




ECONOMIC IMPACT ANALYSIS

TYNDALL AFB INSTALLATION OF THE FUTURE

Fiscal Year 2022



COMMANDER'S WELCOME



Tyndall Air Force Base is pleased to present our Economic Impact Analysis (EIA) for Fiscal Year 2022. This EIA provides base visitors and state and local leaders with an overview of the installation's mission and its financial impact on the local area.

Fiscal Year 2022 saw substantial growth here at Tyndall as we prepared to shift mission sets from an F-22 training base to a combat-ready F-35 base. This year, much of that growth will culminate with the arrival of our first F-35A Lightning II in August 2023. Our focus remains on ensuring we have the right people, equipment, and infrastructure needed to support this new mission, while continuing to train the best F-22 pilots in the world until the F-22 Formal Training Unit transitions to Joint Base Langley-Eustis. Both are critical jobs, and I am confident in the professionalism, character, and

competence of our Checkertail Airmen to get them done.

Looking ahead, Tyndall will continue to grow as the rebuild into the Installation of the Future hits full speed. Construction efforts continue to ramp up, with an expected peak in 2024, and we will soon see the first of our new construction completed and ready for use. Each project reflects an effort to bring the future faster, keep the members of Team Tyndall and the community safe, and support our nation's most advanced power projection platforms. Accomplishing this mission requires a total team effort consisting of active duty, reserve, guard, civilians, their families, and the community working together.

I couldn't be prouder of the work Team Tyndall is doing and couldn't be more grateful for the exceptional support our community provides us. I hope this EIA reflects our desire to be "good neighbors" and provide support back to the community. We are privileged to live and work here, and we look forward to sharing many important milestones in the months and years ahead.

GEORGE R. WATKINS, Colonel, USAF
Commander, 325th Fighter Wing

MESSAGE FROM THE COMPTROLLER

The mission of the 325th Comptroller Squadron is to provide all commanders, personnel, and retirees a full spectrum of financial analysis, accounting, and customer service. The squadron is proud to present the Economic Impact Analysis (EIA) for Fiscal Year 2022. It provides insight into the economic impact that Tyndall Air Force Base has on the surrounding communities. This document is available to senior military officials, federal, state and local leaders. It will provide details of the installation's capital assets, expenditures for construction and services; and as Bay County's largest employer, it will show personnel and annual payroll figures by classification.

Tyndall had a staggering \$4.5B economic impact in FY22. The largest driver is direct and indirect Military Construction (MILCON) expenditures. One example is the F-35 Zone 1 campus that awarded for \$604M, and is the largest Air Force MILCON contract since 2008. The indirect impact from construction reached nearly \$1.5B based on the Bureau of Economic Analysis Regional Input-Output Modeling System (RIMS).

ANDREW R. FINGALL, Lt Col, USAF
Commander, 325th Comptroller Squadron



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EXECUTIVE SUMMARY

Tyndall Air Force Base (TAFB) encompasses 28,932 acres in southeastern Bay County. The local economic impact area is comprised of communities within a 50-mile radius of the base. Ongoing installation rebuild efforts, demolition, facility repair and temporary facilities continue to dot the landscape as the overhead and ground-level views evolve. Tyndall remains charged to incorporate the *Base of the Future* concept with Fiscal Year (FY) 2022 focused on *Flightline of the Future* technology initiatives.

TAFB continues to partner with the Florida Department of Transportation to complete the Highway 98 flyover and the overpass which will connect the North and South sides of the installation. Additionally, TAFB is continuing the partnership with the Nature Conservancy for various Coastal Resiliency projects designed to protect TAFB's 129 miles of shoreline from future storms and storm surge.

TAFB has 30 F-22 Raptors, 16 T-38s, 46 QF-16s (12 of which are unmanned), 30 BQM-167As, and 2 E-9A aircraft assigned. TAFB also possesses 9 watercrafts including patrol boats, utility boats, drone recovery boats, and jet skis.

TAFB saw a 13% decrease in military personnel and a 6% decrease in appropriated-fund civilians from FY21 to FY22 largely due to higher-than-normal retirements and transfers. TAFB serves a population of 2.9K military, 1.5K civilians, 11.9K retirees from all service branches and their dependents. During FY22 the Base Education Office facilitated the payments of \$1.5M in tuition assistance to local area colleges, vocational schools and various online education in support of the Airmen.

