

Fall 2012

# Economic Impact of Texas A&M University-San Antonio



Prepared by:

TEXAS A&M ENGINEERING



---

EXTENSION SERVICE

## TABLE OF CONTENTS

I.	Executive Summary .....	2
II.	Decade of Growth and Service.....	3
III.	Value-Added Programs and Collaborations .....	6
	a. Patriots’ Casa: Military Affairs .....	7
	b. Teacher Preparation Program .....	7
	c. Center for Excellence in Information Assurance: Cyber Security .....	7
	d. Water Conservation and Technology Center (WCTC) .....	8
IV.	Recommendations - Founded on the Future.....	9
V.	Economic Impact Methodology* .....	10
VI.	Bexar County Profile.....	11
VII.	Complementary Education Institutes in Greater Bexar County Region .....	14
	Community Colleges.....	15
	Four-Year University.....	15
	Private Universities.....	15
	San Antonio Military Bases.....	16
	Eagle Ford Shale .....	16
	Attachment 1 – Profile of Bexar County and Surrounding Region .....	18
	Attachment 2 – Regional Map and TAMU-SA Location .....	19
	Attachment 3 – San Antonio MSA 2003 .....	20
	Bibliography and Related Sources .....	21

## I. EXECUTIVE SUMMARY

Knowledge Engineering (KE), the economic development, market intelligence, and community development unit of the Texas A&M Engineering Extension Service (TEEX), is providing a final report of the economic impact assessment of Texas A&M University–San Antonio. Highlights of the final report are bulleted below:

### IMPACT

- The institute generates \$54.9 million in gross sales annually across the seven-county service area, with the bulk of spending occurring in Bexar County.
- TAMU-SA contributes \$16.6 million in value-added to the region's gross regional product (GRP), including \$9.4 million in labor income, and 422 jobs across the economy annually.
- Following the completion of the Main Building in 2011, the University began the next phase with the construction of a \$75 million multipurpose building – that will support an estimated \$130.3 million in gross sales across the region, including \$65.7 million in value-added contribution, \$48.6 million in labor income, and an estimated creation of 899 jobs.
- The nascent institution currently provides scholarships and grants to students with \$2.7 million provided in financial aid, indicating induced expenditures of up to \$3.1 million across the regional economy. Total job creation over the period from 2013 – 2015 is estimated to be 1,304 jobs annually.

### UNIVERSITY

- The University represents a vital force in higher education, job creation, and economic impact not only in Bexar County, but also South Texas in particular, and the State of Texas in general.
- Texas A&M University–San Antonio (TAMU-SA) is strategically located south of the downtown San Antonio metropolitan area on a 694 acre campus.
- First established as a center within the Texas A&M University System by SB 800, the Texas legislature established TAMU-SA as a stand-alone institution in the Fall of 2009.
- Over the past three years, TAMU-SA has been the fastest growing university in the Texas A&M University System, with an average increase of year-on-year enrollment of over 15 percent.
- Current Fall 2012 enrollment is over 4,100; an increase of 16.29 percent over 2011 and an overall enrollment growth of 191 percent from Fall 2008 to Fall 2012.

### REGIONAL ECONOMY

- TAMU-SA will complement, via its graduates and programs, an expanding energy industry highlighted by the oil and gas play in the Eagle Ford Shale, TAMU-SA will also support the growing economy, as well as diverse military, health care, and manufacturing endeavors across the region and state.
- In terms of regional growth, Texas A&M University–San Antonio will continue to be a very positive catalyst for local growth of the region in terms of single and multi-family housing development, hotel-motel lodging on the south side of San Antonio, as well as enhanced job opportunities for a broad cross-section of services and industrial expansion in the region.

## II. DECADE OF GROWTH AND SERVICE

### Texas A&M University–San Antonio: 2000-2012

“Our focus is on degrees that result in jobs in our dynamic economy”

-Dr. Maria Hernandez Ferrier

Texas A&M University–San Antonio (TAMU-SA) is located in southern Bexar County and is one of the few *de novo* university campuses in the United States over the past decade. San Antonio is in the heart of a region that boasts over 2 million in population and one of the most economically vibrant and rapidly growing commercial areas in the United States today. Current enrollment is 4,100 students, along with 234 full-time faculty and staff. Over the past three years, the institution has had the most rapid student expansion, in percentage terms, of any institution in the Texas A&M University System – increasing year-on-year enrollment at an average of 15 percent per year.

TAMU-SA was first established as a Center in the A&M System in Fall of 2000. The target market for the nascent institute of higher education was the growing southern portions of Bexar County, as well as some 32 county regions in greater South Texas. The center, which held its first classes at Palo Alto College, offered junior, senior, and graduate level courses in seven academic disciplines. The inaugural class numbered 126 students. As the enrollment grew, the center soon became a part of the Texas A&M University-Kingsville campus for purposes of administration, oversight, and granting of degrees for those who completed course requirements in San Antonio.

Continued growth and the demands for a stand-alone campus soon took seed with a commitment by the City of San Antonio to provide infrastructure and support services for a campus. What followed was a Texas legislative approval of the formal creation of the new University and subsequent authorization of a \$40 million Tuition Revenue Bond in 2006 for the Phase I construction of a new campus. Land for the new permanent campus was donated in 2007 by the Verano Land Group along with a commitment for \$1 million in scholarships. The formal establishment of TAMU-SA as a stand-alone campus followed in the Fall 2009 with the passage of Senate Bill 629, clearing the way to access the Tuition Revenue Bond funding.

There are three primary locations where the university is housed. The School of Arts and Sciences and School of Education and Kinesiology are located at the Main Campus, the School of Business is located at the Brooks City-Base Campus, and additional classes are offered at The Alamo Colleges' University Center on the northeast side of the city. The following degree programs are offered at TAMU-SA:

- Criminology
- English
- History
- Communications
- Mathematics
- Psychology
- Sociology
- Finance
- Computer Science
- Spanish
- Biology
- Political Science
- International Business Management
- General Business Administration
- Accounting
- Applied Arts and Sciences
- Computer Information Systems
- Management
- Interdisciplinary Studies
- Kinesiology

