



# Florida Defense Factbook



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# Florida Military Facts

<b>Total Statewide Economic Impact \$94.9 B</b>	
<b>Percent of Florida Economy</b>	<b>8.9%</b>
<b>Statewide Direct and Indirect Jobs</b>	<b>914,787</b>
<b>Buildings Owned by Military <sup>1</sup></b>	<b>5,922</b>
<b>Total Acreage (all installations) <sup>1</sup></b>	<b>522,734</b>
<b>Plant Replacement Value <sup>1</sup></b>	<b>\$32.5 Billion</b>
<b>Military Personnel <sup>2</sup></b>	<b>65,267</b>
<b>Civilian Personnel <sup>2</sup></b>	<b>31,367</b>
<b>Military Reserve <sup>2</sup></b>	<b>24,779</b>
<b>National Guard Full-time <sup>3</sup></b>	<b>2,470</b>
<b>National Guard Traditional Guardsmen <sup>3</sup></b>	<b>10,667</b>
<b>Total Veterans Living in Florida <sup>4</sup></b>	<b>1,491,072</b>
<b>Total Military Retirees Living in Florida <sup>5</sup></b>	<b>203,177</b>

<sup>1</sup>. Department of Defense, Base Structures Report – FY 2018 Baseline

<sup>2</sup>. Defense Manpower Data Center – Military and Civilian Personnel By Service/ Agency by State/Country (2018)

<sup>3</sup>. Adjutant General's Report FY 2018, Committed to Readiness, Florida's Force – We Work for You

<sup>4</sup>. U.S. Department of Veterans Affairs

<sup>5</sup>. Department of Defense, Office of the Actuary

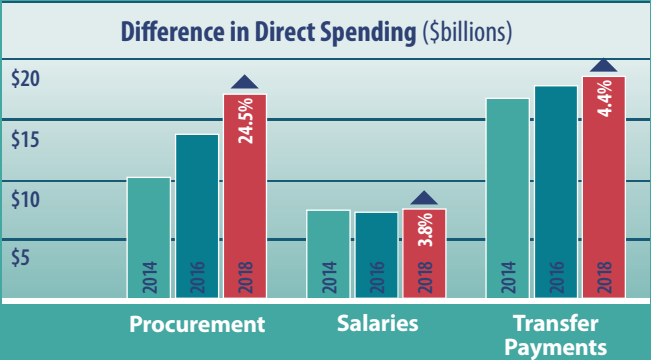
# Study Overview



In its continuing effort to preserve and protect Florida’s military missions and installations, the Florida Defense Support Task Force commissioned this update to the Florida Defense Industry Economic Impact Analysis in 2019. The update utilizes the same econometric forecasting models

and defense-related spending flows as previous studies. This includes using the REMI PI+ model to estimate total economic impacts at the state and county levels. As in previous years, the study relies primarily on data from the REMI model, U.S. Department of Treasury, U.S. Department of Defense (DoD), U.S. Department of Veterans Affairs, U.S. Department of Homeland Security (DHS), Florida National Guard, DoD Base Structures Report, DoD Green Book, U.S. Census Bureau, U.S. Bureau of Economic Analysis, and U.S. Bureau of Labor Statistics.

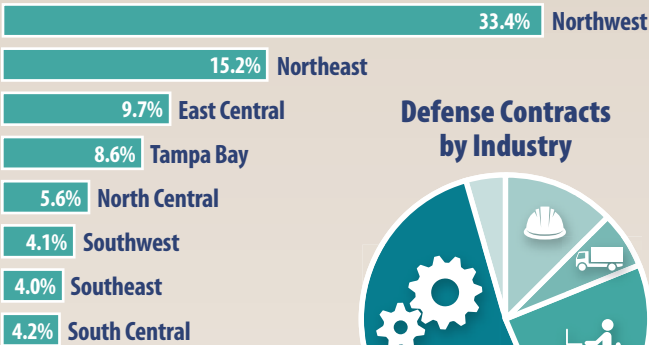
The figure below outlines the major differences in direct inputs between 2014, 2016, and 2018 defense spending. Since the 2016 study, DoD and DHS procurement (contracts) flows to the state have increased by over 24.5%; salaries to military personnel remained relatively stable, increasing by 3.8%; and, transfer payments through military retirement payments and Veterans Affairs benefits increased by 4.4%. In all, direct defense-related spending in the state of Florida increased by 11.4%, equating to \$44 billion in FY 2018. This direct spending rippled through the Florida economy generating nearly \$95 billion in value-added economic impacts and supported just under 915,000 direct, indirect, and induced jobs.



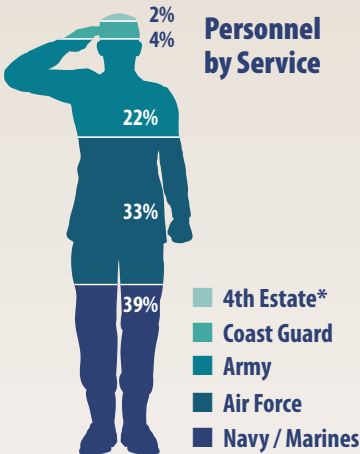
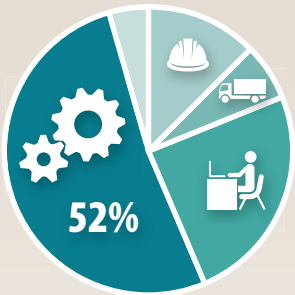


