

THE ECONOMIC IMPACT OF THE MILITARY COMMUNITY
IN SOUTH CAROLINA

Prepared at the request
of the South Carolina Military
Base Task Force by:

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EXECUTIVE SUMMARY

The military footprint in South Carolina is significant. The state is home to eight major military installations. According to the most recent *Demographics Report* prepared by the Office of the Deputy Under Secretary of Defense (Military Community and Family Policy), approximately 36,400 active-duty military personnel, 19,100 military reserve personnel, and 10,400 Department of Defense Civilian personnel are operating in the state. The most current *Statistical Report on the Military Retirement System* indicates that over 56,000 military retirees reside in South Carolina. In addition, there are nearly 900 defense contracting firms executing Department of Defense contracts within the state. This report, prepared by the South Carolina Department of Commerce Research Division in support of the South Carolina Military Base Task Force, analyzes the impact this military community had on the state and local economies of South Carolina for Federal Fiscal Year 2011 (October 2010 – September 2011). The principal units of analysis in this report are:

- Fort Jackson
- Shaw Air Force Base
- Joint Base Charleston
- Space and Naval Warfare Systems Center Atlantic
- Marine Corps Air Station Beaufort
- Marine Corps Recruit Depot Parris Island
- Naval Hospital Beaufort
- McEntire Joint National Guard Base
- South Carolina National Guard
- Military Retirees
- Defense Contracting Firms

These units of analysis make up South Carolina's military community. The key findings of this report are as follows:

- **South Carolina's military community generated a total of \$15.7 billion in economic activity and supported approximately 138,161 jobs earning \$7.2 billion in annual employee compensation.**
- **Fort Jackson, McEntire Joint National Guard Base, Shaw Air Force Base, Joint Base Charleston, Space and Naval Warfare Systems Center Atlantic, Marine Corps Air Station Beaufort, Marine Corps Recruit Depot Parris Island, and Naval Hospital Beaufort** generated a combined total of over \$13.33 billion in economic activity and supported 120,043 jobs in South Carolina. These jobs earned approximately \$6.4 billion in annual employee compensation.
 - These installations purchased over \$252 million worth of goods and services from South Carolina companies and individuals.
 - Every ten full-time positions on these installations supported approximately 13 full-time, non-Department of Defense civilian positions.
 - Approximately 360,541 out-of-state civilians (including tourists and non-DOD civilian personnel) visited these installations, spending a combined \$65 million during their visits.
- **Fort Jackson** generated a total of \$2.012 billion in economic activity statewide and supported 19,834 jobs. These jobs earned approximately \$941 million in annual employee compensation.
 - The 120,000 out-of-state civilians that visited Fort Jackson in 2011 generated a total of \$24.8 million in economic activity and supported at least 304 jobs earning approximately \$7.9 million in employee compensation.

- **Shaw Air Force Base** generated a total of \$1.752 billion in economic activity statewide and supported 16,445 jobs. These jobs earned approximately \$879 million in annual employee compensation.
- **Joint Base Charleston** generated a total of \$4.375 billion in economic activity statewide and supported 38,527 jobs. These jobs earned approximately \$2.326 billion in annual employee compensation.
- **Space and Naval Warfare Systems Command Systems Center Atlantic** generated a total of \$3.378 billion in economic activity statewide and supported 27,492 jobs. These jobs earned approximately \$1.553 billion in annual employee compensation.
- **Marine Corps Air Station Beaufort** generated a total of \$702 million in economic activity statewide and supported 8,544 jobs. These jobs earned approximately \$339 million in annual employee compensation.
- **Marine Corps Recruit Depot Parris Island** generated a total of \$594 million in economic activity statewide and supported 5,307 jobs. These jobs earned approximately \$220 million in annual employee compensation.
 - The 165,000 out-of-state civilians that visited Marine Corps Recruit Depot in 2011 generated a total of \$81.2 million in economic activity and supported at least 997 jobs earning approximately \$25.7 in employee compensation.
- **Naval Hospital Beaufort** generated a total of \$167 million in economic activity statewide and supported 1,591 jobs. These jobs earned approximately \$77 million in annual employee compensation.
- **McEntire Joint National Guard Base** generated a total of \$296 million in economic activity and supported 2,303 jobs. These jobs earned approximately \$61 million in annual employee compensation.
- **The South Carolina Army National Guard** generated a total of \$697 million in economic activity and supported 12,318 jobs. These jobs earned approximately \$349 million in annual employee compensation.
- There are over **56,000 military retirees** residing in South Carolina who draw pension payments from the military retirement system. Pension payments to these retirees totaled \$1.3 billion for FY 2011.
 - An estimated 22,700 military retirees have chosen to reside in South Carolina because of the state's military installations and access to the amenities offered by these installations. These retirees generated \$442 million in economic activity for FY 2011.
- Since 2000, the Department of Defense has obligated over \$34.1 billion to **defense contractors operating in South Carolina**, accounting for approximately 2% of South Carolina's gross state product each year.
 - Defense contractors operating in South Carolina but serving the out-of-state military community generated a total of \$1.29 billion in economic activity in FY 2011 and supported at least 5,800 jobs earning \$285 million in employee compensation.

1. Introduction

The military footprint in South Carolina is significant. The state is home to eight major military installations. According to the most recent *Demographics Report* prepared by the Office of the Deputy Under Secretary of Defense (Military Community and Family Policy), approximately 36,400 active-duty military personnel, 19,100 military reserve personnel, and 10,400 Department of Defense Civilian personnel are operating in the state. The most current *Statistical Report on the Military Retirement System* indicates that over 56,000 military retirees reside in South Carolina. In addition, there are nearly 900 defense contracting firms executing Department of Defense contracts within the state. This report, prepared by the South Carolina Department of Commerce Research Division in support of the South Carolina Military Base Task Force, analyzes the impact this military community had on the state and local economies of South Carolina for Federal Fiscal Year 2011 (October 2010 – September 2011). The principal units of analysis in this report are:

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South Carolina's military installations directly impact the state economy in a variety of ways. The personnel assigned to each installation, both military and civilian, spend a significant portion of their income on goods and services offered by local vendors. Because their income comes from the Federal Government, purchases made by personnel assigned to an installation represent an injection of outside money into the state's economy rather than a redistribution of existing in-state capital. Military installations also purchase supplies and services from local establishments. Once funds have flowed into the local economy, additional economic activity is supported by economic multiplier effects.

Beyond the economic activity of the military installations, South Carolina's state and local economies receive a significant boost from the South Carolina National Guard, military retirees who are drawing payments from the military retirement system, and defense contractors performing work in the state. This report examines the economic impact of these entities and, by doing so, provides a more complete perspective of the military's impact on the state and local economies of South Carolina.

2. Methodology

To quantify the economic impact of South Carolina's military community the Research Division at the South Carolina Department of Commerce utilized IMPLAN, an independent general input-output model that estimates how events impact economies within specified regions. IMPLAN is an acronym for Impact analysis for PLANning, and is the most widely used economic software for this type of analysis.

IMPLAN identifies the effects of a change in economic activity within a specified region through the use of multipliers, which vary by industry and are determined by the size of the local supplier network. Multipliers are measurements of the rate at which a direct effect creates an indirect effect (e.g., changes in the inter-industry transactions when supplying industries respond to increased demands from the directly affected industries and changes in local spending that result from income changes in the directly and indirectly affected industries). IMPLAN generates three multipliers for each industry within a specified region, which are defined as follows:

Employment Multiplier: Measures the total change in employment due to a one-unit change in the employed labor force of a particular sector.

Labor Income Multiplier: Measures the total change in income throughout the economy from a dollar-unit change in final demand for any given sector.

Output Multiplier: Measures the sum of direct and indirect requirements from all sectors needed to deliver an additional dollar-unit of output.

In a broad sense, these multipliers allow for estimates to be made on how changes in economic activity in one industry ripple through the entire economy of the specified region. Consider a hypothetical industry in South Carolina with a total employment multiplier of 2. The loss of 1 full-time position within that industry would result in a total loss of 2 jobs within South Carolina ($2 = 1 \times 2$). Conversely, the addition of 1 full-time position within that industry would result in a total gain of 2 jobs within South Carolina. Regarding military installations, multipliers allow for estimates to be made on the proportion of the workforce, total income of the workforce, and total annual expenditures within a specified region that are attributable to a specific military installation. In addition to capturing the multiplier effects of a given industry, IMPLAN is able to estimate specific industry-to-industry linkages. This allows for estimates to be made on the economic impact that a military installation has on all other industries within the specified region.

2.1 IMPLAN Inputs

A review of previous state-level military economic studies conducted for South Carolina and other states indicated that IMPLAN requires four military installation-specific inputs to best estimate the economic impact of a military installation: employment numbers, payroll totals, purchase/procurement totals, and visitor totals. The definition of each input is summarized below.

Employment: The total number of in-state active duty, reserve, civilian, rotational, and student personnel assigned to the installation. Rotational personnel receiving Basic Combat Training (BCT) at Fort Jackson and Marine Corps Recruit Depot Parris Island do not routinely leave their host installation and have little or no direct impact on the state and local economies. Because of this, those rotational personnel receiving BCT are not counted as part of an installation's total employment. The decision to exclude these rotational personnel means that the analysis conducted in the following pages results in a conservatively low estimate – the economic impact of installations hosting rotational personnel receiving training is

likely higher than what is reported. The analysis does account for base expenditures on food and other supplies used to support the recruits in BCT. The payroll impact of rotational personnel receiving advanced training at Fort Jackson and Joint Base Charleston are included in this analysis. A portion of their income is assumed to be spent in the local economy of their host installation. Students are considered non-military civilians studying at the base temporarily, perhaps in the form of an internship.

Payroll: The total payroll for all personnel employed at the installation. Rotational personnel receiving BCT at Fort Jackson or Marine Corps Recruit Depot Parris Island receive a regular paycheck but, because they do not routinely leave their host installation, have no opportunity to spend their money in the local economy. Because of this, those rotational personnel receiving BCT are not counted as part of the installation's total payroll. Rotational personnel receiving advanced training at Fort Jackson and Joint Base Charleston are allowed to leave their host installation. This report assumes that these rotational personnel spend 25% of their pay in the state and local economies.

Procurement: The total in-state purchases and expenditures of the installation, including all purchases and expenditures related to the training and accommodation of rotational personnel.

Visitors: The number of out-of-state civilians (including tourists and non-DOD civilians) that visited the installation and the amount of money they spent off-base, as estimated by the installation. While out-of-state civilian visitors are common at every military installation, their economic impact is likely most significant in the areas surrounding Fort Jackson and Marine Corps Recruit Depot Parris Island. These two installations attracted approximately 285,000 out-of-state civilians each year, the majority of whom are attending one of the installation's graduations.

To gather necessary data for these inputs the South Carolina Department of Commerce designed a standardized data collection survey and asked a relevant point-of-contact at each military installation to complete it. Survey respondents provided detailed information for Fiscal Year 2011. A copy of the data collection from is provided in Appendix A.

2.2 IMPLAN Outputs

IMPLAN applies multipliers to each of the above inputs to determine the **total effect** that a military installation has on the size of the workforce (**employment**), the total income of the workforce (**labor income**), and the total annual expenditures (**output**) within a specified region. In the case of a military installation in South Carolina, the total effect for each of these measures of economic activity is defined as:

Employment: Total number of *all* full-time equivalent (FTE) jobs in South Carolina supported by the military installation. This includes the FTE positions that are directly employed by the military installation *and* the FTE positions off-base that exist because of the expenditures of the military installation as well as those FTE positions off-base that exist because of the off-base spending of the FTE personnel directly employed by the military installation.

Labor Income: Total labor income of *all* (FTE) jobs in South Carolina supported by the military installation. This includes the labor income of the FTE positions that are directly employed by the military installations *and* the labor income of the FTE positions off-base that exist because of the expenditures of the military installation as well as the labor income of those FTE positions off-base that exist because of the off-base spending of the FTE personnel directly employed by the military installation.

Output: Total expenditures of the military installation *and* all industries supported by the military installation in South Carolina, which is quantified as the sum of: (1) gross expenditures of the military installation; (2) spending by suppliers and contractors producing inputs for the installations; and (3) household spending on goods and services by the employees of the installation and the employees of suppliers and contractors producing inputs for the installation.

IMPLAN also uses procurement inputs to determine the business volume in each industry sector within the specified study region that is the result of a military installation's spending. This analysis reports the direct effect, multiplier effect, and total effect of each military installation for each of these measures of economic activity, as well as the twenty industry sectors that are most impacted by each military installation

2.3 Joint Base Charleston and Space and Naval Warfare Systems Center Atlantic Methodology

Joint Base Charleston is home to over 50 tenant commands, including Space and Naval Warfare Systems Centers Atlantic (SSC Atlantic). SSC Atlantic is a Department of the Navy organization under the direct command of Space and Naval Warfare Systems Command (SPAWAR). Over 3,700 permanent personnel are assigned to SSC Atlantic and the facility is not geographically located within the perimeters of Joint Base Charleston. Given the large headcount of SCC Atlantic, and the stand-alone duties performed by SSC Atlantic, this study treats SSC Atlantic as an individual, independent military installation in this study rather than a part of Joint Base Charleston. Detailed employment, labor income, and procurement/purchases for SSC Atlantic were provided for this study.

