



**2011**

# **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 2011. This Economic Impact Analysis 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 Education and Training Command. Our mission is to provide air dominance training for F-22 Raptor pilots, as well as train air battle managers, intelligence personnel, and air traffic controllers for worldwide combat assignments. 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 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.

A careful comparison of last year's EIA reveals a lower total impact to the local economy. This is primarily due to the transition from the F-15 Eagle to expanded F-22 operations. To this end, over the next two years TAFB will gain 800-1000 additional personnel in support of 24 additional F-22s and a fleet of 20 T-38 aircraft. 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.

A handwritten signature in black ink that reads "John K. McMullen".

JOHN K. MCMULLEN, Brig Gen, USAF  
Commander, 325th Fighter Wing

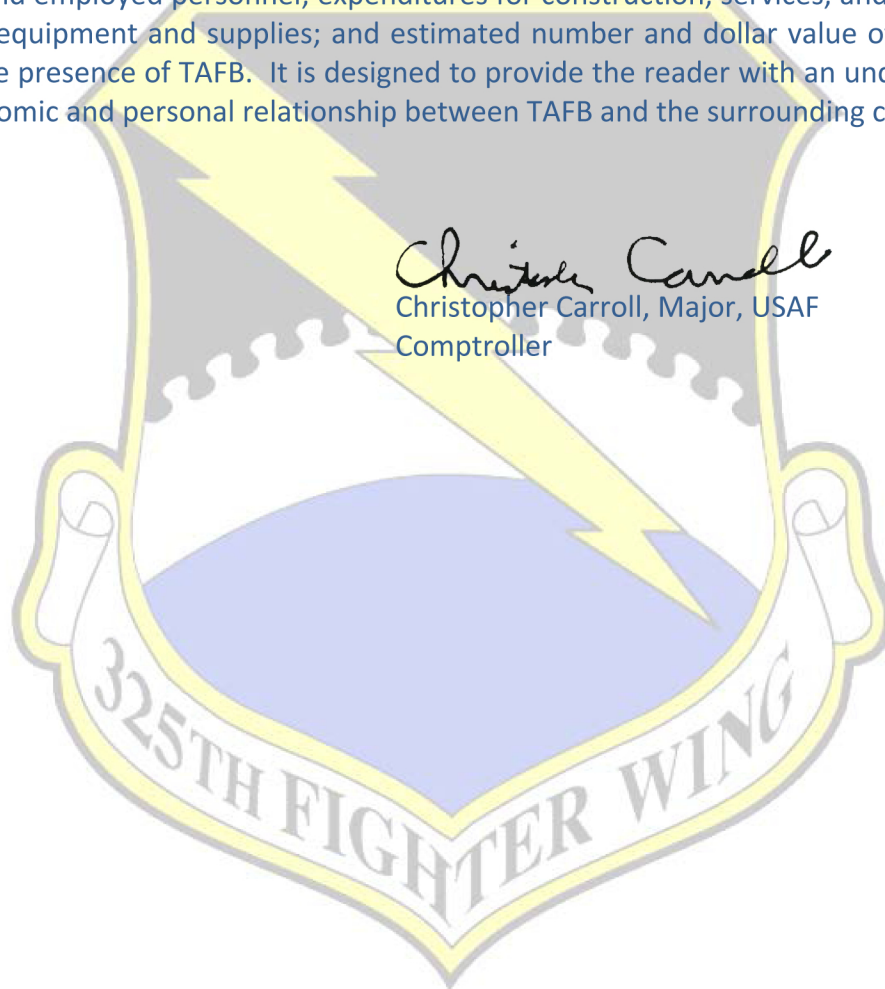
# MESSAGE FROM THE COMPTROLLER

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, as well as to local business leaders and visitors to the base.

The EIA addresses 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.