# Impacts by the Numbers

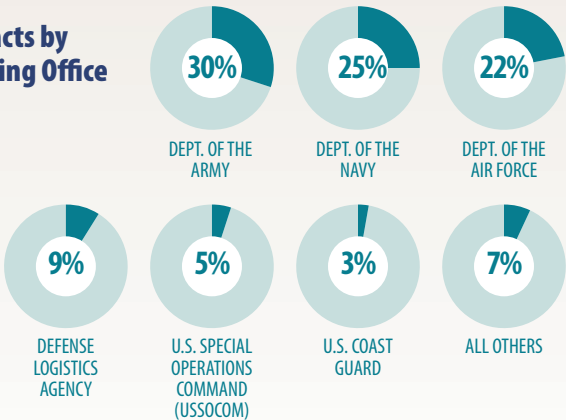
## Defense as a Percent of Total Economy for Each Region



## Defense Contracts by Industry



## Contracts by Awarding Office



\* Refers to personnel working in DoD agencies not directly tied to a military branch, such as the Office of the Secretary of Defense, Defense Commissary Agency, DARPA, etc.

# How Florida Ranks in FY 2018



*Florida has the*

**2<sup>nd</sup> Largest**  
**MILITARY**  
**RETIREE**  
population



*Florida has the*

**3<sup>rd</sup> Largest**  
**VETERAN**  
population



*Florida ranks*

**4<sup>th</sup> in DEFENSE**  
**CONTRACTS** with  
**\$17.5 Billion**  
UP FROM 5TH IN 2016.



*Florida ranks*

**5<sup>th</sup> in DoD**  
**PERSONNEL**  
with 134,550

## Florida hosts a variety of missions critical to our Nation's defense.

### Florida is home to:

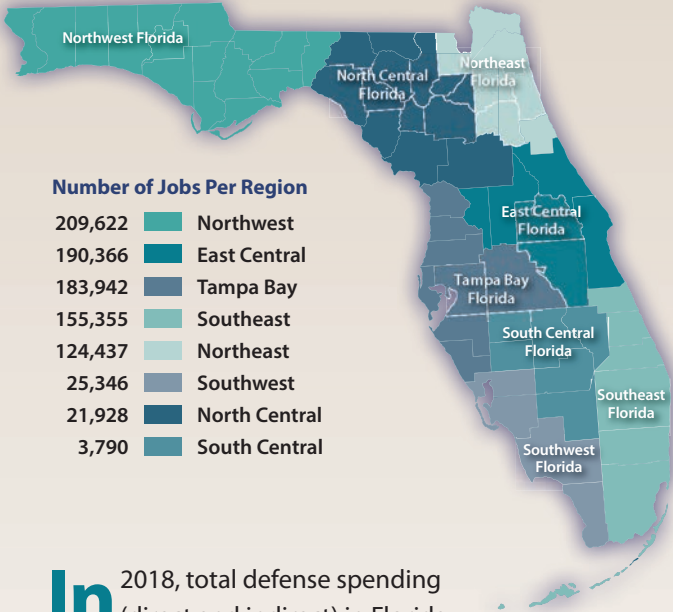
- Three of ten unified combatant command headquarters.
- Hosts two (of only four) deep water naval ports with adjacent airfields.
- The military's only east coast space launch facility.
- The Marine Corps's only maritime prepositioning force facility.
- One of only three Navy Fleet Readiness Centers.
- The Joint Gulf Range Complex.
- Several critical research, development, training, and evaluation (RDT&E) centers.

The DoD's strategy emphasizes rapidly deployable joint forces, joint training, access to space, special operations, precision strike, and research & development, all of which are found in Florida.

Air, land, and sea training areas and ranges associated with the Joint Gulf Range Complex host large, complex joint exercises that allow the services to train like they fight, thus bringing tremendous advantages to our military. Additionally, the Complex connects test and training ranges that extend from Key West to Northwest Florida and across the eastern Gulf of Mexico. It includes 180,000 square miles of DoD controlled airspace, as well as 724 sq. miles of adjacent land ranges, 3,200 sq. miles of airspace over adjacent land, 17 miles of shoreline access, interconnected radars and 2 launch areas for missiles. The training area contains multiple live-fire bombing ranges, including Pinecastle Range, Avon Park Air Force Range and the Eglin Bombing Range, that allow for simultaneous maritime, air, and land training exercises. Due to its tremendous capabilities and Florida's commitment to partnership, the Complex is an integral part of DoD's Training Resources Strategy.

# State of Florida

## Total Employment Impacts of Defense Activities



**In** 2018, total defense spending (direct and indirect) in Florida generated roughly \$95 billion, or 9 percent, of Florida’s gross state product. Total defense spending also accounted for nearly 915,000 jobs across the state — many of which are associated with a wage premium. For example, nearly \$5.5 billion was directly spent in the Aerospace and Navigational Instruments manufacturing industries. This accounts for nearly 14,000 direct jobs, which pay an average salary of over \$116,000. This industry pays approximately 132% higher than the state average of \$50,000. Defense spending creates jobs in every county in Florida. The map above displays total job impacts (direct and indirect) across the state.

