

2014
**ECONOMIC
IMPACT
ANALYSIS**



TYNDALL AIR FORCE BASE, FLORIDA

COMMANDER'S WELCOME



Tyndall Air Force Base (TAFB) is pleased to present our Economic Impact Analysis (EIA) for fiscal year 2014. This EIA provides base visitors, as well as both state and local leaders, an overview of Tyndall's mission and its financial impact on the local area.

TAFB is part of the United States Air Force Air Combat Command. The 325th Fighter Wing mission is to train and project combat air power for the F-22 Raptor, as well as train intelligence personnel and air traffic controllers for worldwide combat assignments. Accomplishing our mission requires a total team effort with active duty, reserve, guard, civilians, their families, and the community all working together.

We could not succeed in this important mission without the contribution and support of our local communities. I extend my gratitude to every team member, to their families, and the Bay County area for their world-class service and support to TAFB. We are proud to be a part of a community that faithfully and consistently supports our military.

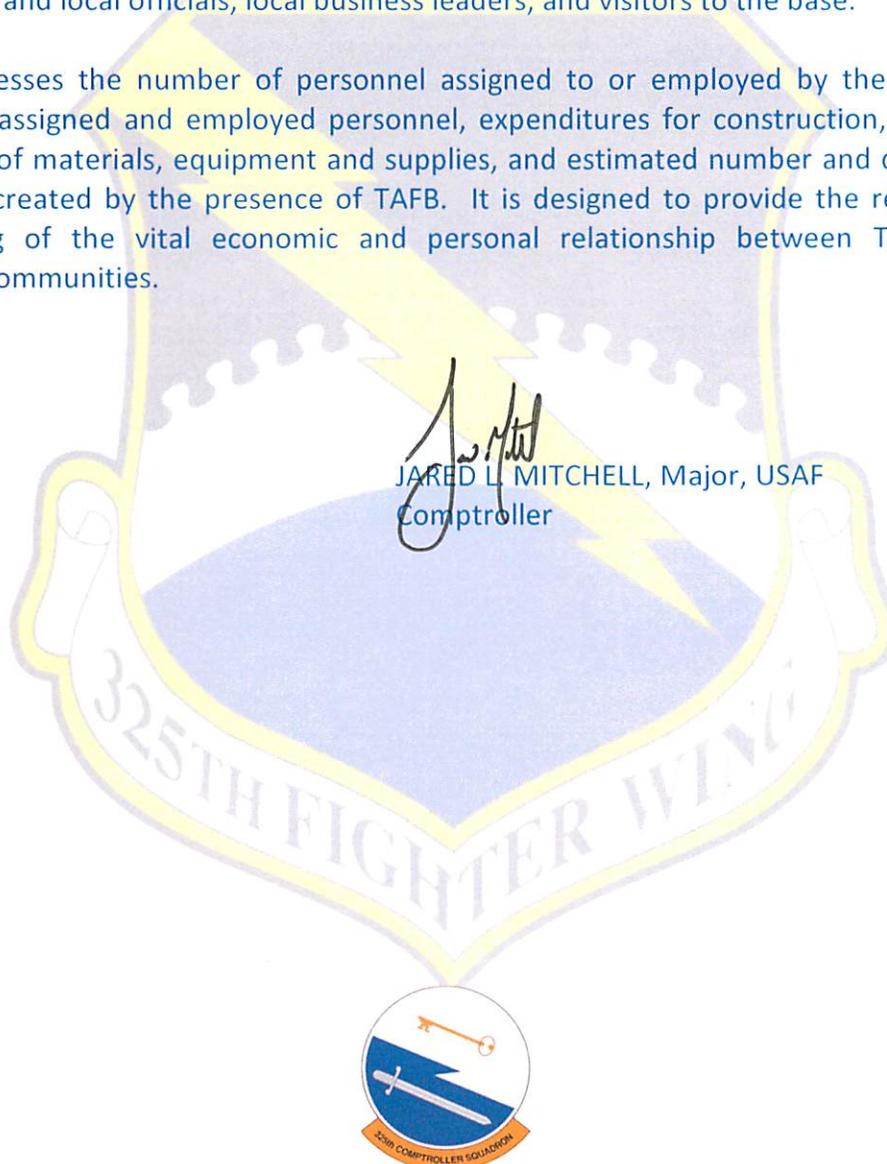
Over the past year, TAFB has worked diligently in the face of budget constraints to maintain operational and training air superiority with a fleet of 52 F-22 and 20 T-38 aircraft, which has doubled since 2013. These assets both support our training objectives and expand our mission as a force provider. I am excited to see this investment at Tyndall by our Air Force and look forward to a continuously prosperous relationship with Bay County over the coming years.