**FIGURE 1.1 TEXAS A&M UNIVERSITY SYSTEM**

	2011 Head Count	2012 Head Count	Head Count Change	% Head Count Change	2011 SCH*	2012 SCH	SCH Change	% SCH Change
PVAMU	8,425	8,485	60	0.71%	104,217	104,576	359	0.34%
Tarleton	9,893	10,281	388	3.92%	111,292	117,917	6,625	5.95%
TAMIU	7,037	7,331	294	4.18%	70,411	72,546	2,135	3.03%
TAMU	49,861	50,353	492	0.99%	624,773	623,143	(1,630)	-0.26%
TAMUG	2,035	2,025	(10)	-0.49%	27,561	27,509	(52)	-0.19%
TAMU-CT	2,096	2,259	163	7.78%	14,225	15,747	1,522	10.70%
TAMU-C	10,726	12,052	1,326	12.36%	105,597	116,411	10,814	10.24%
TAMU-CC	10,162	10,538	376	3.70%	115,035	120,623	5,588	4.86%
TAMU-K	6,731	7,231	500	7.43%	80,033	86,007	5,974	7.46%
TAMU-SA	3,554	4,116	579	16.29%	31,570	36,737	5,167	16.37%
TAMU-T	1,907	1,952	45	2.36%	19,106	19,733	627	3.28%
WTAMU	7,886	7,955	69	0.87%	91,963	93,152	1,189	1.29%
HSC	2,122	2,144	22	1.04%	12,604	12,295	(309)	-2.45%
<b>TOTAL</b>	<b>122,435</b>	<b>126,739</b>	<b>4,304</b>	<b>3.52%</b>	<b>1,408,387</b>	<b>1,446,396</b>	<b>38,009</b>	<b>2.70%</b>

\*SCH: Student Contact Hours

## Mission Statement

*Texas A&M University-San Antonio faculty and staff prepare and empower students through innovative and challenging academic and co-curricular programs that contribute to and enrich the economic and social development of the community and region. A solid foundation for success is established through dynamic teaching, scholarship, research, and public service that inspire graduates to lifelong learning and responsible global citizenship.*

The dynamic urban setting of the university and its ability to cover South Texas in targeted programs will enhance collaboration with regional businesses to create jobs.

After years of community support and use of multiple facilities, the university programs and administration were consolidated in the first permanent building in August 2011. An extensive Campus Master Plan has been developed for the dynamic future growth. Ground was broken in November 2012 for the first of two extensive buildings to be added to the campus. Future plans call for additional academic facilities, student housing, dining, and conference and meeting venues. In addition to a growing campus, TAMU-SA has awarded more than 3,000 degrees. As the institution transitions to a four year university, enrollment will more than double and there will be corresponding commercial and private sector development around the campus, creating value added services and a broad range of employment.

Texas A&M University–San Antonio generates \$54.9 million in gross sales annually across its seven-county service region, including a \$16.6 million value-added contribution to GDP, \$9.4 million in labor income and 405 jobs. Labor income is a component of GDP, which is a portion of gross sales, so these figures cannot be summed. The university generates \$52.9 million in gross sales annually in Bexar County alone, including a \$15.4 million contribution to GDP, \$8.7 million in labor income and 388 jobs. These financial statistics are based on the Implan model and data provided by TAMU SA, see figures 1.2 and 1.3.

Following the completion of the main building in 2011, the University began construction of \$75 million in new facilities which could support \$130.3 million in gross sales across the region, including \$65.7 million in value-added investment, \$48.6 million in labor income, and 899 jobs.

Scholarships and grants at the university provide students \$2.7 million in financial aid, initiating induced expenditures of up to \$3.1 million across the regional economy. The 1.18 multiplier of scholarship spending captures only induced spending. Industry multipliers, which include both indirect (business-to-business) and induced (household income) spending, average 1.72 for the region

**FIGURE 1.2 ECONOMIC IMPACT OF TAMU-SAN ANTONIO OPERATIONS ON THE BEXAR COUNTY ECONOMY**

Impact Type	Output	Value Added	Labor Income	Employment
Direct Effect	\$27,361,400	\$3,854,700	\$2,267,000	251.0
Indirect Effect	\$8,420,200	\$1,200,000	\$681,100	14.4
Induced Effect	\$17,118,400	\$10,378,200	\$5,765,100	139.5
<b>Total Effect</b>	<b>\$52,900,000</b>	<b>\$15,432,900</b>	<b>\$8,713,300</b>	<b>404.9</b>

**FIGURE 1.3 ECONOMIC IMPACT OF TAMU-SAN ANTONIO CONSTRUCTION ON THE SEVEN COUNTY SERVICE AREA ECONOMY**

Impact Type	Output	Value Added	Labor Income	Employment
Direct Effect	\$75,000,000	\$33,259,900	\$29,518,700	475.0
Indirect Effect	\$21,160,300	\$11,796,500	\$7,701,500	142.5
Induced Effect	\$34,109,800	\$20,630,500	\$11,416,100	281.3
<b>Total Effect</b>	<b>\$130,270,100</b>	<b>\$65,686,900</b>	<b>\$48,636,300</b>	<b>898.8</b>

\*IMPLAN Group, Inc. 2010, Version 3.0, Stillwater, MN, [www.implan.com](http://www.implan.com)

### III. VALUE-ADDED PROGRAMS AND COLLABORATIONS

Texas A&M University-San Antonio (TAMU-SA) will be defined by its programs and work-ready graduates. Several TAMU-SA administrators captured the essence of the mission of the university when stating, “Whatever we do – we must do well.” For example, academic programs in microbiology, criminology, cyber security, business, veteran programs, water resources management, and those that prepare our future generation of teachers will hallmark the expanding contribution of the university to meet regional economic needs and impact across the state of Texas. Particular note is given to the following initiatives:

#### **a. Patriots' Casa: Military Affairs**

Addressing veterans and veteran services is a priority of TAMU-SA from its very founding. The San Antonio region is home to one of the largest populations of active duty military and retirees in the nation. The student body reflects this growing sector with over 500 veterans, 12 percent, of the current student enrollment. Keen to San Antonio's military heritage, the stand-alone Patriots' Casa dedicated facilities will be completed by early 2014 to address programs and concerns of veterans and active duty personnel interested in programs at the university. The campus center and military community relations offices will embrace the veterans with academic counseling and transition of civilian workforce jobs and careers. Furthermore, a Reserve Officer Training Corps (ROTC) unit will serve as the prime vehicle in assisting the preparation of officers for the U.S. Armed Forces.

#### **b. Teacher Preparation Program**

Teachers are the life-blood and cornerstone of insuring well prepared future students. TAMU-SA, in conjunction with independent school districts (ISDs) and Alamo Colleges across the region, has established a core goal to assist and assure teachers bound for K-12 are the most competitive, best prepared and are ready to make a difference. The "Ready from Day One" initiative provides a field-based residency to prepare new teachers for the classroom. Working with mentors from the ISDs over a three semester period, teachers are given an extensive hands-on opportunity and leadership skills to transition to their new jobs.