# Defense Economic Impact Estimates

Total State Economic Impacts	
State Economic Impact	\$94.9 Billion
Employment	914,787 Jobs
Percent of Economy	8.9%
Consumption	\$57.5 Billion
Capital Investment	\$18.6 Billion
Direct Defense Spending	
Procurement	\$17.5 Billion
Salaries	\$7.6 Billion
Pensions & Transfers	\$18.8 Billion
Total Defense Spending	\$44.0 Billion
Impacts by Component	
Federal Military	
Economic Impact	\$87.4 Billion
Employment	846,569 Jobs
National Guard	
Economic Impact	\$4.6 Billion
Employment	36,763 Jobs
Coast Guard	
Economic Impact	\$3.0 Billion
Employment	31,455 Jobs

# Northwest Florida Region



**T**he sixteen-county Northwest Florida Region is home to Tyndall Air Force Base, Naval Support Activity Panama City, Eglin Air Force Base, Hurlburt Field, Naval Air Station Whiting Field, Naval Air Station Pensacola, Corry Field and Saufley Field. Defense activities in Northwest Florida generate an estimated 209,622 jobs and account for over \$22.7 billion in gross regional product (GRP), which is 33% of the region's total gross product. The bulk of the impacts are generated by direct federal military spending, which accounts for nearly 194,847 total (direct and indirect) jobs, followed by the National Guard with 9,644 and Coast Guard with 5,132 total jobs respectively in this region.

# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$22,651.1
Percent of Economy	33.4%
Employment	209,622 Jobs
Consumption	\$11,950.4
Capital Investment	\$3,733.9
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$3,125.8
Salaries	\$3,460.8
Pensions & Transfers	\$2,706.6
Total Defense Spending	\$9,293.2
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$20,794.5
Employment	194,847 Jobs
National Guard	
Economic Impact	\$1,314.3
Employment	9,644 Jobs
Coast Guard	
Economic Impact	\$542.3
Employment	5,132 Jobs

# Northwest Florida Region

## Bay County



**Home to:**

- Naval Support Activity Panama City
- Tyndall Air Force Base

Naval Support Activity Panama City’s mission is to provide research, development, test and evaluation, and in-service support for expeditionary, amphibious warfare, diving, maritime special operations, and mine warfare.

Tyndall Air Force Base is the home of the 325th Fighter Wing, which conducts advanced training for F-22 pilots, maintenance personnel, air traffic and weapon controllers and F-22 specific intelligence personnel. The Air Force’s North / 1st Air Force Command Center for air operations in North America is located at Tyndall.

*\* It should be noted that defense spending data used in this study is from FY 2018 and does not include impacts from Hurricane Michael.*

### Total County Impact *(in Millions)*

County Economic Impact	\$3,162.5
Percent of Economy	32.8%
Employment	28,965 Jobs
Consumption	\$1,565.2
Capital Investment	\$510.0

### Direct Defense Spending *(in Millions)*

Procurement	\$728.6
Salaries	\$355.5
Pensions & Transfers	\$374.6
<b>Total Defense Spending</b>	<b>\$1,458.7</b>



# Northwest Florida Region

## Escambia County



**Home to:**

- Naval Air Station Pensacola
- Corry Station
- Saufley Field

Naval Air Station Pensacola, “The Cradle of Naval Aviation,” is tasked with providing superior training support and a quality environment to its more than 90 tenant commands.

Corry Station’s primary mission is to operate and administer assigned schools that provide training to military and civilian personnel of the Department of Defense and international military students.

Saufley Field is a multi-purpose facility hosting the Naval Education & Training Professional Development Center, a Federal Prison Camp, and other activities.

### Total County Impact *(in Millions)*

County Economic Impact	\$6,786.0
Percent of Economy	43.6%
Employment	63,391 Jobs
Consumption	\$3,048.9
Capital Investment	\$962.6

### Direct Defense Spending *(in Millions)*

Procurement	\$408.2
Salaries	\$1,194.9
Pensions & Transfers	\$643.8
<b>Total Defense Spending</b>	<b>\$2,246.9</b>

# Northwest Florida Region

## Okaloosa County



**Home to:**

- Eglin Air Force Base
- Hurlburt Field

Eglin Air Force Base hosts the 96th Test Wing and is the largest military base in the U.S. with 724 square miles of land range. Eglin hosts the Joint Gulf Range Complex, which is a training resource with tremendous capabilities and a commitment to partnering for joint training.

Hurlburt Field’s mission is to support the training and execution of worldwide aviation special operations such as unconventional warfare, special reconnaissance, counter proliferation, foreign internal defense, information operations, psychological operations, civil affairs and combating terrorism.

### Total County Impact *(in Millions)*

County Economic Impact	\$9,388.8
Percent of Economy	72.2%
Employment	78,757 Jobs
Consumption	\$4,077.3
Capital Investment	\$1,295.8

### Direct Defense Spending *(in Millions)*

Procurement	\$1,189.9
Salaries	\$1,787.9
Pensions & Transfers	\$753.3
<b>Total Defense Spending</b>	<b>\$3,731.1</b>

# Northwest Florida Region

## Santa Rosa County



### Home to:

- Naval Air Station Whiting Field

Naval Air Station (NAS) Whiting Field’s mission is to produce the military’s best trained “Aviation Warfighter.” With 12 outlying fields, NAS Whiting hosts 21 tenant activities, including Training Air Wing 5 which trains over 1,200 pilots a year. NAS Whiting Field owns 52% of Navy outlying landing fields, and 11% of all DoD flight hours are flown out of NAS Whiting annually.