DEREK C. FRANCE, Colonel, USAF
Commander, 325th Fighter Wing

MESSAGE FROM THE COMPTROLLER

The 325th Comptroller Squadron prepares annually the Economic Impact Analysis (EIA) for Tyndall Air Force Base (TAFB) to provide unclassified information about the economic impact of TAFB on the surrounding area. This document is made available to senior military officials, federal, state, and local officials, local business leaders, and visitors to the base.

The EIA addresses the number of personnel assigned to or employed by the base, annual payroll of all assigned and employed personnel, expenditures for construction, services, and procurement of materials, equipment and supplies, and estimated number and dollar value of indirect jobs created by the presence of TAFB. It is designed to provide the reader with an understanding of the vital economic and personal relationship between TAFB and the surrounding communities.



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EXECUTIVE SUMMARY

Tyndall Air Force Base (TAFB) encompasses more than 29,000 acres of Southeastern Bay County. The communities within a 50-mile radius of Tyndall comprise the local economic impact area. TAFB has 52 F-22 Raptors, 20 T-38s, 40 QF-4s, 5 QF-16s, 35 BQM-167As, and 2 E-9A aircraft assigned. TAFB possesses 13 watercraft for coastal security and aerial target recovery. Serving a population of 3,921 active military personal, TAFB also serves 9,316 retirees from all service branches: 5,504 Air Force, 1,767 Army, 146 Coast Guard, 200 Marine Corps, and 1,699 Navy. During Fiscal Year 2014, \$ 2,115,764 was paid out in tuition assistance to local area colleges and vocational schools and \$ 537,936 in government impact aid to local area schools.

Total FY14 Economic Impact \$ 605,297,898

The total economic impact is computed using standard factors developed by the U.S. Department of Commerce that consider the effect of payrolls, expenditures for contracts, materials, equipment, services, construction, and other procurement actions on the economy of the region.



TABLE OF CONTENTS

Part I – BACKGROUND

- History of Tyndall AFB 6
- Organizations 8

Part II – ECONOMIC IMPACT

- Table 1 – Force Structure 9
- Table 2 – Capital Assets 10
- Table 3 – Capital Assets (Other) 11
- Table 4 – Personnel and Payroll by Classification and Housing Location 12
- Table 5 – Annual Payrolls by Classification and Housing Location 13
- Table 6 – Expenditures for Construction, Services, and Procurement of Materials, Equipment and Supplies 14
- Table 7 – Estimate of Number and Dollar Value of Indirect Jobs Created 15
- Table 8 – Total Annual Economic Impact Estimate 16

PART I BACKGROUND

History of Tyndall AFB

In December 1940, a site board determined that Flexible Gunnery School No. 9 would be located 12 miles southeast of Panama City, Florida on East Peninsula. On May 6, 1941, Army and local dignitaries held an official ground breaking for the school. Panama City's mayor, Harry Fannin, dug the first spade full of sand, and Colonel Warren Maxwell, Tyndall's first commander, wielded the first ax on the stubborn palmetto plants, so common on the East Peninsula. The site was covered with pine and palmetto trees, scrub brush, and swamps. Bulldozers worked around the clock to clear the brush and fill in swamps.

Although construction was well underway, the base lacked a name. Congressman Bob Sikes suggested naming the school in memory of Lieutenant Francis B. Tyndall. A native of Sewall Point, Florida, Lieutenant Tyndall was a fighter pilot during World War I and was credited with shooting down four German planes well behind enemy lines in 1918. While inspecting Army fields near Mooresville, North Carolina on July 15, 1930, Tyndall's plane crashed, killing him instantly. On June 13, 1941, the War Department officially named the new installation Tyndall Field.

