

Military Construction Spending is a Bridge to Sustainable Economic Recovery

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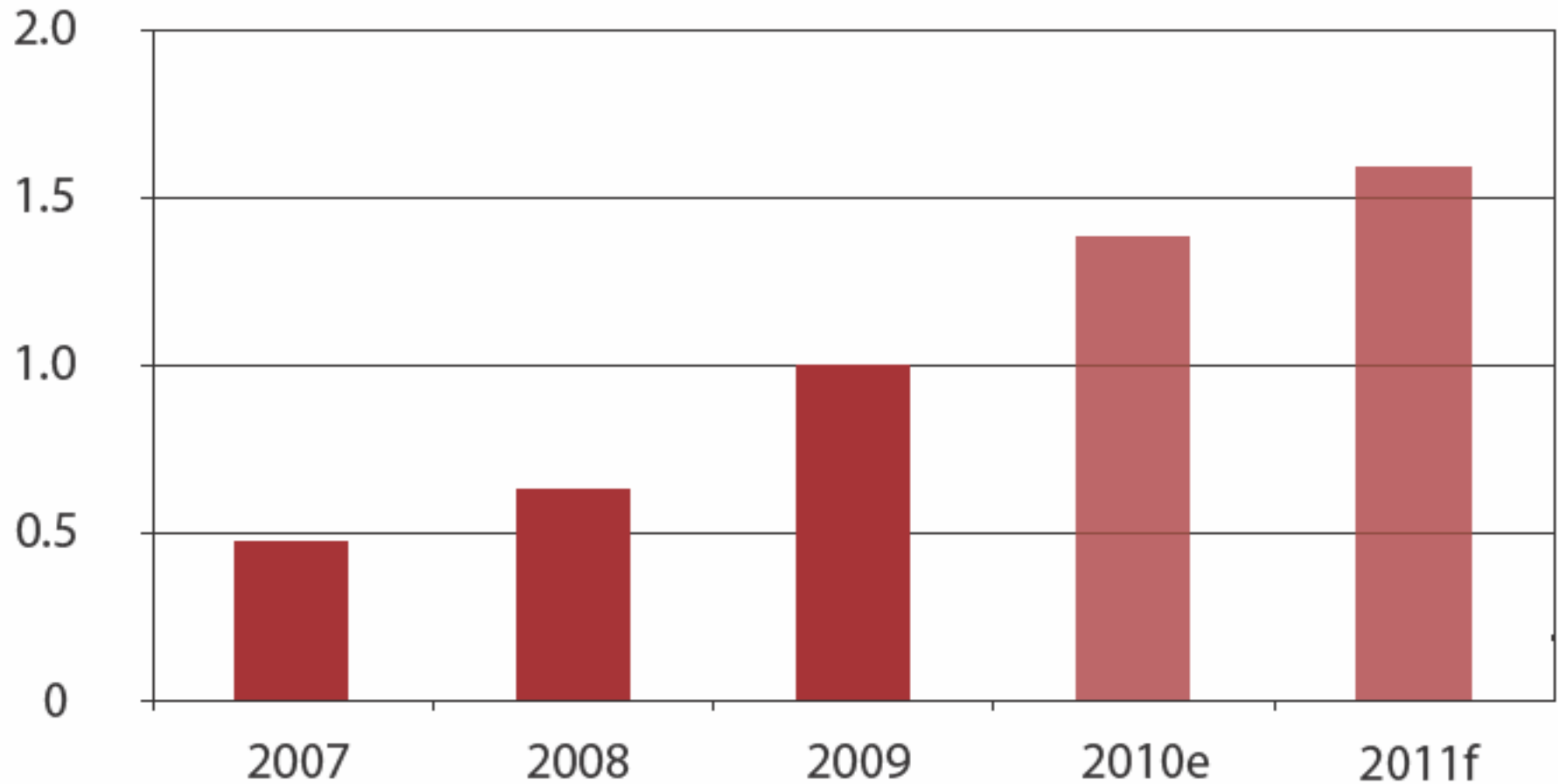
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Key Topics

- Military Construction Contracts:
Size and Scope
- Cushioning Recession
- Output, Earnings, and Jobs
- Energy Efficiency
- Conclusions