Total FY22 Economic Impact \$4.54B

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

Fiscal Year 2022

HOME OF AIR DOMINANCE

Total Economic Impact \$4.54 Billion

\$2.4 Billion in expenditures

\$1.8 Billion value of indirect impact

\$340 Million annual payroll

~23,200 members of Team Tyndall

~6,800 Military, civilians & families living, working and contributing every day

~16,400 Retirees and their families served



124 aircraft and aerial targets assigned

30 F-22 Raptors

16 T-38 Talons

2 E-9A Widgets

46 QF-16 full scale aerial targets

30 BQM 167A subscale aerial targets



Training combat air power

32 F-22 Pilots produced for the combat Air Force

167 Air Battle Managers produced for global battle management and command and control

3,087 RED HORSE trained contingency combat support personnel

Rebuild: 17 MILCON contract awards including:

\$248 Million OPS Hangar 1-3

\$276 Million Dorm Complex

\$133 Million 53 WEG Hangar

\$117 Million LRS Complex



Accelerating change with innovation

4 Robot dogs

2 Autonomous lawn mowers

2 Mobile vehicle & cargo inspection systems



INSTALLATION OF THE FUTURE

Tyndall AFB

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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 groundbreaking 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.

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.

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 with the 337 ACS at Tyndall.

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. As USAF transitioned from air superiority to air dominance, the William Tell competition became obsolete. The final competition was held in 2004.

Tyndall's second association with 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 testing weapons for the USAF Air Defense Weapons Center (USAFADWC). 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. The USAFADWC inactivated in 1991, 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 active duty F-15 air superiority training wing until October 2010. 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 shuttered in 2005, and the 2 FS and 95 FS both inactivated in 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. In July 2010, USAF announced that Tyndall would receive an operational F-22 squadron. On 1 Oct 2012, the 325 FW re-flagged as an ACC operational unit after almost 2 decades in AETC. On 11 Oct 2013, the 95th Fighter Squadron reactivated and in mid-April 2014 received its full complement of 24 Raptors. The 95 FS deployed to support USCENTCOM in October 2014. They deployed again in 2017 and returned in spring 2018. In 2019, the 95 FS disbanded due to Hurricane Michael.

The 325th Fighter Wing is proud of its evolving mission "to develop resourceful and resilient Airmen trained to project unrivaled combat airpower on behalf of the United States of America." Today, the installation is being rebuilt to not only support standard base functions, but is under planning, reconstruction, and upgrade to become the "Installation of the Future" for support of the F-35 Lightning II aircraft and operations.

ORGANIZATIONS

325th Fighter Wing Staff Agencies

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

325th Operations Group

- 2nd Fighter Training Squadron
- 325th Operations Support Squadron
- 325th Training Support Squadron
- 43rd Fighter Squadron

325th Maintenance Group

- 325th Aircraft Maintenance Squadron
- 325th Maintenance Squadron
- 325th Munitions Squadron
- 95th Fighter Generation Squadron

325th Medical Group

- 325th Operational Medical Readiness 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

Tenants

- 1st Air Force (AFNORTH)
- 16th Electronic Warfare Squadron/Detachment 1
- 337th Air Control Squadron
- 372nd Training Squadron/Detachment 4
- 44th Fighter Group
- 53rd Weapons Evaluation Group
- 702nd Computer Systems Squadron & System Support Facility
- 801st Red Horse Squadron/Detachment 1
- Air Force Civil Engineer Center - East
- Air Force Office of Special Investigation
- Department of Homeland Security
- National Disaster Recovery (NDR)

PART II ECONOMIC IMPACT

TOTAL FORCE STRUCTURE

AIRCRAFT

F-22	30
E-9A	2
T-38	16
TOTAL	48

AERIAL TARGETS

BQM-167A	30
QF-16	34
Unmanned QF-16	12
TOTAL	76



SIMULATORS

F-22 Full Mission Trainers (FMTs)	8
F-22 Weapons & Tactics Trainers (WTTs)	16
F-22 Debrief Systems	5
TOTAL	29

WATERCRAFT

Jet Ski	2
22 Ft - Patrol Boat	1
25 Ft - Utility Boat	4
120 Ft - Drone Recovery Boat	2
TOTAL	9



