



SAN ANTONIO MILITARY ECONOMIC IMPACT STUDY

THE MILITARY GENERATED A \$27.7 BILLION IMPACT



From the establishment of the Presidio de Bexar in 1718, which served as the seat of government and headquarters of military power in Colonial Texas, to the establishment of the Joint Base San Antonio (JBSA) in 2010, San Antonio has enjoyed a deep and long-standing history with the U.S. military. Over the past 294 years, the military and San Antonio have participated in many historic milestones which have formed the foundation for a continuing and significant contribution of the military to the social and economic fabric of the city.

Today, San Antonio, the 7th largest city in the U.S., is home to more Department of Defense (DoD) students and active runways than any other military installation and houses the DoD's largest hospital and only Level-One Trauma Center providing health care support to more than 250,000 veterans and their dependents.

To capture the military's economic impact in the community, the City of San Antonio's Office of Military Affairs and Economic Development Department commissioned a study conducted by the SABÉR Institute which concluded that in 2011, the DoD:

- Provided a \$27.7 billion economic impact
- Supported the employment of 189,148 in the community
- Awarded \$4 billion in local contracts including \$1.5 billion to the SA2020 targeted industries of Aerospace, Biosciences/Healthcare and Information Technology and Cybersecurity
- Supported over 55,000 DoD retirees who reside in the area

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Without question, the military has been and will continue to be an important part of San Antonio's community and economy.

SAN ANTONIO MILITARY MEDICAL CENTER (SAMMC)

Is the largest inpatient medical facility in the Department of Defense. It plays a critical role in patient care, graduate medical education and research, as well as taking care of wounded service members. SAMMC provides inpatient care in a 2.1 million-square-foot, 425-bed, state-of-the-art medical treatment facility. SAMMC is a certified Level-One Trauma Center, and receives more than 5,700 emergency room visits each month. It is one of only 15 hospitals in the United States that holds both Level-One Trauma certification and accreditation from the American Burn Association.



In 2011, the economic impact of the Department of Defense in San Antonio was \$27.7 billion, while the total employment supported by DoD was 189,148, with JBSA directly employing 92,000.

DID YOU KNOW?
JOINT BASE SAN ANTONIO SUPPORTS...

425 retired general officers, the 2nd largest concentration in the U.S.

TOTAL ECONOMIC IMPACT OF THE DEPARTMENT OF DEFENSE IN SAN ANTONIO: 2011

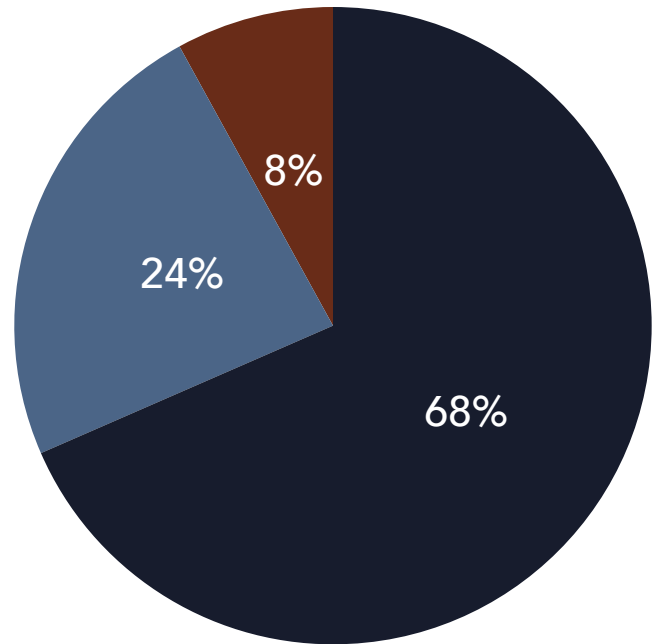
IMPACT TYPE	EMPLOYMENT	ECONOMIC OUTPUT
Direct Effect	131,963	\$20.5 Billion
Indirect Effect*	11,554	\$1.6 Billion
Induced Effect*	45,631	\$5.6 Billion
Total Effect	189,148	\$27.7 Billion

*Induced is derived from the spending of employees; indirect is supported by spending of suppliers and contractors.