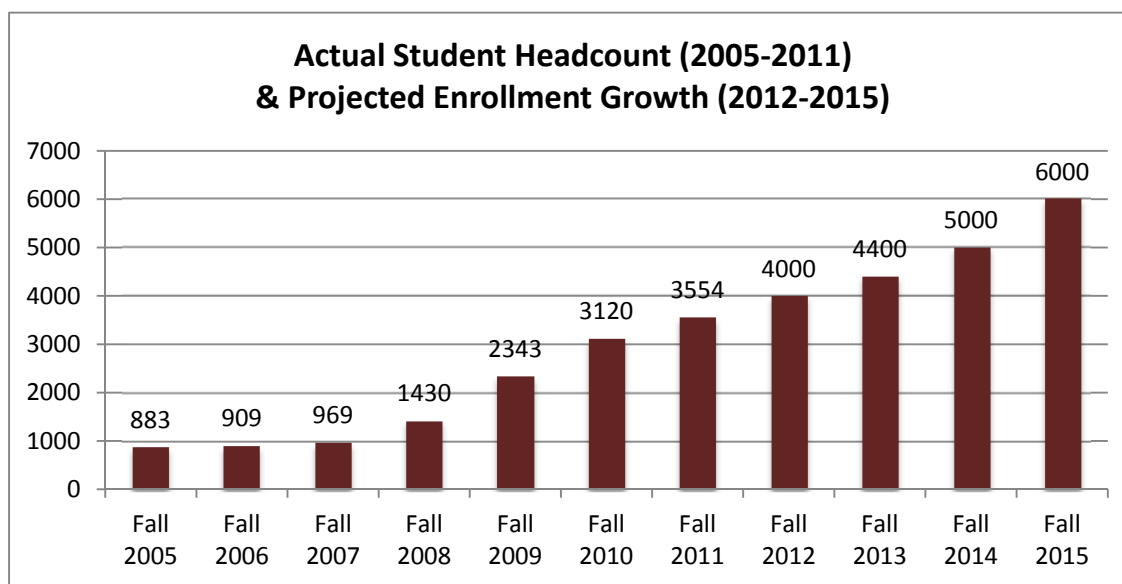
#### **c. Center for Excellence in Information Assurance: Cyber Security**

We live in a more connected 'cyber' world. To address the growing demand for cyber-courses the university will offer an expanded program in Information Technology (IT), Information Assurance (IA), and Forensics. These activities will compliment and collaborate with the demands for cyber-trained graduates, as well as work with the cyber training program of the Department of Homeland Security (DHS) sponsored programs at TEEX.

#### d. Water Conservation and Technology Center (WCTC)

The university is working with the WCTC to expand water related programs and training that is so vital to the needs of the South Texas region. Key topics include components to accelerate development, adoption of new and innovative technologies to solve emerging problems, and future needs associated with water conservation, water reuse, groundwater, desalination, and environmental issues, as well as water use for energy development. The university is working in partnership with the Texas Water Resources Institute (TWRI) and the Texas Center for Applied Technology (TCAT). Science and technology created through collaboration with the WCTC will be regionally focused to support the State's water requirements, the expanding water demands, and new hydraulic fracturing technologies for the Eagle Ford Shale oil and gas development region. Expansion of these programs will support applied research and hands-on opportunities for students and faculty.

**FIGURE 1.4 STUDENT HEADCOUNT AND GROWTH**



Source: TAMU-SA

## IV. RECOMMENDATIONS AND OBSERVATIONS

Texas A&M University-San Antonio is well positioned to have a significant impact in the Bexar County region and South Texas. As the physical facilities of the main campus grow, the university will need to strive to brand and promote its core competencies and manage growth as it implements “downward expansion” to include student enrollment in the freshman and sophomore classes by 2015. While challenges will be accompanied with growing pains, funding, enrollment management, enhancement of distance learning and the addition of expanded library services will prove vital to the reputation of the University. Branding can be enhanced by the growth of the university’s endowment and the fostering of a strong alumni network.

The hallmark for the growth and enhancement of university programs to produce value-added programs and graduates ready for work in today’s economy will hinge on three factors:

- **Access to affordable higher education** – TAMU-SA is well positioned to serve a dynamic regional market by expanding the breadth and depth of affordable educational opportunities. The current transition of students from the Alamo Colleges is a remarkable indication of the pent up demand in the region for higher education opportunities. Educating students for regional jobs is cost effective and a means to address expanded job opportunities. In doing so, it is hoped that local businesses will not only hire, but also provide scholarships and endowments to expand the arts and recreational facilities.
- **Success in higher education** – The targeted market for the TAMU-SA campus of South Texas will address growth in both the private and public sector. Oil and gas exploration and support services are estimated to more than double over the next decade, requiring expertise in a broad cross-section of disciplines, including water and environmental disciplines. The expansion of the University to a four year institution will allow a broader pool of teachers for K-12 and professionals to address private sector demands. The growing collaboration among both education and business is critical for the future of the region.
- **Economic Growth and the Community** – The San Antonio region is one of the fastest growing areas in the nation. Providing expanded higher education in the region bodes well for retaining the brightest graduates in the broad cross-section of growing firms of the region. The growth of business depends heavily on a skilled workforce. The multiplier impact spills over into retail sales, housing expansion, and enhanced services in health care.

## V. ECONOMIC IMPACT METHODOLOGY\*

Economic contribution analysis is based on the idea that a dollar spent in a region stimulates additional economic activity, or ‘multiplies’ as it circulates through the economy. This multiplier effect recognizes that the total effect on output, employment, personal income and government revenue in the region is greater than the initial dollar spent. The multiplier concept captures the ‘total’ effect of an institution’s ‘direct’ dollar and employment impact on the overall economy of the geographic area selected.

The multiplier concept captures the ‘total’ effect of an institution’s ‘direct’ impact on the overall economy of the region.

A business’s or organization’s purchase of supplies at a local company contributes not only to that business, but also to its suppliers, its supplier’s employee’s incomes and the corresponding tax revenues. Of course, some of the original expenditures leak out of the regional economy, for example as inventory and services are imported from other regions. Furthermore, employees commute from surrounding regions and businesses and households pay local, state and federal taxes. The portion of money that remains in the local economy throughout these transactions constitutes the net economic gain. Larger regional areas contain more economic linkages, which is why many large cities and multi-county regions generally have larger multipliers than smaller communities.

The measurement of the economic impact of an industry, firm, or in this case, an educational institution is driven by two important factors – dollar output and jobs. Estimating the total economic impact requires the determination of the ‘direct’ dollar output associated with the institution being evaluated. Thus, in the case of institutions of higher education, the term direct is associated with the broad base of operational expenses, to include budgets, salaries, capital improvements, tuition, and fees.

