SAN ANTONIO
Overview
San Antonio is the nation’s seventh largest city in terms of population in the United States and the second largest in the state of Texas. It was the fastest growing on the Top 10 Largest Cities in the United States from 2000-2010 and the second from 1990-2000. The city of San Antonio serves as the seat of Bexar County. In the heart of Southern Texas, the city is home to noted national landmarks and celebrated public spaces like the Riverwalk and The Alamo and welcomes more than 20 million visitors per year. Interstate highways connect San Antonio to the major Texas population centers and to primary border crossing points into Mexico, because of this combination of ideal location and quality infrastructure, more than 50 percent of the total goods flowing between the U.S. and Mexico travel through San Antonio before reaching their final destination.

San Antonio is home to five Fortune 500 companies including Valero Energy, USAA, Tesoro, Clear Channel Communications and NuStar, other major companies in the metro area include Whataburger’s Corporate Headquarters, H-E-B, Medtronic, Caterpillar, Rackspace and Eye Care Centers of America. A leader in the Cyber-Security revolution, San Antonio is home to the 2nd largest data center concentration in the United States and has more science and technology “security cleared” workers than any city in the US outside of the Washington, DC area. San Antonio has a strong military presence and is home to Fort Sam Houston, Lackland Air Force Base, Randolph Air Force Base and Brooks City-Base with Camp Bullis and Camp Stanley outside the city.

The United States Army Installation Management Command (IMCOM) is headquartered in San Antonio on Ft. Sam Houston after relocating in October, 2010 from Arlington, VA as part of the Base Realignment and Closure (BRAC) Act of 2005. The San Antonio BRAC is the largest economic development event in the city’s history with 10,000 families moving to San Antonio approximately 12,500 new jobs created. Construction at Ft. Sam to accommodate growth is projected to be approximately $2.8 million.

San Antonio is also home to the South Texas Medical Center which consists of over 900 acres of medical-related facilities and directly serves 38 counties. The healthcare industry is one of the city’s top employers, bringing close to $3.4 billion into the region every year. In addition to serving as a regional hub for medical care, San Antonio is also home to a growing bioscience research industry. The combined economic impact of the health care and the bioscience research is almost $11.5 billion.

RECOGNIZED STATE RANKINGS
Texas
#1 Most Cities in America’s Best-Performing Cities 2013 Milken Institute
#1 Top States for Job Creation 2012 CNBC
#1 Top States for Personal Income Growth 2012 Bureau of Economic Analysis News

RECOGNIZED CITY RANKINGS & ACCOLADES
San Antonio
SA Tech Block Advocate for the Tech Industry 2015 Silicon Hills News
San Antonio New Home for Innovative Tech 2013 National Journal
#1 Destination 2014 Texas Highways Magazine
#1 Nation’s Best Performing City for 2011 Milken Institute
#1 Best Cities for Job Outlook 2011 Forbes
#3 America’s New Tech Hot Spots 2013 Forbes
#4 Nation’s Next “Boom Town” 2011 Forbes
#10 Nation’s Best Performing City for 2014 Milken Institute
ECONOMY

Over 41,000 jobs gained in last 12 months

Historically, the first quarter of any given year starts slowly, but 2015 is off to a strong start. A total of 41,075 jobs were created in the San Antonio - New Braunfels MSA. Payroll job growth ended at 4.2%, 270 basis points above the U.S. average of 1.5%. The current unemployment rate in San Antonio is under the 5% mark at 3.9%, the lowest in over 11 years. This compares with a national unemployment rate of 5.5% in May 2015.

CORE INDUSTRIES SAN ANTONIO - NEW BRAUNFELS MSA

Atascosa, Bandera, Bexar, Comal, Guadalupe, Kendall, Medina and Wilson Counties

<table>
<thead>
<tr>
<th>INDUSTRY</th>
<th>WAGES BY INDUSTRY (IN MILLIONS)</th>
<th>COMPOSITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government</td>
<td>$2,112.80</td>
<td>17%</td>
</tr>
<tr>
<td>Trade, Transportation &amp; Utilities</td>
<td>$1,712.40</td>
<td>17%</td>
</tr>
<tr>
<td>Professional &amp; Business Services</td>
<td>$1,691.60</td>
<td>13%</td>
</tr>
<tr>
<td>Education &amp; Health Services</td>
<td>$1,503.00</td>
<td>15%</td>
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<tr>
<td>Financial Activities</td>
<td>$1,212.00</td>
<td>9%</td>
</tr>
<tr>
<td>Construction</td>
<td>$665.70</td>
<td>5%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>$635.60</td>
<td>5%</td>
</tr>
<tr>
<td>Leisure &amp; Hospitality</td>
<td>$601.70</td>
<td>12%</td>
</tr>
<tr>
<td>Information</td>
<td>$364.10</td>
<td>2%</td>
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<tr>
<td>Mining and Logging</td>
<td>$204.50</td>
<td>1%</td>
</tr>
<tr>
<td>Other Services</td>
<td>$203.70</td>
<td>4%</td>
</tr>
<tr>
<td>San Antonio - New Braunfels MSA Total</td>
<td>$10,907.10</td>
<td>100%</td>
</tr>
</tbody>
</table>

SOURCE: Texas Workforce Commission

PAYROLL JOB GROWTH

TRENDS

5-YEAR TREND  CURRENT QUARTER

JOB GROWTH

41,075 jobs gained in last 12 months

UNEMPLOYMENT RATE

SOURCE: Bureau of Labor Statistics

LARGEST EMPLOYERS

- Lackland Air Force Base – Military (37,097)
- Fort Sam Houston – U.S. Army – Military (32,000)
- USAA – Financial Services & Insurance (17,000)
- H-E-B – Super Market Chain (20,000)
- Northside I.S.D. – School District (12,751)
- City of San Antonio – City Government (11,731)
- Randolph Air Force Base – Military (11,068)
- Northeast I.S.D. – School District (10,522)
- Methodist – Health Care Services (8,000)
- San Antonio I.S.D. – School District (7,374)