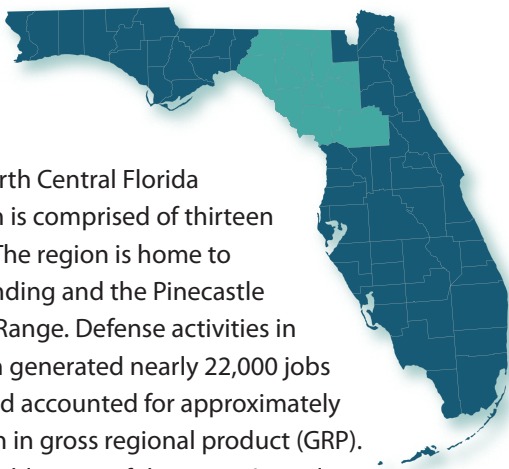
### Total County Impact *(in Millions)*

County Economic Impact	\$1,405.4
Percent of Economy	31.3%
Employment	14,505 Jobs
Consumption	\$1,565.2
Capital Investment	\$444.3

### Direct Defense Spending *(in Millions)*

Procurement	\$26.6
Salaries	\$53.8
Pensions & Transfers	\$465.8
Total Defense Spending	\$546.2

# North Central Florida Region



**T**he North Central Florida region is comprised of thirteen counties. The region is home to Camp Blanding and the Pinecastle Bombing Range. Defense activities in this region generated nearly 22,000 jobs in 2018 and accounted for approximately \$1.8 billion in gross regional product (GRP). This is roughly 5.6% of the region's total gross regional product (GRP). The bulk of the jobs – 20,937 – flow through from federal military spending. Total spending by the National Guard accounts for over 731 jobs, and the Coast Guard accounts for 261 jobs in this region.

# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$1,787.2
Percent of Economy	5.6%
Employment	21,928 Jobs
Consumption	\$1,776.5
Capital Investment	\$566.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$160.0
Salaries	\$97.3
Pensions & Transfers	\$1,111.2
Total Defense Spending	\$1,368.5
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$1,696.8
Employment	20,937 Jobs
National Guard	
Economic Impact	\$70.0
Employment	731 Jobs
Coast Guard	
Economic Impact	\$20.4
Employment	261 Jobs



# North Central Florida Region

## Bradford County



**Home to:**

- **Camp Blanding Joint Training Center**

Camp Blanding Joint Training Center is the primary military reservation and training

base for the Florida National Guard. The base is located in adjacent Clay County, approximately 25 miles south of Jacksonville, and is composed of 73,000 acres of forest, lakes, and grassland. Camp Blanding possesses billeting to accommodate more than 3,500 personnel and ranges which can support training for small arms weapons, mortars, artillery, attack helicopter gunnery and close air support aircraft.


### Total County Impact *(in Millions)*

County Economic Impact	\$33.7
Percent of Economy	5.0%
Employment	451 Jobs
Consumption	\$65.4
Capital Investment	\$19.1

### Direct Defense Spending *(in Millions)*

Procurement	\$0.3
Salaries	\$1.6
Pensions & Transfers	\$39.5
<b>Total Defense Spending</b>	<b>\$41.4</b>

# Northeast Florida Region



**T**he seven-county Northeast Florida Region is home to several major installations including Naval Station Mayport, Naval Air Station Jacksonville, and the Marine Corps Support Facility Blount Island. Spending flows to the region totaled over \$5.8 billion in 2018 from all sources. These spending flows generated nearly 124,500 total jobs in the region and accounted for 15.2% of the region's GRP (\$14.2 billion). Impacts related to federal military spending accounted for 113,910 jobs. The National Guard and Coast Guard accounted for 8,022 jobs and 2,504 jobs, respectively, in this region.



# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$14,168.3
Percent of Economy	15.2%
Employment	124,437 Jobs
Consumption	\$8,151.9
Capital Investment	\$2,500.0
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,824.3
Salaries	\$1,756.5
Pensions & Transfers	\$2,230.1
Total Defense Spending	\$5,810.9
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$12,915.7
Employment	113,910 Jobs
National Guard	
Economic Impact	\$1,023.2
Employment	8,022 Jobs
Coast Guard	
Economic Impact	\$229.5
Employment	2,504 Jobs

# Northeast Florida Region

## Clay County



**Home to:**  
■ **Camp Blanding Joint Training Center**

Camp Blanding Joint Training Center is the primary military reservation and

training base for the Florida National Guard. The base is located in rural Clay County, approximately 25 miles south of Jacksonville, and is composed of 73,000 acres of forest, lakes, and grassland. Camp Blanding possesses billeting to accommodate more than 3,500 personnel and ranges which can support training for small arms weapons, mortars, artillery, attack helicopter gunnery and close air support aircraft.

### Total County Impact *(in Millions)*

County Economic Impact	\$780.6
Percent of Economy	14.7%
Employment	10,382 Jobs
Consumption	\$1,143.0
Capital Investment	\$315.7

### Direct Defense Spending *(in Millions)*

Procurement	\$32.7
Salaries	\$226.8
Pensions & Transfers	\$490.3
<b>Total Defense Spending</b>	<b>\$749.8</b>

# Northeast Florida Region

## Duval County



**Home to:**

- Naval Air Station Jacksonville
- Naval Station Mayport
- Marine Corps Support Facility Blount Island
- Jacksonville Air National Guard

Naval Air Station Jacksonville is a multi-mission base, which hosts more than 100 tenant organizations and is the third largest naval installation in the U.S.

Naval Station Mayport is host to 84 tenant commands including 22 ships, four helicopter squadrons and the Navy’s Fourth Fleet. Marine Corps Support Facility Blount Island plans, coordinates, and executes the logistic efforts necessary to support Maritime Prepositioning Ships squadrons.

The 125th Fighter Wing provides air defense for the southeastern U.S. from Charleston, SC to New Orleans, LA at the Jacksonville Air National Guard Base.