ECONOMIC IMPACT BY ACTIVITY

ECONOMIC IMPACT: \$27.7 BILLION

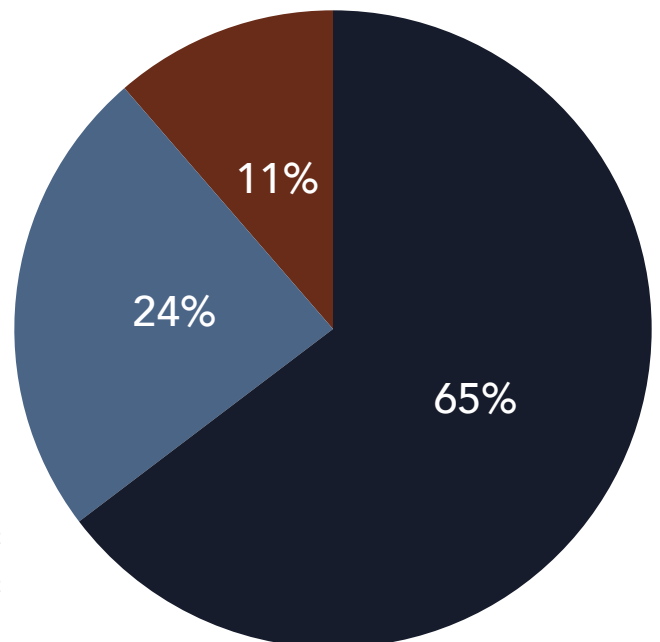
- Joint Base San Antonio: \$19B
- DoD Contracts: \$6.5B
- Military Retirees: \$2.2B



In 2011, the economic activity of the Department of Defense resulted in a total economic impact of \$27.7 billion. The largest economic activity contribution was from Joint Base San Antonio, followed by DoD contracts and military retirees.