2.4 Naval Hospital Beaufort Methodology

Naval Hospital (NH) Beaufort is comprised of three components: a main hospital, a branch clinic at Marine Corps Recruit Depot (MCRD) Parris Island, and a branch clinic at Marine Corps Air Station (MCAS) Beaufort. For this study, each branch clinic was treated as part of its *host* installation, not part of NH Beaufort. For example, the personnel reporting to NH Beaufort assigned to the branch clinic at MCAS Beaufort are included in the total personnel count of MCAS Beaufort, as are the clinic's payroll and purchases. Conversely, only the personnel, payroll, and purchases of the main hospital, not including the branch clinics, are used in our analysis of NH Beaufort. The decision to take this approach was based on the reasoning that the two branch clinics primarily serve the host installation's population.

2.5 South Carolina Air National Guard and McEntire Joint National Guard Base Methodology

The South Carolina Air National Guard (SCANG) consists of more than 1,500 Airmen who work and drill at McEntire Joint National Guard Base (JNGB), a federal military installation operated by the SCANG. All SCANG personnel are assigned to McEntire JNGB and all purchases made by the SCANG would be made out of McEntire JNGB. Due to the identical nature of McEntire JNGB and the SCANG, the economic impact of the two entities is identical. This report treats McEntire JNGB and the SCANG as one in the same.

2.6 Linked Retirees Methodology

Some military retirees in South Carolina are directly linked to the state's military installations. These retirees reside in South Carolina because of the state's military community and access to the amenities offered by one of state's military installations. This study estimates the number of retirees linked to each installation using a least square prediction estimation technique, which estimates the impact that a one-person decrease in the number of active-duty personnel in South Carolina has on the number of military retirees in the state.

2.7 Defense Contractors Methodology

The Department of Defense (DOD) issued 27,533 contracts (including modifications) to over 800 defense contractors performing work in South Carolina for Fiscal Year 2011. Some contracts were issued to companies that served one of the state's military installations (e.g., an electrician rewiring a barracks) while some contracts were issued to companies that served the military community outside of South Carolina (e.g., a researcher performing an analysis for the Pentagon). This study identifies a defense contractor as serving the military *outside* of South Carolina as any contractor that was awarded contracts (in the aggregate) in excess of \$10 million for FY 2011, unless there was a reason to believe the contractor was serving the needs of one of the state's military installations. Defense contractors meeting this criterion include Sopakco, Michelin, FN Manufacturing, General Dynamics, and others. Such defense contractors would be fairly insulated from any changes to South Carolina's military composition but would be impacted by changes to the nation's total military expenditures. An analysis on the statewide economic impact of defense contractors operating in South Carolina but serving the out-of-state military community is conducted in chapter six. The economic impact of defense contractors serving the state's military installations is captured in the output effect of each military installation, where the dollar amount obligated to each of these contractors is included in the procurement / purchase data provided by each installation.

2.8 Impact of Construction

Significant constructions project were initiated or completed in FY 2011 at Fort Jackson, Shaw Air Force Base, and Marine Corps Air Station Beaufort. In some instances, the installations funded these construction projects directly. In others, the DOD funded construction projects directly. This report captures the economic impact of both types of construction projects. In the case of the former, the procurement information provided by each installation includes all dollars spent in-state for construction purposes. In the case of the latter, the value of DOD contracts issued to defense contractors serving the state's military installations includes all DOD dollars spent in-state for in-state construction purposes.

2.9 Interpreting the Findings of this Report

As with any economic analysis, there are caveats to this report. First, the IMPLAN multipliers used for this analysis are based on 2010 data for the state and counties of South Carolina. These figures were the latest available at the time of analysis. Applying 2010 multipliers to 2011 direct data does not pose any serious methodological problems – IMPLAN multipliers do not change drastically from one year to the next. Second, the input data used for each military installation was provided directly by the installation and its host community. The same is true for the input data regarding the South Carolina National Guard. Except when noted, no further adjustments, additions, or omissions were made to the input data provided.

Third, this analysis measures the gross employment, wage, and economic output impact of the military community in South Carolina, rather than the contribution to the state's economy net of taxes used to fund these military expenditures. As with any government enterprise, there is an opportunity cost associated with the taxation used to fund the military. This analysis does not attempt to provide an assessment of this opportunity cost, which is the potential effect had these tax dollars been spent elsewhere in the economy, either through other government programs or through private expenditures and investments.

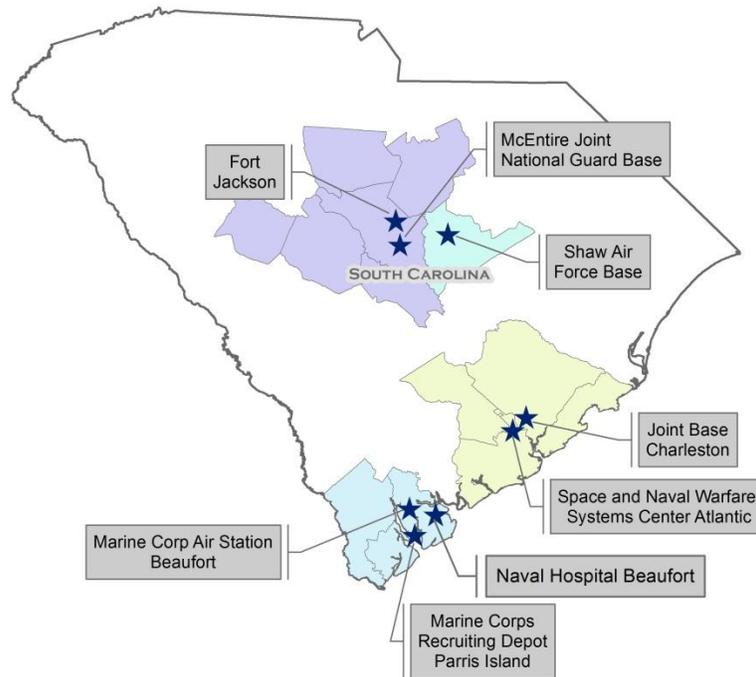
Fourth, the US Bureau of Economic Analysis cautions inaccuracies may be higher when modeling industries that comprise a large proportion of the economy of a small area. Because of the large economic impact of the military in South Carolina, the margins of error in this report are possibly higher than similar analysis of smaller industries in the state. Fifth, output should not be confused with gross

state product (GSP), which is a measure of economic value added. Output, which is analogous to business sales, can be looked at from the revenue side (i.e. gross revenues earned in a year) or from the expenditures side (i.e. expenditures + payroll + taxes + profits). In the case of a military installation, output is looked at on the expenditure side, with output being equal to annual expenditures.

3. Individual Facility Reports

The following sub-sections provide an analysis on the economic impact of South Carolina's **federal military installations** on the state and local economies. For reference, the geographic location of each federal military installation, as well as the outline of the Metropolitan or Micropolitan Statistical Area each installation resides in, is presented in Figure 1.

Figure 1. Locations of Federal Military Installations in South Carolina



The following information is provided for each installation: (1) a historical and present overview of the installation as well as its current mission, (2) the impact of the installation on the state economy, and (3) the impact of the installation on the regional and local economies within the state.¹ Each analysis reflects the total economic impact of the installations' employment and wages, procurement activities, and base visitors. The economic impact of the South Carolina Army National Guard, military retirees, and defense contractors are addressed separately in latter sections.

¹ A general rule of economic impact analysis is that the smaller the study area the smaller the economic impact of an industry. Hence, regional and local economic impacts are always smaller than statewide impacts for various reasons, such as: leakage, personnel assigned to an installation do not always live in close proximity to the installation, businesses serving the installations are not always located in close proximity to the installation, etc.

3.1 Fort Jackson

Mission Statement: The United States Army Training Center and Fort Jackson trains Soldiers and other personnel in support of full spectrum operations; receives and transforms volunteers into Soldiers who are able to function effectively in their first unit of assignment; trains and educates our military and civilian leaders; and provides the highest possible quality of life for our Soldiers and their Families.

Named in honor of President Andrew Jackson, a South Carolina native, Fort Jackson was founded in 1917 to serve as a training center for troops training for World War I. The first military unit organized at the Fort was the 81st “Wildcat” Division, which was later incorporated into the 30th “Old Hickory” Division. More than 45,000 troops from these two divisions went to France as part of the American Expeditionary Forces. Control of the Fort reverted to the Cantonment Lands Commission in 1925, but once again came under Federal control in 1939 when it was organized as an infantry training center. More than 500,000 men who served in World War II received some phase of their training at Fort Jackson. In 1973, Fort Jackson was designated as a US Army Training Center, charged with supplying the Army with trained, disciplined, and physically fit soldiers.

Today, Fort Jackson is the US Army’s largest and most active Initial Entry Training Center, training 50% of the Army’s Basic Combat Training (BCT) load and 70 percent of the women entering the Army. BCT is a ten week course that trains Soldiers in rifle marksmanship, dismounted land navigation, patrolling, military operations in urban terrain, convoy defense, improvised explosive device (IED) defeat, and several other skills that are essential for Soldiers in today’s Army. The 165th, 171st, and 193rd Infantry Brigades provide BCT to more than 36,000 Soldiers each year at Fort Jackson. Upon graduation from BCT, Soldiers are sent to the next phase of their training that in almost all cases is Advanced Individual Training (AIT), where Soldiers have the opportunity to practice their Military Occupational Specialty (MOS). More than 8,000 Soldiers receive their AIT at Fort Jackson each year, and more than 50,000 soldiers graduate from BCT and AIT each year at Fort Jackson.

Fort Jackson provides additional advanced training to over 20,000 students each year through several advanced schools. The Drill Sergeant School trains all active duty and reserve Army Drill Instructors. The Soldier Support Institute (SSI), established at Fort Jackson in 1994, houses the Adjunct General School, the Army School of Music, Financial Management School, Noncommissioned Officers Academy, and the Recruiting and Retention School. The Defense Academy for Credibility Assessment, which trains personnel for careers as forensic psycho-physiologists, and the Armed Forces Chaplaincy Center and School, which houses the training for all US military chaplains, are both located on base.

Medical support at Fort Jackson is provided by Moncreif Army Community Hospital, a 60-bed general medical and surgical hospital that is accredited by the Joint Commission. In addition to primary care, the hospital provides immunization services, laboratory services, radiology services, and behavioral health service. Moncrief serves the personnel and families assigned to Fort Jackson and Shaw Air Force Base, as well as the thousands of military retirees residing in the Midlands.

Fort Jackson is located in Columbia and spans more than 52,000 acres, with over 100 ranges and field training sites and 1,150 buildings. Approximately 15,000 acres in the eastern portion of Fort Jackson is licensed to the South Carolina Army National Guard (SCARNG) which operates the McGrady National Training Center (MTC). MTC trains members of the SCARNG and is the central training facility for Navy and Air Force Personnel assigned as Individual Augmentees. The installation hosts a wide array of recreational services and facilities. The Fort has one elementary school, one middle school, two bowling alleys, several park and picnic areas, a sport-shooting range, a miniature golf course, hunting and fishing grounds, a recreational water park, and a 36-hole golf course. Over 72,000 rounds of golf are played at

the golf course each year. Major renovations over the last five years have significantly improved officer, enlisted, and family housing.

3.1a Fort Jackson's State Economic Impact

As demonstrated in Table 1a, Fort Jackson generated a total of \$2.012 billion in economic activity in South Carolina for FY 2011. The Fort supported a total of 19,834 jobs earning approximately \$941 million in employee compensation. Every ten full-time positions on the Fort supported approximately 15 full-time positions off-base.

Table 1a. Statewide Economic Impact of Fort Jackson Summary for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	7,798	\$469	\$693
Multiplier Effect	12,042	\$471	\$1,318
Total Effect	19,834	\$941	\$2,012

Notes: The rotational personnel receiving BCT at Fort Jackson in 2011 are not included in this analysis or any other analysis in section 3.1. Rotational personnel receiving advanced training are included.

The Total Economic Output in Table 1a includes the economic impact of the estimated 120,000 out-of-state civilians that visited the Fort in FY 2011, the majority attending one of the Fort's bi-monthly graduations. Estimates provided by the Fort on the spending habits of these out-of-state civilians indicate that they generated a total of \$24.8 million in economic activity statewide and supported *at least* 304 jobs earning approximately \$7.9 million in employee compensation.

Statewide, Fort Jackson had a significant economic impact on several industry sectors. Table 1b summarizes the twenty most impacted industry sectors.

