



ECONOMIC IMPACT ANALYSIS

TYNDALL AFB
INSTALLATION OF THE FUTURE



COMMANDER'S WELCOME



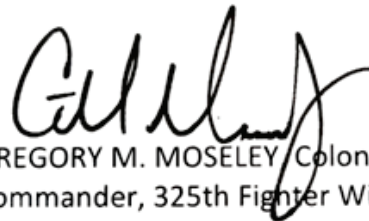
Tyndall Air Force Base is pleased to present our Economic Impact Analysis (EIA) for fiscal years 2020 and 2021. This EIA provides base visitors and state and local leaders with an overview of the installation's mission and its financial impact on the local area.

Here at Tyndall, we continue to work in partnership with the Program Management Office (PMO) and USACE to build the Department of Defense's first ever "Installation of the Future." This base will meet the needs of our current and future forces by incorporating resilient infrastructure, innovative designs, and novel technology to equip Airmen to execute the mission of today and tomorrow.

It is important to remember that while the rebuild is an essential part of what we do, it's not all we do. Throughout the rebuild, we have continued to develop resourceful and resilient Airmen trained to project unrivaled combat airpower on behalf of the United States of America. Every day, our Airmen are focused on operational readiness for the 325th Fighter Wing and our mission partners.

We have worked diligently in the face of budget constraints, rebuild efforts and challenges posed by the COVID-19 pandemic to maintain air superiority. Over the next few years, we anticipate an increase in manpower and assets as our mission of projecting air dominance expands to include F-35A Lightning II aircraft. The first of these aircraft are slated to arrive in September 2023.

Tyndall is evolving into a more lethal, ready, and resilient base and this would not be possible without the contributions and support of our local communities. Accomplishing our mission requires a total team effort consisting of active duty, reserve, guard, civilians, their families, and the community working together. We are privileged to live and work in a community that supports the military at large, our mission and our Team Tyndall Airmen. I am proud of the progress made over the past few years and am excited to see what the future holds for the "Installation of the Future."



GREGORY M. MOSELEY/Colonel, USAF
Commander, 325th Fighter Wing

MESSAGE FROM THE COMPTROLLER

The mission of the 325th Comptroller Squadron is to provide Team Tyndall with a full spectrum of financial analysis, accounting, and customer service to all commanders, personnel, and retirees. The squadron is proud to present the Economic Impact Analysis (EIA) for Fiscal Years 2020 and 2021. 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 AFB has seen unprecedented growth in construction and services contracts in FY20 and 21. Overall expenditures for that timeframe are \$502M in FY20 and \$537M in FY21. That trend will continue as the installation builds the Department of Defense's 'Installation of the Future' and welcomes the new F-35A Lightning II flying mission in FY23.



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EXECUTIVE SUMMARY

Tyndall Air Force Base (TAFB) encompasses 28,932 acres in southeastern Bay County. The communities within a 50-mile radius of Tyndall comprise the local economic impact area. The landscape of the installation is rapidly changing as structures that were damaged by Hurricane Michael are being demolished. Since 2019, 250 structures totaling 1.8M square feet have been demolished. That activity resulted in a surge of construction contracts valued at \$800M in FY20 and FY21. 325 FW continues to work in collaboration with the Air Force Civil Engineering Center's Program Management Office and U.S. Army Core of Engineers to build the Department of Defense's first ever "Installation of the Future".

TAFB has seen Florida Department of Transportation make significant progress in the construction of the \$20M flyover bridge on Highway 98. When complete, it will separate the flow of traffic on HWY 98 from traffic bound for the installation. TAFB has 31 F-22 Raptors, 16 T-38s, 5 QF-16s, 35 BQM-167As, and 2 E-9A aircraft assigned. For coastal security and aerial target recovery, TAFB also possesses 10 watercraft.

TAFB saw a 9% increase in military personnel and a 7% increase in appropriated-fund civilians from FY20 to FY21. With a serving population of 2.9K military, and 1.5K civilians, TAFB also serves 17.9K retirees and dependents from all service branches.

Total FY20 Economic Impact \$920M

Total FY21 Economic Impact \$1,014M

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.

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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 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.