EMPLOYMENT IMPACT: 189,148

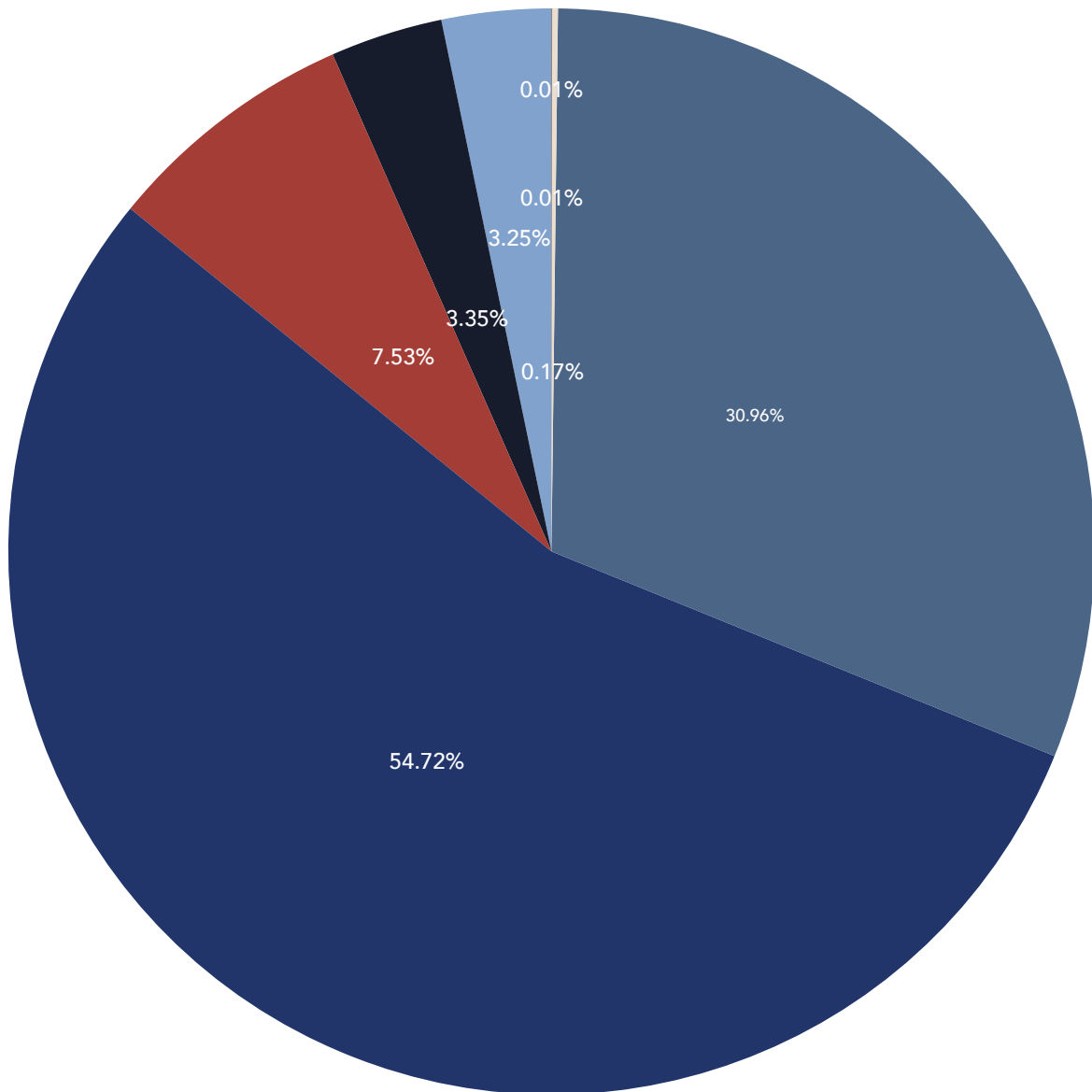
- Joint Base San Antonio: 121,970
- DoD Contracts: 45,574
- Military Retirees: 21,604



In 2011, DoD activity supported the employment of 189,148. Joint Base San Antonio accounted for the largest share of the employment impact, followed by contracts and military retirees.

LOCAL DEFENSE CONTRACTS BY INDUSTRY SECTOR

The Department of Defense awarded nearly \$4 billion in contracts in 2011, which impacted nearly every industry in San Antonio.



- Natural Resources & Mining: 0.01%
- Utilities: 0.17%
- Manufacturing: 54.72%
- Retail Trade: 3.35%
- Mining, Quarrying & Oil and Gas Extraction: 0.01%
- Construction: 30.96%
- Trade, Transportation & Utilities: 7.53%
- Transportation & Warehousing: 3.25%