On December 7, 1941, the first of 2,000 troops arrived at Tyndall Field. Although construction was incomplete, instructors and students began preparing for the first class. The first class of 40 gunnery students began on February 23, 1942.

Of the thousands of students passing through the Tyndall gates, the most famous was actor Clark Gable, a student here during 1943.

One common thread between those early years and today's training at Tyndall is foreign student training. It began at Tyndall in 1943 with French Air Force gunnery students being the first and Chinese students following that year. The last class of foreign students entered training in 1946. They were Chinese Nationals. Today, foreign students attend weapons controller training at Tyndall.

When World War II ended, Tyndall went through the demobilization process, as did most Army Air units. Fortunes changed as the base fell under the control of the Tactical Air Command in 1946. This only lasted three months. Then Tyndall became part of Air University.

In September of 1950, Tyndall became an Air Training Command (ATC) base. Several schools were assigned, including Weapons Controllers, USAF Air Police, and USAF Instrument Instructor Pilot. Then on January 4, 1951, ATC began aircrew (interceptor) training at Tyndall using F-86, F-89, and F-94 aircraft. This relationship lasted until July 1, 1957, when Tyndall became part of the Air Defense Command, an association that would continue for more than 22 years.

Tyndall began hosting William Tell in 1958, just one year after becoming an Air Defense Command unit. William Tell is the nickname for the USAF Air-to-Air Weapons Meet held bi-annually. Tyndall still hosts the competition, but under the sponsorship of Air Combat Command (ACC) and with competition from all over the world.

Tyndall's second association with the Tactical Air Command began on October 1, 1979. Over the next few years, modernization, upgrade, and reorganization became the key words around Tyndall. A major reorganization occurred on July 1, 1981, with the activation of the 325th Fighter Weapons Wing. The wing began its mission at Tyndall with the F-101, F-106, and T-33 aircraft, while at the same time phasing out the F-101 and F-106 and preparing for the arrival of Tyndall's first F-15 aircraft in 1983.

Over the years, Tyndall gained additional missions as other units were stationed on the base. The Air Force Engineering and Services Center was formed at Tyndall as a part of a major reorganization. In 1991, it was renamed the Air Force Civil Engineering Agency. The 23d Air Division, renamed the Southeast Air Defense Sector, also relocated to Tyndall. It had the responsibility for the air defense of the southeastern United States.

As the base entered its fiftieth year, Tyndall underwent reorganization in response to the DoD effort to streamline defense management.

Headquarters, First Air Force moved from Langley Air Force Base, Virginia, to Tyndall, and the 325th Fighter Wing became the installation host.

Transition continued for the base as it transferred from being an Air Combat Command installation to an Air Education and Training Command installation on July 1, 1993. This move emphasized Tyndall's commitment to training. The 325th Fighter Wing remained the sole F-15 air superiority training wing until October 2010.

Tyndall AFB was selected as the center for training the Air Force's newest F-22 Raptor and received its first aircraft in 2004. The 43d Fighter Squadron provides training for pipeline students receiving initial F-22 training, and pilots transitioning from other airframes. As Tyndall's newest mission ramped up, its "bread and butter" mission, training F-15 pilots began a gradual phase out. The 1st Fighter Squadron inactivated in 2006, while both the 2d and 95th Fighter Squadrons shuttered in 2010. In July 2010, USAF announced that Tyndall would receive an operational F-22 squadron. On 1 Oct 2012, the 325th Fighter Wing re-flagged as an ACC operational unit after almost 2 decades in AETC. Air Battle Manager training remained with AETC, and the unit became the 337th Air Control Squadron. On 11 Oct 2013, the 95th Fighter Squadron reactivated and in mid-April 2014 received its full complement of 24 Raptors.

The 325th Fighter Wing is proud of its evolving mission to "Train and Project Unrivaled Combat Airpower."