Table 1b. Statewide Economic Impact of Fort Jackson on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Medical and diagnostic labs and outpatient and other ambulatory care services	\$249
Construction of other new nonresidential structures	\$136
Food services and drinking places	\$73
Real estate establishments	\$56
Offices of physicians, dentists, and other health practitioners	\$38
Wholesale trade businesses	\$34
Scientific research and development services	\$31
Monetary authorities and depository credit intermediation activities	\$31
Private hospitals	\$26
Construction of new residential permanent site single- and multi-family structures	\$26
Electric power generation, transmission, and distribution	\$24
Nondepository credit intermediation and related activities	\$24
Telecommunications	\$23
Insurance carriers	\$18
Architectural, engineering, and related services	\$18
Securities, commodity contracts, investments, and related activities	\$16
Legal services	\$14
Other state and local government enterprises	\$14
Services to buildings and dwellings	\$13
Retail Stores - General merchandise	\$13

3.1b Fort Jackson's Economic Impact in the Columbia MSA.

Fort Jackson is located within the Columbia Metropolitan Statistical Area, which encompasses Calhoun, Fairfield, Kershaw, Lexington, Richland, and Saluda Counties. As demonstrated in Table 1c, the Fort generated a total of \$1.698 billion in economic activity in the Columbia MSA for FY 2011. The Fort supported a total of 16,460 jobs earning approximately \$856 million in employee compensation. Every ten full-time positions on the Fort supported approximately 11 full-time positions off-base in the Columbia MSA.

Table 1c. Economic Impact of Fort Jackson in the Columbia MSA for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	7,773	\$469	\$692
Multiplier Effect	8,687	\$387	\$1,006
Total Effect	16,460	\$856	\$1,698

The Total Economic Output in Table 1c includes the economic impact of the estimated 120,000 out-of-state civilians that visited the Fort in FY 2011. Analysis of these out-of-state civilians indicates that they alone generated a total of \$24.1 million in economic activity in the Columbia MSA and supported *at least* 296 jobs earning approximately \$7.6 million in employee compensation.

Fort Jackson had a significant economic impact on several industry sectors within the Columbia MSA. Table 1d summarizes the twenty most impacted sectors.

Table 1d. Economic Impact of Fort Jackson on Select Industry Sectors within the Columbia MSA for FY 2011
(Dollars in Millions)

Industry Sector	Output
Medical and diagnostic labs and outpatient and other ambulatory care services	\$248
Construction of other new nonresidential structures	\$69
Food services and drinking places	\$61
Real estate establishments	\$40
Offices of physicians, dentists, and other health practitioners	\$29
Insurance carriers	\$28
Monetary authorities and depository credit intermediation activities	\$28
Private hospitals	\$27
Construction of new residential permanent site single- and multi-family structures	\$24
Wholesale trade businesses	\$22
Telecommunications	\$20
Nondepository credit intermediation and related activities	\$20
Electric power generation, transmission, and distribution	\$19
Legal services	\$13
Securities, commodity contracts, investments, and related activities	\$10
Services to buildings and dwellings	\$10
Retail Stores - General merchandise	\$10
Employment services	\$9
Hotels and motels, including casino hotels	\$9
Architectural, engineering, and related services	\$9

3.2 Shaw Air Force Base

Mission Statement of the 20th Fighter Wing: Provide combat-ready airpower and combat-ready Airmen to meet any challenge, anytime, anywhere.

Named after 1st Lieutenant Ervin Shaw, a Sumter County native who was killed in action during World War I, Shaw Air Force Base (AFB) is one of the oldest installations in the US Air Force and the only AFB on the East Coast with dual runways. Over 8,100 active duty and reserve personnel are assigned to the Air Base, with 87.5% of those personnel living off-base. Shaw AFB is the only AFB on the East Coast with dual runways.

The Air Base is home to the 20th Fighter Wing (FW), the largest F-16 combat wing in the Air Force and the largest suppression wing in the continental United States. The 20th FW operates approximately 80 F-16CJ fighter aircraft in conventional and anti-radiation suppression of enemy air defenses, strategic attack, counter air, air interdiction, joint maritime operations, and combat search-and-rescue missions. In 2011, the FW was the most tasked in the Air Force, flying more than 21,000 hours. The 20th FW also retains the responsibility for providing facilities, personnel, and materials for Shaw AFB's operations and the more than 9,500 permanent personnel assigned to the base.

The installation is also home to the 9th Air Force, US Air Forces Central (USAFCENT), and the 3rd Army Headquarters. The 9th Air Force is the headquarters for USAFCENT and serves as the air component for a 27-nation area within US Central Command's (USCENTCOM) area of responsibility (AOR). The 9th Air Force is also an intermediate headquarters under Air Combat Command (ACC) and is responsible for five active-duty flying wings, as well as overseeing the operational readiness of 18 designated units of the Air National Guard and Air Force Reserve. The 3rd Army transferred to Shaw AFB as a result of the 2005 Base Realignment and Closure (BRAC) Commission. Dual hatted as US Army Central (ARCENT), the US 3rd Army is the Army Component of USCENTCOM and the Coalition Forces Land Component Command (CFLCC). The US 3rd Army deployed to Kuwait after the September 11, 2001 attacks and directed the ground war in Afghanistan and surrounding countries from November 11 to May 31, 2001. Today, the 3rd Army continues to support Operation Enduring Freedom and provides Title 10 support to all US Army Forces in USCENTCOM's AOR.

Other tenant organizations at Shaw AFB include the 682nd Air Support Operations Squadron, 372nd Training Squadron (Detachment 2), 337th Recruiting Squadron, Air Force Audit Agency (Team D, Mid-Atlantic area audit office), Air Force Office of Special Investigations (Detachment 212), and Viper East F-16 Demonstration Team.

Shaw AFB underwent a number of significant infrastructure improvements in 2011. In February, construction commenced on expanding the USAFCENT and 9th Air Force Headquarters facility by 49,880 square feet. The project will cost a total of \$14.4 million and is scheduled to be completed by September 2012. In October, the Fitness Center Annex, located within two hundred yards of the 3rd Army Headquarters, officially opened. The 23,000-square-foot Annex cost \$5.4 million and serves the 3rd Army's personnel. In November, construction on a new \$20 million shopping center was completed. Owned and operated by the Army & Air Force Exchange Services, the center offers customers a range of services and products including a grocery store, pharmacy, barber shop, and beauty shop. The center was built with the latest US Green Building Council LEED Silver Standards for energy and environmental conservation and employs 49 people. Later in November the commander of the 20th FW broke ground on a new family housing privatization development project that will demolish 680 existing homes and replace them with 630 new homes by 2015.

3.2a Shaw Air Force Base's State Economic Impact

As demonstrated in Table 2a, Shaw AFB generated a total of \$1.752 billion in economic activity in South Carolina for FY 2011. The AFB supported a total of 16,445 jobs earning approximately \$879 million in employee compensation. Every ten full-time positions on the AFB supported approximately 7.2 full-time positions off-base.

Table 2a. Statewide Economic Impact of Shaw Air Force Base for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	9,585	\$625	\$997
Multiplier Effect	6,860	\$254	\$755
Total Effect	16,445	\$879	\$1,752

Statewide, Shaw AFB had a significant economic impact on several industry sectors. Table 2b summarizes the twenty most impacted sectors.

Table 2b. Statewide Economic Impact of Shaw Air Force Base on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Construction of other new nonresidential structures	\$72
Real estate establishments	\$40
Offices of physicians, dentists, and other health practitioners	\$38
Food services and drinking places	\$34
Medical and diagnostic labs and outpatient and other ambulatory care services	\$25
Monetary authorities and depository credit intermediation activities	\$25
Private hospitals	\$24
Wholesale trade businesses	\$24
Nondepository credit intermediation and related activities	\$20
Electric power generation, transmission, and distribution	\$17
Telecommunications	\$15
Securities, commodity contracts, investments, and related activities	\$14
Insurance carriers	\$14
Retail Stores - General merchandise	\$12
Other state and local government enterprises	\$12
Retail Stores - Motor vehicle and parts	\$11
Nursing and residential care facilities	\$11
Retail Stores - Food and beverage	\$10
Legal services	\$9
Civic, social, professional, and similar organizations	\$9

3.2b Shaw Air Force Base's Economic Impact in the Sumter MSA

Shaw AFB is located within the Sumter Metropolitan Statistical Area, which encompasses Sumter County. As demonstrated in Table 2c, Shaw AFB generated a total of \$1.543 billion in economic activity in the Sumter MSA for FY 2011. The AFB supported a total of 14,924 jobs earning approximately \$804 million in employee compensation. Every ten full-time positions on the AFB supported approximately 5.6 full-time positions off-base in the Sumter MSA.

Table 2c. Economic Impact of Shaw Air Force Base in the Sumter MSA for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	9,585	\$625	\$997
Multiplier Effect	5,339	\$179	\$545
Total Effect	14,924	\$804	\$1,543

Shaw AFB had a significant economic impact on several industry sectors within the Sumter MSA. Table 2d summarizes the twenty most impacted sectors.

Table 2d. Economic Impact of Shaw Air Force Base on Select Industry Sectors within the Sumter MSA for FY 2011
(Dollars in Millions)

Industry Sector	Output
Construction of other new nonresidential structures	\$72
Offices of physicians, dentists, and other health practitioners	\$33
Private hospitals	\$33
Food services and drinking places	\$27
Real estate establishments	\$24
Medical and diagnostic labs and outpatient and other ambulatory care services	\$21
Monetary authorities and depository credit intermediation activities	\$17
Nondepository credit intermediation and related activities	\$12
Wholesale trade businesses	\$11
Other state and local government enterprises	\$10
Retail Stores - General merchandise	\$10
Nursing and residential care facilities	\$10
Retail Stores - Motor vehicle and parts	\$9
Retail Stores - Food and beverage	\$8
Securities, commodity contracts, investments, and related activities	\$8
Civic, social, professional, and similar organizations	\$7
Electric power generation, transmission, and distribution	\$7
Waste management and remediation services	\$5
Transport by truck	\$5
Private junior colleges, colleges, universities, and professional schools	\$5

3.3 Joint Base Charleston

Mission Statement: Provide globally ready forces to combatant commanders and installations support to the tenants and war fighting agencies of Joint Team Charleston.

Prior to 2010, Charleston was home to two distinct, separate military installations – Naval Weapons Station (NWS) Charleston and Charleston AFB. NWS Charleston was commissioned as a US Naval Ammunition Depot in 1941 and served as a munitions collection and distribution point during World War II. By the mid-1950s, the Depot began handling guided missiles and base personnel were tasked with arming submarines with the UGM-27 Polaris, a nuclear armed submarine-launched ballistic missile. Charleston AFB can be traced back to the City of Charleston leasing the Charleston Airport to the War Department in 1942. Serving as a training depot station, the Air Base provided the final phase of training to service groups and air depot groups departing for World War II. The City of Charleston regained control of Charleston Airport after the Japanese Surrender, but leased the land to the newly formed Air Force in 1952. The base was officially named Charleston AFB and has hosted Military Airlift Wings ever since. In 2010, Charleston AFB and NWS Charleston were merged into Joint Base Charleston. The merger was the result of the 2005 round of BRAC. As one of twelve joint bases, Joint Base Charleston serves as a joint logistics, transportation, and engineering hub.

The host unit of Joint Base Charleston is the 628th Air Base Wing (ABW), which has two operational groups consisting of 13 squadrons and one wing staff directorate. The primary duty of the 628th ABW is to provide installation support to 53 DOD and Federal Agencies, servicing a total force of over 79,000 Airmen, Sailors, Soldiers, Marines, Coast Guardsmen, civilians, dependents, and retirees. The Naval Nuclear Power Training Command, located on the Joint Base, educates all enlisted and commissioned personnel in science and engineering that is fundamental to the design, operation, and maintenance of the naval nuclear fleet. All naval nuclear training, whether for surface or subsurface vessels, starts at Joint Base Charleston. Other tenant units of Joint Base Charleston include:

437 th Airlift Wing	315 th Airlift Wing
Naval Support Activity Charleston	Naval Health Clinic
1 st Combat Camera Squadron	AF ROTC Det 772 (Charleston Southern University)
American Red Cross	Army Air Force Exchange Services
Civil Air Patrol (Coastal-Charleston Composite Sq)	Defense Commissary Agency
841 st Transportation Battalion	Southeast Air Defense Sector OL-A
US Navy Construction	373 rd Training Squadron, Detachment 5
412 th Logistics Support Squadron OL-AC	AFOSI Det 310 Office of Special E
Boeing C-17 Field Service	Boeing C-17 Recovery and Modifications
Area Defense Counsel	North Auxiliary Airfield

Joint Base Charleston sits on 23,777 acres and includes 16 miles of Atlantic shoreline along with 28 miles of rail. The base shares runways with the Charleston International Airport. Of the active duty personnel assigned to Joint Base Charleston, approximately 60% live off-base. In June, 2012, a ribbon cutting ceremony was held to kick off the construction of 335 new homes which will house base personnel and their families. Construction should be completed by September 2013.

