business or government agency paying staff, contractors, and suppliers—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 economic impacts” reflect the “multiplier effect” of portions of those direct expenditures being circulated through the local economy, as described above. Total impacts include the indirect and secondary impacts associated with additional expenditures that result when the initial direct expenditures—taken in as sales receipts, wages, or payments for services—are then “spent again” in the local economy.

This study utilized the National Park Service’s MGM2 model for estimating economic impact. This model is applied each year to every park across the Park Service, and it is well known and established especially among Park Service employees, the media, and others familiar with national parks. In side-by-side comparisons with other commonly used economic impact models,³⁹ MGM2 has yielded similar results given the same inputs.

II. Study Focus on Visitation and Visitor Spending

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 Site status focuses solely on visitor spending for three reasons:

³⁹ Harbinger has compared the results of MGM2 analyses with those generated by the IMPLAN model and the Regional Economic Models, Inc. PI+ model.

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 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.⁴⁰
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 NHP 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 (or the National Historical Park and the Alamo) 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.

III. Impact Area

This study estimates economic impacts of visitor spending associated with WHS status for Bexar County, which entirely encompasses the city of San Antonio.

The WHS would likely have some impacts for the surrounding region, including the broader San Antonio metropolitan area—which, in addition to Bexar, includes Guadalupe, Comal, Medina, Atascosa, Wilson, Kendall, and Bandera counties. According to the U.S. Census, in 2011, Bexar County accounted for 78 percent of the population of the San Antonio metropolitan area. In its 2007-2012 comprehensive economic development strategy, the Alamo Area Council of Governments noted a similar population concentration in Bexar County—within its 12-county region, Bexar County accounted for 76 percent of the population.⁴¹

⁴⁰ The Harbinger Consulting Group, 2011.

⁴¹ Alamo Area Council of Governments. Comprehensive Economic Development Strategy, 2007-2012.

The proposed World Heritage Site lies almost entirely within Bexar County, as do nearly all of the visitor facilities and services likely to be utilized by visitors in conjunction with their WHS visit. In this impact study, we assume that approximately 90 percent of the economic benefits to the region as a direct result of WHS designation will accrue to residents of, and businesses based in, Bexar County.

As noted earlier in this report, the World Heritage Site is expected to be of particular interest to cultural travelers and international visitors. To the extent that targeted regional cooperation also draws WHS visitors to areas and complementary attractions outside Bexar County, greater economic benefits could be felt in the immediately surrounding region and beyond. These potential benefits are not incorporated into this economic impact study.

IV. Estimating Baseline (2015) Visitation

This study estimates the economic impacts of WHS designation for the San Antonio Missions in 2025, ten years following the likely inscription year of 2015. Visitation, visitor spending, and estimated economic impacts for the site in 2015 are used as a base for projecting future (2025) impacts of World Heritage status.

Visitation at the new World Heritage Site in 2015 is estimated based on 2011 visitor numbers from San Antonio Missions NHP and The Alamo. Visitation figures for 2011 and the anticipated annual growth rate between 2011 and 2015 were estimated in consultation with staff of the managing entities, the National Park Service and the Daughters of the Republic of Texas.

2011 VISITATION

San Antonio Missions NHP	1,500,000 ⁴²
The Alamo	2,000,000 ⁴³
Adjustment for visitors who go to both sites	<u>(750,000)</u> ⁴⁴
Total 2011 visitation	2,750,000

2015 VISITATION

San Antonio Missions NHP	1,848,162 ⁴⁵
The Alamo	2,000,000 ⁴⁶
Adjustment for visitors who go to both sites	<u>(924,081)</u>
Total 2015 visitation	2,924,081

⁴² Because of construction associated with the San Antonio River Improvements Project, many of the NHP's visitor counters were not working in 2011. The number of visitors is an estimate based on past years and park staff observations.

⁴³ For many years, visitors to The Alamo have been counted using technology that, it appears, significantly over-reported visitation to this site. Based on recently upgraded counters and cross-checking to other indicators such as gift shop sales, Alamo staff believe annual visitation hovers around two million.

⁴⁴ Based on interaction with visitors at the missions and visitor center in the NHP, park staff estimate that about 60 percent of park visitors also go to the Alamo. We have reduced this figure to 50 percent, to account for park visitors who may go see and photograph the Alamo from the Plaza but who do not enter the shrine (and are therefore not included in Alamo visitor counts).