ORGANIZATIONS

325th Fighter Wing Staff Agencies

- Chaplain
- Command Post
- Community Support Coordinator
- Comptroller Squadron
- Drug Demand Reduction
- Historian
- Information Assurance
- Inspector General
- Military Equal Opportunity/Equal Employment Opportunity
- Plans and Programs
- Protocol
- Public Affairs
- Safety
- Sexual Assault Response Coordinator
- Staff Judge Advocate

325th Maintenance Group

- 325th Aircraft Maintenance Squadron
- 325th Maintenance Squadron

325th Medical Group

- 325th Aeromedical Dental Squadron
- 325th Medical Operations Squadron
- 325th Medical Support Squadron

325th Mission Support Group

- 325th Civil Engineer Squadron
- 325th Communications Squadron
- 325th Contracting Squadron
- 325th Force Support Squadron
- 325th Logistics Readiness Squadron
- 325th Security Forces Squadron

325th Operations Group

- 2d Fighter Training Squadron
- 43d Fighter Squadron
- 95th Fighter Squadron
- 325th Operations Support Squadron
- 325th Training Support Squadron

Tenants

- 16th Electronic Warfare Squadron/Detachment 1
- 44th Fighter Group
- 53d Weapons Evaluation Group
- 337th Air Control Squadron
- 372d Training Squadron/Detachment 4
- 702d Computer Systems Squadron & System Support Facility
- 823d Red Horse Squadron/Detachment 1
- Air Force Civil Engineer Center - East
- Air Force Office of Special Investigation
- Airey NCO Academy
- Continental NORAD Region – First Air Force (Air Forces Northern)

PART II ECONOMIC IMPACT

Table 1 FORCE STRUCTURE

TYPE AIRCRAFT		AIRCRAFT ASSIGNED
F-22		52
E-9A		2
T-38		20
TOTAL		74
 Aerial Targets		
BQM-167A		35
QF-4		40
QF-16		5
TOTAL		80
TYPE AIRCRAFT SIMULATOR		SIMULATORS ASSIGNED
F-22		4
F-15		4
TOTAL		8
RUNWAYS TYPE	WIDTH (feet)	LENGTH (feet)
Primary	200	10,000
Secondary	150	9,075
Drone	150	7,000
 WATERCRAFT		NUMBER ASSIGNED
25 Ft - Outboard Boat		2
120 Ft - Drone Recovery Boat		3
34 Ft - Search and Rescue Boat		1
17 Ft - Patrol Boat		1
24 Ft - Patrol Boat		2
21 Ft - Patrol Boat		1
65 Ft - Range Operation Boat		1
Jet Ski		2
TOTAL		13

Table 2 CAPITAL ASSETS

BUILDING/FACILITIES	# OF BUILDINGS	SQ FT
Operations/Training	84	690,323
Maintenance/Production	98	1,042,625
Administrative	34	527,892
Technical Training	2	17,736
Privatized Housing	525	1,291,832
Camp Troop	4	21,504
Commissary	1	72,360
Base Exchange	8	94,573
Community	79	478,402
Medical Treatment Facility	8	152,782
Storage	117	452,502
Research, Development, Test & Evaluation	13	141,342
Utilities	35	17,466
Bachelor Airmen Quarters	11	205,612
Visiting Airmen Quarters	4	99,325
Visiting Officer Quarters	11	122,225
Temporary Lodging Facility	27	74,448
Transportation	16	8,967
Housing Support Facility	5	34,403
TOTAL	1,082	5,546,319
LAND		ACRES
Base Proper	Public Domain	2,101
Base Proper	Fee Condemned	26,661
Base Proper	Easement	57
Base Proper	Fee Purchased	5
Carrabelle	Fee Purchased	33
Lynn Haven	Fee Purchased	203
St George Island	Fee Purchased	1
Apalachicola	Lease	7
Sumatra	Permitted	1
TOTAL ACREAGE		29,069

Table 3 CAPITAL ASSETS (OTHER)

TYPE	VALUE
Communications Systems	\$ 51,600,000
Computers/Equipment	\$ 19,557,323
TOTAL	\$ 71,157,323

VEHICLES	
Owned	633
Leased	66
TOTAL	699

TYNDALL AFB TRAINING COURSE	GRADUATES
F-22A IFTU	90
B-Course	30
TX-1	15
TX-2/3	15
ALS	247
NCOA	1254
337 ACS	114
Intelligence	28
TOTAL	1,793