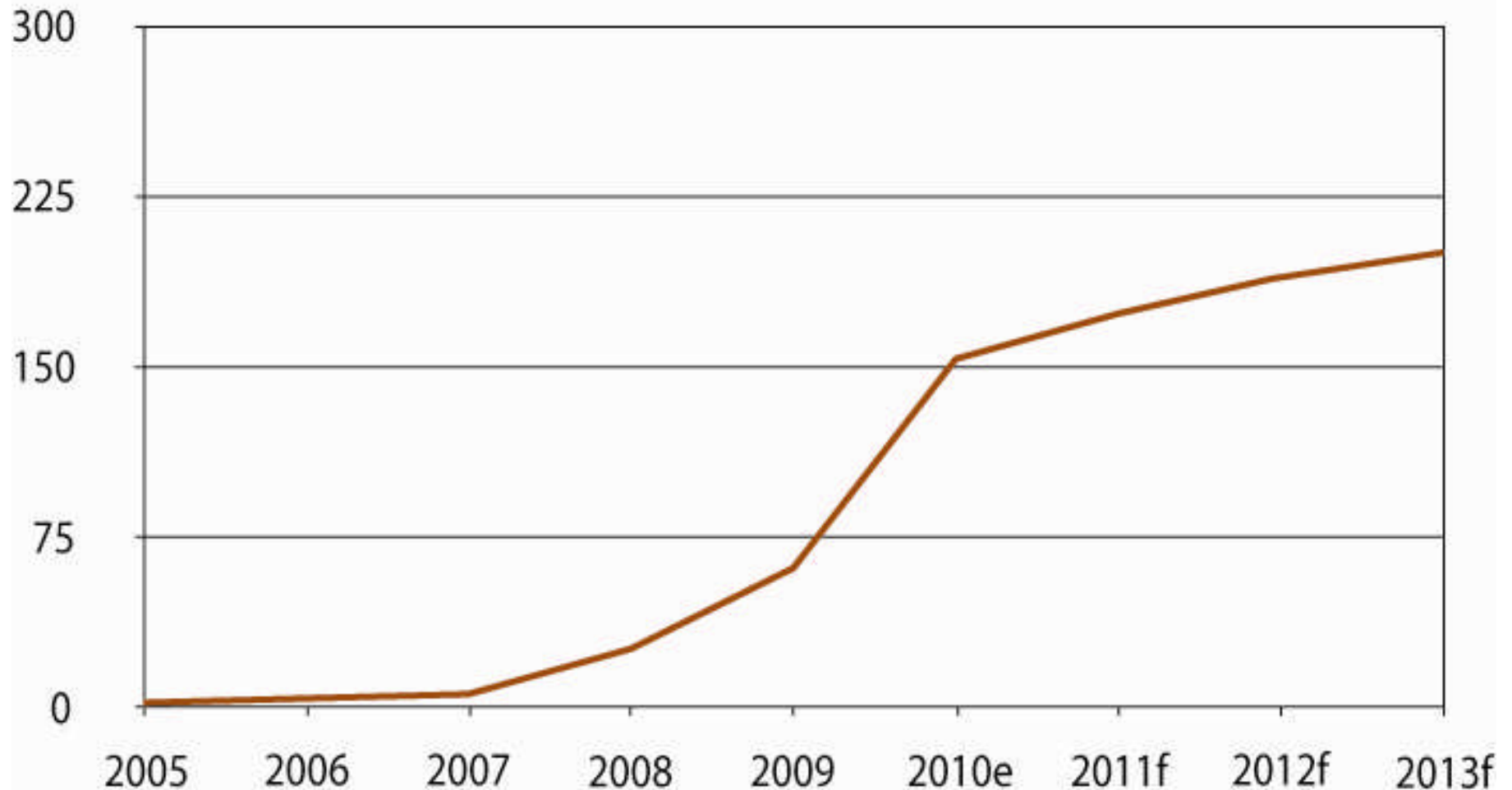
Military Construction in San Diego Hits \$1.4 Billion in 2010

Billions of dollars



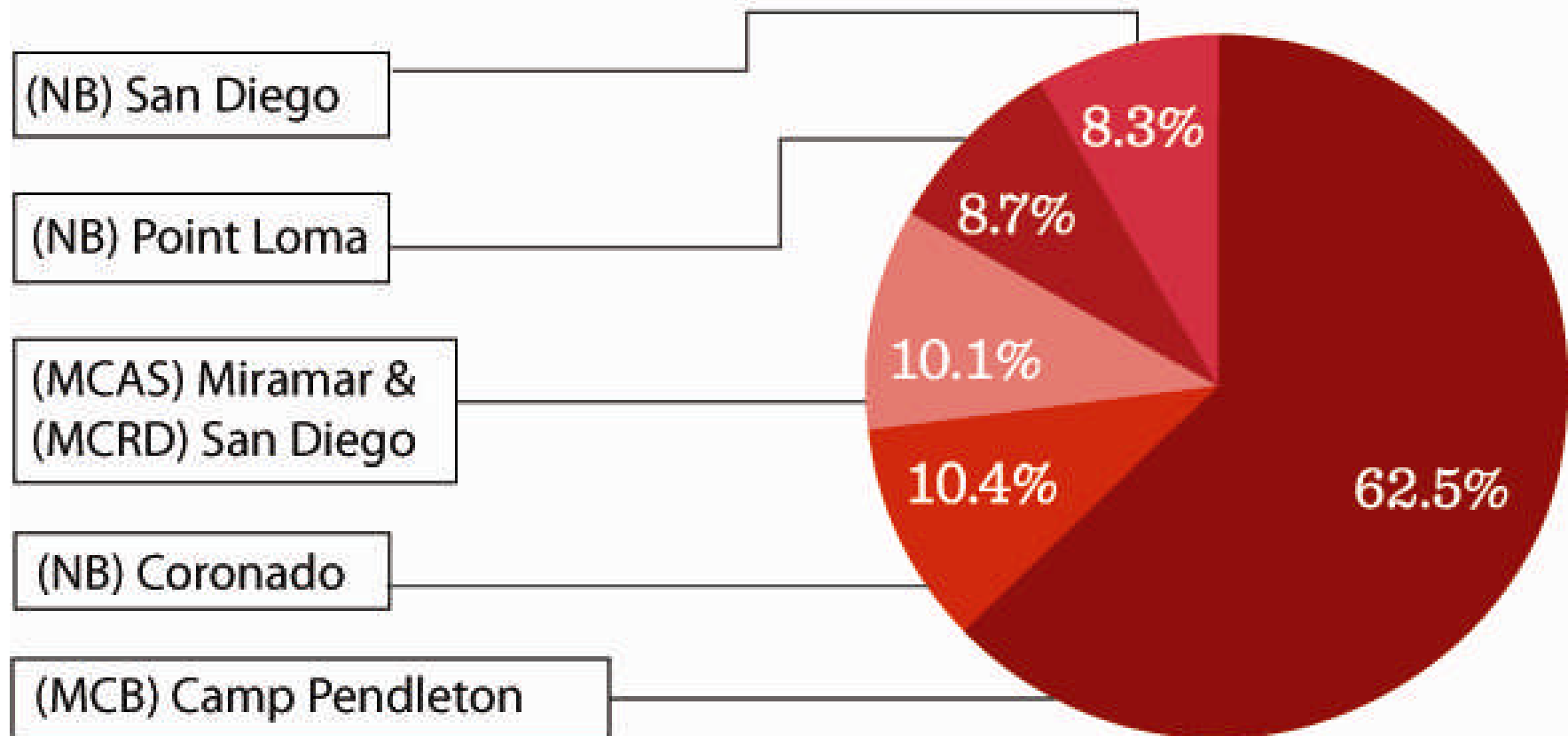
Contract Expenditures Follow an "S-Curve"