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

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

325th Medical Group

- 325th Operational 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
- 823rd Red Horse Squadron/Detachment 1
- Air Force Civil Engineer Center - East
- Air Force Office of Special Investigation
- Department of Homeland Security

PART II ECONOMIC IMPACT

Table 1: TOTAL FORCE STRUCTURE

AIRCRAFT		
F-22		31
E-9A		2
T-38		16
TOTAL		49
AERIAL TARGETS		
BQM-167A		35
QF-16		5
TOTAL		40
SIMULATORS		
F-22 Full Mission Trainers (FMTs)		8
F-22 Weapons & Tactics Trainers (WTTs)		16
F-22 Debrief Systems		5
F-15 Simulator		4
QF-16 Simulator		1
TOTAL		34
WATERCRAFT		
Jet Ski		2
22 Ft - Patrol Boat		2
25 Ft - Utility Boat		4
120 Ft - Drone Recovery Boat		2
TOTAL		10
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 (ACQUIRED IN FY21)		
Robot Dogs		4
Mobile Vehicle and Cargo Inspection System (MVACIS)		2
Auto Lawn Mowers		2

Table 2: CAPITAL ASSETS**FY21**

BUILDING/FACILITIES	# OF BUILDINGS	SQ FT
Vehicle Fueling	3	1,825
Communications/Navigation	17	41,349
Aviation Operations	2	26,500
General Operational Support	16	218,012
Small Craft Storage	2	2,280
Training	28	299,004
Vehicle Maintenance	5	58,703
Aircraft Maintenance	23	179,172
Facility Maintenance	15	64,617
Research Development, Test & Evaluation	7	52,410
Supply/Storage	50	199,639
Medical Support	4	16,750
Medical Treatment	1	114,504
Administrative	17	324,833
Unaccompanied Personnel Housing	7	85,176
Dining	1	19,189
Personnel Support	16	250,183
Recreation	28	113,641
Accompanied Temporary Lodging	32	93,440
Base Support Structures	21	17,892
TOTAL	295	2,179,117
LAND	TYPE	ACRES
Base Proper	Public Domain	2,100
Base Proper	Fee Condemned	26,728
Base Proper	Easement	57
Base Proper	Fee Purchased	5
Carrabelle	Fee Purchased	33
St George Island	Fee Purchased	1
Apalachicola	Lease	7
Sumatra	Permitted	1
TOTAL		28,932
NON-BUILDING/LINEAR ASSETS	AMOUNT	ACRES
Parking Aprons/Pavement Shoulders	22	642,829 sq yd
Fuel Storage	20	2,781,886 gal
Antennas	30	
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

Table 3: TRAINING GRADUATES	FY20	FY21
B-Course	38	22
TX-1	2	6
TX-2/3	10	10
ALS	100	162
NCOA	0	48
337th ACS	162	143
Red Horse (Silver Flag)	700	2,441
TOTAL	1,012	2,832

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 supervisors and reporting officials throughout the Air Force.
- **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 Reserves Command, Air National Guard, Army, Marine Corps and allied nation mission support group personnel.

Table 4: PERSONNEL	FY20	FY21
APPROPRIATED FUND MILITARY		
Active Duty	2,285	2,527
Air Force Guard Reserve (AFR)/Air National Guard (ANG)	245	245
Traditional Guard/Reserve (DSG)	99	99
International Active Duty	31	31
TOTAL	2,660	2,902
ACTIVE DUTY MILITARY DEPENDENTS	4,522	5,328
APPROPRIATED FUND CIVILIANS		
General Schedule	721	774
Federal Wage Grade	36	34
Postal	1	1
TOTAL	758	809
NON-APPROPRIATED FUNDS (NAF)		
Civilian NAF	153	145
Base Exchange (AAFES)	49	41
Tyndall Federal Credit Union	4	4
Contracted Civilians	726	545
TOTAL	932	735
TOTAL PERSONNEL INCLUDING DEPENDENTS	8,872	9,774
MILITARY RETIREES		
Air Force	7,508	7,877
Army	1,272	1,447
Navy	650	663
Marine Corps	97	121
Coast Guard	263	272
TOTAL	9,790	10,380
MILITARY RETIREE DEPENDENTS	1,928	2,277
TOTAL PERSONNEL INCLUDING DEPENDENTS, RETIREES, AND RETIREE DEPENDENTS	20,590	22,431