3.3a Joint Base Charleston's State Economic Impact

As demonstrated in Table 3a, Joint Base Charleston generated a total of \$4.375 billion in economic activity in South Carolina for FY 2011. Joint Base Charleston supported a total of 38,527 jobs earning approximately \$2.326 billion in employee compensation. Every ten full-time positions on Joint Base Charleston supported approximately 8.9 full-time positions off-base.

Table 3a. Statewide Economic Impact of Joint Base Charleston for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	20,315	\$1,674	\$2,475
Multiplier Effect	18,212	\$652	\$1,900
Total Effect	38,527	\$2,326	\$4,375

Notes: The employment, labor income, and purchase/procurement data for SSC Atlantic are not included in this analysis or any other analysis in section 3.3

Statewide, Joint Base Charleston had a significant economic impact on several industry sectors. Table 3b summarizes the twenty most impacted sectors.

Table 3b. Statewide Economic Impact of Joint Base Charleston on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Real estate establishments	\$106
Offices of physicians, dentists, and other health practitioners	\$96
Food services and drinking places	\$93
Medical and diagnostic labs and outpatient and other ambulatory care services	\$80
Monetary authorities and depository credit intermediation activities	\$65
Private hospitals	\$65
Wholesale trade businesses	\$59
Construction of other new nonresidential structures	\$58
Management, scientific, and technical consulting services	\$54
Electric power generation, transmission, and distribution	\$53
Nondepository credit intermediation and related activities	\$51
Telecommunications	\$41
Insurance carriers	\$37
Securities, commodity contracts, investments, and related activities	\$37
Retail Stores - General merchandise	\$33
Services to buildings and dwellings	\$32
Other state and local government enterprises	\$30
Nursing and residential care facilities	\$28
Retail Stores - Motor vehicle and parts	\$28
Retail Stores - Food and beverage	\$27

3.3b Joint Base Charleston's Economic Impact in the Charleston-North Charleston-Summerville MSA

Joint Base Charleston is located within the Charleston-North Charleston-Summerville Metropolitan Statistical Area, which encompasses Berkeley, Charleston, and Dorchester Counties. As demonstrated in Table 3c, Joint Base Charleston generated a total of \$4.205 billion in economic activity in the Charleston-North Charleston-Summerville MSA for FY 2011. Joint Base Charleston supported a total of 36,327 jobs earning approximately \$2.292 billion in employee compensation. Every ten full-time positions on the Joint Base supported approximately 7.4 full-time positions off-base in the Charleston-North Charleston-Summerville MSA.

Table 3c. Economic Impact of Joint Base Charleston in the Charleston-North Charleston-Summerville MSA for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	20,315	\$1,674	\$2,475
Multiplier Effect	15,012	\$618	\$1,730
Total Effect	36,327	\$2,293	\$4,204

Joint Base Charleston had a significant economic impact on several industry sectors within the Charleston-North Charleston-Summerville MSA. Table 3d summarizes the twenty most impacted sectors.

Table 3d. Economic Impact of Joint Base Charleston on Select Industry Sectors within the Charleston-North Charleston-Summerville MSA for FY 2011
(Dollars in Millions)

Industry Sector	Output
Real estate establishments	\$111
Medical and diagnostic labs and outpatient and other ambulatory care services	\$81
Offices of physicians, dentists, and other health practitioners	\$80
Food services and drinking places	\$79
Private hospitals	\$65
Monetary authorities and depository credit intermediation activities	\$63
Construction of other new nonresidential structures	\$60
Management, scientific, and technical consulting services	\$58
Securities, commodity contracts, investments, and related activities	\$51
Nondepository credit intermediation and related activities	\$44
Telecommunications	\$37
Wholesale trade businesses	\$34
Services to buildings and dwellings	\$31
Retail Stores - General merchandise	\$29
Other state and local government enterprises	\$28
Electric power generation, transmission, and distribution	\$28
Legal services	\$25
Retail Stores - Motor vehicle and parts	\$24
Insurance carriers	\$24
Retail Stores - Food and beverage	\$23

3.4 Space and Naval Warfare Systems Center Atlantic (SSC Atlantic)

Space and Naval Warfare Systems Command (SPAWAR) is the Navy's Information Dominance Systems Command providing capabilities in the fields of intelligence, reconnaissance, cyber warfare, command and control, communication systems, information management, and enabling technologies. SPAWAR programs cover the full life-cycle from research and development, systems engineering, testing and evaluation, acquisition, installations, operations, and in-service support. SSC Atlantic is one of two systems centers under the command of SPAWAR and is located in Charleston.

SSC Atlantic is an engineering laboratory that works diligently to meet the country's needs for uninterrupted vigilance, cybersecurity, adaptive response, and engineering excellence by delivering secure, integrated, and innovative solutions to many naval, joint, and national agencies. The work done at SSC Atlantic helps transform ships, aircraft, and vehicles from individual platforms into integrated battle forces, enhancing information dominance and awareness among America's warfighters. Approximately 91% of the permanent personnel assigned to SSC Atlantic are civilians. The majority of work done at SSC Atlantic is classified, but one of its most visible non-classified projects has been the SPAWAR Internet Café program which is managed by the European arm of SSC Atlantic. The SPAWAR Internet Café program currently supports over 600 Megabits of satellite connectivity for approximately 10,000 computers and over 4,000 telephones which provide members of the Armed Services stationed overseas with access to a variety of communication devices. While the majority of service men and women stationed overseas utilize SPAWAR Internet Cafés to keep in touch with friends and family, many use the Cafés for continuing education programs while deployed.

3.4a SSC Atlantic's State Economic Impact

As demonstrated in Table 4a, SSC Atlantic generated a total of \$3.378 billion in economic activity in South Carolina for FY 2011. SSC Atlantic supported a total of 27,492 jobs earning approximately \$1.553 billion in employee compensation. Every ten full-time positions at SSC Atlantic supported 64.8 full-time positions off-base.

Table 4a. Statewide Economic Impact of SSC Atlantic for FY 2011

(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	3,673	\$291	\$388
Multiplier Effect	23,819	\$1,263	\$2,990
Total Effect	27,492	\$1,553	\$3,378

The multipliers for SSC Atlantic are relatively large considering SSC Atlantic directly employs fewer full-time employees than other installations studied for this report. These high multipliers are the result of the high proportion of SSC Atlantic's expenditures that are obligated to local engineering and high-tech firms. Such firms support thousands of high-paying jobs and have large annual expenditures.

Statewide, SSC Atlantic had a significant economic impact on several industry sectors. Table 4b summarizes the twenty most impacted sectors.

Table 4b. Statewide Economic Impact of SSC Atlantic on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Architectural, engineering, and related services	\$213
Broadcast and wireless communications equipment manufacturing	\$187
Scientific research and development services	\$129
Real estate establishments	\$85
Food services and drinking places	\$70
Wholesale trade businesses	\$65
Offices of physicians, dentists, and other health practitioners	\$64
Telecommunications	\$63
Monetary authorities and depository credit intermediation activities	\$53
Electronic computer manufacturing	\$47
Private hospitals	\$43
Nondepository credit intermediation and related activities	\$39
Medical and diagnostic labs and outpatient and other ambulatory care services	\$37
Electric power generation, transmission, and distribution	\$34
Insurance carriers	\$29
Securities, commodity contracts, investments, and related activities	\$27
Services to buildings and dwellings	\$26
Legal services	\$26
Other state and local government enterprises	\$25
Management, scientific, and technical consulting services	\$24

3.4b SSC Atlantic's State Economic Impact in the Charleston-North Charleston-Summerville MSA

SSC Atlantic is located within the Charleston-North Charleston-Summerville Metropolitan Statistical Area, which encompasses Berkeley, Charleston, and Dorchester Counties. As demonstrated in Table 4c, SSC Atlantic generated a total of \$2.488 billion in economic activity in the Charleston-North Charleston-Summerville MSA for FY 2011. SSC Atlantic supported a total of 20,999 jobs earning approximately \$1.324 billion in employee compensation. Every ten full-time positions on SSC Atlantic supported approximately 47 full-time positions off-base in the Charleston-North Charleston-Summerville MSA.

Table 4c. Economic Impact of SSC Atlantic in the Charleston-North Charleston-Summerville MSA for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	3,673	\$291	\$388
Multiplier Effect	17,326	\$1,034	\$2,100
Total Effect	20,999	\$1,324	\$2,488

SSC Atlantic had a significant economic impact on several industry sectors within the Charleston-North Charleston-Summerville MSA. Table 4d summarizes the twenty most impacted sectors.

Table 4d. Economic Impact of SSC Atlantic on Select Industry Sectors within Charleston-North Charleston-Summerville MSA for FY 2011
(Dollars in Millions)

Industry Sector	Output
Architectural, engineering, and related services	\$209
Real estate establishments	\$74
Food services and drinking places	\$51
Offices of physicians, dentists, and other health practitioners	\$47
Telecommunications	\$43
Monetary authorities and depository credit intermediation activities	\$43
Private hospitals	\$38
Medical and diagnostic labs and outpatient and other ambulatory care services	\$36
Scientific research and development services	\$33
Securities, commodity contracts, investments, and related activities	\$31
Nondepository credit intermediation and related activities	\$28
Wholesale trade businesses	\$26
Management, scientific, and technical consulting services	\$24
Computer systems design services	\$21
Legal services	\$20
Other state and local government enterprises	\$20
Data processing, hosting, ISP, web search portals and related services	\$19
Services to buildings and dwellings	\$19
Maintenance and repair construction of nonresidential structures	\$17
Insurance carriers	\$16

3.5 Marine Corps Air Station (MCAS) Beaufort

Mission Statement: To provide the highest quality aviation facilities, support and services to promote the combat readiness of our Marines and Sailors in defense of our nation.

MCAS Beaufort is located in the southeast corner of the Lowcountry, approximately 65 miles south of Charleston. The Air Station spans 6,900 acres in South Carolina and operates an additional 5,200 acres at the Townsend Bombing Range in McIntosh County, Georgia. The land occupied by the Air Station was formerly the site of several prominent Lowcountry plantations. In 1943, the Civil Aeronautics Authority established Naval Air Station Beaufort as an auxiliary station which supported training of anti-submarine patrol squadrons. The base was activated as a Marine Corps Auxiliary Airfield in 1956 and designated an MCAS in 1960. On September 19, 1975, the airfield on MCAS Beaufort was named Merritt Field in honor of Major General Louis G. Merritt, a South Carolina native and Citadel graduate. Approximately 38% of the personnel assigned to the Air Station live off-base.

Nicknamed “Fightertown East,” MCAS Beaufort is currently home to the Marine Corps’ Atlantic Coast fixed-wing, fighter-attack aircraft assets and Marine Aircraft Group 31 (MAG-31). MAG-31 is composed of four F/A-18C squadrons, one F/A-18A+ squadron, two F/A-18D squadrons, as well as a maintenance and logistics squadron. All FA-18 Hornets in the 2nd MAW are housed on MCAS Beaufort. Two Navy F/A-18 squadrons are also stationed aboard the installation. Squadrons based out of MCAS Beaufort rotate overseas regularly for Western Pacific deployments or aboard Navy aircraft carriers. At any given time up to half of the squadrons may be found overseas. In 2010, the Navy announced its decision to house three active-duty F-35B Joint Strike Fighter squadrons and two training squadrons at MCAS Beaufort. F-35Bs are short-take off/vertical landing (STOVL) fighter jets that will help the US maintain air superiority. Construction is currently underway at the Air Station to prepare for the arrival of the 88 new F-35Bs, which is currently slated for early 2013.

Marine Wing Support Squadron 273 (MWSS-273), stationed at MCAS Beaufort, provides essential aviation group support to the Air Station. The “Sweathogs” of MWSS-273 have distinguished themselves around the world. In 1989, the Sweathogs provided comprehensive disaster relief support to the City of Charleston during the aftermath of Hurricane Hugo. During their most recent deployment in support of Operation Iraqi Freedom, MWSS-273 provided over 28 million gallons of fuel to Coalition aircraft, conducted over 275,000 miles of motor transport operations, rendered safe 126 enemy explosive devices, destroyed ten enemy weapons caches, and conducted over 100,000 hours of heavy equipment operations.

3.5a MCAS Beaufort's State Economic Impact

As demonstrated in Table 5a, MCAS Beaufort generated a total of \$702 million in economic activity in South Carolina for FY 2011. The Air Station supported a total of 8,544 jobs earning approximately \$339 million in employee compensation. Every ten full-time positions on the Air Station supported approximately seven full-time positions off-base.