### Total County Impact *(in Millions)*

County Economic Impact	\$12,017.0
Percent of Economy	17.0%
Employment	97,280 Jobs
Consumption	\$4,915.1
Capital Investment	\$1,597.3

### Direct Defense Spending *(in Millions)*

Procurement	\$1,718.5
Salaries	\$1,492.0
Pensions & Transfers	\$1,164.2
<b>Total Defense Spending</b>	<b>\$4,374.8</b>

# East Central Florida Region



**T**he East Central Region is comprised of seven counties. The region is home to Cape Canaveral Air Force Station, Patrick Air Force Base, the Naval Support Activity Orlando—Multi-Service Modeling, Simulation and Training Acquisition, and the Naval Ordnance Test Unit (NOTU). The region received nearly \$8.1 billion in procurement spending from defense activities along with \$3.8 billion in transfers and \$595 million in salaries for a total of \$12.5 billion in direct spending. These inputs generated more than 190,500 jobs in the region—a majority of which are associated with federal procurement flows. Indeed, federal procurement dollars account for almost 88,570 total jobs in the region. This region is unique in that procurement flows are the key driver of economic impacts driven largely by the presence of the industry clusters that congregate around Orange and Brevard counties. These two counties received over \$5.7 billion in procurement for manufacturing alone—over half of those funds were within the Aerospace industry.

# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$18,374.4
Percent of Economy	9.7%
Employment	190,366 Jobs
Consumption	\$11,526.0
Capital Investment	\$3,914.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$8,080.8
Salaries	\$594.3
Pensions & Transfers	\$3,756.8
Total Defense Spending	\$12,431.9
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$17,736.8
Employment	184,302 Jobs
National Guard	
Economic Impact	\$452.0
Employment	4,029 Jobs
Coast Guard	
Economic Impact	\$185.6
Employment	2,034 Jobs

# East Central Florida Region

## Brevard County



**Home to:**

- Patrick Air Force Base
- Cape Canaveral Air Force Station
- Naval Ordnance Test Unit

Patrick Air Force Base is a major component of the Air Force Space Command. It provides combat capabilities through launch, range and expeditionary operations. The host organization is the 45th Space Wing.

Cape Canaveral Air Force Station is controlled by the 45th Space Wing and is responsible for ensuring America’s safe and assured access to space. It co-joins Kennedy Space Center and consists of 47 Launch complexes used to launch Atlas, Titan and Delta rockets.

### Total County Impact *(in Millions)*

County Economic Impact	\$6,181.2
Percent of Economy	25.1%
Employment	61,089 Jobs
Consumption	\$3,657.5
Capital Investment	\$1,217.6

### Direct Defense Spending *(in Millions)*

Procurement	\$3,467.5
Salaries	\$257.8
Pensions & Transfers	\$1,010.1
<b>Total Defense Spending</b>	<b>\$4,735.3</b>

# East Central Florida Region

## Orange County



**Home to:**

- **Naval Support Activity Orlando: Multi-Service Modeling, Simulation and Training Acquisition**

Naval Support Activity (NSA) Orlando serves as one of the principal foundations of Orlando’s Central Florida Research Park. NSA Orlando is home to a variety of private industry, government and academic organizations, many of whom specialize in high-tech research and development programs, including modeling and simulation, which is collectively known as Team Orlando. NSA Orlando is a 40- acre facility located in the Central Florida Research Park adjacent to the University of Central Florida. NSA Orlando’s mission is to provide shore installation support services to tenant DoD agencies enabling mission accomplishment in a joint services environment.

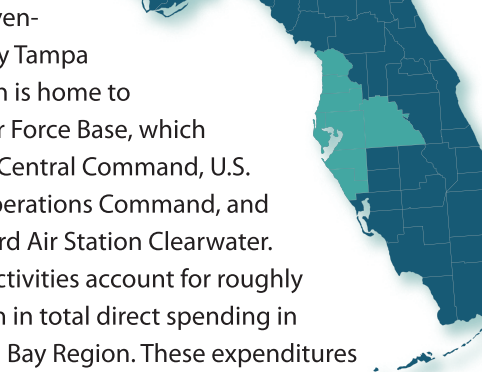
### Total County Impact *(in Millions)*

County Economic Impact	\$8,258.3
Percent of Economy	8.2%
Employment	80,460 Jobs
Consumption	\$3,634.7
Capital Investment	\$1,398.1

### Direct Defense Spending *(in Millions)*

Procurement	\$4,449.5
Salaries	\$111.8
Pensions & Transfers	\$973.9
<b>Total Defense Spending</b>	<b>\$5,535.3</b>

# Tampa Bay Region



**T**he seven-county Tampa Bay Region is home to MacDill Air Force Base, which hosts U.S. Central Command, U.S. Special Operations Command, and Coast Guard Air Station Clearwater. Defense activities account for roughly \$8.5 billion in total direct spending in the Tampa Bay Region. These expenditures generated 184,000 jobs in 2018 and accounted for \$19.3 billion of the region's gross regional product (8.6% of the region's total GRP). Transfer payments to veterans and retirees residing in the region supported 78,000 jobs, while procurement contracts generated 40,500. The bulk of the economic impact associated with defense activities in the region is a result of federal dollars flowing through the region to the military—roughly \$17.7 billion of the \$19.3 billion impact. The Coast Guard accounted for nearly 7,500 total jobs and the National Guard for an additional 7,000 total jobs in this region.



# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$19,295.8
Percent of Economy	8.6%
Employment	183,942 Jobs
Consumption	\$12,512.4
Capital Investment	\$4,029.6
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$2,447.4
Salaries	\$902.5
Pensions & Transfers	\$5,157.6
Total Defense Spending	\$8,507.5
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$17,695.6
Employment	169,381 Jobs
National Guard	
Economic Impact	\$893.3
Employment	7,076 Jobs
Coast Guard	
Economic Impact	\$706.9
Employment	7,485 Jobs

# Tampa Bay Region

## Hillsborough County



**Home to:**

- MacDill Air Force Base
- U.S. Central Command
- U.S. Special Operations Command

MacDill Air Force Base’s host command is the 6th Air Refueling Wing, whose primary mission is aerial refueling. MacDill hosts U.S. Central Command and U.S. Special Operations Command.

U.S. Central Command is one of six geographically defined unified commands in the DoD. It is responsible for U.S. Security interests in 20 nations in Northeast Africa as well as Southwest and Central Asia.

U.S. Special Operations Command’s primary mission is to disrupt, defeat and destroy terrorist networks that threaten U.S. citizens and interests worldwide.

### Total County Impact *(in Millions)*

County Economic Impact	\$11,009.0
Percent of Economy	11.7%
Employment	90,148 Jobs
Consumption	\$5,323.4
Capital Investment	\$1,752.3

### Direct Defense Spending *(in Millions)*

Procurement	\$1,357.4
Salaries	\$666.9
Pensions & Transfers	\$1,775.0
<b>Total Defense Spending</b>	<b>\$3,799.3</b>

# Tampa Bay Region

## Pinellas County



### Home to:

- **United States Coast Guard Air Station Clearwater**

Coast Guard Air Station Clearwater is the largest and busiest air station in the Coast Guard. The Area of Operations includes the Gulf of Mexico, the Caribbean basin and the Bahamas. The Station maintains deployed H-60s for operations in the Bahamas, and Turks and Caicos engaging anti-drug and migrant smuggling operations. The Station also has C-130s deployed in support of its operations in the Caribbean.

### Total County Impact *(in Millions)*

County Economic Impact	\$4,445.1
Percent of Economy	8.7%
Employment	46,559 Jobs
Consumption	\$3,033.7
Capital Investment	\$991.6

### Direct Defense Spending *(in Millions)*

Procurement	\$929.4
Salaries	\$119.0
Pensions & Transfers	\$1,199.7
<b>Total Defense Spending</b>	<b>\$2,248.1</b>



45661  
CURTIS BAY

# Tampa Bay Region

## Polk County



### Home to:

- Avon Park Air Force Range

Avon Park Air Force Range (APAFR) (Highlands and Polk Counties) is the largest live ordnance bombing and gunnery range east of the Mississippi River.

APAFR includes 400 square

miles of restricted airspace, 1,000 square miles of military operating area and 106,035 acres inside the fence. APAFR provides an important training facility for Active, Guard, and Reserve military units from the Army, Navy, Air Force, Marines, and Coast Guard, and for special operations and Homeland Security personnel.

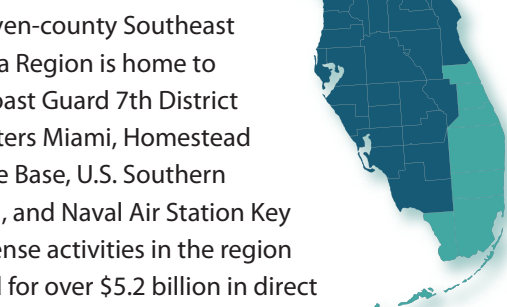
## Total County Impact *(in Millions)*

County Economic Impact	\$1,159.8
Percent of Economy	4.5%
Employment	12,859 Jobs
Consumption	\$998.1
Capital Investment	\$324.8

## Direct Defense Spending *(in Millions)*

Procurement	\$18.8
Salaries	\$31.3
Pensions & Transfers	\$512.8
<b>Total Defense Spending</b>	<b>\$562.8</b>

# Southeast Florida Region



**T**he seven-county Southeast Florida Region is home to the U.S. Coast Guard 7th District Headquarters Miami, Homestead Air Reserve Base, U.S. Southern Command, and Naval Air Station Key West. Defense activities in the region accounted for over \$5.2 billion in direct spending. These inputs, in turn, generated nearly 155,500 total jobs in the region and accounted for \$16.1 billion in gross regional product (GRP) in 2018. This was roughly 4% of the region's total GRP. Transfer payments to the region generated just over 49,200 jobs and procurement flows generated approximately 32,700 jobs. Federal military spending for procurement, salaries, and transfers generated roughly \$14 billion of the \$16.1 billion total impact (GRP), with the National Guard accounting for an additional \$765 million. The Coast Guard accounted for roughly \$1.3 billion in GRP.

# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$16,133.7
Percent of Economy	4.0%
Employment	155,355 Jobs
Consumption	\$9,479.9
Capital Investment	\$3,186.0
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,670.7
Salaries	\$684.5
Pensions & Transfers	\$2,859.3
Total Defense Spending	\$5,214.6
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$14,073.3
Employment	135,494 Jobs
National Guard	
Economic Impact	\$764.5
Employment	6,333 Jobs
Coast Guard	
Economic Impact	\$1,295.9
Employment	13,528 Jobs

# Southeast Florida Region

## Miami-Dade County



- Home to:**
- United States Southern Command
  - Homestead Air Reserve Base
  - 7th Coast Guard District HQ

United States Southern Command’s mission is to embrace the concept of preventative defense through constructive engagement. The Command is assigned areas of Latin America south of Mexico, the waters adjacent to Central and South America, its 13 island nations, the Gulf of Mexico and part of the Atlantic Ocean.

Homestead Air Reserve Base hosts the 482nd Fighter Wing of the Air Force Reserve whose mission is to provide combat-ready F-16 fighter jets capable of worldwide deployment on short notice.