Multipliers are calculated based on the purchasing patterns of industries and institutions in the regional economy. The direct effects on the economy are the initial final-demand expenditures. The direct results cause two types of secondary effects: the indirect effect resulting from the purchase of inputs among local industries; and the induced effects resulting from the expenditures of employees of the directly and indirectly affected businesses.

\*IMPLAN Group, Inc. 2010, Version 3.0, Stillwater, MN, [www.implan.com](http://www.implan.com)

Four types of multiplier effects are reported in the contribution analysis. Output or sales multipliers measure the effect of external spending on the overall economic activity in the region. The output multiplier provides the largest economic impact value; however, the output multiplier says nothing about how the event affects the relative welfare or profitability of businesses.

The value-added multiplier is a much more appropriate measure of regional welfare. The value-added multiplier measures the event's contribution to regional gross domestic product (GDP). Thus, it is the value-added to the regional economy or the return on the local resources used in the operations of the University.

The labor income multiplier is part of the value-added multiplier but is often reported alone. The income multiplier measures the effect of final demand spending on the incomes of households in the region. The employment multiplier determines and measures the impact of initial (direct) expenditures on the regional employment. Calculations of the employment multiplier assume that existing employees are fully occupied and does not distinguish between full-time or part time workers.

San Antonio is considered one of the best places to do business in the nation and has an annual job growth of 2.4%.

## VI. BEXAR COUNTY PROFILE

Bexar County is part of the San Antonio-New Braunfels Metro Statistical Area (MSA) and has a land area of 7,313 square miles (see Figure 1.5). The seven counties making up the San Antonio MSA: Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina, and Wilson, have a combined population of 2,142,508. San Antonio, the county seat, is the nation's seventh most populated city with a population of 1,327,407, while Bexar County on a whole has a population of 1,714,773. Bexar County has grown 22.7% from 2000 to 2010.

San Antonio is Texas' top tourist attraction with approximately 26 million visitors annually. Attractions in San Antonio include the River Walk, the Alamo, SeaWorld San Antonio, Six Flags Fiesta Texas, the San Antonio Stock Show & Rodeo, and several sporting events. The San Antonio River Walk is eight miles long in central San Antonio along the San Antonio River and offers over fifty different eateries. One of the most iconic historical locations in the state, the Alamo, is located in downtown San Antonio. SeaWorld and Six Flags are the major theme park attractions in the area that attracts visitors of all ages. The San Antonio Stock Show and Rodeo allows exhibitors from around the state to

showcase their livestock animals and is a sanctioned Professional Rodeo Cowboys Association (PRCA) event. San Antonio hosts numerous sporting events including every Spurs home game, the Valero Texas Open and the Valero Alamo Bowl.

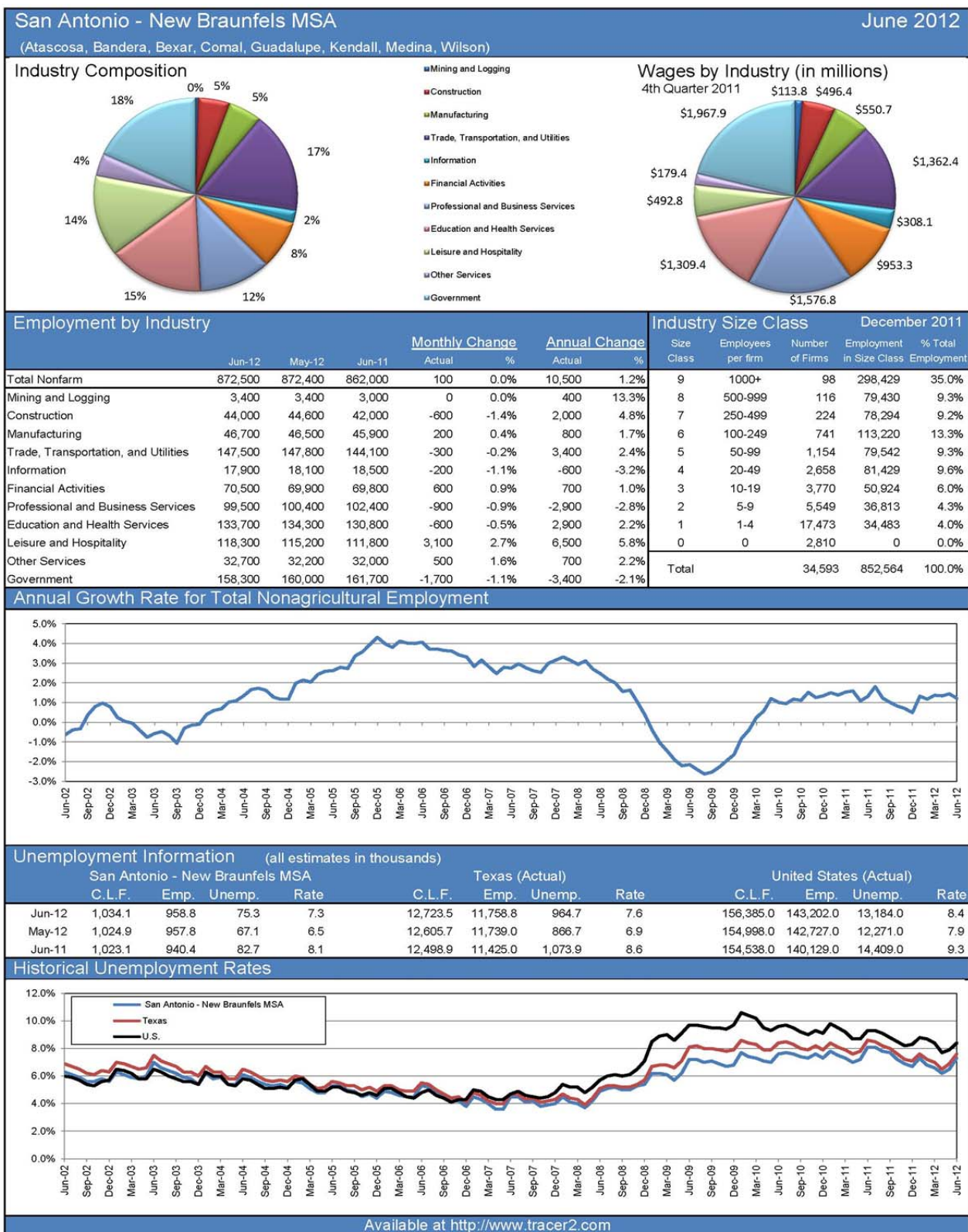
Of the citizens age 25 and older in the San Antonio-New Braunfels MSA, 77.3% are high school graduates while only 22.4% obtained a Bachelor's degree. There are 19 different independent school districts in the San Antonio area with close to 1.5 million students. These high schools provide the majority of the enrollment to the 13 universities and community colleges in Bexar County. The combined enrollment of the institutions of higher education is 109,685.