Table 5a. Statewide Economic Impact of MCAS Beaufort for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	5,012	\$199	\$296
Multiplier Effect	3,582	\$140	\$406
Total Effect	8,544	\$339	\$702

Notes: The employment, labor income, and purchase/procurement data for Naval Hospital (NH) Beaufort's branch clinic at MCAS Beaufort is included in this specific analysis and all other analysis in section 3.5

Statewide, MCAS Beaufort had a significant economic impact on several industry sectors. Table 5b summarizes the twenty most impacted sectors.

Table 5b. Statewide Economic Impact of MCAS Beaufort on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Construction of other new nonresidential structures	\$99
Wholesale trade businesses	\$36
Real estate establishments	\$27
Offices of physicians, dentists, and other health practitioners	\$24
Food services and drinking places	\$23
Monetary authorities and depository credit intermediation activities	\$17
Private hospitals	\$16
Nondepository credit intermediation and related activities	\$13
Electric power generation, transmission, and distribution	\$12
Telecommunications	\$11
Architectural, engineering, and related services	\$10
Securities, commodity contracts, investments, and related activities	\$9
Insurance carriers	\$9
Other state and local government enterprises	\$8
Retail Stores - Motor vehicle and parts	\$7
Retail Stores - General merchandise	\$7
Nursing and residential care facilities	\$7
Retail Stores - Food and beverage	\$7
Legal services	\$7
Civic, social, professional, and similar organizations	\$6

3.5b MCAS Beaufort's State Economic Impact in Beaufort and Jasper Counties

MCAS Beaufort is located within the Hilton Head Island-Beaufort Micropolitan Statistical Area, which encompasses Beaufort and Jasper Counties. As demonstrated in Table 5c, MCAS Beaufort generated a total of \$595 million in economic activity in Beaufort and Jasper Counties for FY 2011. The Air Station supported a total of 7,570 jobs earning approximately \$300 million in employee compensation. Every ten full-time positions on the Air Station supported approximately 5.3 full-time positions off-base in Beaufort and Jasper Counties.

Table 5c. Economic Impact of MCAS Beaufort in Beaufort and Jasper Counties for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	4,957	\$195	\$288
Multiplier Effect	2,613	\$104	\$306
Total Effect	7,570	\$300	\$595

MCAS Beaufort had a significant impact on several industry sectors within Beaufort and Jasper Counties. Table 5d summarizes the twenty most impacted sectors.

Table 5d. Economic Impact of MCAS Beaufort on Select Industry Sectors within Beaufort and Jasper Counties for FY 2011
(Dollars in Millions)

Industry Sector	Output
Construction of other new nonresidential structures	\$102
Real estate establishments	\$14
Wholesale trade businesses	\$11
Food services and drinking places	\$11
Offices of physicians, dentists, and other health practitioners	\$9
Retail Stores - Gasoline stations	\$9
Monetary authorities and depository credit intermediation activities	\$8
Electric power generation, transmission, and distribution	\$6
Telecommunications	\$5
Nondepository credit intermediation and related activities	\$5
Legal services	\$4
Other state and local government enterprises	\$4
Retail Stores - Food and beverage	\$4
Medical and diagnostic labs and outpatient and other ambulatory care services	\$3
Civic, social, professional, and similar organizations	\$3
Nursing and residential care facilities	\$3
Retail Stores - General merchandise	\$3
Services to buildings and dwellings	\$3
Private hospitals	\$3
Retail Stores - Motor vehicle and parts	\$3

3.6 Marine Corps Recruit Depot (MCRD) Parris Island

Mission Statement: We make Marines who are committed to our core values in services to the country.

MCRD Parris Island is the Marine Corps' second oldest post. Marines were first stationed on Parris Island in 1891 in the form of a small security detachment that guarded a naval coaling station. The Island was established as a Recruit Depot in 1915 for the training of enlisted Marine recruits and has been active in that capacity ever since. In 1949, a separate command was activated for the sole purpose of training female Marine enlisted recruits. This command is designated the 4th Recruit Training Battalion and is the only battalion in the Corps to train enlisted female recruits. Since 1952, MCRD Parris Island has housed a Marine Corps Drill Instructor School, a twelve week course that develops the knowledge, command presence, leadership, and instructional ability of selected officers, staff non-commissioned, and non-commissioned duties of a serious officer and drill instructor.

Enlisted male recruits living east of the Mississippi River and enlisted female recruits from all over the US report to MCRD Parris Island for basic training. Male recruits living west of the Mississippi River usually receive their training at MCRD San Diego but may train at MCRD Parris Island by special request. Basic training lasts 12 weeks, not including the first week of in-processing and orientation, and culminates in a 54-hour field training exercise known as The Crucible. Recruits train in physical fitness, closed order drill, combat water survival, martial arts, marksmanship, basic combat skills, and general military subjects. Direct training is provided by the 1st, 2nd, 3rd, and 4th Recruit Training Battalions, but all personnel assigned to MCRD Parris Island help transform recruits into Marines.

Since its establishment as a Recruit Depot, MCRD Parris Island has trained over one million Marines, earning the installation the nickname "Cradle of the Corps." From 1941 to 1945, 204,509 recruits trained at the Depot, and more than 20,000 recruits were aboard the Depot at the time of the Japanese surrender. During the Korean conflict Parris Island Drill Instructors trained more than 138,000 recruits, reaching peak training load of 24,424 recruits in one year. Approximately 250,000 recruits were trained at the Depot during the Vietnam War, and more recently, over 160,000 graduates from the Depot have served in Operations Enduring Freedom (Afghanistan) and Iraqi Freedom (Iraq). Over 18,840 recruits were trained at MCRD Parris Island in 2011.

In addition to training duties, MCRD Parris Island is the headquarters for the Marine Corps' Eastern Recruiting Region (ERR). The ERR, encompassing all land east of the Mississippi River and Puerto Rico, is responsible to the Marine Corps Recruiting Command (MCRC) for all new accessions. The ERR is divided into three recruiting districts and over 20 recruiting stations and is responsible for the enlistment of over 20,000 newly enlisted recruits each year. The ERR is also responsible for the recruitment of new officers through the Platoon Leadership Course, Officer Candidate Class, and the Naval Reserve Officer Training Corps (ROTC).

Located on 8,095 acres in Beaufort County, including more than 4,000 acres of salt marsh and tidal streams, MCRD Parris Island is one of the most visited military facilities in the world, hosting an estimated 165,000 visitors in 2011. The majority of visitors attend one of the installations Graduation Ceremonies, of which there are approximately 39 a year. The average visitor stays for two days and spends an estimated \$143 per day. Visitors throughout the year learn the history and traditions of the Marine Corps at the Parris Island Museum, the Marine Corps' first Command Museum. The Museum boasts over 8,000 square feet of exhibit galleries and is open to the public.

3.6a MCRD Parris Island's State Economic Impact

As demonstrated in Table 6a, MCRD Parris Island generated a total of \$594 million in economic activity in South Carolina for FY 2011. MCRD Parris Island supported a total of 5,307 jobs earning approximately \$220 million in employee compensation. Every ten full-time positions on MCRD Parris Island supported approximately ten full-time positions off-base.

Table 6a. Statewide Economic Impact of MCRD Parris Island for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	2,697	\$134	\$322
Multiplier Effect	2,610	\$87	\$272
Total Effect	5,307	\$220	\$594

Notes: The rotational personnel receiving BCT at MCRD Parris Island in 2011 are not included in this analysis or any other analysis in section 3.6. The employment, labor income, and purchase/procurement data for NH Beaufort's branch clinic at MCRD Parris Island is included in this specific analysis and all other analysis in section 3.6.

The Total Economic Output in Table 6a includes the economic impact of the 165,000 out-of-state civilians that visited the Recruit Depot in FY 2011, the majority attending one of the installation's graduations. Estimates provided by MCRD Parris Island on the spending habits of these out-of-state civilian visitors indicate that they generated a total of \$81.2 million in economic activity statewide and supported *at least* 997 jobs earning approximately \$25.7 million in employee compensation.

Statewide, MCRD Parris Island had a significant economic impact on several industry sectors. Table 6b summarizes the twenty most impacted sectors.

Table 6b. Statewide Economic Impact of MCRD Parris Island on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Hotels and motels, including casino hotels	\$29
Food services and drinking places	\$27
Real estate establishments	\$9
Electric power generation, transmission, and distribution	\$8
Offices of physicians, dentists, and other health practitioners	\$7
Monetary authorities and depository credit intermediation activities	\$5
Wholesale trade businesses	\$5
Private hospitals	\$5
Nondepository credit intermediation and related activities	\$4
Telecommunications	\$4
Waste management and remediation services	\$3
Insurance carriers	\$3
Securities, commodity contracts, investments, and related activities	\$3
Private junior colleges, colleges, universities, and professional schools	\$3
Construction of other new nonresidential structures	\$3
Natural gas distribution	\$3
Other state and local government enterprises	\$3
Water, sewage and other treatment and delivery systems	\$3
Retail Stores - General merchandise	\$3
Nursing and residential care facilities	\$2

3.6b MCRD Parris Island's Economic Impact in Beaufort and Jasper Counties

MCRD Parris Island is located within the Hilton Head Island-Beaufort Micropolitan Statistical Area, which encompasses Beaufort and Jasper Counties. As demonstrated in Table 6c, MCRD Parris Island generated a total of \$465 million in economic activity in Beaufort and Jasper Counties for FY 2011. MCRD Parris Island supported a total of 4,019 jobs earning approximately \$164 million in employee compensation. Every ten full-time positions on the Recruit Depot supported approximately seven full-time positions off-base in Beaufort and Jasper Counties.

Table 6c. Economic Impact of MCRD Parris Island in Beaufort and Jasper Counties for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	2,359	\$109	\$281
Multiplier Effect	1,660	\$55	\$184
Total Effect	4,019	\$164	\$465

The Total Economic Output in Table 6a includes the economic impact of the 165,000 out-of-state civilians that visited the Recruit Depot in FY 2011. Analysis of these out-of-state civilians indicates that they alone generated a total of \$73.9 million in economic activity within Beaufort and Jasper counties and supported at least 885 jobs earning approximately \$25.3 million in employee compensation.

MCRD Parris Island had a significant economic impact on several industry sectors within Beaufort and Jasper Counties. Table 6d summarizes the twenty most impacted industry sectors.

Table 6d. Economic Impact of MCRD Parris Island on Select Industry Sectors within Beaufort and Jasper Counties for FY 2011
(Dollars in Millions)

Industry Sector	Output
Hotels and motels, including casino hotels	\$29
Food services and drinking places	\$26
Real estate establishments	\$9
Electric power generation, transmission, and distribution	\$7
Offices of physicians, dentists, and other health practitioners	\$5
Monetary authorities and depository credit intermediation activities	\$4
Waste management and remediation services	\$3
Construction of other new nonresidential structures	\$3
Telecommunications	\$3
Nondepository credit intermediation and related activities	\$3
Water, sewage and other treatment and delivery systems	\$3
Other state and local government enterprises	\$2
Retail Stores - General merchandise	\$2
Medical and diagnostic labs and outpatient and other ambulatory care services	\$2
Wholesale trade businesses	\$2
Retail Stores - Food and beverage	\$2
Private hospitals	\$2
Legal services	\$2
Services to buildings and dwellings	\$2
Nursing and residential care facilities	\$2

3.7 Naval Hospital (NH) Beaufort

Mission Statement: To be a committed partner in the delivery of quality and compassionate patient and family centered health care while maintaining operational readiness.

Commissioned in 1949, NH Beaufort replaced NH Parris Island, which was open from 1891 until 1949. NH Beaufort provides general medical, surgical, and emergency services to all Active Duty Navy and Marine Corps personnel, as well as Retired military personnel and all military dependents residing in the Beaufort area, a total population of approximately 35,000 beneficiaries. The command provides safe, efficient, effective patient and family centered health care while ensuring operational readiness. The hospital is accredited by the Joint Commission, which acknowledges the commitment of NH Beaufort to continuously meet rigorous national and world-wide health care standards. NH Beaufort also operates two Branch Medical Clinics – one at MCRD Parris Island and the other at MCAS Beaufort. Including both health clinics, NH Beaufort employs 1,109 personnel and manages an average of 28,500 patients a month.

Located on 127 acres of land, NH Beaufort is one of the few military facilities that is a complete military compound in itself, rather than a tenant of a larger command. Within the boundaries of the Naval Hospital are 53 single-family housing units, two Bachelor Enlisted Quarters (able to accommodate 190 residents), a navy exchange retail store, a gas station, and a mini mart. The command also has its own public works facility. Recreational facilities include two softball fields, swimming pools, lighted tennis and basketball courts, an outdoor fitness course, a gym, fishing pier, and a children's playground.

3.7a NH Hospital Beaufort's State Economic Impact

As demonstrated in Table 6a, Naval Hospital Beaufort generated a total of \$167 million in economic activity in South Carolina for FY 2011. The Hospital supported a total of 1,591 jobs earning approximately \$77 million in employee compensation. Every ten full-time positions at the Hospital supported approximately 12.9 full-time positions outside of the Naval Hospital.