Total County Impact <i>(in Millions)</i>	
County Economic Impact	\$7,436.5
Percent of Economy	4.4%
Employment	66,315 Jobs
Consumption	\$3,393.0
Capital Investment	\$1,196.3
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$518.0
Salaries	\$357.9
Pensions & Transfers	\$744.7
Total Defense Spending	\$1,620.6



# Southeast Florida Region

## Monroe County



**Home to:**

- **Naval Air Station Key West**

Naval Air Station Key West provides an extensive air-to-air training venue for transient tactical aviation squadrons. It is home to the Joint Interagency Task Force - South, whose mission is to provide the necessary operations for detection, monitoring and deterrence of drug smuggling operations. Major tenants also include the Army Special Forces Underwater Operations School.


### Total County Impact *(in Millions)*

County Economic Impact	\$1,025.5
Percent of Economy	22.8%
Employment	9,220 Jobs
Consumption	\$542.9
Capital Investment	\$167.4

### Direct Defense Spending *(in Millions)*

Procurement	\$133.0
Salaries	\$107.8
Pensions & Transfers	\$81.5
<b>Total Defense Spending</b>	<b>\$322.3</b>

# South Central Florida Region



**T**he South Central Region, composed of six counties in Southern Florida, is home to the Avon Park Air Force Range. Total military impacts in the region are less than the other economic regions in Florida. In 2018, the region received roughly \$253 million in direct spending related to defense activities. These dollars accounted for approximately 3,400 jobs and generated just over \$319 million in gross regional product (GRP). The vast majority of all impacts were driven by federal military spending with 3,650 total jobs. The National Guard and Coast Guard accounted for only 150 total jobs, or 3.9% of all impacts.

# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$319.3
Percent of Economy	4.2%
Employment	3,790 Jobs
Consumption	\$289.0
Capital Investment	\$123.9
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$53.0
Salaries	\$12.8
Pensions & Transfers	\$187.7
Total Defense Spending	\$253.4
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$304.4
Employment	3,642 Jobs
National Guard	
Economic Impact	\$11.0
Employment	98 Jobs
Coast Guard	
Economic Impact	\$4.0
Employment	50 Jobs



# South Central Florida Region

## Highlands County



**Home to:**

- **Avon Park Air Force Range**

Avon Park Air Force Range (APAFR) (Highlands and Polk Counties) is

the largest live ordnance bombing and gunnery range east of the Mississippi River. APAFR includes 400 square miles of restricted airspace, 1,000 square miles of military operating area and 106,035 acres inside the fence. APAFR provides an important training facility for Active, Guard, and Reserve military units from the Army, Navy, Air Force, Marines, and Coast Guard, and for special operations and Homeland Security personnel.

### Total County Impact *(in Millions)*

County Economic Impact	\$119.0
Percent of Economy	4.6%
Employment	1,588 Jobs
Consumption	\$134.1
Capital Investment	\$39.9

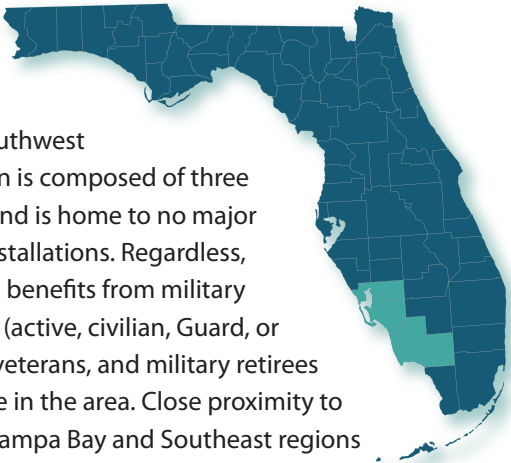
### Direct Defense Spending *(in Millions)*

Procurement	\$2.1
Salaries	\$6.3
Pensions & Transfers	\$97.9
<b>Total Defense Spending</b>	<b>\$106.4</b>

# Southwest Florida Region



**T**he Southwest Region is composed of three counties and is home to no major military installations. Regardless, the region benefits from military personnel (active, civilian, Guard, or Reserve), veterans, and military retirees who reside in the area. Close proximity to both the Tampa Bay and Southeast regions generated economic spill-over effects which led to the region receiving \$1.1 billion in total dense spending during 2018. These revenues, in turn, generated more than 25,300 jobs and accounted for \$2.3 billion in gross regional product (GRP).



# Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$2,261.6
Percent of Economy	4.1%
Employment	25,346 Jobs
Consumption	\$1,806.0
Capital Investment	\$573.7
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$122.0
Salaries	\$131.2
Pensions & Transfers	\$826.3
Total Defense Spending	\$1,079.6
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$2,139.8
Employment	24,056 Jobs
National Guard	
Economic Impact	\$82.2
Employment	829 Jobs
Coast Guard	
Economic Impact	\$39.6
Employment	461 Jobs

# Military & Defense Support

*Working to “Keep Florida the Most Military-Friendly State in the Nation.”*

## The Florida Model

GOVERNOR’S OFFICE • LEGISLATURE

Governor’s  
Meetings  
with Base  
Commanders

Florida  
Defense  
Support  
Task Force

Florida  
Defense  
Alliance

Defense  
Grant  
Programs

## Military Friendly Florida

### Advantages

- No State Income Tax
- Support for Military Spouses (Employment / Licensure)
- In-state College Tuition for Military Family Members
- Numerous Military Friendly Laws and Programs