⁴⁵ Annual visitation growth at the NHP is estimated at two percent, which accounts for the influence of factors such as the expansion of the San Antonio B-Cycle program, the completion of the Mission Trails walking and biking path network, and general historical trends. Starting in 2014, the annual number of visitors was also increased to reflect the influence of two projects: the hike/bike trails and mission portals associated with the San Antonio River Improvements Project (56,350 additional visitors), and the Mission San Juan demonstration farm (200,000 additional visitors). These visitation increases are based on projections in the 2011 San Antonio Missions NHP economic impact study.

⁴⁶ Alamo staff anticipates no significant increase in visitation between 2011 and 2015.

V. Baseline (2015) Visitor Profile

Based on estimates developed for the 2011 San Antonio Missions NHP economic impact study and a survey of park visitors, San Antonio Missions NHP visitation breaks down as follows:

- 20% Local visitors
- 8% International overnight visitors⁴⁷
- 20% Non-local U.S. overnight visitors⁴⁸
- 52% Non-local day visitors

Based on a survey of Alamo visitors, and applying the ratio of overnight to day visits estimated for the 2011 NHP economic impact study, Alamo visitation breaks down as follows:

- 16% Local visitors
- 5% International overnight visitors⁴⁹
- 22% Non-local U.S. overnight visitors⁵⁰
- 57% Non-local day visitors

⁴⁷ Percentage of local and international visitors from Margaret Littlejohn. San Antonio Missions National Historical Park (Visitor Service Project report #65). Cooperative Park Studies Unit, University of Idaho, 1994. For this analysis, all international visitors are assumed to be overnight visitors.

⁴⁸ No The “non-local U.S. overnight visitors” category is estimated to include visitors whose length of stay at the mission site (park or Alamo) would necessitate an overnight stay, or for whom the site is the primary motivator of an overnight visit to San Antonio.

⁴⁹ Percentage of local and international visitors adjusted from Thomas F. Cannon. The Alamo Visitor Intercept Study, 2010. College of Business, University of Texas at San Antonio, 2010. For this analysis, all international visitors are assumed to be overnight visitors.

⁵⁰ See note 48 above.

Visitor surveys and staff observations suggest that Alamo visits are shorter on average than visits to the National Historical Park. Alamo visitors spend an estimated 1.5-2 hours, compared to 3-5 hours at the park. However, the Alamo is a better-known attraction and likely plays a larger role in influencing travelers' decisions to visit Bexar County and San Antonio than does the park. As a starting point for the 2015 calculations, we "credit" both the Alamo and SAAN with the same ratio of non-local U.S. overnight visitors (28 percent) to non-local day visitors (72 percent).

VI. Estimating Baseline (2015) Visitor Expenditures

The 2015 visitor spending profile used in this study is based on the one developed for the 2011 San Antonio Missions NHP economic impact study which used data from NHP and Texas visitor surveys. It has been adjusted to reflect inflation to 2013 dollars, which is the currency valuation in which all future expenditures and impacts are reported in this study.

Spending Category	Non-local day visitor spending (per party per day)	Non-local overnight visitor spending (per party per day)
Motel, hotel cabin or B&B	0.00	100.35
Restaurants & bars	15.38	47.23
Groceries, take-out food/drinks	5.05	9.90
Gas & oil	37.71	24.52
Other vehicle expenses	1.31	0.79
Local transportation	0.43	19.45
Admissions & fees	2.32	21.94
Clothing	0.93	2.12
Sporting goods	1.44	0.61
Gambling	16.05	27.64
Souvenirs and other expenses	17.11	27.27
Total	\$97.73	\$281.82

In 2015, an estimated 2.9 million individuals will visit the San Antonio Missions NHP and The Alamo (which together would comprise the new World Heritage Site), spending \$181 million associated only with their visit to the site.

VII. Estimating Future (2025) Visitation and Visitor Profiles

Visitation at the San Antonio Missions World Heritage Site in 2025 is projected based on estimated 2015 visitor numbers for San Antonio Missions NHP and the Alamo. As described earlier in this report, 2025 visitation, expenditures, and economic impact estimates have been developed under three different scenarios for leveraging the designation of the missions as a World Heritage Site.

