

# 2017 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 2017. This EIA provides base visitors and state and local leaders with 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's primary mission is to train and project unrivaled combat air power for F-22 Raptor pilots and maintenance personnel to support the combat Air Forces. Accomplishing our mission requires a total team effort consisting of active duty, reserve, guard, civilians, their families, and the community working together.

We could not succeed in this important mission without the contributions and support of our local communities. I extend my gratitude to every team member, 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 55 F-22 and 17 T-38 aircraft. Over the next few years, we anticipate an increase in manpower and assets as our mission of projecting air dominance expands to include the MQ-9 Reaper. Like you, I am excited to see this investment at Tyndall by our Air Force and look forward to making it a reality over the coming years.

MICHAEL F. HERNANDEZ, Colonel, USAF  
Commander, 325th Fighter Wing



# MESSAGE FROM THE COMPTROLLER

The 325th Comptroller Squadron prepares 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, as well as to 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 an 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.



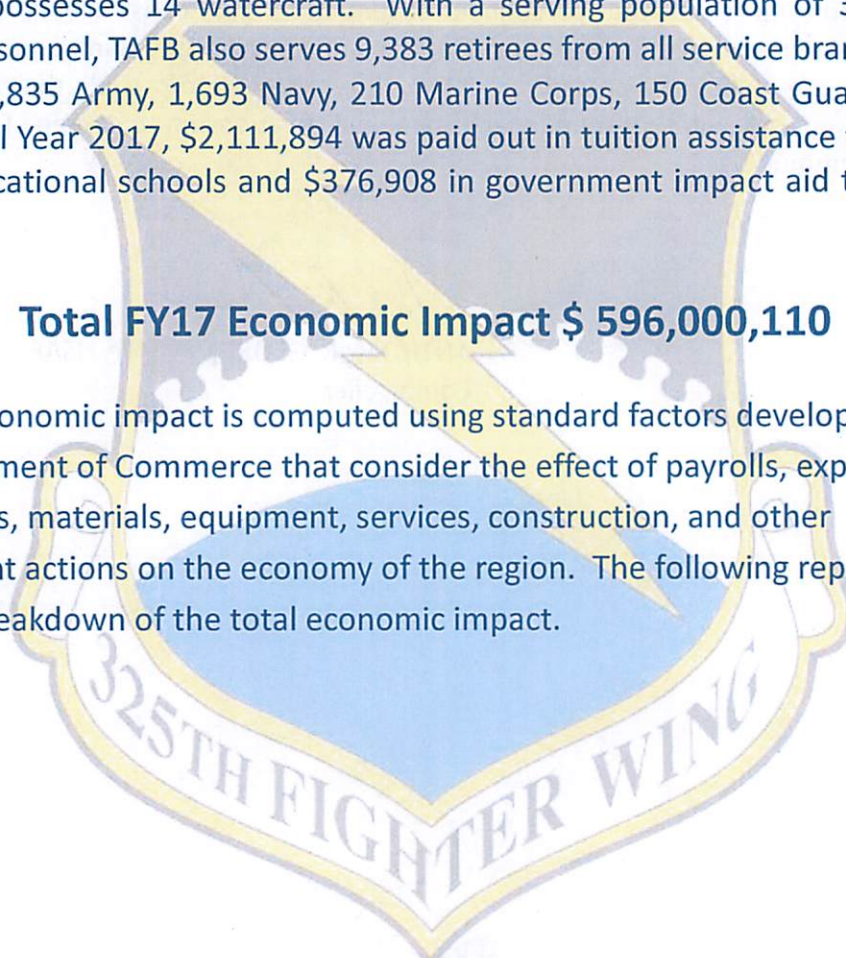
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## EXECUTIVE SUMMARY

Tyndall Air Force Base (TAFB) encompasses 29,000 acres in southeastern Bay County. Within the base, facilities amount to a total plant replacement value of \$3.4B. The communities within a 50-mile radius of Tyndall comprise the local economic impact area. TAFB has 55 F-22 Raptors, 17 T-38s, 18 QF-16s, 50 BQM-167As, and 2 E-9A aircraft assigned. For coastal security and aerial target recovery, TAFB also possesses 14 watercraft. With a serving population of 3,393 Active military personnel, TAFB also serves 9,383 retirees from all service branches: 5,495 Air Force, 1,835 Army, 1,693 Navy, 210 Marine Corps, 150 Coast Guard. Of note during Fiscal Year 2017, \$2,111,894 was paid out in tuition assistance to local area colleges/vocational schools and \$376,908 in government impact aid to local area schools.