Cumulative spending, millions of dollars



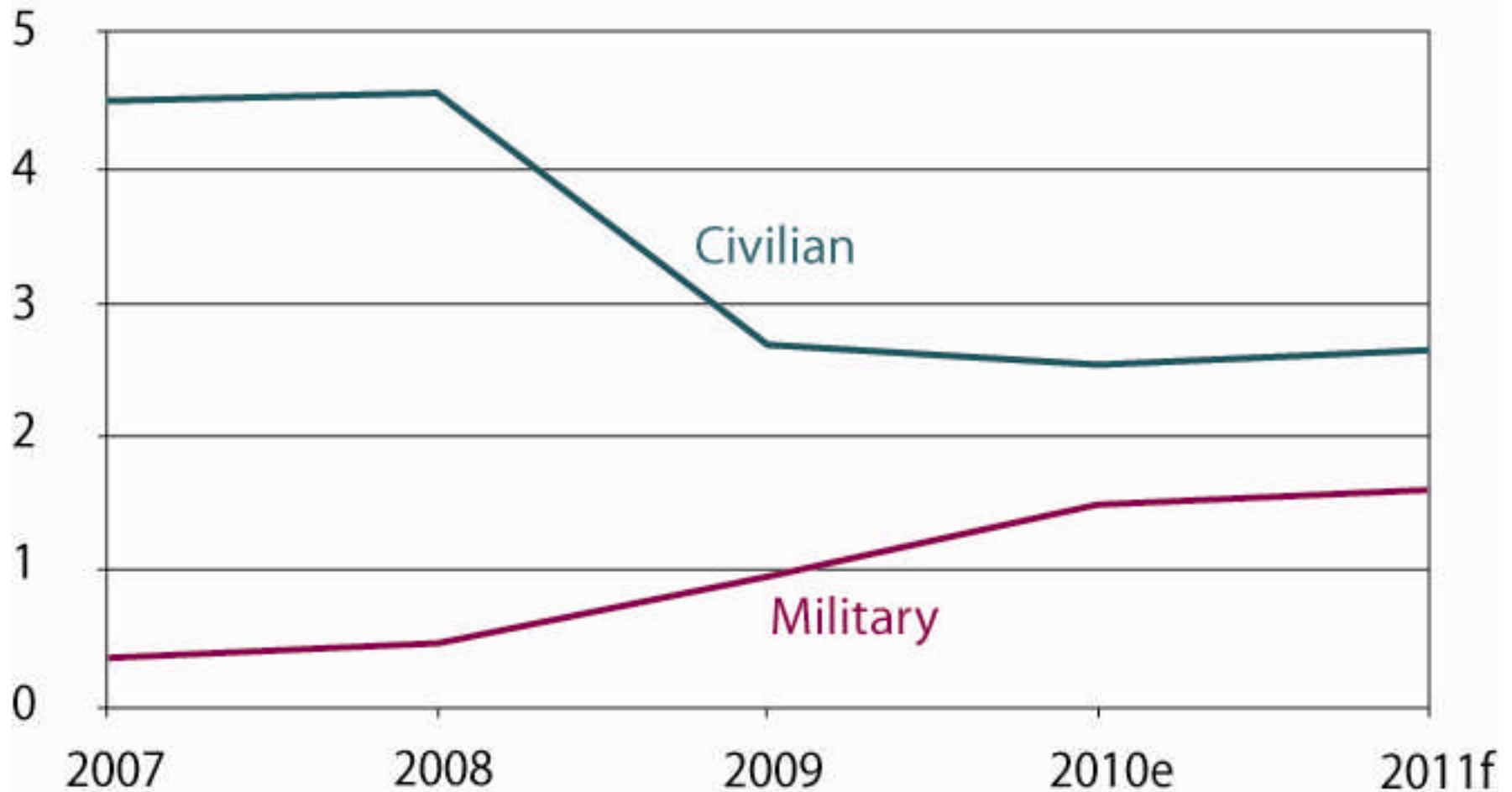
Camp Pendleton Leads Military Construction Spending