San Antonio is considered one of the best places to do business in the nation. The unemployment rate was 6.0% in September of 2012 according to the Texas Workforce Commission and has an annual job growth of 2.4%. The average income for residents in San Antonio was \$61,635 in 2011 and had a Cost of Living Index of 92.4 according to American Chamber of Commerce Research Association (ACCRA). The cost of utilities in San Antonio is 20% lower than the national average and homes are sold for nearly \$50,000 less than those located in similar markets. See SMSA Figure, 1.5.

The largest employer in the San Antonio area is the military through the Joint Base San Antonio (JBSA): Fort Sam Houston, Brooks City-Base, Lackland Air Force base and Randolph Air Force Base. The combined military and civilian employee at JBSA is nearly 73,000. Other major industries in Bexar County are aerospace, manufacturing, and oil and gas. A cross section of the top employers in the area include: USAA, H-E-B, Valero Energy, Toyota Motor Manufacturing, Southwest Research Institute, Boeing Aerospace Support Center, and AT&T.

San Antonio is host to several world-renown medical facilities: Baptist Health System, Christus Santa Rosa Health Care, Methodist Healthcare System, Brooke Army Medical Center (BAMC), and the University of Texas Health Science Center at San Antonio. The Health Care and Bioscience industry had 141,251 employees in 2009 with approximately \$6.5 billion in wages.

FIGURE 1.5 SAN ANTONIO MSA



**FIGURE 1.6 REGIONAL MSA**

Area Name	Total	Anglo	Black	Hispanic	Other
San Antonio MSA	2,156,984	755,525	150,565	1,177,244	73,650
Atascosa	44,911	16,510	286	27,785	330
Bandera	20,485	16,758	98	3,415	214
Bexar	1,714,773	530,249	126,644	1,006,958	50,922
Comal	108,472	78,219	1,845	26,989	1,419
Guadalupe	131,533	73,191	8,729	46,889	2,724
Kendall	33,410	26,020	158	6,829	403
Medina	46,006	21,644	1,013	22,871	478
Wilson	42,918	25,455	715	16,412	336

Source: <http://www.dshs.state.tx.us/chs/popdat/ST2010.shtm>

## VII. COMPLEMENTARY EDUCATION INSTITUTES IN GREATER BEXAR COUNTY REGION

A hallmark of the San Antonio region is the tremendous focus on the role and value of education at all levels. From K-12 through graduate and professional programs, the San Antonio market has a pent-up demand for educational opportunities. In this regard, Texas A&M University–San Antonio fills a major niche as one of the only two public universities of higher learning. In this 150<sup>th</sup> anniversary of the Morrill Land Grant Act of 1862, TAMU-SA mission and course offerings add a critical dimension to educate students for value-added jobs in the region and across the state of Texas.

In 2012, approximately 85 percent of the TAMU-SA student body were from the Alamo area

The independent school districts across the region have a growing enrollment of some 1.5 million students. Additionally, over 35,000 students annually are educated at the Alamo Colleges for transition to upper-level universities. The nexus of the growing student population and the demand for “education-to-work force” oriented degree programs and complimentary certifications places TAMU-SA in a significant role to address the needs and demands of the region. Today, some 85 percent of the students enrolling in upper-level courses at TAMU-SA are from the Alamo Colleges.

### Community Colleges

San Antonio has five community colleges: Northwest Vista College, Palo Alto College, St. Philip's College, San Antonio College, and Northeast Lakeview College. These five colleges are the members of Alamo Colleges with a combined enrollment of nearly 62,600 students. The Alamo Colleges offer more than 425 courses that transfer to leading four-year institutions. Between the five colleges, students have approximately 205 associate degrees and 240 certificates to pursue. The total estimated student cost per year based on a fifteen hour semester at the Alamo Colleges is roughly \$11,200.

### Four-Year University

The University of Texas-San Antonio (UTSA) is the only four-year public university in Bexar County besides Texas A&M University-San Antonio (TAMU-SA) and is the region's single largest educational enterprise. As part of the University of Texas System, UTSA was established in June of 1969. The enrollment at UTSA is approximately 30,968. UTSA offers 66 bachelors, 51 masters and 24 doctoral programs through their eight academic colleges. UTSA has three campuses in San Antonio with the Main Campus being comprised of 29 buildings on 725 acres located on Loop 1604. The Faculty at UTSA is comprised of 614 tenured and tenure-track faculty.

### Private Universities

The four private universities in San Antonio: Our Lady of the Lake University, St. Mary's University, Trinity University and University of the Incarnate Word, has a combined enrollment of 16,117. These universities offer a broad cross-section of academic majors. The enrollment of each has remained constant in recent years and should not detract from the growth of upper level and graduate programs at TAMU-SA.

Texas Lutheran University (TLU) is located in Seguin, Texas, 35 miles east of San Antonio, on 184 acres. There are approximately 1,400 students enrolled at TLU and nearly 50 degree programs to major in. The estimated total tuition for a student living off-campus is roughly \$24,990. TLU has 77 full time faculty members.

Wayland Baptist University has a campus in San Antonio, although their main campus is located in Plainview, Texas. The university has an enrollment of more than 1,000 students on the main campus, plus an additional 5,800 students spread over 13 campuses, including the campus in San Antonio.

### San Antonio Military Bases

The military bases that make up Joint Base San Antonio (JBSA), listed in the Bexar County Profile section; have the highest number of employees in San Antonio with approximately 73,000 between the military and civilian positions. The aggregate of JBSA is the largest base organization in the United States Department of Defense (DoD). JBSA services more DoD students than any other installation through diverse training, flying, medical, cyber, intelligence and installation missions every day. The annual payroll of the three major JBSA locations is more than \$1.3 billion.

Fort Sam Houston is the ninth oldest army installation in the nation and is located northeast of downtown San Antonio. Brooks City Base is located southeast of downtown San Antonio and is one of the oldest United States Air Force facilities. Lackland Air Force Base offers basic military training for all non-prior service airmen. Lackland is located southwest of downtown San Antonio. Randolph Air Force Base is located northwest of downtown San Antonio and serves as headquarters for the Air Education Training Command. Randolph alone had 16,613 personnel and an annual payroll close to \$5.75 billion.