### **Total FY17 Economic Impact \$ 596,000,110**

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. The following report provides a further breakdown of the total economic impact.





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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. 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 here, 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 (FS) 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 will return in Spring 2018. The 95 FS also conducts RAPID RAPTOR deployments as requested by the president to support the US national security strategy.

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
- 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 Operations Group

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

## 325th Maintenance Group

- 325th Aircraft Maintenance Squadron
- 325th Maintenance Squadron

## 325th Medical Group

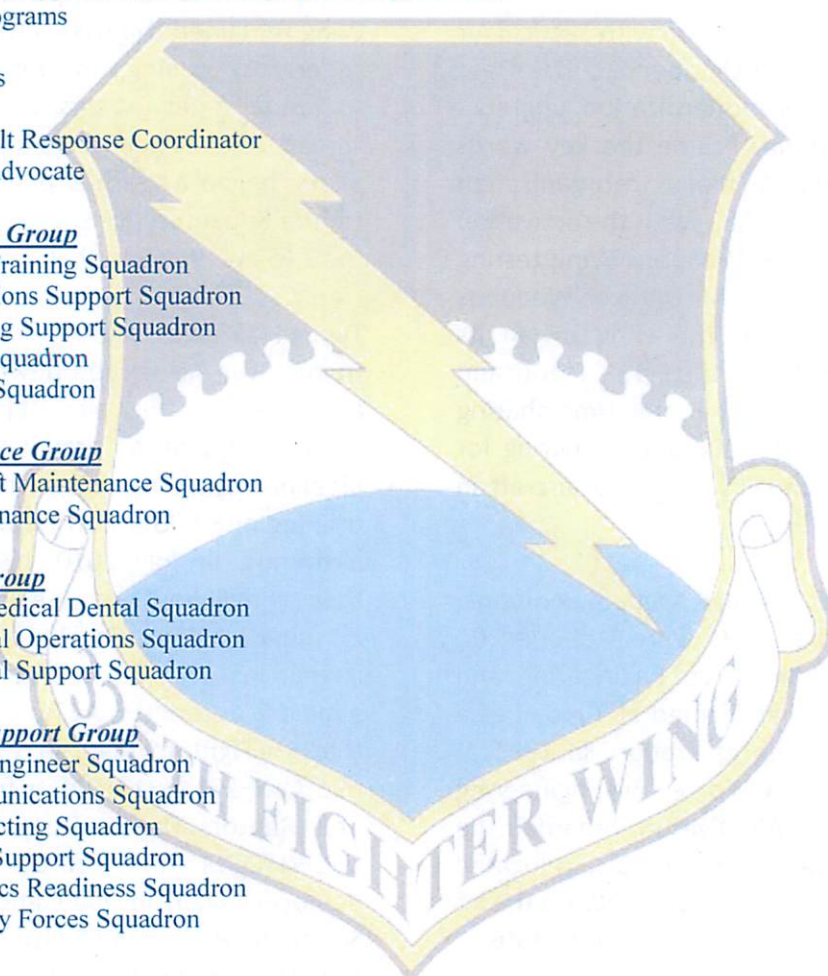
- 325th Aeromedical Dental Squadron
- 325th Medical Operations Squadron
- 325th Medical Support Squadron

## 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

## Tenants

- 1st Air Force (AFNORTH)
- 16th Electronic Warfare Squadron/Detachment 1
- 337th Air Control Squadron
- 372d Training Squadron/Detachment 4
- 44th Fighter Group
- 53d Weapons Evaluation Group
- 601st Air Operations Center
- 823d Red Horse Squadron/Detachment 1
- Air Force Civil Engineer Center - East
- Air Force Office of Special Investigation
- Airey NCO Academy
- Department of Homeland Security





## PART II ECONOMIC IMPACT

**Table 1 FORCE STRUCTURE**

<b>TYPE AIRCRAFT</b>	<b>AIRCRAFT ASSIGNED</b>
F-22	55
E-9A	2
T-38	17
<b>TOTAL</b>	<b>74</b>

<b>Aerial Targets</b>	<b>AMOUNT</b>
BQM-167A	50
QF-16	18
<b>TOTAL</b>	<b>68</b>

<b>TYPE AIRCRAFT SIMULATOR</b>	<b>SIMULATORS ASSIGNED</b>
F-22	8
F-15	4
<b>TOTAL</b>	<b>12</b>

<b>RUNWAYS TYPE</b>	<b>WIDTH (feet)</b>	<b>LENGTH (feet)</b>
Primary	200	10,000
Secondary	150	9,170
Drone	150	7,000