Shares of total, 2010e

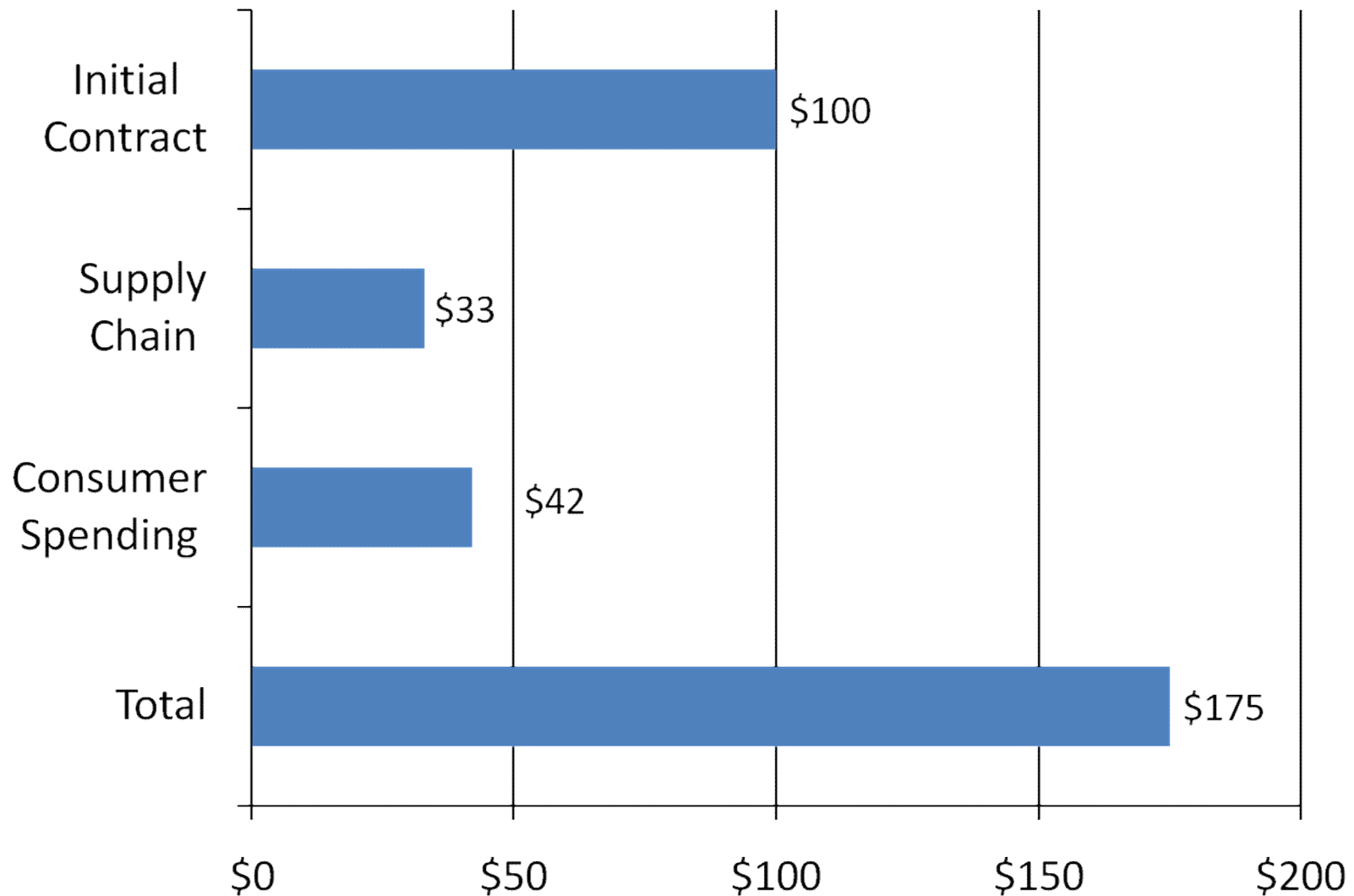


Civilian Construction Contracts Plummet, While Military Construction Soars

Billions of dollars

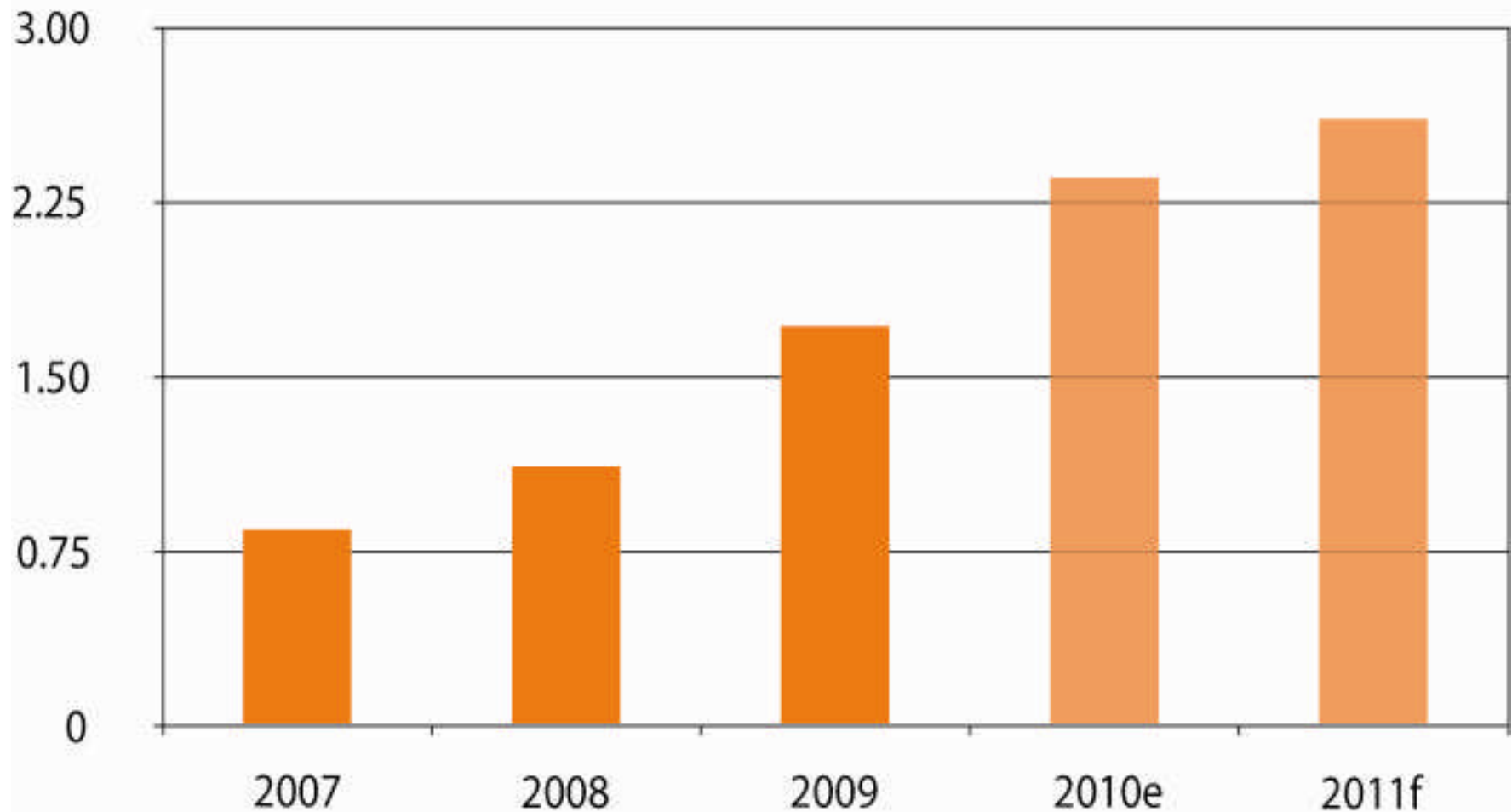


Multiplier Effects on Output are Large