Table 4 PERSONNEL BY CLASSIFICATION AND HOUSING LOCATION

1. APPROPRIATED FUND MILITARY	LIVING ON BASE	LIVING OFF BASE	TOTAL
Active Duty	470	3451	3921
Air Nat'l Guard (ANG)/Reserve Permanent Party	26	224	250
Traditional Guard/Reserve (DSG)	2	77	79
TOTAL	498	3,752	4,250
2. ACTIVE DUTY MILITARY DEPENDENTS	1,959	3,503	5,462
3. APPROPRIATED FUND CIVILIANS			
General Schedule			1,235
Federal Wage Board			37
DECA (Commissary)			58
Postal			3
TOTAL			1,333
4. NON-APPROPRIATED FUND (NAF), CONTRACT CIVILIANS AND PRIVATE BUSINESS			
Civilian BX			100
Civilian NAF			283
Contract Civilians			444
Branch Banks/Credit Union			6
TOTAL			833
TOTAL PERSONNEL INCLUDING DEPENDENTS			<u>11,878</u>
5. MILITARY RETIREES			
Air Force			5,504
Navy			1,699
Army			1,767
Marine Corps			200
Coast Guard			146
TOTAL			9,316

Table 5 ANNUAL PAYROLLS BY CLASSIFICATION AND HOUSING LOCATION

CLASSIFICATION	LIVING ON BASE	LIVING OFF BASE	TOTAL
1. APPROPRIATED FUND MILITARY			
Active Duty	\$ 15,313,542	\$ 191,014,006	\$ 206,327,548
ANG/Reserve Permanent Party	\$ 2,079,232	\$ 17,913,382	\$ 19,992,614
Traditional Guard/Reserve (DSG)	\$ 57,528	\$ 2,214,825	\$ 2,272,353
TOTAL	\$ 17,450,302	\$ 211,142,213	\$ 228,592,515
2. APPROPRIATED FUND CIVILIANS			
General Schedule			\$ 67,152,101
Federal Wage Board			\$ 1,805,650
Postal			\$ 134,042
DECA (Commissary)			\$ 2,558,678
TOTAL			\$ 71,650,471
3. NON-APPROPRIATED FUND, CONTRACT CIVILIANS AND PRIVATE BUSINESS			
Civilian NAF			\$ 5,185,801
Civilian BX			\$ 2,487,614
Contract Civilians (not elsewhere included)			\$ 55,088,228
Branch Banks/Credit Union			\$ 246,004
TOTAL			\$ 63,007,647
	TOTAL ANNUAL PAYROLL		<u>\$ 363,250,663</u>

**Table 6 EXPENDITURES FOR CONSTRUCTION, SERVICES, AND
PROCUREMENT OF MATERIALS, EQUIPMENT, AND SUPPLIES***

	ACTUAL ANNUAL EXPENDITURES
1. CONSTRUCTION	
Military Construction Program	\$ 25,190,673
Non-Appropriated Fund	\$ 284,634
Tenant Funded	\$ 6,664,634
Operation and Maintenance (O&M)	\$ 29,589,039
Environmental Restoration Act	\$ 165,389
TOTAL	\$ 61,894,369
2. SERVICES	
Services Contracts	\$ 54,710,018
NAF service Contracts	\$ 37,003
Utilities	\$ 8,035,593
TOTAL	\$ 62,782,614
3. MATERIALS, EQUIPMENT, AND SUPPLIES PROCUREMENT	
Commissary	\$ 1,200,000
Base Exchange (BX)	\$ 3,961,835
Health (CHAMPUS, Government cost only)	\$ 20,677,244
Education (Impact aid and tuition assistance)	\$ 2,653,700
NAF	\$ 110,887
TDY	\$ 9,152,166
TOTAL	\$ 37,755,782
TOTAL ANNUAL EXPENDITURES	<u>\$ 162,432,765</u>

* Includes only contracts and goods purchased in the local economic area or contracts requiring the use of locally supplied goods and services.