DOD CONTRACTS & SA2020

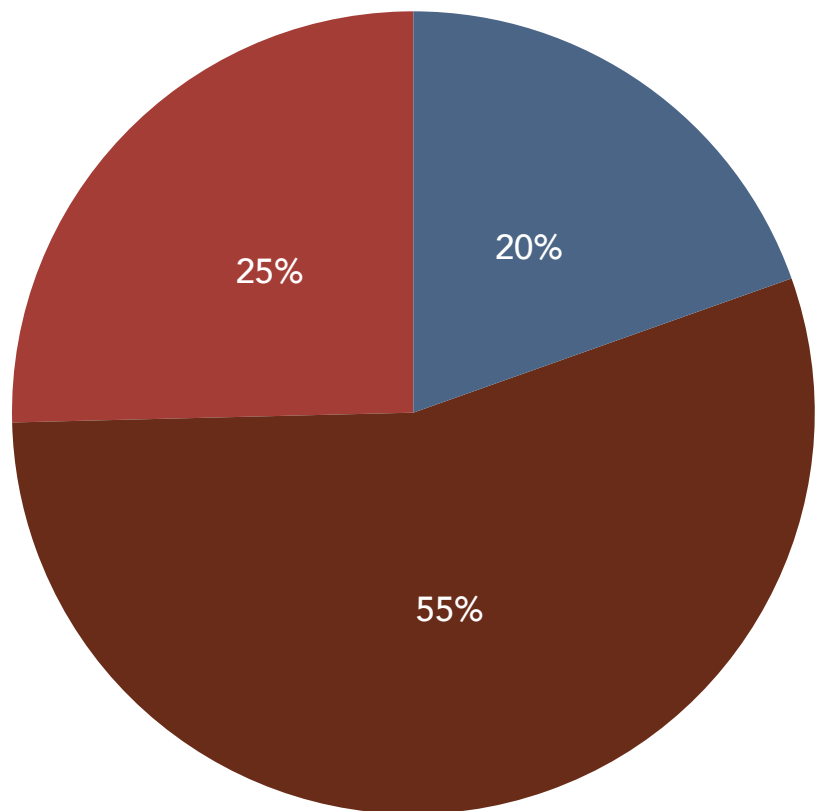


SA2020 was derived from community input, challenging and energizing the entire community to achieve shared goals by the year 2020. The community, together with Mayor Julián Castro and the City Council, agreed that in the year 2020 San Antonio would be recognized as a leader in business that prospers through innovation in 21st century industries, such as Aerospace, Cybersecurity & Information Technology and Bioscience & Healthcare.

DoD contracts span across the major SA2020 industries providing more than \$1.5 billion in local contract opportunities for San Antonio area businesses in 2011.

TOTAL = \$1.55 BILLION

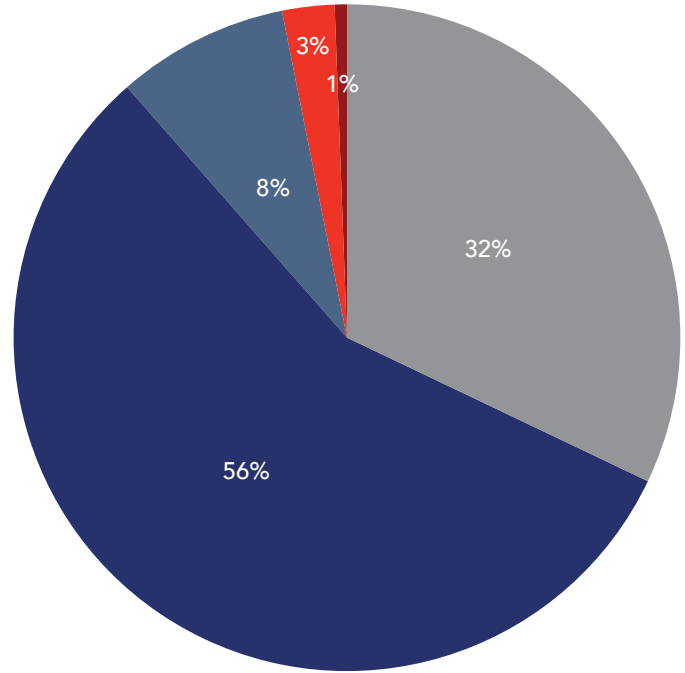
- Cybersecurity/IT: \$303M
- Aerospace: \$853M
- Bioscience & Healthcare: \$394M