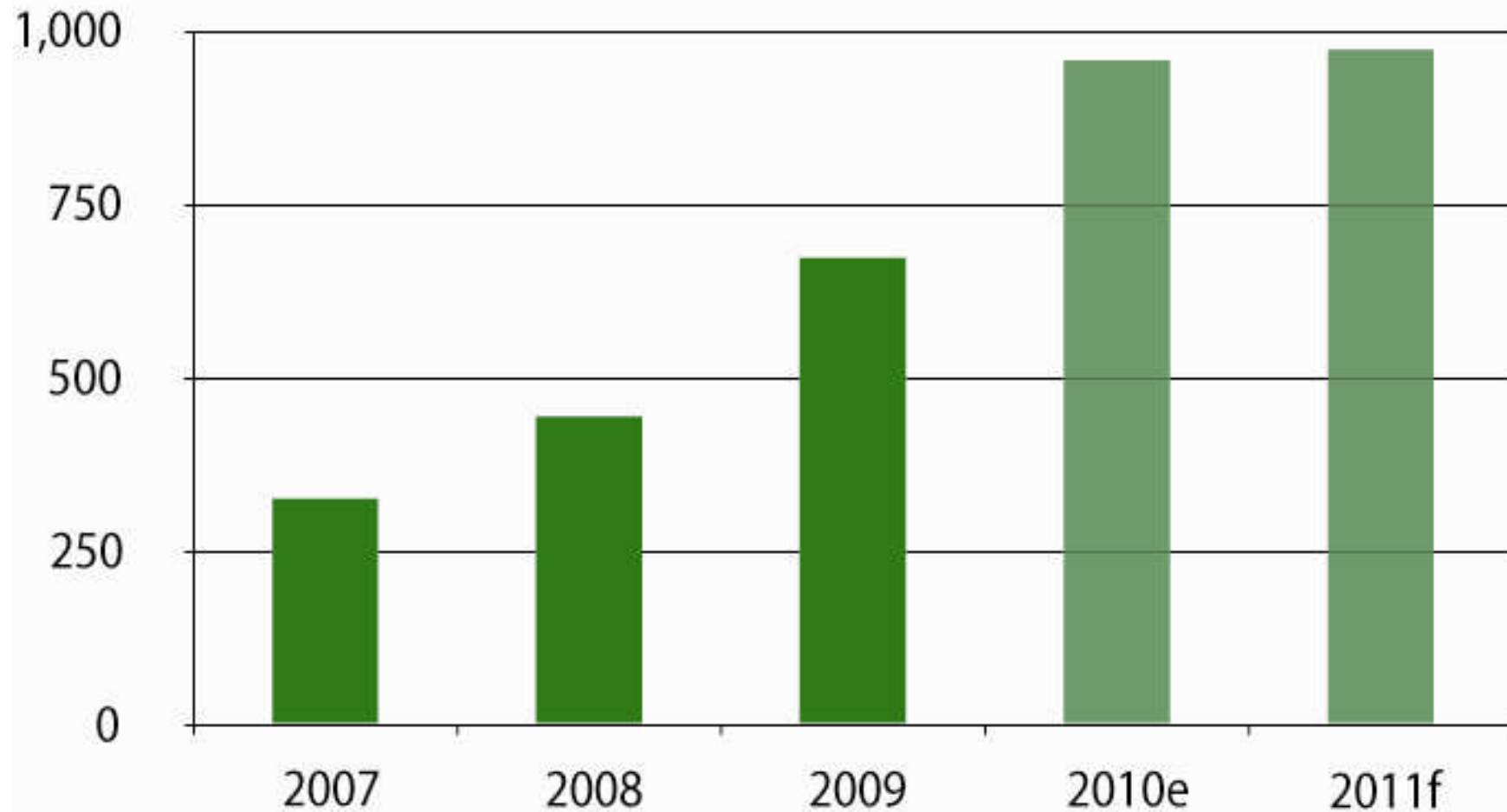
Total Output of \$2.3 Billion in 2010

Billions of dollars



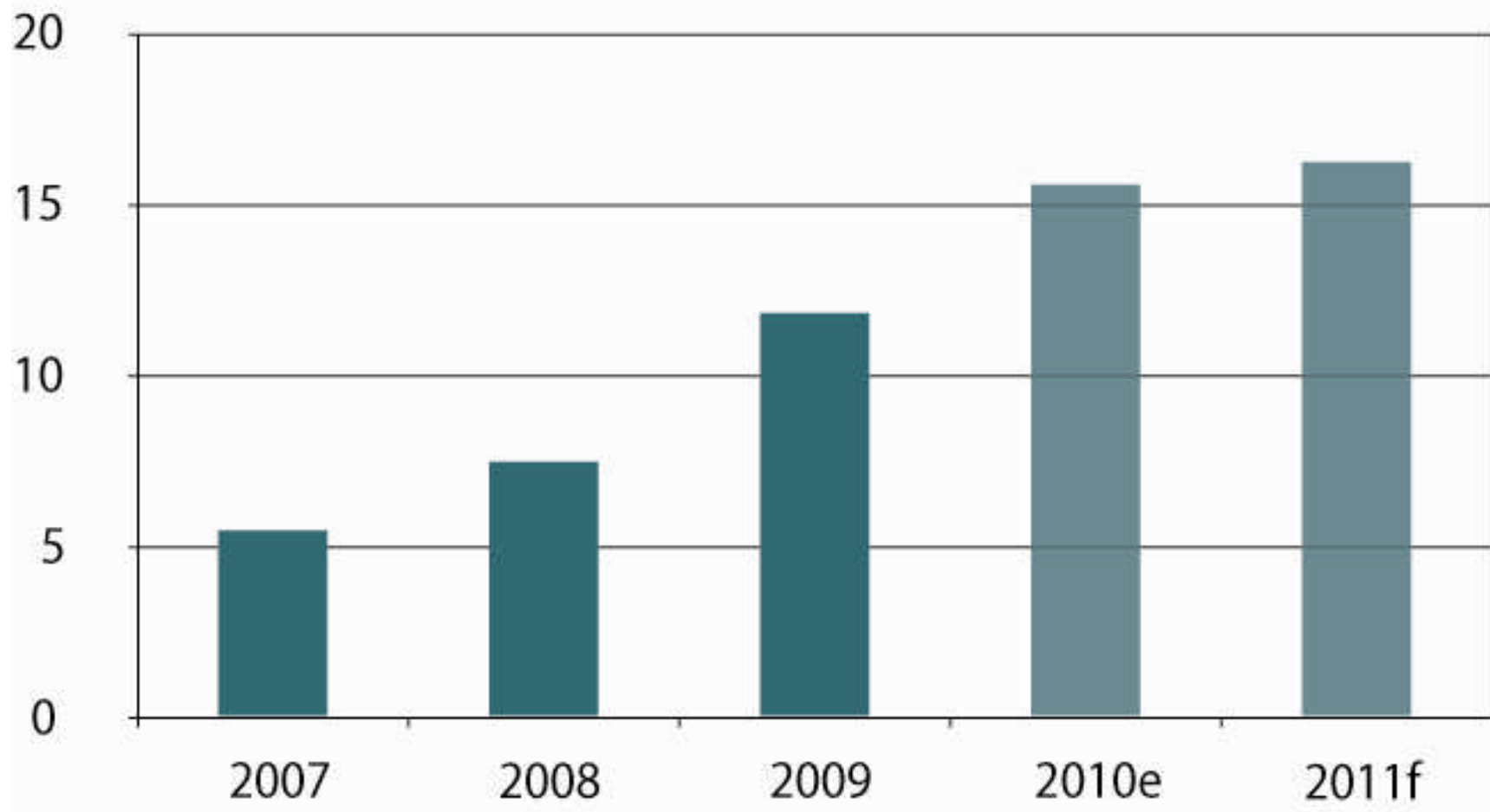
\$960 Million of Total Earnings in 2010

Millions of dollars



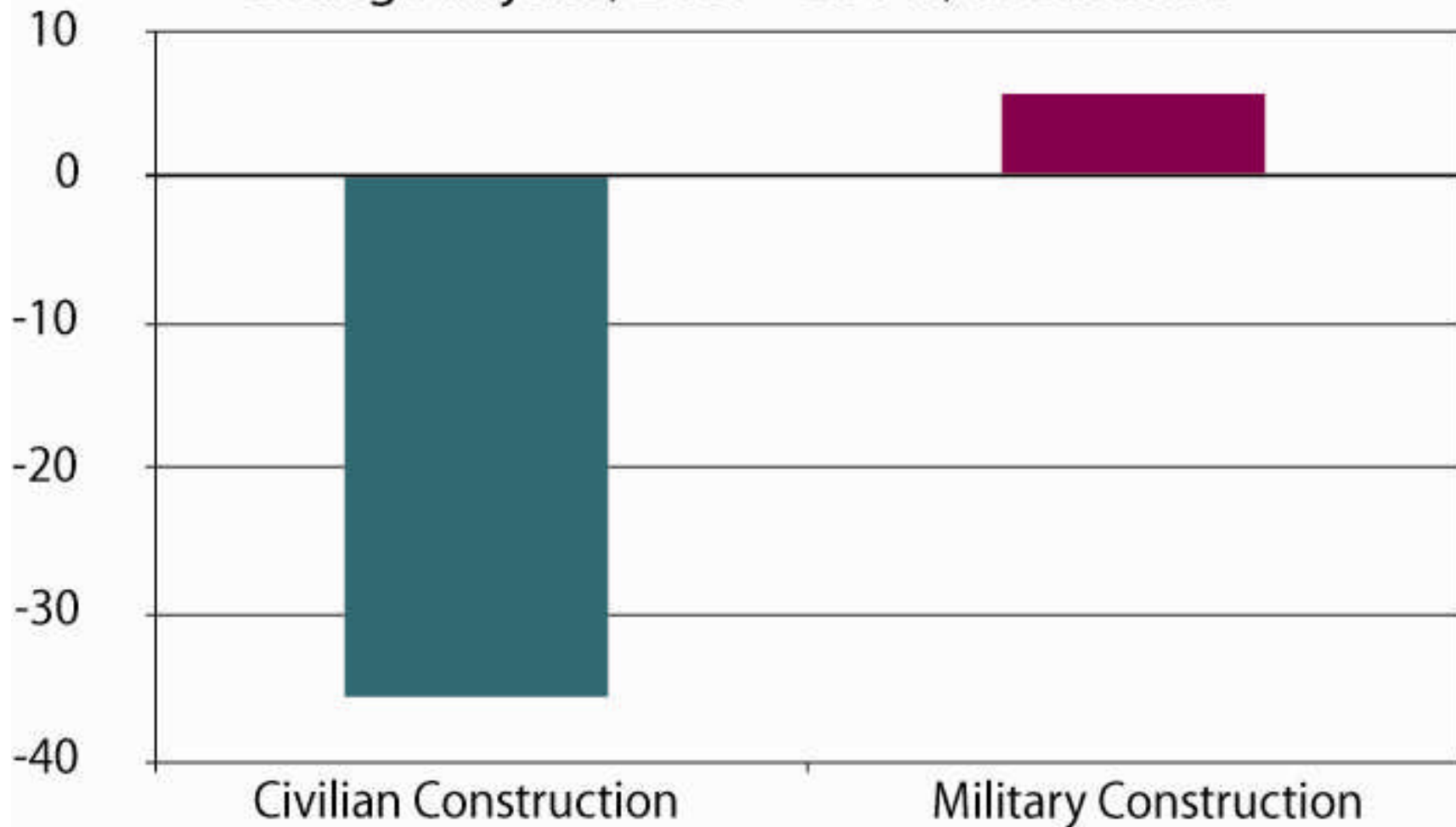