Christopher Carroll, Major, USAF  
Comptroller



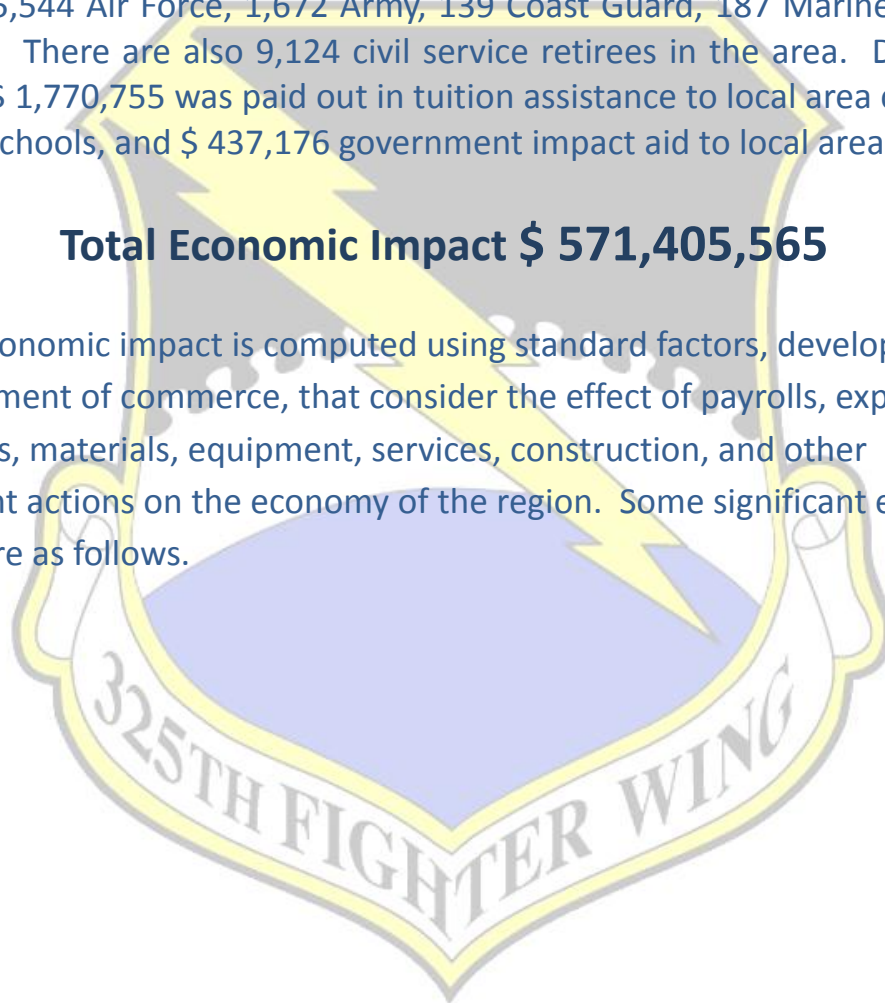
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## EXECUTIVE SUMMARY

Tyndall Air Force Base (TAFB) encompasses more than 29,000 acres in Southeastern Bay County. The communities within a 50-mile radius of Tyndall comprise the local economic impact area. TAFB has 30 F-22 Raptors, 80 QF-4s, 29 BQM-167As, and 2 E-9A aircraft assigned. Tyndall has 13 watercrafts for coastal security and aerial target recovery. TAFB serves 9,263 retirees from all service branches: 5,544 Air Force, 1,672 Army, 139 Coast Guard, 187 Marine Corps, and 1,721 Navy. There are also 9,124 civil service retirees in the area. During Fiscal Year 2011, \$ 1,770,755 was paid out in tuition assistance to local area colleges and vocational schools, and \$ 437,176 government impact aid to local area schools.

### **Total Economic Impact \$ 571,405,565**

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. Some significant economic highlights are as follows.



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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.

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. The 325th Air Control Squadron remains the only air battle manager training unit in the United States Air Force.

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 F22 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. Additionally, Tyndall will convert from AETC to ACC in 2012, when the first aircraft begin arriving.

The 325th Fighter Wing remains committed to its goal to "Provide world class training to GUARANTEE AIR DOMINANCE for America and to support Team Tyndall."

# ORGANIZATIONS

## 325th Fighter Wing Staff Agencies

- Inspector General
- Public Affairs
- Safety
- Command Post
- Chaplain
- Staff Judge Advocate
- 325th Comptroller Squadron
- Military Equal Opportunity/Equal Employment Opportunity

## 325th Operations Group

- 43d Fighter Squadron
- 325th Operations Support Squadron
- 325th Air Control Squadron
- 325th Training Support Squadron

## 325th Maintenance Group

- 325th Maintenance Operations Squadron
- 325th Maintenance Squadron
- 325th Aircraft Maintenance Squadron