These scenarios, more fully described above, are:

2025 Scenario #1: Inscription only, no significant additional actions

2025 Scenario #2: Partner-controlled actions and promotion

2025 Scenario #3: County-wide embrace and promotion of WHS and World Heritage as an important part of the area's identity

2025 VISITATION AND PROFILE: SCENARIO #1

This scenario, which may include small actions such as inclusion of the WHS logo and description on partner websites, local media coverage, and local events such as an inscription celebration, is expected to result in negligible change in non-local visitation.

In this scenario, "natural" visitation growth is anticipated for both the Alamo and the NHP, not related to the designation of the World Heritage Site. Thus, this scenario serves as a baseline to which the effects of the actions contemplated under the other two scenarios may be compared.

SCENARIO #1

Assumptions

- 2% annual growth from 2015 for San Antonio Missions NHP
- Additional 347,000 new NHP visitors from the Mission San Juan demonstration farm and enhanced Mission San José interpretive programming⁵¹
- 5% growth for the period from 2015 for the Alamo

Visitation

San Antonio Missions NHP	2,648,085
The Alamo	2,200,000
Adjustment for visitors who go to both sites(1,059,234) ⁵²	
Total SCENARIO #1 2025 WHS visitation	3,788,851

Visitor Profile

The aggregated 2015 visitor profile was used for 2025 Scenario #1, since no significant changes are anticipated during the ten year span.

17% Local visitors

41% Non-local (U.S. and international) overnight visitors⁵³

42% Non-local day visitors

⁵¹ Visitation increases projected in Harbinger Consulting Group, 2011. Increased visitation calculated as follows: 47,000 new demonstration farm visitors (2015); 100,000 new visitors due to enhanced interpretive programming each year 2018-2020.

⁵² Assumes that 40 percent of NHP visitors also go to the Alamo and are included in Alamo visitor counts. The lower percentage from the 2015 scenario accounts for the increasing importance of the NHP as an independent destination for visitors.

⁵³ Since no change in the proportion of international to domestic visitation is anticipated between 2015 and 2025 in Scenario #1, domestic and international overnight visitors are collapsed into a single category in this visitor profile.

2025 VISITATION AND PROFILE: SCENARIO #2

This scenario includes a robust set of actions and promotion largely controlled and managed by partner organizations (those involved in the core of the World Heritage Site working group and advisory committee). These actions are expected to result in a five percent increase in non-local visitation overall.

SCENARIO #2

Assumptions

- Same level of growth not attributable to WHS status as in Scenario #1.
- 10% increase in international visitation (30,311 new, all overnight)
- 4% increase in non-local U.S. cultural travelers (113,666 new visitors—half overnight, half day visitors)
- 1% increase in non-local visitation due to longer stays at the site, repeat visitation, and new visitation from travelers already in the area who learn about the WHS after arriving (28,416 visitor days)

Visitation

Baseline 2025 visitation (from Scenario #1)	3,712,295
New international visitors	30,311
New U.S. cultural travelers	112,854
Longer/repeat visits	<u>28,416</u>
Total SCENARIO #2 2025 WHS visitation	3,961,244

Visitor Profile

After projected increases in visitation, the expected breakdown of visitation is:

- 17% Local visitors
- 42% Non-local (U.S. and international) overnight visitors⁵⁴
- 41% Non-local day visitors

⁵⁴ Because there is no need for separate calculations, domestic and international overnight visitors are collapsed into a single category in the 2025 visitor profiles

2025 VISITATION AND PROFILE: SCENARIO #3

This scenario encompasses the activities in Scenario #2, and includes some additional activities requiring participation outside the existing group of partner organizations. These actions are expected to result in a 14 percent increase in non-local visitation overall.