ECONOMIC IMPACT OF RETIREES

RETIREES BY SERVICE: 55,208

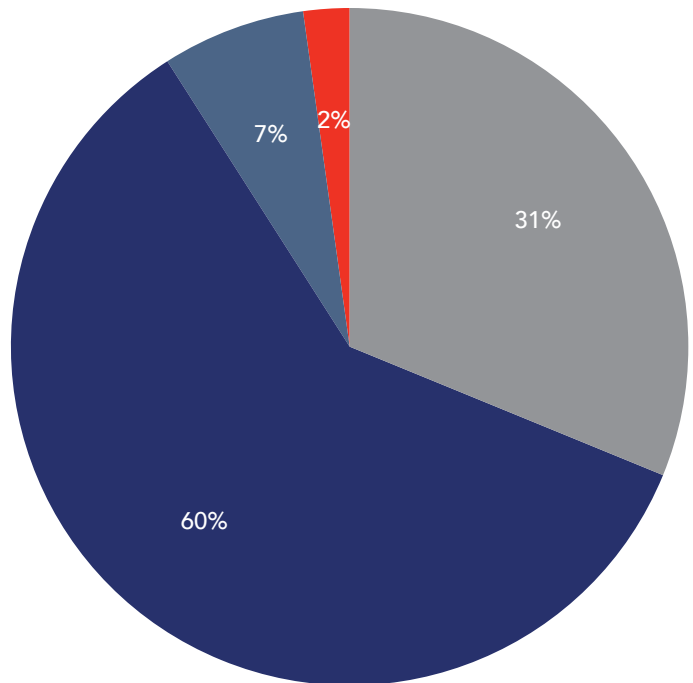
- Army: 17,621
- Air Force: 31,288
- Navy: 4,580
- Marines: 1,393
- Coast Guard: 326



More than 55,000 retirees from the four services of the armed forces, as well as retired civilians from the Department of Defense (DoD), live in the San Antonio area. Annual payments to retirees from the DoD is substantial, totaling nearly \$1.5 billion annually. This monthly paycheck provides a significant economic impact to the community, particularly in times of economic downturn.

ANNUAL PAYMENTS TO RETIREES BY SERVICE: \$1.5 BILLION

- Army: \$468M
- Air Force: \$896M
- Navy: \$102M
- Marines: \$33M



Military retirees are those individuals who retire from the military after 20 or more years of service or who became totally and permanently disabled due to military service. Veterans are individuals who serve our country in the armed forces who were honorably discharged and or who became ineligible for active service due to a disability received during the act of service.

JOINT BASE SAN ANTONIO QUICK FACTS

- Services more DoD students than any other installation, more active runways than any other installation.
- Houses the DoD's largest hospital and only Level One Trauma Center, supports more than 250,000 personnel.
- Interfaces with 1,000 civic leaders of San Antonio, 20 smaller communities, four counties and four Congressional Districts.
- Total plant replacement value is about \$32 billion.
- Annual budget of \$800 million.

DID YOU KNOW?
JOINT BASE SAN ANTONIO
COVERS

MORE THAN
55,000 ACRES



Ribbon Cutting of the new Long Barracks at Fort Sam Houston.

JOINT BASE SAN ANTONIO

As a result of BRAC 2005, Joint Base San Antonio (JBSA) was established to provide installation support functions for JBSA-Fort Sam Houston, JBSA-Lackland, JBSA-Randolph and eight other operating locations. The Air Force established the 502nd Air Base Wing to provide installation support across all JBSA locations and its Air Force commander also serves as the JBSA commander. JBSA is one of twelve joint bases in the U.S. military.

MAJOR JBSA COMMANDS & MISSIONS

Some of the major mission partner organizations within Joint Base San Antonio include:

- U.S. Army North (Fifth U.S. Army)
- Installation Management Command
- Army Medical Command
- U.S. Army South (Sixth U.S. Army)
- Army Medical Department Center & School
- Southern Regional Medical Command
- Brooke Army Medical Center (San Antonio Military Medical Center)
- Medical Education and Training Campus
- Air Education and Training Command
- Air Force Personnel Center
- Air Force Recruiting Service
- 24th Air Force
- 59th Medical Wing
- Air Force Intelligence, Surveillance & Reconnaissance Agency



Military Working Dog Training Program at Lackland Air Force Base.

REPORT PRESENTED BY



We would like to acknowledge the hard work and dedication of Steve Nivin, Ph.D., in preparing this report. Dr. Nivin is Director and Chief Economist of the Strategic Alliance for Business and Economic Research (SABÉR) Institute—an economic research collaborative between the San Antonio Hispanic Chamber of Commerce and St. Mary's University.

CITY OF SAN ANTONIO ECONOMIC DEVELOPMENT

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