<b>WATERCRAFT</b>	<b>NUMBER ASSIGNED</b>
Jet Ski	2
17 Ft Patrol Boat	1
21 Ft Patrol Boat	2
24 Ft Patrol Boat	1
25 Ft - Outboard Boat	2
30 Ft Patrol Boat	2
34 Ft Search and Rescue Boat	1
120 Ft - Drone Recovery Boat	3
<b>TOTAL</b>	<b>14</b>



**Table 2 CAPITAL ASSETS**

<b>BUILDING/FACILITIES</b>	<b># OF BUILDINGS</b>	<b>SQ FT</b>
Vehicle Fueling	4	3,178
Communications/Navigation	24	71,548
Aviation Operations	14	117,500
General Operational Support	67	251,030
Small Craft Storage	2	4,560
Training	43	294,598
Vehicle Maintenance	13	83,162
Aircraft Maintenance	58	878,249
Facility Maintenance	24	112,872
Research Development, Test & Evaluation	16	162,217
Supply/Storage	119	440,240
Medical Support	5	33,306
Medical Treatment	2	123,140
Administrative	31	546,978
Unaccompanied Personnel Housing	38	446,359
Dining	3	25,309
Personnel Support	30	366,925
Recreation	71	379,835
Accompanied Temporary Lodging	32	9,340
Privatized Housing	656	1,312,458
Base Support Structures	88	21,874
<b>TOTAL</b>	<b>1,340</b>	<b>5,684,678</b>

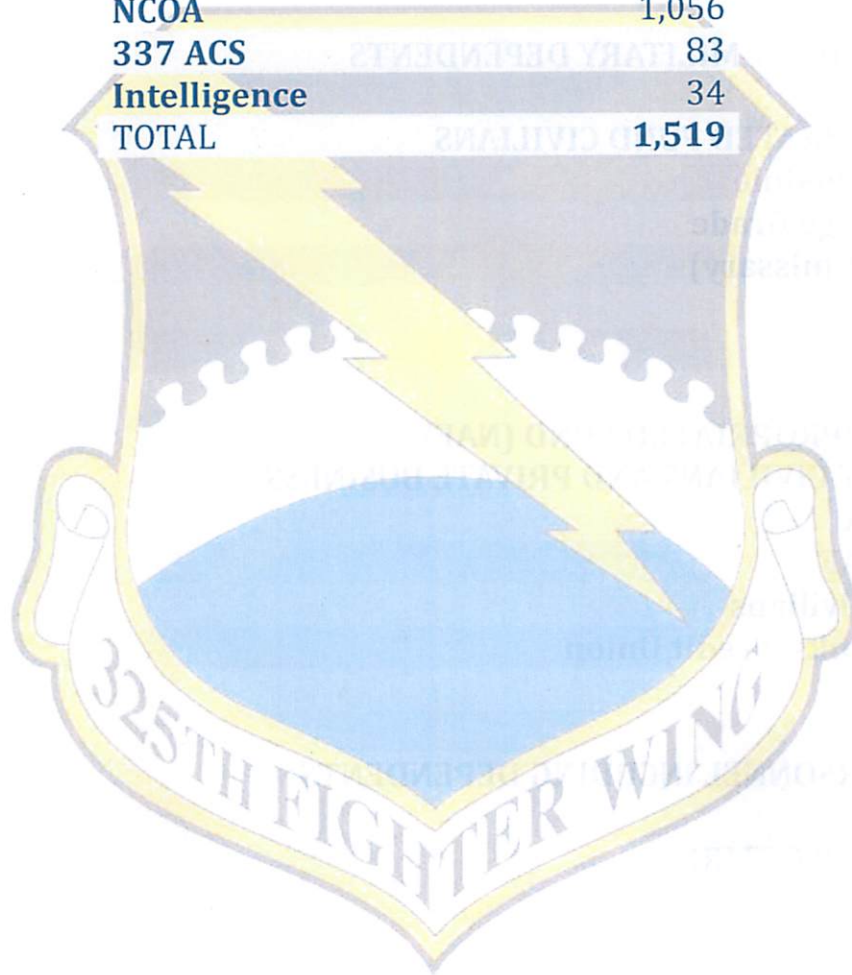
<b>LAND</b>	<b>TYPE</b>	<b>ACRES</b>
Base Proper	Public Domain	2,100
Base Proper	Fee Condemned	26,728
Base Proper	Easement	57
Base Proper	Fee Purchased	5
Carrabelle	Fee Purchased	33
St George Island	Fee Purchased	1
Apalachicola	Lease	7
Sumatra	Permitted	1
<b>TOTAL ACREAGE</b>		<b>28,932</b>