## 325th Medical Group

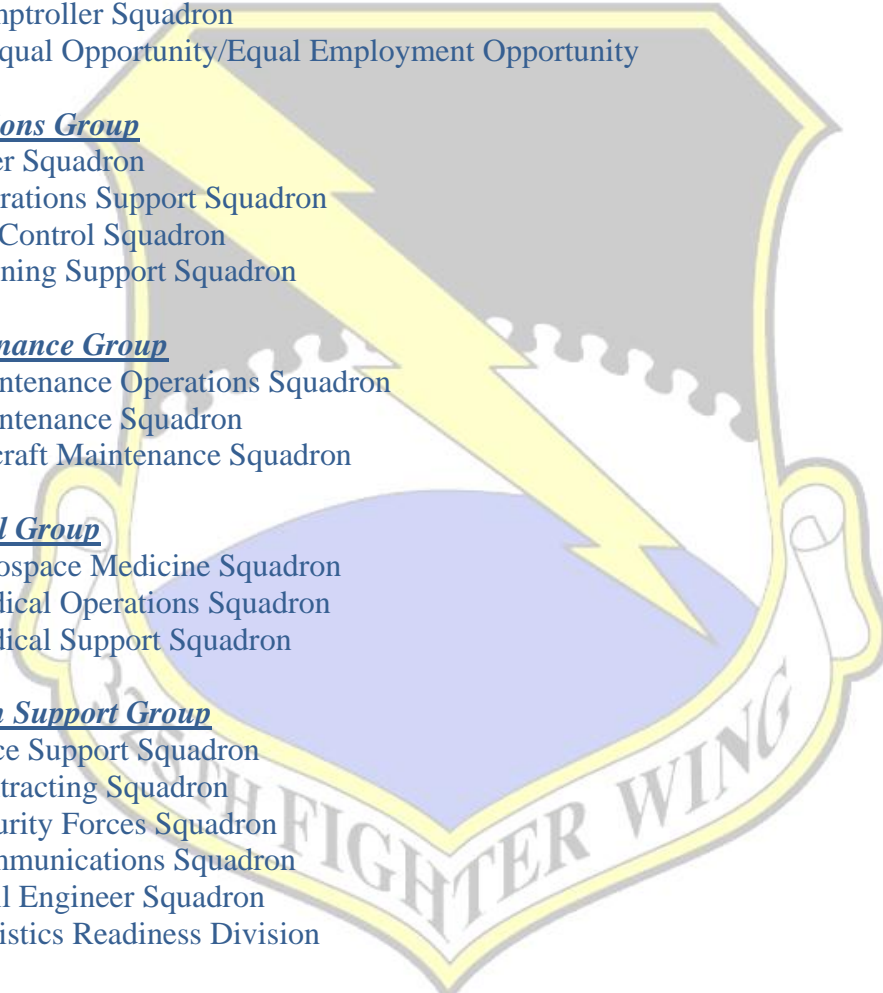
- 325th Aerospace Medicine Squadron
- 325th Medical Operations Squadron
- 325th Medical Support Squadron

## 325th Mission Support Group

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

## Tenants

- 1st Air Force (AFNORTH)
- Air Force Civil Engineer Support Agency
- Air Force Research Laboratory
- 16th Electronic Warfare Squadron/Detachment 1
- 372d Training Squadron/Detachment 4
- 702d Computer Systems Squadron & System Support Facility
- 823d Red Horse Squadron/Detachment 1
- Airey NCO Academy
- 53d Weapons Evaluation Group