SCENARIO #3

Assumptions

- Same level of growth not attributable to WHS status as in Scenario #1.
- 60% increase in international visitation (181,865 new, all overnight)
- 8% increase in non-local U.S. cultural travelers (227,331 new visitors—half overnight, half day visitors)
- 4% increase in non-local visitation due to longer stays at the site, repeat visitation, and new visitation from travelers already in the area who learn about the WHS after arriving (113,666 visitor days)

Visitation

Baseline 2025 visitation (from Scenario #1)	3,712,295
New international visitors	181,865
New U.S. cultural travelers	227,331
Longer/repeat visits	<u>113,666</u>
Total SCENARIO #3 2025 WHS visitation	4,311,712

Visitor Profile

After projected increases in visitation, the expected breakdown of visitation is:

- 16% Local visitors
- 45% Non-local (U.S. and international) overnight visitors⁵⁵
- 39% Non-local day visitors

⁵⁵ Because there is no need for separate calculations, domestic and international overnight visitors are collapsed into a single category in the 2025 visitor profiles.

VIII. Estimating Future (2025) Visitor Expenditures

The 2025 visitor spending profile matches the 2015 spending profile, reported in 2013 dollars.

Estimated visitor expenditures for the three scenarios follow:

Scenario #1

3.79 million visitors spending \$261 million associated only with their visit to the site.

Scenario #2

3.96 million visitors spending \$290 million associated only with their visit to the site.

Scenario #3

4.31 million visitors spending \$328 million associated only with their visit to the site.

Economic Impact Projections for Bexar County

2015 Baseline

Estimated visitation and economic impact (2013 dollars)

2015 total visitation:	2.9 million
Total spending:	\$181 million
Economic activity:	\$275 million
Jobs:	2,866
Labor income:	\$98 million
State Taxes (sales + hotel):	\$7.5 million
Local Taxes (hotel):	\$5.5 million

2025 Scenario #1

Estimated visitation and economic impact (2013 dollars)

2025 total visitation:	3.71 million
Total spending:	\$261 million
Economic activity:	\$397 million
Jobs:	4,141
Labor income:	\$142 million
State Taxes (sales + hotel):	\$10.7 million
Local Taxes (hotel):	\$8.1 million

2025 Scenario #2

Estimated visitation and economic impact (2013 dollars)

2025 total visitation:	3.96 million
Total spending:	\$290 million
Economic activity:	\$441 million
Jobs:	4,606
Labor income:	\$158 million
State Taxes (sales + hotel):	\$12 million
Local Taxes (hotel):	\$8.9 million

2025 Scenario #3

Estimated visitation and economic impact (2013 dollars)

2025 total visitation:	4.31 million
Total spending:	\$328 million
Economic activity:	\$502 million
Jobs:	5,239
Labor income:	\$180 million
State Taxes (sales + hotel):	\$13.7 million
Local Taxes (hotel)	\$10.3 million

	2025 Scenario #1	2025 Scenario #2	2025 Scenario #3
Overview	Negligible effect on non-local visitation expected; no significant additional economic impact from WHS designation.	Compared to Scenario #1: 5% more non-local visitation 5% greater economic activity	Compared to Scenario #1: 14% more non-local visitation 18% greater economic activity
	3.71 million annual visitors <ul style="list-style-type: none"> • 2% annual growth for the NHP + 347,000 new visitors from San Juan demonstration farm, San José interpretive programming • 5% growth over 10 years for the Alamo 	3.96 million annual visitors <p>Same as Scenario #1 PLUS:</p> <ul style="list-style-type: none"> • 10% increase in international visitation (30,311 new, all overnight) • 4% increase in non-local cultural travelers (113,666 new visitors—half overnight, half day visitors) • 1% increase in non-local visitation from longer stays, repeat visitors, and new incidental visits (28,416 visitor days) 	4.31 million annual visitors <p>Same as Scenario #1 PLUS:</p> <ul style="list-style-type: none"> • 60% increase in international visitation (181,865 new, all overnight) • 8% increase in non-local cultural travelers (227,331 new visitors, half overnight, half day visitors) • 4% increase in non-local visitation from longer stays, repeat visitors, and new incidental visits (113,666 visitor days)
Estimated Economic Impacts	Impacts <ul style="list-style-type: none"> • Total spending: \$261 million • Economic activity: \$397 million • Jobs : 4,141 • Labor income: \$142 million • State and local sales + hotel taxes: \$18.8 million 	Impacts <ul style="list-style-type: none"> • Total spending: \$290 million • Economic activity: \$441 million • Jobs : 4,606 • Labor income: \$158 million • State and local sales + hotel taxes: \$20.9 million 	Impacts <ul style="list-style-type: none"> • Total spending: \$328 million • Economic activity: \$502 million • Jobs : 5,239 • Labor income: \$180 million • State and local sales + hotel taxes: \$24 million