<b>NON-BUILDING/LINEAR ASSETS</b>	<b>COUNT</b>	<b>AMOUNT</b>
Parking Aprons/Pavement Shoulders	22	642,829 sq yd
Fuel Storage	20	2,781,886 sq yd
Antennas		66
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 TYNDALL AFB TRAINING COURSES**

TRAINING COURSE	GRADUATES
F-22A IIQC	25
B-Course	23
TX-1	3
TX-2/3	22
ALS	273
NCOA	1,056
337 ACS	83
Intelligence	34
TOTAL	1,519





**Table 4 PERSONNEL BY CLASSIFICATION**

<b>1. APPROPRIATED FUND MILITARY</b>	<b>TOTAL</b>
Active Duty	3,393
Air Nat'l Guard (ANG)/Reserve Permanent Party	137
Traditional Guard/Reserve (DSG)	88
International Active Duty	26
<b>TOTAL</b>	<b>3,644</b>
<b>2. ACTIVE DUTY MILITARY DEPENDENTS</b>	<b>5,058</b>
<b>3. APPROPRIATED FUND CIVILIANS</b>	
General Schedule	1,240
Federal Wage Grade	3
DECA (Commissary)	60
Postal	1
<b>TOTAL</b>	<b>1,304</b>
<b>4. NON-APPROPRIATED FUND (NAF), CONTRACT CIVILIANS AND PRIVATE BUSINESS</b>	
Civilian BX	107
Civilian NAF	278
Contract Civilians	320
Branch Banks/Credit Union	4
<b>TOTAL</b>	<b>709</b>
<b>TOTAL PERSONNEL INCLUDING DEPENDENTS</b>	<b><u>10,715</u></b>
<b>5. MILITARY RETIREES</b>	
Air Force	5,495
Army	1,835
Navy	1,693
Marine Corps	210
Coast Guard	150
<b>TOTAL</b>	<b>9,383</b>
<b>6. MILITARY RETIREE DEPENDENTS</b>	<b>6,500</b>
<b>TOTAL PERSONNEL INCLUDING DEPENDENTS, RETIREES, AND RETIREE DEPENDENTS</b>	<b><u>26,598</u></b>



**Table 5 ANNUAL PAYROLLS BY CLASSIFICATION**

		<b>TOTAL</b>
<b>1. APPROPRIATED FUND MILITARY</b>		
Active Duty		\$ 253,007,858
ANG/Reserve Permanent Party		\$ 19,992,614
Traditional Guard/Reserve (DSG)		\$ 188,208
International Active Duty		\$2,598,668
<b>TOTAL</b>		<b>\$ 275,787,349</b>
<b>2. APPROPRIATED FUND CIVILIANS</b>		
General Schedule		\$ 80,161,389
Federal Wage Board		\$ 218,975
Postal		\$ 134,042
DECA (Commissary)		\$ 3,832,694
<b>TOTAL</b>		<b>\$ 84,347,100</b>
<b>3. NON-APPROPRIATED FUND, CONTRACT CIVILIANS, AND PRIVATE BUSINESS</b>		
Civilian NAF		\$ 6,552,232
Civilian BX		\$ 2,383,870
Contract Civilians (not elsewhere included)		\$1,610,000
Branch Banks/Credit Union		\$ 201,682
<b>TOTAL</b>		<b>\$ 10,747,784</b>
<b>TOTAL ANNUAL PAYROLL</b>		<b><u>\$ 370,882,233</u></b>



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

<b>1. CONSTRUCTION</b>	<b>ACTUAL ANNUAL EXPENDITURES</b>
Military Construction Program	\$ 0
Non-Appropriated Funds	\$ 735,268
Operation and Maintenance (O&M)	\$ 24,330,587
<b>TOTAL</b>	<b>\$ 25,065,855</b>
<b>2. SERVICES</b>	
O&M Services Contracts	\$ 30,341,938
NAF service Contracts	\$ 55,304
Utilities	\$ 7,723,983
<b>TOTAL</b>	<b>\$ 38,121,225</b>
<b>3. MATERIALS, EQUIPMENT, AND SUPPLY PROCUREMENT</b>	
Commodity Purchases	\$1,617,440
Commissary	\$ 1,026,696
Base Exchange (BX)	\$ 61,296,005
Health (TriCare, Government cost only)	\$ 16,293,926
Education (Impact aid & tuition assistance)	\$ 2,488,802
NAF	\$468,868
TDY	\$ 3,334,900
<b>TOTAL</b>	<b>\$ 86,526,638</b>
<b>TOTAL ANNUAL EXPENDITURES</b>	<b><u>\$ 149,713,717</u></b>