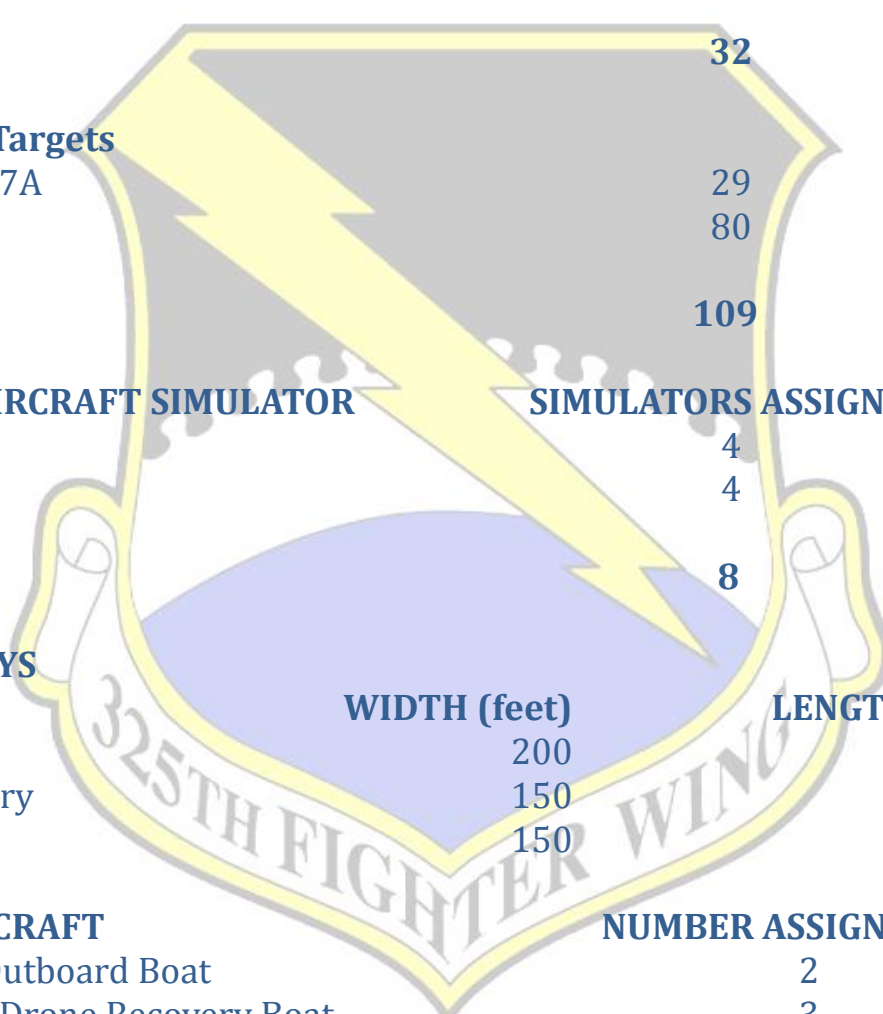




## PART II ECONOMIC IMPACT

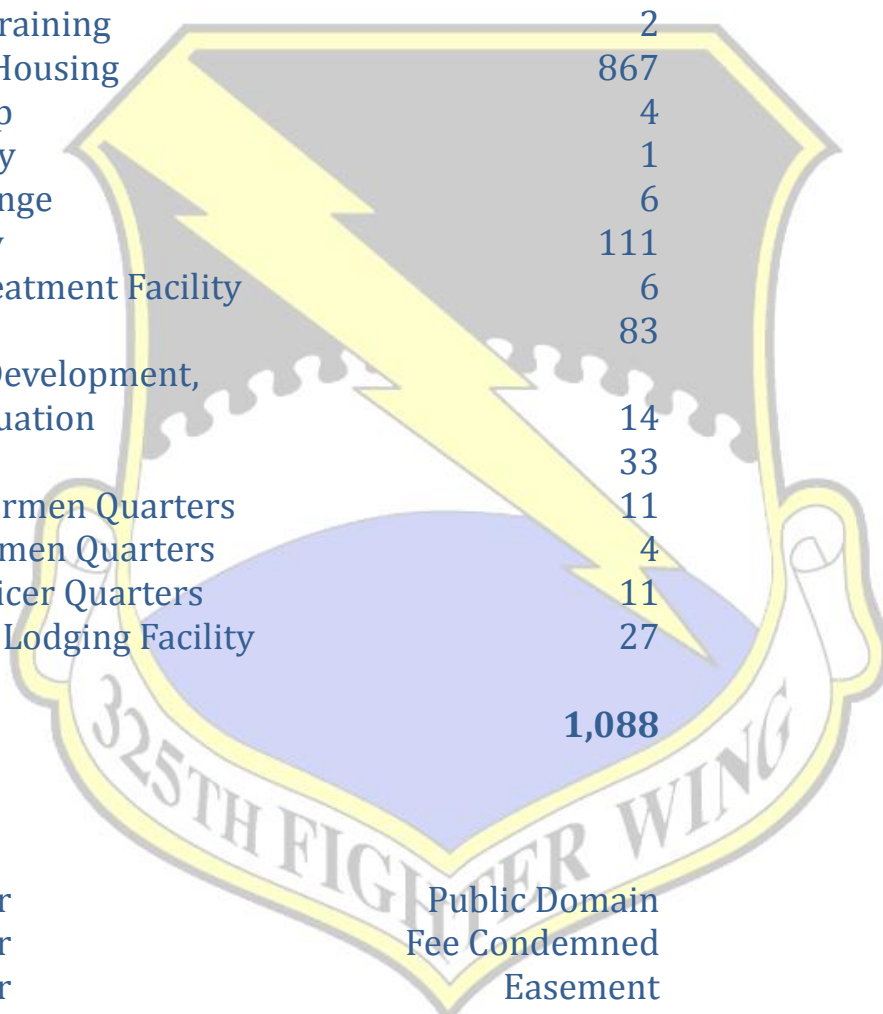
**Table 1 FORCE STRUCTURE**

<b>TYPE AIRCRAFT</b>	<b>AIRCRAFT ASSIGNED</b>	
F-22	30	
E-9A	2	
<b>TOTAL</b>	<b>32</b>	
<b>Aerial Targets</b>		
BQM-167A	29	
QF-4s	80	
<b>TOTAL</b>	<b>109</b>	
<b>TYPE AIRCRAFT SIMULATOR</b>	<b>SIMULATORS ASSIGNED</b>	
F15	4	
F22	4	
<b>TOTAL</b>	<b>8</b>	
<b>RUNWAYS</b>		
<b>TYPE</b>	<b>WIDTH (feet)</b>	<b>LENGTH (feet)</b>
Primary	200	10,000
Secondary	150	9,075
Drone	150	7,000
<b>WATERCRAFT</b>		<b>NUMBER ASSIGNED</b>
25 Ft - Outboard Boat		2
120 Ft - Drone Recovery Boat		3
65 Ft - Range Operation Boat		1
34 Ft - Search and Rescue Boat		1
17 Ft - Patrol Boat		1
21 Ft - Patrol Boat		2
24 Ft - Patrol Boat		1
Jet Ski		2
<b>TOTAL</b>		<b>13</b>



**Table 2 CAPITAL ASSETS**

<b>BUILDING/FACILITIES</b>	<b># OF BUILDINGS</b>	<b>SQ FT</b>
Operations/Training	85	701,784
Maintenance/Production	130	1,134,380
Administrative	35	524,849
Technical Training	2	17,736
Privatized Housing	867	1,291,832
Camp Troop	4	21,504
Commissary	1	72,360
Base Exchange	6	88,380
Community	111	512,475
Medical Treatment Facility	6	146,882
Supply	83	319,053
Research, Development, Test & Evaluation	14	154,996
Utilities	33	15,031
Bachelor Airmen Quarters	11	205,612
Visiting Airmen Quarters	4	99,325
Visiting Officer Quarters	11	122,225
Temporary Lodging Facility	27	74,448
<b>TOTAL</b>	<b>1,088</b>	<b>5,502,572</b>
<b>LAND</b>		<b>ACRES</b>
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
<b>TOTAL ACREAGE</b>		<b>29,069</b>