Table 7 ESTIMATE OF NUMBER AND DOLLAR VALUE OF INDIRECT JOBS CREATED

TYPE OF PERSONNEL	# OF BASE JOBS	MULTIPLIER	# OF INDIRECT JOBS
Active Duty Military	3,921	0.29	1137
ANG/Reserve Permanent Party	250	0.29	72
Traditional Guard/Reserve (DSG)	79	0.13	10
APF Civilians	1,333	0.43	573
Other Civilians	833	0.43	358
TOTAL PERSONNEL	6,416		2,150
Estimated number of indirect jobs create			2,150
Average annual pay for the local community			\$ 37,030
ESTIMATED ANNUAL DOLLAR VALUE OF JOBS CREATED			<u>\$ 79,614,500</u>

Data Sources Multipliers LMI Economic Impact Database, Installations and Indirect/Induced Job Multipliers, Feb 95

Average Annual Pay Current tables for Average Annual Pay Levels in Metropolitan Areas and Average Annual Pay by State and Industry are accessible at:
<http://www.bls.gov/bls/blswage.htm#Metropolitan>

Table 8 TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE

ANNUAL PAYROLL

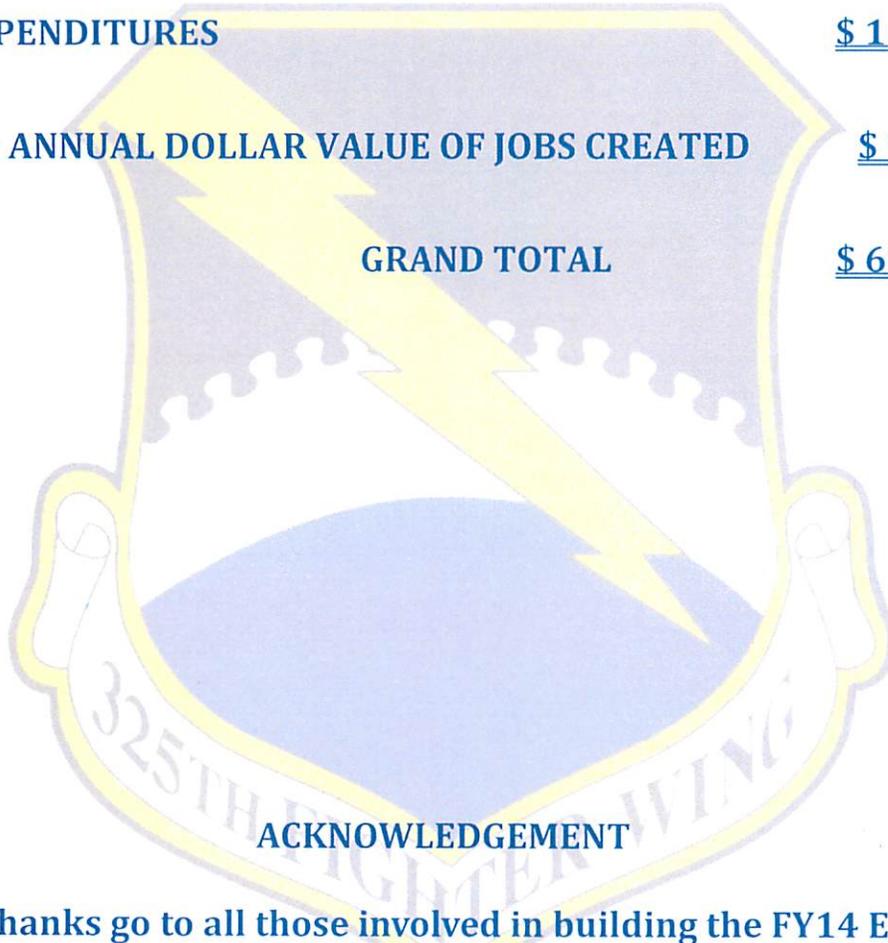
Military	\$ 228,592,515
Federal Civilian	\$ 71,650,471
Other Civilian	\$ 63,007,647

TOTAL \$ 363,250,633

ANNUAL EXPENDITURES \$ 162,432,765

ESTIMATED ANNUAL DOLLAR VALUE OF JOBS CREATED \$ 79,614,500

GRAND TOTAL \$ 605,297,898



ACKNOWLEDGEMENT

Special thanks go to all those involved in building the FY14 Economic Impact Analysis, including those who provided data, formatted the product, and distributed the EIA throughout the surrounding communities.

FY14 Documentation Team
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