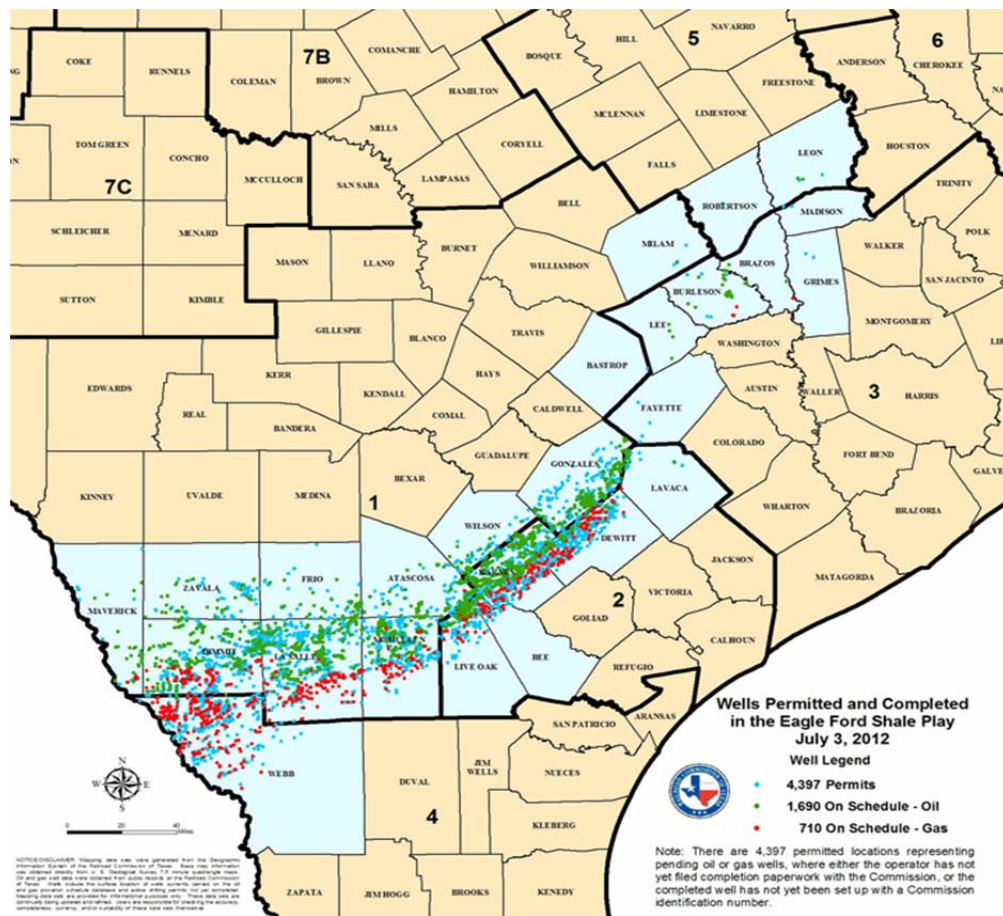
Port San Antonio is located next to Lackland Air Force Base at the former Kelly Air Force Base site. This 1,900 acre facility is equidistant from the east and west coast of the United States and strategically positioned on the north-south North American Free Trade Agreement (NAFTA) trade corridor between Mexico and Canada. An active 11,500 foot runway and 7.7 million square feet of space makes it ideal to a number of large aerospace companies. St. Philips College has programs specifically for the aerospace and aviation industry due to their proximity to the large population of aerospace workers. Port San Antonio is in Foreign-Trade Zone #80-10, allowing goods to be admitted under bond, and not subject to formal U.S. Customs entries or payments of duties.

### Eagle Ford Shale

The Eagle Ford Shale oil and gas field stretches across 30 counties (roughly 50 miles wide and 400 miles long) in South Texas from north of Gonzales County down to the Texas-Mexican border in Webb County (the attached map displays the Eagle Ford Shale, see figure 1.7 below). Natural gas production varies from depths of 4,000 to 14,000 feet across the field. There are 79 active companies and lease operators in the Eagle Ford Shale play with a rig count in mid-2012 of 270. These companies spend \$3.1 billion in salaries related to the play's development. The average employee salary across the fourteen core counties has risen by more than 25% over the past year.

The Eagle Ford Shale impacted the region's economy by more than \$25 billion in 2011. By 2021, the shale is expected to have created approximately 117,000 jobs throughout the region. This increase of jobs in the area will lead to more of the population pursuing higher education and training to satisfy the growing jobs demand.

**FIGURE 1.7 EAGLE FORD SHALE PLAY**



## ATTACHMENT 1 – PROFILE OF BEXAR COUNTY AND SURROUNDING REGION

### SAN ANTONIO REGIONAL COUNTY PROFILES

County	Population 2010	Land Area square miles	Universities	Community Colleges	ISDs <sup>1</sup>	Districts	
						Congressional	House
Bexar	1,714,773	1,239.82	10	5	15 (20)	20, 21, 23, 28, 35	116-125
Kendall	33,410	662.45	0	0	2 (5)	21	73
Comal	108,472	559.48	0	1	2 (3)	21, 35	73
Guadalupe	131,533	711.30	1	0	4 (11)	15, 35	44
Wilson	42,918	803.73	0	0	4 (6)	15, 28	44
Atacosa	44,911	1,219.54	0	0	5 (7)	28	31
Medina	46,006	1,325.36	0	0	5 (8)	23	53
Bandera	20,485	790.96	0	0	2 (4)	21	53

### BEXAR

St. Mary's University  
 University of Texas at San Antonio  
 University of Texas at San Antonio Health Science Center  
 Texas A&M University-San Antonio  
 Our Lady of the Lake University  
 Trinity University  
 University of the Incarnate Word  
 Wayland Baptist  
 Baptist University of the Americas San Antonio  
 Concordia University

#### *Community Colleges:*

Alamo Colleges (serves all counties except Medina)  
 5 campuses in San Antonio: San Antonio College, St. Philip's College, Palo Alto College,  
 Northwest Vista College, Northeast Lakeview College