RUNWAY TYPE

WIDTH LENGTH

Primary	200 ft	10,000 ft
Secondary	150 ft	9,170 ft
Drone	150 ft	7,000 ft

INSTALLATION OF THE FUTURE ASSETS

Robot Dogs	4
*MVACIS	2
Auto Lawn Mowers	2



**Mobile Vehicle and Cargo Inspection System*

Table 2: CAPITAL ASSETS

BUILDING/FACILITIES	# OF BUILDINGS	SQ FT
Communications/Navigation	26	31,081
Aviation Operations	3	72,049
General Operational Support	31	164,187
Small Craft Storage	1	440
Training	23	290,207
Vehicle Maintenance	6	31,844
Aircraft Maintenance	20	122,306
Facility Maintenance	14	49,653
Research Development, Test & Evaluation	2	9,937
Supply/Storage	76	107,628
Medical Support	4	21,489
Medical Treatment	1	114,504
Administrative	19	295,691
Unaccompanied Personnel Housing	6	11,657
Dining	1	19,189
Personnel Support	12	252,781
Recreation	11	110,925
Accompanied Temporary Lodging	28	88,436
Base Support Structures	8	11,819
TOTAL	292	1,805,823

LAND	TYPE	ACRES
Base Proper	Public Domain	2,100
Base Proper	Fee Condemned	26,643
Base Proper	Easement	3,959
Base Proper	Fee Purchased	5
Carrabelle	Fee Purchased	33
St George Island	Fee Purchased	1
Apalachicola	Lease	7
Sumatra	Permitted	1
TOTAL		32,749

NON-BUILDING/LINEAR ASSETS	AMOUNT	ACRES
Runways		622,802 sq yd
Taxiways		601,250 sq yd
Parking Aprons/Pavement Shoulders	22	642,829 sq yd
Fuel Storage	20	2,781,886 gal
Antennas	32	Each
Electrical Distribution Lines		609,832 ft
Water Distribution Lines		414,860 ft
Wastewater Distribution Lines		534,324 ft
Storm Drainage Distribution Lines		257,475 ft
Paved Roads		62 miles
Paved Parking		893,849 sq yd

TRAINING GRADUATES

B-Course	32
TX-1	8
TX-2/3	7
ALS	180
NCOA	760
337th ACS	167
Red Horse (Silver Flag)	3,087
TOTAL	4,241



Course Descriptions

- **B-Course** is an F-22 Basic Qualification Course with the purpose of graduating new fighter pilots who are safe and trainable with the fundamental understanding of F-22 Tactics, Techniques, and Procedures resulting in a Basic Aircraft Qualified (BAQ).
- **TX-1** training course's purpose is to graduate a BAQ fighter pilot in F-22 conversion, air-to-ground, and air-to air mission tasks resulting in them qualifying for a different aircraft.
- **TX- 2/3** is a Senior Officer Course/Test Pilot (SOC/TP) with the purpose of graduating a BAQ fighter pilot in F-22 conversion tasks, and basic fighter maneuvers.
- **Airman Leadership School (ALS)** program focuses on leadership skills required for front-line supervisors and reporting officials throughout the Air Force.
- **Noncommissioned Officer Academy (NCOA)** prepares NCOs for increased leadership responsibilities in the joint, combined, and interagency environment.
- **337th Air Control Squadron (ACS)** trains officers to become Air Battle Managers (ABM) who will synchronize weapons, sensors, and fuel to meet the Commander's intent.
- **Red Horse (Silver Flag)** provides contingency combat support training to Active-Duty, Air Force Reserve Command, Air National Guard, Army, Marine Corps and allied nation mission support group personnel.

PERSONNEL

MILITARY

Active Duty	2,124
Air Force Reserve (AFR)/Air National Guard (ANG)	252
Traditional Guard/Reserve	99
International Active Duty	39
TOTAL	2,514

ACTIVE-DUTY MILITARY DEPENDENTS	2,836
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APPROPRIATED FUND CIVILIANS

General Schedule	713
Federal Wage Grade	26
Defense Commissary Agency (DeCA)	22
Postal	1
TOTAL	762



NON-APPROPRIATED FUND, CONTRACT CIVILIANS, AND PRIVATE BUSINESS

Civilian NAF	150
Base Exchange (AAFES)	40
Contracted Civilians	499
TOTAL	689

MILITARY RETIREES

Air Force	5,695
Army	3,500
Navy	2,641
Marines	471
TOTAL	12,307

MILITARY RETIREE DEPENDENTS	4,100
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TOTAL PERSONNEL INCLUDING DEPENDENTS, RETIREES, AND RETIREE DEPENDENTS	23,208
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PAYROLL

MILITARY

Active Duty	\$206,214,307
Air Force Guard Reserve (AFR)/Air National Guard (ANG)	\$29,873,289
International Active Duty	\$2,720,000
TOTAL	\$238,807,596

APPROPRIATED FUND CIVILIANS

General Schedule	\$91,029,250
Federal Wage Board	\$679,887
Commissary (DECA)	\$2,371,536
TOTAL	\$94,080,673