15,500 Jobs in 2010

Thousands of jobs



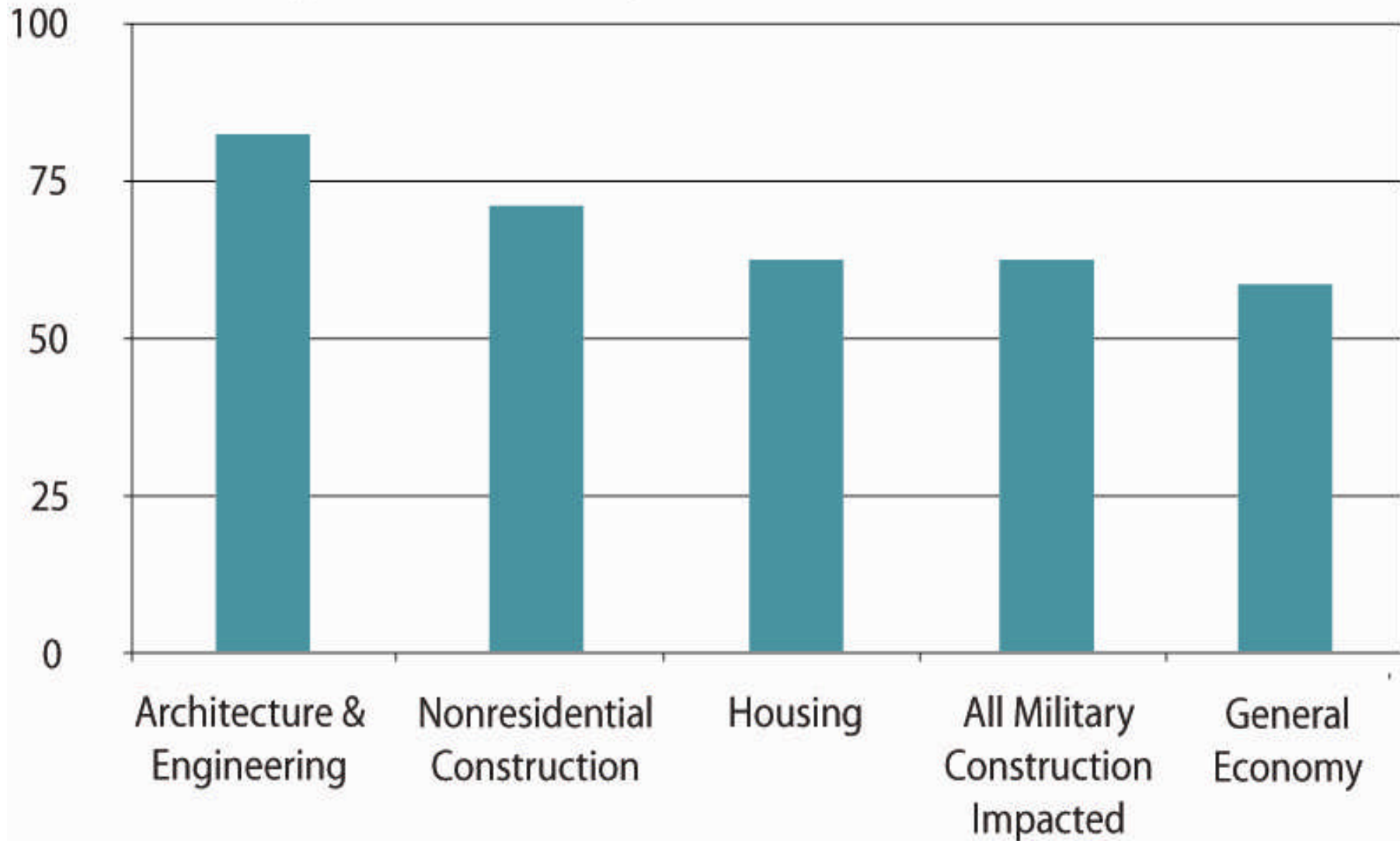
Military Construction Job Gains Counter Civilian Losses

Change in jobs, 2007 - 2011f, thousands



High-Paying Jobs

Average annual earnings, thousands of dollars, 2010e



Energy Efficiency

- Military Construction Sets the Standard
- Natural Ventilation and Heating
- New Lighting Systems
- Silver Level or Higher of LEED

Recap

- Military Construction Spending Major Driver in San Diego
- Buffer against Recession
- Boost to Output, Earnings and Jobs
- Military Leads in Energy Conservation and Efficiency
- Catalyst and Bridge to Sustainable Economic Expansion

Questions

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