### Base Encroachment Protections

- Legislative Protections
- Florida Forever
- Military Base Protection Program

### Partnerships

- Public-Public; Public-Private Partnerships (P4) to reduce Base Operational Costs
- Space Industry – Launch Capability
- Energy Resilience / Industry Sharing
- Modeling, Simulation, and Training with Academia and Business

### Gulf Range Complex / Avon Park Air Force Range

- National Assets for Test and Training the Entire Joint Force

### Grant Programs

- FY 2019 Defense Infrastructure Grants = \$2.1M
- FY 2019 Defense Reinvestment Grants = \$850K
- FY 2019 FDSTF Grants = \$725K



# Partnerships

The Florida Legislature created the Florida Defense Alliance (FDA) in 1998 within Enterprise Florida as a non-profit partnership between the Governor, Florida State Officials, Federal Delegation, State Legislators, Base Commanders, community leaders, and business executives to increase military value, reduce base inefficiencies, and promote multi-service synergies for Florida's military bases. The FDA provides a superb venue for defense issue development and communication, and the sharing of best practices. For more about the FDA, visit [enterpriseflorida.com/floridadefense](http://enterpriseflorida.com/floridadefense).



The Florida Defense Support Task Force was established in 2011 by Florida Statute 288.987. The task force is comprised of the Governor or his designee, and four members each appointed by the Governor, the President of the Florida Senate, and the Speaker of the Florida House of Representatives. Governor DeSantis notes that "Our state is blessed to have 20 active duty military installations and great training and testing ranges. Since my election, I have made it a priority to maintain Florida's reputation as the most military-friendly state in the Nation."

## Florida Defense Support Task Force Mission

- To make recommendations to preserve and protect military installations.
- To support the state's position in research and development related to or arising out of military missions and contracting.
- To improve the state's military friendly environment for service members, military dependents, military retirees and businesses that bring military and base-related jobs to the state.

For more information about the Florida Defense Support Task Force, visit [enterpriseflorida.com/fdstf](http://enterpriseflorida.com/fdstf).

# Current Issues Facing the Florida

## **Issue 1** – *Awareness of how critical a resource the Joint Gulf Range Complex is to the 2018 National Defense Strategy.*

The Department of Defense chose Florida for Navy and Air Force bases because of the good flying weather. Most bases in Florida are situated near the Joint Gulf Range Complex.

The Eglin Gulf Test and Training Range (EGTTR) encompasses the Eastern Gulf of Mexico (EGOMEX). The Joint Gulf Range Complex refers to EGTTR plus the inland bombing ranges at Pinecastle and Avon Park and the National Center for Simulation extending it into the virtual realm.

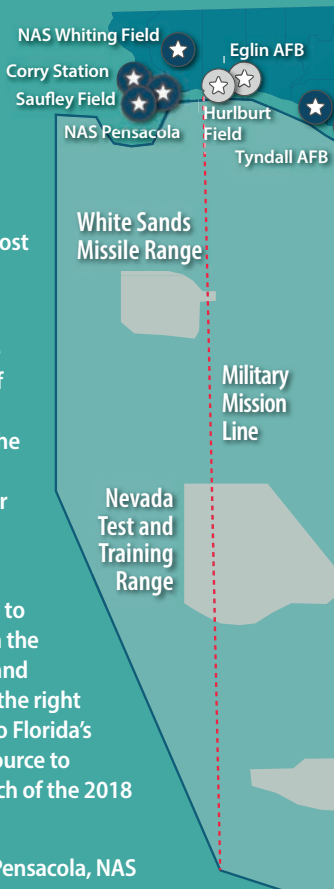
Stretching from the Florida panhandle to Key West, the Gulf Range is larger than the combined area of all other major test and training ranges in the U.S. The map to the right shows how all other ranges compare to Florida's Gulf Range. It is a unique and vital resource to accomplish the objectives and approach of the 2018 National Defense Strategy.

The Gulf Range directly supports NAS Pensacola, NAS Whiting Field, Hurlburt Field, Eglin AFB, NSA Panama City, Tyndall AFB, MacDill AFB and NAS Key West missions. It also hosts nearly continuous live fire weapons and operational testing for visiting Air Force, Navy and Marine units from around the world.

Emerging technologies such as hypersonics, 5th and 6th generation fighters and weapons, and advanced sub-surface systems will require more space. The Gulf Range is the only test range in the U.S. large enough to accommodate a full-range test flight (Key West to Eglin AFB) of a hypersonic missile.

## **Issue 2** – *Extending the Moratorium on Drilling in the Eastern Gulf of Mexico*

The number and diversity of military testing and training activities east of the north-south line at 86° 41' is so great that this line was established as the Military Mission Line (MML). The area east of the MML, depicted in the map above, is especially critical to protect.



# Defense Economy



Drilling structures and associated development in this area pose hazards and are incompatible with missile flights, low-flying aircraft, weapons testing, and training. Oil exploration will jeopardize the military's ability to test more sophisticated and longer distance weapons and reduce Florida's appeal to keep military bases in the Sunshine State.

The current moratorium on oil exploration and drilling expires in 2022. If Congress does not extend the moratorium, this vital national resource will be lost, and our military readiness will be significantly diminished.

\* For more detailed information you can access the white paper on our webpage: <https://www.enterpriseofl.com/wp-content/uploads/FDSTF-White-Paper-Oil-Drilling-and-Military-Mission-Compatibility.pdf>



*This study was commissioned and sponsored by  
Enterprise Florida and the Florida Defense  
Support Task Force.*

*For information, please visit  
**[www.enterpriseflorida.com/fdstf](http://www.enterpriseflorida.com/fdstf)**.*



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