Table 7a. Statewide Economic Impact of NH Beaufort for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	696	\$41	\$87
Multiplier Effect	895	\$36	\$80
Total Effect	1,591	\$77	\$167

Note: The employment, labor income, and purchase/procurement data for NH Beaufort's branch clinics at MCAS Beaufort and MCRD Parris Island are not included in this specific analysis or any other analysis in section 3.7.

Statewide, NH Beaufort had a significant economic impact on several industry sectors. Table 7b summarizes the twenty most impacted sectors.

Table 7b. Statewide Economic Impact of NH Beaufort on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Management, scientific, and technical consulting services	\$21
Real estate establishments	\$4
Food services and drinking places	\$3
Offices of physicians, dentists, and other health practitioners	\$3
Retail Stores - Health and personal care	\$3
Monetary authorities and depository credit intermediation activities	\$3
Private hospitals	\$2
Wholesale trade businesses	\$2
Nondepository credit intermediation and related activities	\$2
Telecommunications	\$2
Insurance carriers	\$1
Securities, commodity contracts, investments, and related activities	\$1
Other state and local government enterprises	\$1
Electric power generation, transmission, and distribution	\$1
Nursing and residential care facilities	\$0.9
Legal services	\$0.9
Retail Stores - Motor vehicle and parts	\$0.9
Retail Stores - Food and beverage	\$0.9
Retail Stores - General merchandise	\$0.9
Civic, social, professional, and similar organizations	\$0.8

3.7b NH Beaufort's Economic Impact in Beaufort and Jasper Counties

NH Beaufort is located within the Hilton Head Island-Beaufort Micropolitan Statistical Area, which encompasses Beaufort and Jasper Counties. As demonstrated in Table 7c, NH Beaufort generated a total of \$150 million in economic activity in Beaufort and Jasper Counties for FY 2011. NH Beaufort supported a total of 1,273 jobs earning approximately \$70 million in employee compensation. Every ten full-time positions on the Hospital supported approximately eight full-time positions off-base in Beaufort and Jasper Counties.

Table 7c. Economic Impact of NH Beaufort in Beaufort and Jasper Counties for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	696	\$41	\$87
Multiplier Effect	577	\$29	\$63
Total Effect	1,273	\$70	\$150

NH Beaufort had a significant economic impact on several industry sectors within Beaufort and Jasper Counties. Table 7d summarizes the twenty most impacted sectors.

Table 7d. Economic Impact of NH Beaufort on Select Industry Sectors within Beaufort and Jasper Counties for FY 2011
(Dollars in Millions)

Industry Sector	Output
Management, scientific, and technical consulting services	\$21
Real estate establishments	\$3
Retail Stores - Health and personal care	\$3
Food services and drinking places	\$3
Offices of physicians, dentists, and other health practitioners	\$2
Monetary authorities and depository credit intermediation activities	\$2
Nondepository credit intermediation and related activities	\$1
Telecommunications	\$1
Other state and local government enterprises	\$0.8
Medical and diagnostic labs and outpatient and other ambulatory care services	\$0.8
Retail Stores - Food and beverage	\$0.8
Legal services	\$0.8
Private hospitals	\$0.7
Nursing and residential care facilities	\$0.7
Civic, social, professional, and similar organizations	\$0.7
Wholesale trade businesses	\$0.7
Retail Stores - General merchandise	\$0.6
Retail Stores - Motor vehicle and parts	\$0.6
Electric power generation, transmission, and distribution	\$0.6
Securities, commodity contracts, investments, and related activities	\$0.5

3.8 McEntire Joint National Guard Base

Mission Statement of the 169th Fighter Wing: To maintain wartime readiness and the ability to mobilize and deploy expeditiously to carry out tactical air missions or combat support activities in the event of a war or military emergency.

Formed in 1946, the South Carolina Air National Guard (SCANG) consists of more than 1,500 Airmen who work and drill at McEntire Joint National Guard Base, a federal military installation operated by the SCANG. McEntire JNGB is named after General Barnie McEntire, the first commander of the SCANG, who died in 1961 when he rode his malfunctioning F-104 into the Susquehanna River to avoid crashing into densely-populated Harrisburg, PA. The base was previously known as Congaree Air Base and was used in World War II as a Marine Corps training base.

The host wing of McEntire JNGB base is the 169th FW, which is also the primary unit of the SCANG. Specializing in the suppression and destruction of enemy air defenses, the 169th FW flies the F-16C/Block 52, a single-seat, multi-purpose fighter with the ability to fly at up to twice the speed of sound. The F-16C/Block 52 is the most advanced F-16 in the Air Force and capable of performing air-to-air and air-to-ground tactical missions. McEntire JNGB is also home to the 245th Air Traffic Control (ATC) Squadron. As one of only ten Air National Guard ATC Squadrons in the country, the 245th ATC Squadron provides McEntire JNGB with ATC services, but also possesses the ability to perform ATC at other fixed locations and remote sites.

The SCANG has been called into active military service for numerous armed conflicts. In the late 1990s, units of the SCANG were activated and deployed to Saudi Arabia in support of Operation Desert Shield / Storm, flying 2,000 combat missions and dropping four million pounds of munitions. In 2002, aircraft and personnel from the 169th FW deployed to Southwest Asia in support of Operation Enduring Freedom and in 2003, all of the 169th FW's F-16 aircraft were deployed as part of Operation Iraqi Freedom attached to the 379th Air Expeditionary Wing (AEW). In 2010, the 169th FW became the first Air Guard unit to support an American Expeditionary Forces mission for a full 120 days. While simultaneously deploying Airmen in support of Operation Enduring Freedom, the 169th FW deployed more than 300 Airmen in support of Operation Iraqi Freedom, flying more than 600 combat patrols over Iraq. In May, 2011, the SCANG accepted the Aerospace Control Alert mission from Shaw AFB, assuming responsibility for continental air defense. In August 2012, the 169th FW returned from a four-month deployment to Afghanistan in support of Operation Enduring Freedom, during which time the 169th FW flew 2,194 combat sorties for 9,192.8 combat hours with a 100% completion rate.

3.8a McEntire Joint National Guard Base's State Economic Impact

As demonstrated in Table 8c, the SCANG generated a total of \$296 million in economic activity in South Carolina for FY 2011. The SCANG supported a total of 2,303 jobs earning approximately \$61 million in employee compensation.

Table 8a. Statewide Economic Impact of McEntire Joint National Guard Base for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	1,742	\$41	\$229
Multiplier Effect	562	\$20	\$66
Total Effect	2,303	\$61	\$296

Statewide, McEntire JNGB had a significant impact on several industry sectors. Table 8B summarizes the twenty most impacted sectors.

Table 8b. Statewide Economic Impact of McEntire Joint National Guard Base on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Construction of other new nonresidential structures	\$4
Real estate establishments	\$3
Offices of physicians, dentists, and other health practitioners	\$2.5
Hotels and motels, including casino hotels	\$2.5
Food services and drinking places	\$2.5
Architectural, engineering, and related services	\$2.4
Services to buildings and dwellings	\$2
Monetary authorities and depository credit intermediation activities	\$1.8
Private hospitals	\$1.7
Wholesale trade businesses	\$1.7
Electric power generation, transmission, and distribution	\$1.5
Nondepository credit intermediation and related activities	\$1.4
Private junior colleges, colleges, universities, and professional schools	\$1.3
Telecommunications	\$1.2
Insurance carriers	\$1
Securities, commodity contracts, investments, and related activities	\$1
Other state and local government enterprises	\$0.9
Retail Stores - General merchandise	\$0.9
Nursing and residential care facilities	\$0.7
Retail Stores - Motor vehicle and parts	\$0.7

3.8b McEntire Joint National Guard Base's Economic Impact in the Columbia MSA

McEntire JNGB is located within the Columbia Metropolitan Statistical Area, which encompasses Calhoun, Fairfield, Kershaw, Lexington, Richland, and Saluda Counties. As demonstrated in Table 8c, the McEntire JNGB generated a total of \$277 million in economic activity in the Columbia MSA for FY 2011. McEntire JNGB supported a total of 2,101 jobs earning approximately \$60 million in employee compensation.

Table 8c. Economic Impact of McEntire Joint National Guard Base in the Columbia MSA for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	1,742	\$41	\$229
Multiplier Effect	359	\$19	\$48
Total Effect	2,101	\$60	\$277

McEntire JNGB had a significant economic impact on several industry sectors within the Columbia MSA. Table 8d summarizes the twenty most impacted sectors.

Table 8d. Economic Impact of McEntire Joint National Guard Base on Select Industry Sectors within the Columbia MSA for FY 2011

(Dollars in Millions)

Description	Total
Construction of other new nonresidential structures	\$2
Real estate establishments	\$2
Offices of physicians, dentists, and other health practitioners	\$2
Private hospitals	\$1.8
Services to buildings and dwellings	\$1.8
Food services and drinking places	\$1.7
Monetary authorities and depository credit intermediation activities	\$1.6
Architectural, engineering, and related services	\$1.5
Insurance carriers	\$1.4
Private junior colleges, colleges, universities, and professional schools	\$1.2
Electric power generation, transmission, and distribution	\$1.1
Nondepository credit intermediation and related activities	\$1.1
Telecommunications	\$1
Wholesale trade businesses	\$1
Retail Stores - General merchandise	\$0.7
Securities, commodity contracts, investments, and related activities	\$0.6
Legal services	\$0.6
Private elementary and secondary schools	\$0.6
Retail Stores - Motor vehicle and parts	\$0.5
Retail Stores - Food and beverage	\$0.5

4. South Carolina National Guard

The South Carolina National Guard (SCNG) consists of the South Carolina Air National Guard (SCANG), the South Carolina Army National Guard (SCARNG), and the South Carolina State Guard. As a dual mission force, the SCNG is normally under the control of the Governor, but can be called into federal service by the President. The State Guard is fully funded by South Carolina and assumes the in-state duties of the SCNG when its units are called into federal duty outside of South Carolina. There are over 11,000 members of the SCNG, with approximately 30% serving full-time. Members of the SCARNG are dispersed throughout South Carolina, and the majority of part-timers report for their training in a different county than which they reside. The SCNG supports a sizeable infrastructure, managing McEntire JNGB, the McGrady Training Center at Fort Jackson, and several armories across the state.

As demonstrated in Table 8a, the SCNG, including McEntire JNGB, generated a total of \$993 million in economic activity in South Carolina for FY 2011. The SCNG supported a total of 14,622 jobs earning approximately \$410 million in employee compensation.

Table 9a. Statewide Economic Impact of the South Carolina National Guard for FY 2011
(Dollars in Millions)

	Employment	Labor Income	Output
Direct Effect	11,530	\$300	\$654
Multiplier Effect	3,092	\$111	\$339
Total Effect	14,622	\$410	\$993

Notes: The employment, labor income, and purchase/procurement data for McEntire JNGB are included in this specific analysis.

Statewide, the SCNG, including McEntire JNGB, had a significant impact on several industry sectors. Table 8b summarizes the twenty most impacted sectors.

Table 9b. Statewide Economic Impact of the South Carolina National Guard on Select Industry Sectors for FY 2011
(Dollars in Millions)

Industry Sector	Output
Real estate establishments	\$18
Offices of physicians, dentists, and other health practitioners	\$17
Food services and drinking places	\$16
Private hospitals	\$11
Monetary authorities and depository credit intermediation activities	\$11
Electric power generation, transmission, and distribution	\$10
Wholesale trade businesses	\$10
Services to buildings and dwellings	\$10
Telecommunications	\$9
Nondepository credit intermediation and related activities	\$9
Retail Stores - General merchandise	\$8
Construction of other new nonresidential structures	\$7
Securities, commodity contracts, investments, and related activities	\$6
Insurance carriers	\$6
Architectural, engineering, and related services	\$6
Other state and local government enterprises	\$5
Nursing and residential care facilities	\$5
Retail Stores - Motor vehicle and parts	\$5
Retail Stores - Food and beverage	\$5
Civic, social, professional, and similar organizations	\$4

Notes: The employment, labor income, and purchase/procurement data for McEntire JNGB are included in this specific analysis.

4.1 South Carolina Army National Guard²

The SCARNG maintains multiple facilities throughout the state. Major units of the SCARNG include: the 59th Troop Command, 59th Aviation Troop Command, 218th Maneuver Enhancement Brigade (MEB), and the 263rd Air Defense Artillery Brigade. In 2008, the 218th MEB 1600-strong force re-deployed home following a year-long mission to train the Afghan police and advise Afghan security forces. This mission marked the single largest deployment of South Carolina Guardsmen since World War II. In March, 2012, 60 South Carolina Guardsmen were deployed to Afghanistan as an Agribusiness Development Team (ADT). The ADT is helping Afghan farmers become self-sufficient through development of the agricultural market place. SCARNG units are trained and equipped as part of the US Army.