Broader Economic Impacts

While it is beyond the scope of this analysis to project economic impacts for areas beyond Bexar County, it is reasonable to expect that impacts will ripple out from San Antonio and Bexar County to a larger region and, to some extent, the state of Texas.⁵⁶

To some extent, this will come as a natural outgrowth of the arrival of new cultural travelers, both domestic and international. Many of these travelers are likely to seek out other experiences and destinations beyond Bexar County's boundaries. The impact beyond Bexar County may be enhanced by selectively leveraging the World Heritage "brand" to entice travelers to explore other cultural and heritage sites, attractions, and events. This type of coordination may be most easily accomplished in the immediately surrounding counties, but it is also possible for more distant areas, especially those within easy driving distance such as Austin, Houston, and the Gulf Coast.

In its most ambitious set of projections (Scenario #3), this study estimates that in 2025, visitors will spend \$328 million associated with their visit to the San Antonio Missions World Heritage Site. However, these visitors will spend more than that during their visit to the area. Conservatively estimated, total spending in Bexar County would be nearly \$706 million in 2025 (under Scenario #3). Visitors may spend even more in the larger region, and in Texas, during their stays.

⁵⁶ Other than sales and hotel taxes, additional state tax revenues have not been estimated in this study, but would include revenue from income tax, gasoline tax, and others.

Appendix A: Participants in Local Interviews, Working Sessions, and Document Review

Nancy Avellar, President, San Antonio Conservation Society Board of Directors

Betty Bueché, Director, Facilities and Parks Department, Bexar County

Thomas Cannon, Senior Lecturer, College of Business, UTSA

Susan Chandoha, Executive Director, Los Compadres de San Antonio Missions

Jordana DeCamps, Assistant Director of Economic Development, Bexar County

Suzanne Dixon, Texas Regional Director, National Parks Conservation Association

Sedef Doganer, Assistant Professor, College of Architecture, UTSA

John Dugan, Planning and Community Development Director, City of San Antonio

William Dupont, Director, Center for Cultural Sustainability, College of Architecture, UTSA

Randy Durband, Senior Partner, Robin Tauck and Partners

Gary Edenburn, Redevelopment Officer, Center City Development Office, City of San Antonio

Father David Garcia, Archdiocesan Director, Old Spanish Missions of San Antonio

Homer Garcia, Parks and Recreation Department Contract Manager, City of San Antonio

Will Garrett, Vice President for Economic Development, Greater San Antonio Chamber of Commerce

Thomas Guevara, Chief of Staff for the Office of the County Manager, Bexar County

Lori Houston, Director, Center City Development Office, City of San Antonio

Sonia Imperial, Vice President of Membership Development, South San Antonio Chamber of Commerce

James Lifshutz, Liberty Properties

Bruce MacDougal, Executive Director, San Antonio Conservation Society

David Marquez, Executive Director for Economic Development, Bexar County

Shanon Shea Miller, AICP Historic Preservation Officer, City of San Antonio

Melinda Navarro, Executive Administrator, The Alamo

Ronnie Price, Assistant Executive Director, Sales and Services, San Antonio Convention and Visitors Bureau

Dorah Putney, Director of Tourism, San Antonio Convention and Visitors Bureau

Alan Ragins, Superintendent, San Antonio Missions National Historical Park

Al Remley, Park Ranger, San Antonio Missions National Historical Park

Steven Schauer, Manager of External Communications, San Antonio River Authority

Suzanne Scott, General Manager, San Antonio River Authority

David Smith, County Manager, Bexar County

Susan Snow, Archaeologist, San Antonio Missions National Historical Park

Colleen Swain, Redevelopment Officer, Center City Development Office, City of San Antonio

Xavier Urrutia, Parks and Recreation Director, City of San Antonio

Appendix B: Selected World Heritage Site Research Bibliography

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World Heritage—Tapping the Potential. Report of a Symposium Held June 13-14, 2012, Charlottesville, Virginia. Sponsored by the Advisory Council on Historic Preservation, National Park Service, and U.S. National Commission on UNESCO.