Table 5: PAYROLL**FY20****FY21****APPROPRIATED FUND MILITARY**

Active Duty	\$177,480,091	\$196,468,140
Air Force Guard Reserve (AFR)/Air National Guard (ANG)	\$29,003,194	\$29,873,290
International Active Duty	\$3,215,351	\$3,311,812
TOTAL	\$209,698,636	\$229,653,241

APPROPRIATED FUND CIVILIANS

General Schedule	\$65,954,586	\$90,778,045
Federal Wage Board	\$33,040,302	\$28,084,256
Commissary (DECA)	\$2,484,135	\$2,420,411
TOTAL	\$101,479,023	\$121,282,712

NON-APPROPRIATED FUND, CONTRACT CIVILIANS, AND PRIVATE BUSINESS

Civilian NAF	\$4,444,757	\$4,455,435
Base Exchange (AAFES)	\$1,309,000	\$1,229,000
Tyndall Federal Credit Union	\$120,000	\$120,000
TOTAL	\$5,873,757	\$5,804,435

TOTAL ANNUAL PAYROLL**\$317,051,416****\$356,740,388**

Table 6: EXPENDITURES**FY20****FY21****CONSTRUCTION**

Military Construction (MILCON)	\$38,780,427	\$351,935,000
Facilities, Sustainment, Restoration, and Maintenance (FSRM)	\$327,455,514	\$81,001,187
TOTAL	\$366,235,941	\$432,936,187

SERVICES

Operations and Maintenance (O&M)	\$85,192,936	\$48,918,410
Non-Appropriated Funds (NAF)	\$182,236	\$196,696
Medical	\$4,300,000	\$6,200,000
Utilities	\$4,446,254	\$6,181,871
TOTAL	\$94,121,426	\$61,496,978

MATERIALS, EQUIPMENT, AND SUPPLY PROCUREMENT

Commissary (DECA)	\$13,199,717	\$11,981,902
Base Exchange (AAFES)	\$12,539,000	\$18,334,000
Non-Appropriated Funds (NAF)	\$361,065	\$314,713
Tyndall Federal Credit Union	\$12,205	\$8,459
TDY	\$266,169	\$201,300
Education	\$33,469	\$47,066
Health	\$719,596	\$1,189,071
Ground Fuel	\$620,953	\$639,565
Other Procurement (Includes Government Purchase Card)	\$13,985,433	\$9,505,425
TOTAL	\$41,737,607	\$42,221,501

TOTAL ANNUAL EXPENDITURES**\$502,094,974 \$536,654,666**

Table 7: INDIRECT JOBS

FY20 PERSONNEL TYPE	# OF BASE JOBS	# OF INDIRECT JOBS
Active Duty Military & ANG/Reserve Permanent Party	2,285	1,264
Traditional Guard/Reserve (DSG)	99	207
Appropriated Fund Civilians	758	723
Non-Appropriated Fund Civilians	932	42
TOTAL	4,074	2,236

FY21 PERSONNEL TYPE	# OF BASE JOBS	# OF INDIRECT JOBS
Active Duty Military & ANG/Reserve Permanent Party	2,527	1,399
Traditional Guard/Reserve (DSG)	99	207
Appropriated Fund Civilians	809	864
Non-Appropriated Fund Civilians	735	41
TOTAL	4,170	2,511

	FY20	FY21
Average Pay for the Local Community	\$45,153	\$48,152
Estimated Annual Dollar Value of Jobs Created	\$100,961,661	\$120,909,672

Table 8: TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE

	FY20	FY21
Payroll	\$317,051,416	\$356,740,388
Expenditures	\$502,094,974	\$536,654,666
Indirect Jobs Created	\$100,961,661	\$120,909,672
GRAND TOTAL	\$920,108,050	\$1,014,304,726

COLLABORATIONS

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

Special thanks to all involved in building the FY20 & FY21 Economic Impact Analysis; to include those who provided data, formatted the product, and distributed the EIA throughout the surrounding communities.