### COMAL

#### *Technical College:*

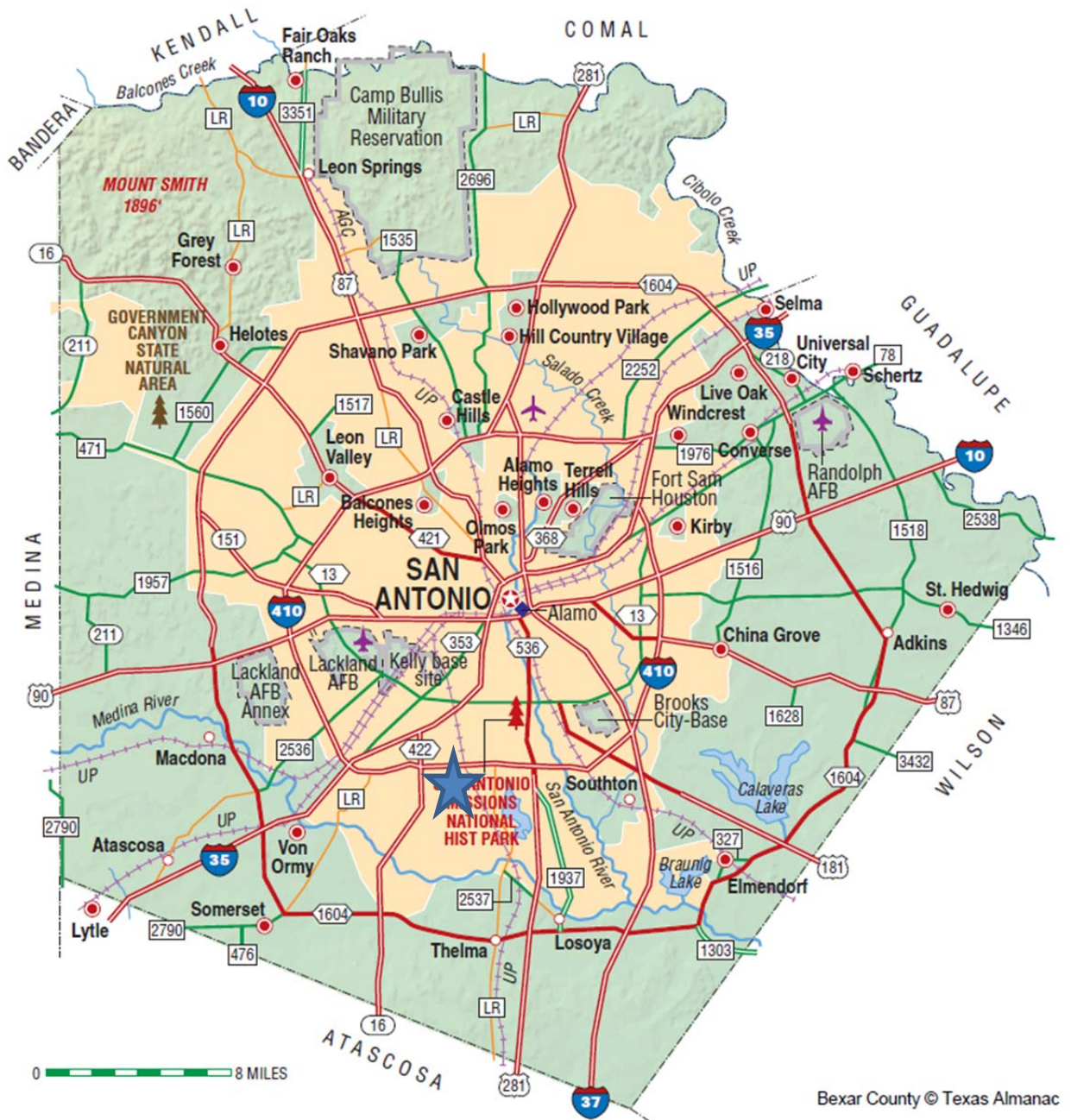
Central Texas Technology Center (at the New Braunfels Municipal Airport)

### GUADALUPE

Texas Lutheran University

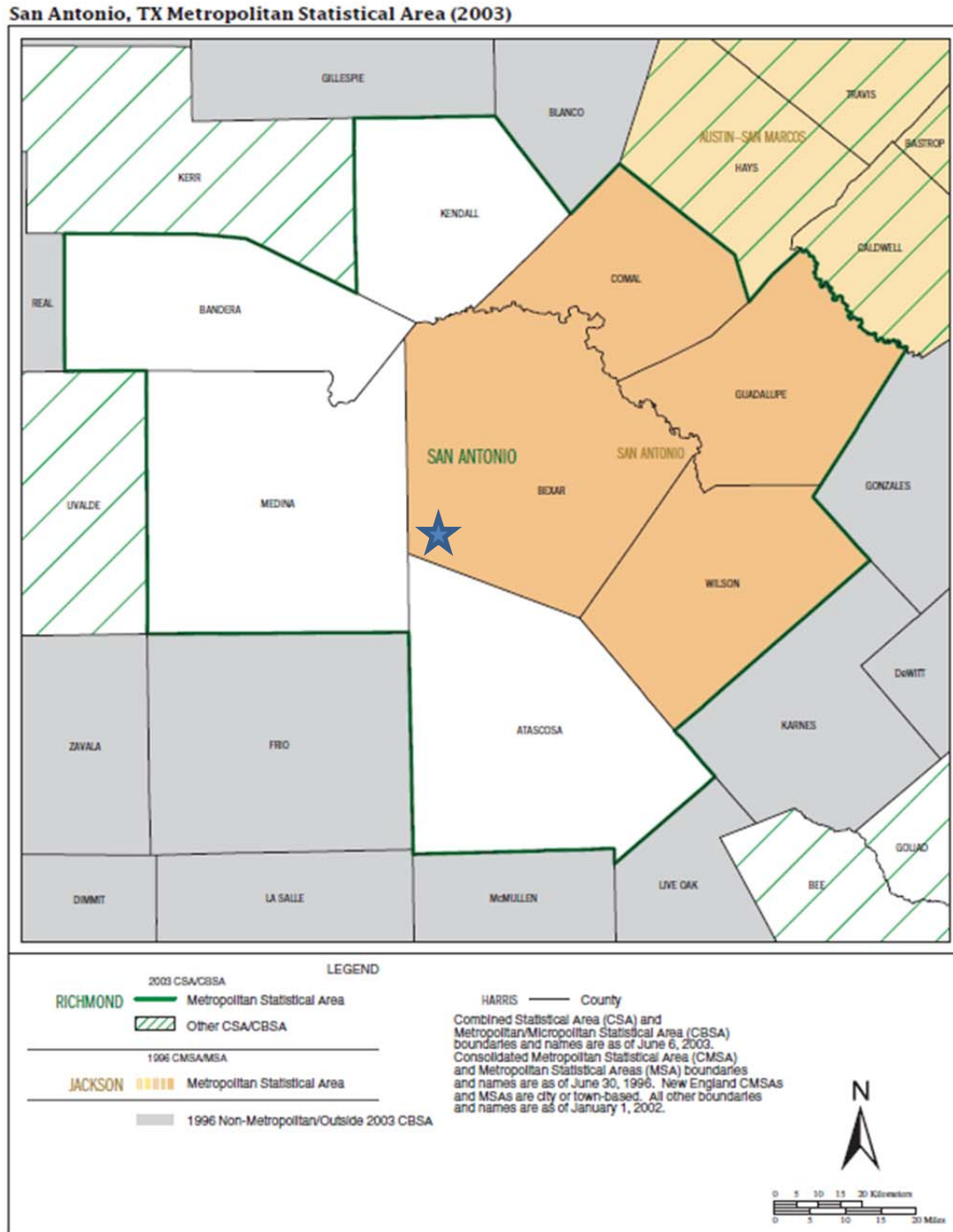
<sup>1</sup> Source: Texas Education Agency. Note: The Number in Parenthesis includes those school districts that are only partially included in the county.