NON-APPROPRIATED FUND, CONTRACT CIVILIANS, AND PRIVATE BUSINESS

Civilian NAF	\$5,270,838
Base Exchange (AAFES)	\$1,637,000
TOTAL	\$6,907,838

TOTAL ANNUAL PAYROLL

\$339,796,107

EXPENDITURES

CONSTRUCTION

*Military Construction (MILCON)	\$2,217,689,000
Facilities, Sustainment, Restoration, and Maintenance (FSRM)	\$67,948,448
Operations and Maintenance (O&M)	\$17,881,966
Non-Appropriated Funds (NAF)	\$825,000
Military Family Housing (MFH)	\$220,695
TOTAL	\$2,304,565,109

SERVICES

Operations and Maintenance (O&M)	\$38,185,078
Non-Appropriated Funds (NAF)	\$119,856
Medical	\$4,176,970
Utilities	\$297,480
TOTAL	\$42,779,384

MATERIALS, EQUIPMENT, AND SUPPLY PROCUREMENT

Commissary (DECA)	\$16,782,582
Base Exchange (AAFES)	\$17,871,441
Non-Appropriated Funds (NAF)	\$683,796
Tyndall Federal Credit Union	\$10,250
TDY	\$14,384,662
Education	\$1,489,169
Health	\$6,029,000
TOTAL	\$57,250,900

TOTAL ANNUAL EXPENDITURES

\$2,404,595,392



**MILICON awards outlined in Appendix I*

INDIRECT IMPACTS

CATEGORY	# OF INDIRECT JOBS	EXPENDITURES
Payroll	2,057	\$263,944,857
Construction	24,197	\$1,466,164,322
Services	1,399	\$59,431,701
Travel and Lodging	141	\$6,838,468
TOTAL	27,794	\$1,796,379,349



Per AFMAN 65-506 Indirect job and expenditure quantities are calculated using the 2022 Economic Impact Analysis Estimation Tool.

TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE

Payroll	\$339,796,107
Expenditures	\$2,404,595,392
Indirect Impact	\$1,796,379,349
GRAND TOTAL	\$4,540,770,848

COLLABORATIONS

- 53rd Weapons Evaluations Group (WEG)
- 101st Air & Space Operations Group (AOG)
- 325th Civil Engineer Squadron (CES)
- 325th Contracting Squadron (CONS)
- 325th Force Support Squadron (FSS)
 - Base Education Office
 - Civilian Personnel Office (CPO)
 - Non-Appropriated Funds (NAF) Human Resources
- 325th Operations Group (OG)
- Air Force Civil Engineer Center (AFCEC)
- Air Force Northern / 1st Air Force (AFNORTH)
- Army Air Force Exchange Store (AAFES)
- Defense Commissary Agency (DECA)
- DoD Office of the Actuary
- TRICARE Operations and Patient Administration (TOPA)
- Tyndall Federal Credit Union (TFCU)

Special thanks to all involved in building the FY22 Economic Impact Analysis; to include those who provided data, formatted the product, and distributed the EIA throughout the surrounding communities.

Appendix I: MILCON AWARDS

Dorm Complex	\$276,000,000
Flightline-MUNS Storage	\$36,000,000
53 WEG Subscale Drone Facility	\$82,000,000
CE/Cons/USACE Complex	\$104,000,000
Demo Site Development	\$566,974,000
Indoor CATM Range	\$17,373,000
Weapons Load Training Hangar	\$25,000,000
Maintenance Squadron Complex	\$65,938,000
Ops & Maintenance Group HQ	\$39,621,000



Ops/Aircraft Hangar 1	\$99,757,000
Ops/Aircraft Hangar 3	\$75,000,000
Ops/Aircraft Hangar 2	\$74,000,000
Aircraft Parking Apron	\$45,000,000
Aircraft Wash Rack	\$41,455,000
Auxiliary Ground Equipment Facility	\$38,386,000
Simulator Facility	\$38,000,000
Aircraft Mx Fuel Cell Hangar	\$37,000,000
MWR Facilities	\$80,000,000

OSS/Radar Approach Control Facility	\$37,000,000
Fire Station #4	\$8,700,000
53 WEG Hangar	\$133,000,000
53 WEG HQ Facility	\$70,000,000
53 WEG Parking Apron	\$20,485,000
LRS Complex	\$117,000,000
Chapel	\$26,000,000
Community Commons Facility	\$64,000,000



TOTAL MILCON AWARDS

\$2,217,689,000