As demonstrated in Table 8d, the SCARNG generated a total of \$697 million in economic activity in South Carolina for FY 2011. The SCARNG supported a total of 12,318 jobs earning approximately \$349 million in employee compensation.

Table 9c. Statewide Economic Impact of the South Carolina Army National Guard for FY 2011
(Dollars in Millions)

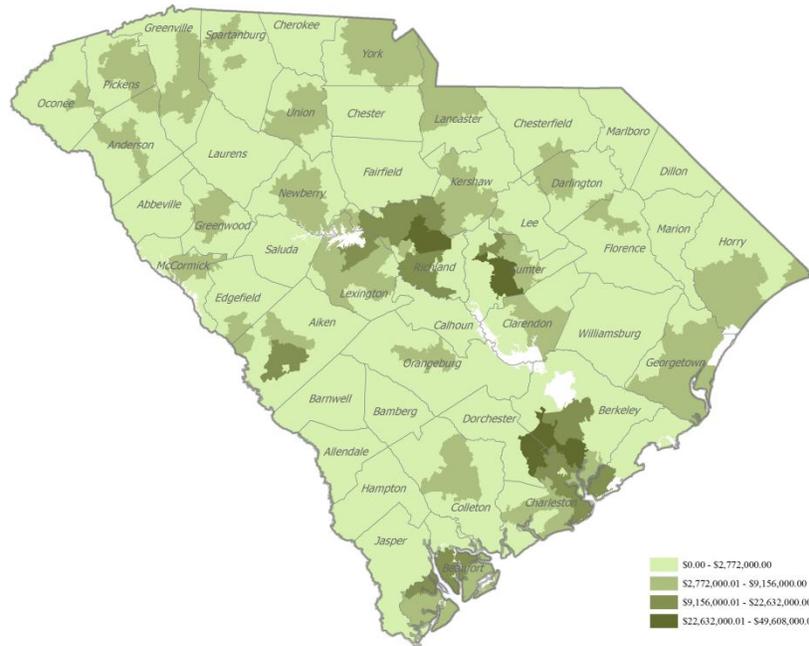
	Employment	Labor Income	Output
Direct Effect	9,788	\$259	\$425
Multiplier Effect	2,530	\$90	\$272
Total Effect	12,318	\$349	\$697

² A detailed analysis of the South Carolina Air National Guard and McEntire Joint National Guard Base can be found in subsection 3.8.

5. Military Retirees

According to the *Statistical Report on the Military System for FY 2011*, South Carolina has the eighth largest military retiree population in the nation. As of September 30, 2011, 56,486 military retirees were residing in South Carolina, with a large share residing in close proximity to the state's military installations. Military retirees have a positive and unique impact on the state's economy because they receive regular retirement payments from the DOD and many embark on a second career after leaving the Armed Services. The military retirement system paid out approximately \$1.3 billion in pension payments to South Carolina's military retirees in FY 2011. Figure 2 show that total payments made by the military retirement system to military retirees by South Carolina ZIP Code for FY 2011.

Figure 2. Military Retirement Pension Payments by South Carolina ZIP Code for FY 2011



Notes: Total value of pension payments per ZIP Code is highly correlated to the number of military retirees per ZIP Code. Fort Gordon is located in Augusta GA, approximately 15 miles from the South Carolina border. This might explain the large concentration of military retirees in Aiken County.

Some military retirees have chosen to reside in South Carolina because of the state's high quality of life, low cost of living, or because their family lives in the state; however, some retirees are directly linked to the state's military installations. These retirees have chosen to retire in the state because their last military assignment was in South Carolina or because they enjoy the access they have to military facilities and services available to them as military retirees, such as commissaries and military hospitals. These retirees would not reside in South Carolina if the installations they are linked to were not located here. The out-of-state migration of these linked retirees would result in a net loss in South Carolina's economy because their income derived from DOD pension payments might not be replaced. In contrast, when a typical worker leaves South Carolina the worker's income remains behind in the sense that an employer can fill the vacant position in the future. The number of retirees linked to each installation can be estimated by specifying the following OLS regression equation:

$$\#MR_S = \beta_0 + \beta_1\#ADMP_S + \beta_2INCOME_TAX_S + \beta_3LTTS_S + \beta_4SC_S + \beta_5GSP_S + \beta_6HOME_S + \beta_7SENIORS_S + \beta_8COLI_S + \epsilon$$

Where S denotes an individual state and $\hat{\epsilon}$ represents an error term. #MR, the dependent variable, is the number of military retirees in the state in 2004, 2005, 2006, 2007, 2008, 2009, and 2010 (all separate observations).³ The primary independent variable of interest is #ADMP, which is the number of active duty military personnel in the state in 2004, 2005, 2006, 2007, 2008, 2009, and 2010 (all separate observations).⁴ The number of active duty military personnel is a strong predictor of the number of military retirees in a state, but it is not the only predictor.⁵ To account for this, several control variables are included in the OLS regression model. INCOME_TAX identifies the state's highest individual income tax bracket as of 01/01/2012; LTTS identifies the state's 2011 rank in the AARP long term service survey; GSP represents the state's 2011 gross state product per capita; HOME represents the state's median single-family home cost from 2000-2010; SENIOR captures the 2010 proportion of seniors in the state; and COLI is the state's 2009 cost of living index. Because COLI data are not available for Alaska and Hawaii, those states are dropped from the analysis. The results of this OLS regression model are presented in Table 9a.

Table 10a. Liked Military Retirees OLS Regression Output
 Dependent Variable: Number of Military Retirees Residing in State

Variable	Coefficient	Standard Error	P-Value
Intercept	1272.705	15178.93	0.933
#ADMP	0.782	0.038	0.000*
INCOME_TAX	-3339.34	363.063	0.000*
LTTS	17.444	71.780	0.808
SC	7436.891	6453.636	0.250
GSP	4.93x10 ⁻⁸	3.82x10 ⁻⁹	0.000*
HOME	-17.650	30.611	0.565
SENIOR	434127.6	68128.37	0.000*
COLI	-30627.62	7871.408	0.000*
R-Squared			0.867
N			336

Notes: * p-value < 0.05

With an r-squared of 0.867, the above OLS Regression accounts for approximately 86.7% of the variance of a state's military retiree population. Furthermore, analysis reveals that the #ADMP variable is statistically significant (p-value is less than 0.05) and the coefficient (0.786) is positive, even when controlling for several other variables that capture a state's attractiveness to all retirees. This suggests that, all else being equal, the addition (or decrease) of one active duty military person in a state is associated with a 0.786 increase (or decrease) in that state's military retiree population. This increase (or decrease) would not be automatic, and no analysis has been done to predict when a state would see changes in its military retiree population in response to changes in its active duty military personnel population. Given the positive, significant relationship between the number of active duty personnel in a state (#ADMP) and the number of military retirees in the state (#MR), the OLS regression equation can be converted to an OLS prediction equation. This allows for the substitution of the #ADMP values to predict the value of #MR at that substituted value of #ADMP. By assuming that all active-duty personnel assigned to an installation would leave the state if their host installation closed, the #ADMP variable can

³ Department of Defense Office of the Actuary. *Statistical Report on the Military Retirement System: Fiscal Year(s) 2004, 2005, 2006, 2007, 2008, 2009, and 2010.*

⁴ Office of the Deputy Under Secretary of Defense. *2004, 2005, 2006, 2007, 2008, 2009, and 2010 Demographics Report(s).*

⁵ The r-squared of the following two variable regression is 0.7371: $\#MR_S = \beta_0 + \beta_1 \#ADMP_S + \hat{\epsilon}$.

be adjusted to account for each installation in South Carolina closing. The military retirees linked to each installation are then defined as the difference between #MP and the predicted #MP. The results are presented in Table 9b. The third column of Table 9b (“Estimated Economic Impact”) estimates the economic impact the linked retirees have on the state economy, which was calculated inputting average annual DOD pension payments into IMPLAN.

Table 10b. Military Retirees Linked to the South Carolina Military Installations
(Dollars in Millions)

Installation	Linked Retirees	Estimated Economic Impact
Fort Jackson	3,102	\$58
Shaw Air Force Base	6,322	\$123
Joint Base Charleston	8,692	\$170
Marine Corps Air Station Beaufort	2,968	\$58
Marine Corps Recruit Depot Parris Island	1,164	\$23
Naval Hospital Beaufort	488	\$10
Total	22,736	\$442

Notes: McEntire JNGB and SSC Atlantic have no on-base housing and do not offer any services or facilities that military retirees might enjoy (e.g. there is no commissary or hospital on base). This leads to the assumption that there are no military retirees linked to either of these installations.

In total, an estimated 22,736 military retirees are directly linked to South Carolina’s military installations. These retirees had a combined estimated economic impact of \$442 million on the state’s economy in FY 2011. This value is likely smaller than the true economic impact of these linked retirees because many of them embark on a second career after retiring from the military or have secondary retirement income. Hence, DOD pension payments might only represent a proportion of the linked retiree’s entire income that is spent on goods and services.

6. Department of Defense Contractors

Several South Carolina business organizations and individuals, commonly referred to as defense contractors, provide products and services to the DOD and the state's military installations. According to USAspending.gov, the DOD has obligated over \$29.4 billion to defense contractors for work performed in South Carolina since 2003. On average, the DOD has obligated \$3.3 billion a year to South Carolina establishments and DOD contracts tend to account for a little more than 2% of South Carolina's gross state product (GSP) each year.

Table 11a. Value of DOD Contracts Obligated to South Carolina Establishments, 2003 – 2011
(Dollars in Billions)

Year	Value of DOD Contracts Obligated to SC Businesses*	DOD Contracts as a Proportion of GSP**
2003	\$1.5	0.0115
2004	\$1.5	0.0111
2005	\$2.0	0.0141
2006	\$2.3	0.0154
2007	\$4.0	0.0254
2008	\$5.0	0.0314
2009	\$5.1	0.0330
2010	\$4.5	0.0285
2011	\$3.5	0.0211
Average (2003-2011)	\$3.3	0.0213

* Data retrieved from USAspending.gov.

** GSP data from the Bureau of Economic Analysis.

For fiscal year 2011, the DOD issued 27,533 contracts (including modifications) to over 800 defense contractors performing work in South Carolina, with a median contract value \$7,798. The majority ($\approx 75\%$) of the contract dollars obligated to South Carolina establishments went to defense contractors that served the needs of South Carolina's military installations.⁶ For example, a \$9 million contract was awarded to Hightower Construction for the company to build a physical center on MCAS Beaufort. These defense contractors will respond to changes to the state's military status quo. The remaining contract dollars ($\approx 25\%$) were awarded to defense contractors serving the needs of the US military outside of South Carolina. For example, the vehicles outfitted by General Dynamics Land System – Force Protection are shipped out-of-state. Such companies would be insulated from any changes to the military status quo in South Carolina but would respond to changes to the nation's total military expenditures.

USAspending.gov does not identify the number of South Carolina employees attached to each DOD contract obligated to a South Carolina establishment. However, IMPLAN is able to estimate the multiplier effect of these missing inputs based on total number of dollars obligated to defense contractors that are serving the needs of the state's military community. The defense contractors that operated in South Carolina but served the out-of-state military community generated a total of *at least* \$1.29 billion economic activity in FY 2011. Defense contractors executing these contracts supported *at least* 5,800 jobs earning *at least* \$285 million in employee compensation.

⁶ The economic impact of defense contractors serving the state's military installations is captured in output effect of each military installation, where the dollar amount obligated to each of these contractors is included in the procurement / purchase data provided by each installation.

7. Impact of Base Realignment and Closure (BRAC), 2005

BRAC is a process used by the DOD and Congress to close excess military installations and realign the total asset inventory to reduce expenditures on operations and maintenance aimed at achieving increased efficiency. There have been five rounds of BRAC, with 2005 being the most recent. The 2005 impact of BRAC on South Carolina's military installations is listed below.