## ATTACHMENT 2 – REGIONAL MAP AND TAMU-SA LOCATION



: Texas A&M University-San Antonio Main Campus

## ATTACHMENT 3 – SAN ANTONIO MSA 2003



U.S. DEPARTMENT OF COMMERCE Economics and Statistics Administration U.S. Census Bureau

2002 Economic Census



: Texas A&M University-San Antonio Main Campus

## BIBLIOGRAPHY

- Alamo Colleges. 201 W. Sheridan, San Antonio, Texas 78204-1429. 210-485-0000. 2012.  
<http://www.alamo.edu/district/>
- "Eagle Ford Shale Play." September 3, 2012. [www.eaglefordshale.com](http://www.eaglefordshale.com)
- "Economic Impact of the Eagle Ford Shale – UTSA Study. May 9, 2012.  
<http://eaglefordshale.com/news/economic-impact-of-the-eagle-ford-shale-utsa-study/>
- Gilmer, Robert. "Oil Boom in Eagle Ford Shale Brings New Wealth to South Texas." Southwest Economy. Federal Reserve Bank of Dallas. 2<sup>nd</sup> Quarter, pp. 3-7
- "Healthcare and Biosciences Impact in 2009." San Antonio Chamber of Commerce. 2009.  
[http://www.sachamber.org/cwt/external/wcpages/publications/Economic\\_Reports.aspx](http://www.sachamber.org/cwt/external/wcpages/publications/Economic_Reports.aspx)
- "Joint Base San Antonio." Military.com Base Guide. 2012. <http://www.military.com/base-guide/joint-base-san-antonio>
- "Market Report 2011: San Antonio-New Braunfels." Real Estate Center at Texas A&M University. Pp 5.  
<http://recenter.tamu.edu/mreports/2011/sanantonio.pdf>
- Mills, Skip. "Collaborating to Make an Impact." p 3-4.
- Mogford, Jon "Collaborating to make an Impact: SAN Antonio Region." The Texas A&M University System. 2012
- "Port San Antonio." 2011. <http://www.portsanantonio.us/>
- Pack, William. "San Antonio Airports impact \$5.1 Billion." San Antonio Express-News. August 9, 2012
- Texas A&M University–San Antonio. "Strategic Plan: TAMU-SA Academic Years 2011-2015." San Antonio: 2011
- \_\_\_\_\_. "Ready from Day ONE." San Antonio, 2011.
- "The Greater San Antonio Chamber of Commerce 2011 Legislative Agenda." The Chamber. 2011.  
[www.SACHamber.org](http://www.SACHamber.org)
- "UTSA Fast Facts: About UTSA." The University of Texas at San Antonio. <http://utsa.edu/about/glance/>
- Welsch, Edward. "The Hunt for Better Ways to Unlock Oil Sands." Wall Street Journal. July 24, 2012
- Wotapka, Dawn. "College Housing Firms Aim Upscale." Wall Street Journal. The Property Report. C10. 10/24/2012

## RELATED SOURCES

- "2010 Demographic Profile: San Antonio." United States Census Bureau. 9/12/2012.  
<http://www.census.gov/popfinder/?fl=4865000>
- "2010 Economic Impact of Prairie View A&M University." Prairie View A&M. 2010.  
[http://www.pvamu.edu/Include/Reports\\_Library/PV%20Economic%20Impact.pdf](http://www.pvamu.edu/Include/Reports_Library/PV%20Economic%20Impact.pdf)
- "Business and Economic Information." The Chamber. 2009. 9/10/2012.  
[http://sanantoniotxcoc.weblinkconnect.com/cwt/external/wcpages/getinvolved/Business\\_and\\_Economic\\_Information.aspx](http://sanantoniotxcoc.weblinkconnect.com/cwt/external/wcpages/getinvolved/Business_and_Economic_Information.aspx)
- City of San Antonio. "SA 2020." SA2020.org. 2011. 11/19/2012.  
[http://www.sa2020.org/wp-content/themes/sa2020/pdf/SA2020\\_Final\\_Report.pdf](http://www.sa2020.org/wp-content/themes/sa2020/pdf/SA2020_Final_Report.pdf)
- Clower, Terry. Weinstein, Bernard. "Dallas & SMU: The Power of Partnership." Southern Methodist University. April 17, 2012. <http://smu.edu/impact/>
- Ewing, Bradley T. "The Economic Impacts of Angelo State University". Texas Tech University. August 2010. [http://www.angelo.edu/asu\\_facts/documents/economic\\_impact.pdf](http://www.angelo.edu/asu_facts/documents/economic_impact.pdf)
- \_\_\_\_\_. "The Economic Impacts of Texas Tech University on Lubbock County: Today and in the Year 2020." Texas Tech University. July 2008.  
<http://www.depts.ttu.edu/provost/acadaffairs/docs/Reports/EIS-brochure-2.pdf>
- "Rio Grande Basin Initiative." Agrilife Research & Extension, Texas A&M System. 4/2012. 11/19/2012.  
<http://riogrande.tamu.edu/>
- "The Economic Impact of Sam Houston State University." Sam Houston State University. 2005.  
[http://www.shsu.edu/~coba/cbr/documents/2005economicimpactstudyfinalreport\\_001.pdf](http://www.shsu.edu/~coba/cbr/documents/2005economicimpactstudyfinalreport_001.pdf)
- "Texas Works 2008: Training and Education for All Texas." Window on State Government. The Economic Impact of Community Colleges Chapter 4. December 2008.  
<http://www.window.state.tx.us/specialrpt/workforce/colleges.php>
- Wells, Deb. "San Antonio's Health Care and Bioscience Industry Economic Impact in 2009." The Chamber. 2010. 9/10/2012. <http://biomedsa.org/pdf/hcbs-report.pdf>