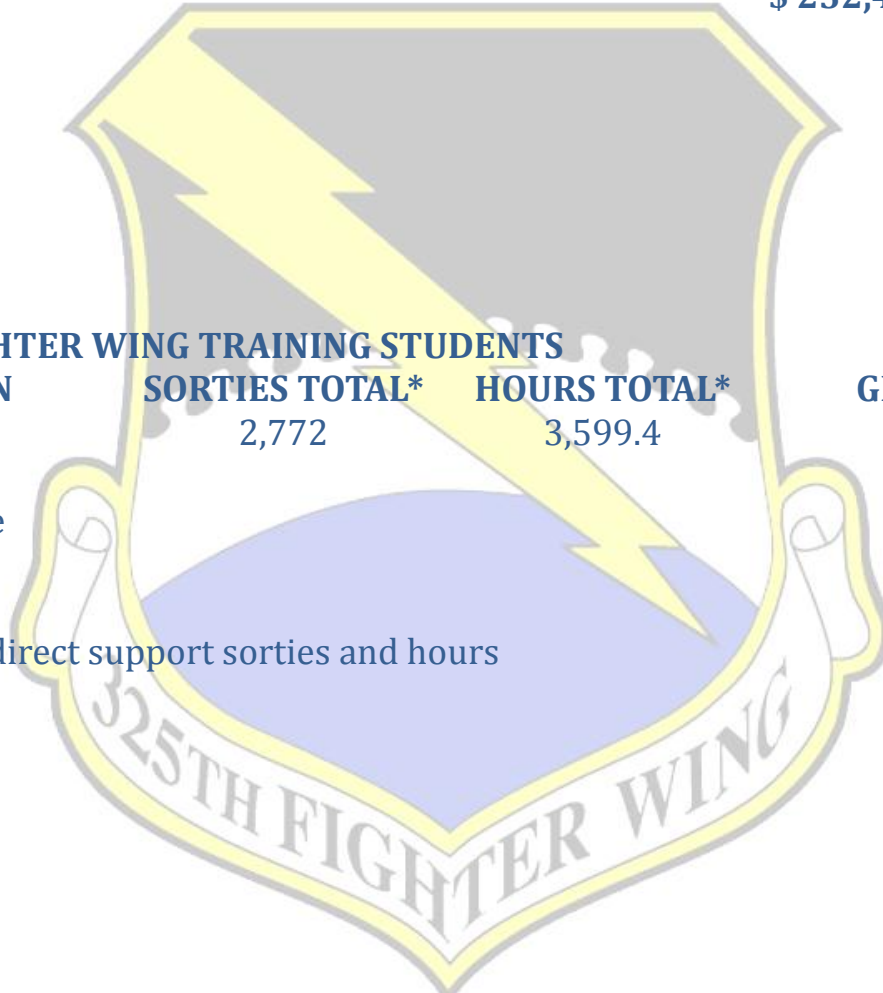
**Table 3 CAPITAL ASSETS (OTHER)**

<b>TYPE</b>	<b>VALUE</b>
Communications Systems	\$ 45,679,492.07
Computers/Equipment	\$ 186,764,896.01
<b>TOTAL</b>	<b>\$ 232,444,388.08</b>

<b>VEHICLES</b>		
Owned		596
Leased		768
<b>TOTAL</b>		<b>1,364</b>

<b>325th FIGHTER WING TRAINING STUDENTS</b>			
<b>SQUADRON</b>	<b>SORTIES TOTAL*</b>	<b>HOURS TOTAL*</b>	<b>GRADUATES</b>
43d FS	2,772	3,599.4	21
325th ACS			163
Intelligence			42
<b>TOTAL</b>			<b>226</b>

\* Includes direct support sorties and hours



**Table 4 PERSONNEL BY CLASSIFICATION AND HOUSING LOCATION**

	<b>LIVING ON BASE</b>	<b>LIVING OFF BASE</b>	<b>TOTAL</b>
<b>1. APPROPRIATED FUND MILITARY</b>			
Active Duty	351	2905	3256
Air Force/Air National Guard	11	207	218
Non-Extended Active Duty Reserve/ANG	0	74	74
<b>TOTAL</b>	<b>362</b>	<b>3,186</b>	<b>3,548</b>
<b>2. ACTIVE DUTY MILITARY DEPENDENTS</b>			
	<b>1,379</b>	<b>3,172</b>	<b>4,551</b>
<b>3. APPROPRIATED FUND CIVILIANS</b>			
General Schedule			748
Federal Wage Board			34
Other			1
<b>TOTAL</b>			<b>783</b>
<b>4. NON-APPROPRIATED FUND CONTRACT CIVILIANS AND PRIVATE BUSINESS</b>			
Civilian NAF			317
Civilian BX			104
Contract Civilians (not elsewhere included)			161
Private Businesses On base, By Type:			71
Branch Banks/Credit Union			6
Other Civilians (not elsewhere included)			65
<b>TOTAL</b>			<b>653</b>
<b>TOTAL PERSONNEL INCLUDING DEPENDENTS</b>			<b>9,535</b>
<b>5. MILITARY RETIREES</b>			
Air Force			5,544
Navy			1,721
Army			1,672
Marine Corps			187
Coast Guard			139
<b>TOTAL</b>			<b>9,124</b>