- 1) Closing Fort McPherson, GA, and relocating the Headquarters 3rd US Army to Shaw AFB.
- 2) Closing the Rock Hill Armed Forces Reserve Center in Rock Hill, SC, and relocating to a new Armed Forces Reserve Center (AFRC) and Organization Maintenance Shop (OMS) in Wilmington, NC, if the Army is able to acquire suitable land for the construction of facilities.
- 3) Realigning Fort Benning, GA, and Fort Leonard Wood, MO, by relocating the Drill Sergeant School at each location to Fort Jackson.
- 4) Realigning the Birmingham Armed Forces Reserve Center, AL, by disestablishing the 81st Regional Readiness Command and establishing the Army Reserve Southeast Regional Readiness Command in a new Armed Forces Reserve Center on Fort Jackson.
- 5) Closing Naval Facilities Engineering Field Division South leased space in Charleston, SC, and consolidating Naval Facilities Engineering Field Division South, Charleston, SC, with Naval Facilities Engineering Field Activity Southeast, Jacksonville, FL, at Naval Air Station Jacksonville, FL; Naval Facilities Midwest, Great Lakes, IL, at Naval Station Great Lakes, IL; and Naval Facilities Atlantic, Norfolk, VA, at Naval Station Norfolk, VA.
- 6) Realigning Moody AFB, GA, by relocating base-level ALQ-814 intermediate maintenance to Shaw AFB, establishing a Centralized Intermediate Repair Facility (CIRF) at Shaw AFB, for ALQ-184 pods.
- 7) Realigning Shaw AFB, SC, by relocating base-level TF-34 engine intermediate maintenance to Moody AFB, GA, establishing a CIRG at Moody AFB for TF-34 engines.
- 8) Adding F-16s to the McEntire JNGB, known in 2005 as McEntire Air Guard Station, SC.
- 9) Realigning Maxwell AFB, AL; Naval Air Station Meridian, MS; and Naval Station Newport, RI; by relocating religious training and education to Fort Jackson, establishing a Joint Center of Excellence for religious training and education.
- 10) Realigning Naval Air Station Jacksonville, FL, and Naval Air Station Pensacola, FL, by relocating the correctional function of each to Naval Weapons Stations Charleston, SC, and consolidating them with the correctional function already at Naval Weapons Station Charleston, SC, to a single Level II Southeastern Joint Regional Correctional Facility.
- 11) Realigning Fort Eustis, VA, Ft Jackson, SC, and Fort Less, VA, by relocating all mobilization processing functions to Fort Bragg, NC, designating it as Joint Pre-Deployment / Mobilization Sire Bragg / Pope.
- 12) Closing the Defense Finance and Accounting Service (DFAS) site at Charleston, SC, and relocating the functions performed to the DFAS site at Cleveland, OH.
- 13) Realigning Naval Weapons Station Charleston, SC, by relocating the installation management function to Charleston AFB.
- 14) Relocating depot maintenance workload and capacity for Aircraft Avionics / Electronics Components, Aircraft Other Components, and Aircraft Structural Components, to the Fleet Readiness Center East Site Beaufort, established at MCAS Beaufort.

- 15) Realigning MCAS Beaufort by disestablishing Naval Air Depot Jacksonville Detachment Beaufort and transferring all depot maintenance workload and capacity to Fleet Readiness Center East Site Beaufort, MCAS Beaufort.
- 16) Realigning Naval Weapons Station Charleston, SC, as follows: relocate Surface Maritime Sensors, Electronic Warfare, and Electronics Research, Development & Acquisition, and Test & Evaluation of the Space Warfare Center to Naval Surface Warfare Center Division, Dahlgren, VA.
- 17) Realigning Naval Air Station Pensacola, FL, by relocating the Space Warfare Systems Center Charleston, SC, detachment Pensacola, FL, to Naval Weapons Station Charleston.

All closures and realignments as a result of BRAC, 2005 were completed prior the publication of this report. A previous report⁷ estimated the impact of South Carolina's military installations on the state's economy based on data from Federal Fiscal Year 2003. By comparing the results of the report for FY 2003 to the results presented in this report, the growth of the military community's economic impact on the state economy can be measured. The value of that change captures the economic impact that BRAC, 2005 had on South Carolina; however, the exact impact of BRAC, 2005 on South Carolina's economy is unclear. A comparison of the report for FY 2003 is provided in Table 11a. Because BRAC, 2005 resulted in significant additions to Fort Jackson, McEntire JNGB, and Shaw AFB, those three installations are also listed separately, but included in the comparison of all military installations.

Table 12a. FY 2003 and FY 2011 Total Output for Military Installations
(Dollars in Millions)

	FY 2003 Total Output	FY 2011 Total Output	FY 2011 and FY 2003 Difference
All Military Installations	\$5,941	\$13,330	+\$7,389
Fort Jackson	\$1,168	\$2,012	+\$844
McEntire JNGB	\$140	\$296	+\$156
Shaw AFB	\$513.3	\$1,752	+\$1,238.7

The comparisons made in Table 11a are for general reference purposes only and should not be viewed as definitive for at least five reasons. First, monetary values in Table 11a are in real dollars, not adjusting for inflation over the eight years. Second, while the report for FY 2003 used the same econometric software as this analysis, IMPLAN; the model has undergone significant modifications since FY 2003. Third, the intricacies of the methodology and assumptions used in the report for FY 2003 are unclear; a complete methodology is not provided in the earlier report. Fourth, it is unknown what inputs were used in the report for FY 2003 – it is unclear that complete procurement data were utilized. Fifth, it is unclear whether the report for FY 2003 included SSC Atlantic. Given these caveats, no definitive claims should be made on the economic impact of BRAC, 2005 on South Carolina's economy using the data provided in Table 10a.

⁷ Schunck, Donald. 2004. *The Economic Impact of the Military in South Carolina: A Focus on the Industry Distribution of Economic Activity*. At the time of the study, Dr. Schunck was the Research Economist for the Division of Research and Assistant Professor of Economics in the Moore School of Business at the University of South Carolina.

ACRONYMS

ABW: Air Base Wing
ACC: Air Combat Command
ADT: Agribusiness Development Team
AEF: American Expeditionary Forces
AEW: Air Expeditionary Wing
AFB: Air Force Base
AFRC: Armed Forces Reserve Center (AFRC)
AIT: Advanced Individual Training
AOR: Area of Responsibility
ATC: Air Traffic Control
ARCENT: United States Army Central
BCT: Basic Combat Training
BEA: Bureau of Economic Analysis
BLS: Bureau of Labor Statistics
BRAC: Base Closure and Realignment Commission
CFLCC: Coalition Forces Land Component Command
CIRF: Centralized Intermediate Repair Facility
DFAS: Defense Finance Accounting Service
DOD: Department of Defense
ERR: Eastern Recruiting Region
FTE: Full-Time Equivalent
FW: Fighter Wing
GSP: Gross State Product
IED: Improvised Explosive Device
JB: Joint Base
JNGB: Joint National Guard Base
MAG: Marine Aircraft Group
MCAS: Marine Corps Air Station
MCRC: Marine Corps Recruiting Command
MCRD: Marine Corps Recruit Depot
MEB: Maneuver Enhancement Brigade
MOS: Military Occupational Specialty
MSA: Metropolitan Statistical Area
MTC: McGrady National Training Center
MWSS: Marine Wing Support Squadron
NH: Naval Hospital
NWS: Naval Weapons Station
OLS: Ordinary Least Squares
OMS: Organization Maintenance Shop
REA: Regional Economic Information Systems
ROTC: Reserve Officer Training Corps
SC: South Carolina
SCANG: South Carolina Air National Guard
SCARNG: South Carolina Army National Guard
SCNG: South Carolina National Guard
SPAWAR: Space and Naval Warfare Systems Command
SSC Atlantic: Space and Naval Warfare Systems Command Atlantic
SSI: Soldier Support Institute

ACRONYMS CONTINUED

STOVL: Short-Take-Off / Vertical Landing
USAFCENT: United States Air Forces Central
USCENTCOM: United States Central Command

APPENDIX A – Data Collection Form

Data Collection Form

SC Military Installation Impact Study



Introduction

The South Carolina Department of Commerce, in cooperation with and support of the South Carolina Military Base Task Force, is preparing a study on the impact of South Carolina's military installations on the state's economy. This study will analyze each of the state's military installations and provide estimates of the economic impact in terms of total employment, wages and business sales resulting from the military's presence. This analysis will use a variety of data on base headcounts, payroll and expenditures, capital and operating costs as inputs.

This data collection form will serve to gather the data necessary to complete the study, and will ensure that similar, comparable data is collected for each military installation. This survey form has been sent to you as the principal point of contact for the base or military community. The command at your military installation should be able to answer the questions in this data collection form; however, if your command lacks access to the required data, please refer this to the appropriate offices or commands that can assist in completing the form.

To accurately account for the local economic impact of the military installations, data will also be collected on the personnel, payroll and procurement activities for persons and businesses located within the region where the installation is located. To estimate the installations' impact on the regional economies of the state, we will need ZIP Code or county data on base expenditures and personnel. If localized data is available from your installation, we will follow-up with you after completion of this survey. We will also collect information from the Department of Defense and other sources to estimate the economic impact of the retirement community tied to the state's military bases.

David Clayton, the Research Director at the South Carolina Department of Commerce, is available to answer any questions about this study and will work with your staff on collecting the required information. He can be reached at dclayton@sccommerce.com and (803) 737-4633. Thank you for your assistance in completing this survey and helping the State of South Carolina accurately illustrate the importance of the military to the health of our state's economy.

Point of Contact Information

Please complete the following information for the survey respondent:

Responding Command: _____

Name of Person Responsible for Completing Survey: _____

Phone: _____

Email: _____

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Research Division
1201 Main Street, Suite 1600-Columbia S.C. 29201 • Info@SCcommerce.com • (803) 737-0400 • SCcommerce.com

SC Military Installation Impact Study

Personnel and Payroll Information

Please complete the blank form below on personnel and payroll at the installation.

Personnel Data			
	Total	Total Residing in South Carolina	Total Residing Out of South Carolina
Total Personnel			
Permanent Active Duty Military			
Living On-Base			
Living Off-Base			
Reserve			
Living On-Base			
Living Off-Base			
Rotational			
Student			
Civilian			

Total Payroll Outlay			
	Total	Total Dollars Paid to Persons Residing in South Carolina	Total Dollars Paid to Persons Residing Out of South Carolina
Total Personnel			
Permanent Active Duty Military			
Living On-Base			
Living Off-Base			
Reserve			
Living On-Base			
Living Off-Base			
Rotational			
Student			
Civilian			

Would you be able to provide number of personnel and total payroll outlay by county or ZIP Code? YES NO
If you have this information, we will follow-up at a later date to collect it.

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SC Military Installation Impact Study



Procurement

What is the installation's total procurement and purchases for the latest fiscal year? _____ (Dollars)

Please fill in the form below on base expenditures and procurement activity.

Procurement and Purchases			
	Total	Total Dollars Paid to Suppliers, Vendors and Contractors in South Carolina	Total Dollars Paid to Suppliers, Vendors and Contractors Out of South Carolina
Building Construction/Maintenance - Total			
Infrastructure Construction			
Institutional Building Construction			
Multifamily Residential Building Construction			
Single Family Residential Building Construction			
Architecture & Engineering			
Environmental			
Custodial			
Groundskeeping and Maintenance			
Other (Please Specify)			
Utilities - Total			
Electricity			
Natural Gas			
Water/Sewer			
Telephone			
Mobile Telephone			
Internet			
Cable Television			
Medical - Total			
Tricare			
Health			
Dental			
Medical Suppliers			
Other (Please Specify)			

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SC Military Installation Impact Study



Procurement (Continued)

Procurement and Purchases			
	Total	Total Dollars Paid to Suppliers, Vendors and Contractors in South Carolina	Total Dollars Paid to Suppliers, Vendors and Contractors Out of South Carolina
Contracts - Total			
Research and Development Services			
Engineering Services			
Computer Services			
Computer Hardware			
Other (Please Specify)			
Purchases - Total			
Government Purchase Card			
Ground Fuel			
Aviation Fuel			
General Equipment			
Computer/IT Equipment			
Communications Equipment			
Travel			
Food			
Other (Please Specify)			
Education - Total			
College/University Tuition			
Community College Tuition			
Elementary Education			
Other (Please Specify)			
Please List Any Other Significant Procurement and Purchase Categories			
1)			
2)			
3)			
4)			
5)			
6)			
7)			
8)			

Please attach additional pages if more room is required for other categories.



SC Military Installation Impact Study



Procurement (Continued)

Would you be able to provide total base procurement and purchases by county or ZIP Code?
(For example, \$10 million in total procurement from businesses in Richland County or ZIP Code 29201.)

YES NO

If you have this information, we will follow-up at a later date to collect it.

Base and Command Visitors

Information on base visitors will help determine the full economic impact of the installations. Please provide us with information on non-base personnel that have visited the installation.

For non-base military personnel that visited the installation:

Number of visitors, annually: _____ (Number)

Average length of visit: _____ (Number of days)

Amount spent by each visitor per day: _____ (Dollars)

For non-base civilian contractors or civilian DOD personnel that visited the installation:

Number of visitors, annually: _____ (Number)

Average length of visit: _____ (Number of days)

Amount spent by each visitor per day: _____ (Dollars)

For friends and family that visited the installation:

Number of visitors, annually: _____ (Number)

Average length of visit: _____ (Number of days)

Amount spent by each visitor per day: _____ (Dollars)

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on Next Page



SC Military Installation Impact Study



Conclusion

Thank you for completing this data collection form. Your responses are critically important in measuring the impact of South Carolina's military installations on the state's economy. Please return your responses to:

David Clayton
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SC Department of Commerce
1201 Main St., Suite 1600
Columbia, SC 29201
(803) 737-4633
dclayton@scommerce.com

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