\* 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**

<b>TYPE OF PERSONNEL</b>	<b># OF BASE JOBS</b>	<b>MULTIPLIER</b>	<b># OF INDIRECT JOBS</b>
Active Duty Military & ANG/Reserve Permanent Party	3,556	0.29	1,031
Traditional Guard/Reserve (DSG)	88	0.13	11
APF Civilians	1,304	0.43	561
Other Civilians	709	0.43	305
<b>TOTAL</b>	<b>5,657</b>		<b>1,908</b>

**Estimated Number of Indirect Jobs Created: 1,908**

**Average Annual Pay for the Local Community: \$ 39,520**

**Estimated Annual Dollar Value of Jobs Created: \$ 75,404,160**

**Data Sources:**

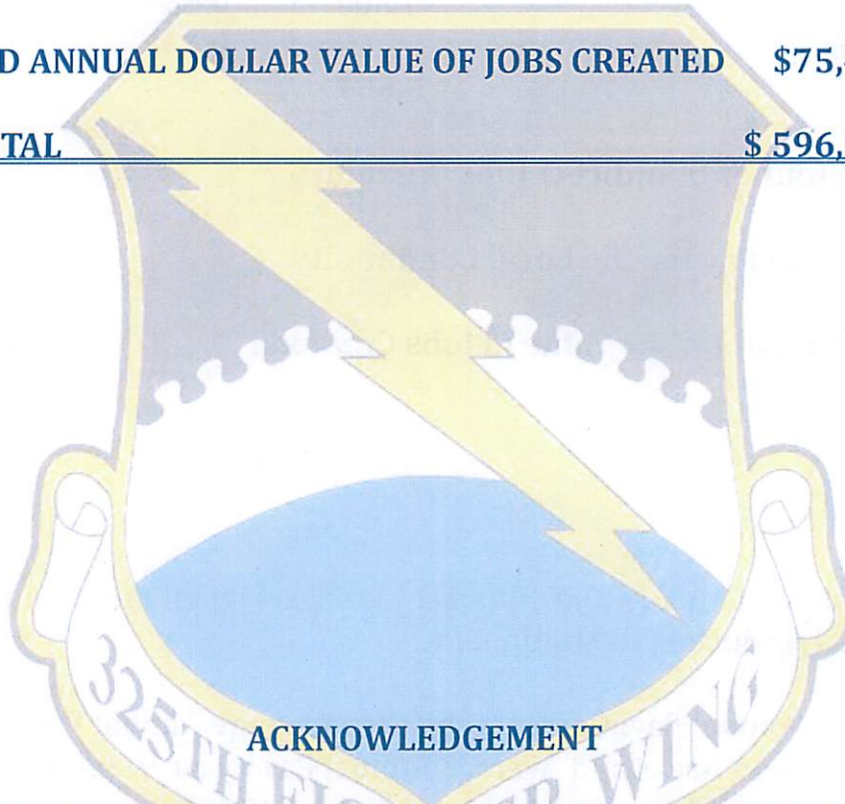
Multipliers: LMI Economic Impact Database, Installations and Indirect/Induced Job Multipliers, Feb 95

Average Annual Pay: Current tables for Average Annual Pay Levels in Metropolitan Areas and Average Annual Pay by city/state; located here: <https://www.bls.gov/news.release/cewqtr.t01.htm>



**Table 8 TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE**

<b>ANNUAL PAYROLL</b>	<b>\$ 370,882,233</b>
Military	\$ 275,787,349
Federal Civilians	\$ 84,347,100
Other Civilians	\$ 10,747,784
<b>ANNUAL EXPENDITURES</b>	<b>\$149,713,717</b>
<b>ESTIMATED ANNUAL DOLLAR VALUE OF JOBS CREATED</b>	<b>\$75,404,160</b>
<b><u>GRAND TOTAL</u></b>	<b><u>\$ 596,000,110</u></b>



**ACKNOWLEDGEMENT**

**Special thanks go to all those involved in building the FY17 Economic Impact Analysis, including those who provided data, formatted the product, and distributed the EIA throughout the surrounding communities.**