**Table 5 ANNUAL PAYROLLS BY CLASSIFICATION AND HOUSING LOCATION**

<b>CLASSIFICATION</b>	<b>LIVING ON BASE</b>	<b>LIVING OFF BASE</b>	<b>TOTAL</b>
<b>1. APPROPRIATED FUND</b>			
<b>MILITARY</b>			
Active Duty	\$ 9,884,889	\$ 190,435,677	\$ 200,320,566
ANG/Reserve	\$ 616,484	\$ 11,601,110	\$ 12,217,594
Non-Extended Active Duty ANG/Reserve	\$0	\$ 3,118,489	\$ 3,118,489
<b>TOTAL</b>	<b>\$ 10,501,373</b>	<b>\$ 205,155,276</b>	<b>\$ 215,656,649</b>
<b>2. APPROPRIATED FUND</b>			
<b>CIVILIANS</b>			
General Schedule			\$ 47,882,142
Federal Wage Board			\$ 1,693,225
Other			\$ 69,475
<b>TOTAL</b>			<b>\$ 49,644,842</b>
<b>3. NON-APPROPRIATED FUND CONTRACT CIVILIANS AND PRIVATE BUSINESS</b>			
Civilian NAF			\$ 7,084,912
Civilian BX			\$ 2,477,782
Contract Civilians (not elsewhere included)			\$ 28,402,883
Private Businesses On Base, By Type:			\$ 2,988,652
Branch Banks/Credit Union			\$ 180,749
Other Civilians (not elsewhere included)			\$ 2,807,903
<b>TOTAL</b>			<b>\$ 40,954,230</b>
	<b>TOTAL ANNUAL PAYROLL</b>		<b><u>\$ 306,255,721</u></b>

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

	<b>ACTUAL ANNUAL EXPENDITURES</b>
<b>1. CONSTRUCTION</b>	
Military Construction Program	\$0
Non-Appropriated Fund	\$ 151,000
Military Family Housing	\$0
O&M	\$ 16,065,104
Other	\$ 24,194,968
<b>TOTAL</b>	<b>\$ 40,411,072</b>
<b>2. SERVICES</b>	
Services Contracts **	\$ 83,766,385
Other Services (not elsewhere included)	\$ 18,916,647
<b>TOTAL</b>	<b>\$ 102,683,032</b>
<b>3. MATERIALS, EQUIPMENT, AND SUPPLIES PROCUREMENT</b>	
Commissary	\$ 22,768,980
Base Exchange (BX)	\$ 30,440,602
Health (CHAMPUS, Government cost only)	\$ 3,375,891
Education (Impact aid and tuition assistance)	\$ 2,207,931
Other Materials, Equipment & Supplies	\$ 23,335,504
<b>TOTAL</b>	<b>\$ 82,282,940</b>
<b>TOTAL ANNUAL EXPENDITURES</b>	<b><u>\$ 225,377,044</u></b>

\*Not including contracts for services supplied to other Air Force installations

\*\*Includes only contracts 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	3,256	<b>0.29</b>	944
RESERVE/ANG/TRAINEES	292	<b>0.13</b>	38
APF CIVILIANS	783	<b>0.43</b>	337
OTHER CIVILIANS	653	<b>0.43</b>	281
<b>TOTAL</b>	<b>4,984</b>		<b>1,600</b>
<b>ESTIMATED NUMBER OF INDIRECT JOBS CREATED</b>			<b>1,600</b>
<b>AVERAGE ANNUAL PAY FOR THE LOCAL COMMUNITY</b>			<b>\$ 24,858</b>
<b>ESTIMATED ANNUAL DOLLAR VALUE OF JOBS CREATED</b>			<b><u>\$ 39,772,800</u></b>

Data Sources  
Multipliers

LMI Economic Impact Database, Installations and Indirect/Induced Job Multipliers, Feb 95  
Current tables for Average Annual Pay Levels in Metropolitan Areas and Average Annual Pay by State and Industry are accessible at:

Average Annual Pay

<http://stats.bls.gov:80/newsrels.htm#OEUS>

**Table 8 TOTAL ANNUAL ECONOMIC IMPACT ESTIMATE**

**ANNUAL PAYROLL**

Military	\$ 215,656,649
Federal Civilian	\$ 49,644,842
Other Civilian	\$ 40,954,230

**TOTAL** **\$ 306,255,721**

**ANNUAL EXPENDITURES** **\$ 225,377,044**

**ESTIMATED ANNUAL DOLLAR VALUE OF JOBS CREATED** **\$ 39,772,800**

**GRAND TOTAL** **\$ 571,405,565**



**ACKNOWLEDGEMENT**

**Special thanks goes to all those involved in building the FY11 Economic Impact Analysis, including those who provided data, formatted the product, and distributed the EIA throughout the surrounding communities.**

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