



Florida Military & Defense Economic Impact Summary

JANUARY 2022

CONTENTS

Study Overview	1
Florida Military Facts	2
Impacts by the Numbers	4
Statewide Defense Economic Impacts	6
Northwest Florida Region	8
Bay County	10
Escambia County	11
Okaloosa County	12
Santa Rosa County	13
North Central Florida Region	14
Bradford County	17
Northeast Florida Region	18
Clay County	20
Duval County	21
East Central Florida Region	22
Brevard County	24
Lake County	25
Orange County	26
Tampa Bay Region	28
Hillsborough County	30
Pinellas County	31
Polk County	33
Southeast Florida Region	34
Miami-Dade County	36
Monroe County	37
South Central Region	38
Highlands County	41
Southwest Region	42
Military & Defense Support	44
Partnerships	46
Florida's Focus on Enhancing its Defense Contracting Community	48

STUDY OVERVIEW



For more than a decade, the Florida Defense Support Task Force (FDSTF) has monitored the economic impacts of defense spending flowing to Florida military installations, private-sector defense contractors, and the more than 1.5 million veterans and military retirees residing in Florida. To do so, the FDSTF conducts a bi-annual update to the economic impacts of the Florida defense industry. This booklet presents a summary of the updated estimates using 2020 spending data. To ensure consistency, the same econometric forecasting models and defense-related spending flows are used as in previous studies. The incredible story told by this data demonstrates the resiliency of Florida's support for defense industries that, despite economic challenges, still achieved real growth and demonstrated a "no excuses" approach to further elevating Florida's economic future.

During 2020, the state experienced a 12% nominal increase in direct defense spending – growing from \$44 billion in 2018 to \$49.3 billion in 2020. As the \$49.3 billion rippled through the economy, it supported nearly 860,200 jobs and generated over \$96.6 billion in value-added economic impacts, or 8.5% of the Florida economy. While defense spending increased over 2018, because household spending shifted from brick & mortar retail and entertainment establishments during the pandemic, the number of total jobs supported decreased slightly as spending shifted to e-commerce which does not generate the levels of employment that brick & mortar household spending typically does.

However, despite the economic disruptions caused by COVID-19, the state of Florida and its defense industry charged ahead during 2020, and the Florida defense industry remains one of the largest and most productive in the nation. Given the headwinds other major industries faced during 2020, defense has proven itself a stabilizing force for Florida communities who have the honor of supporting their local military installations, defense contractors, and the veterans and military retirees who call Florida home.

FLORIDA MILITARY FACTS

Total Statewide Economic Impact \$96.6 B

Percent of Florida Economy 8.5%

Statewide Direct and Indirect Jobs 860,221

Buildings Owned by Military ¹ 5,992

Total Acreage (all installations) ¹ 522,734

Plant Replacement Value ¹ \$32.5 billion

Military Personnel ² 69,290

Civilian Personnel ² 38,095

Military Reserve ² 33,586

National Guard Full-time ³ 2,539

National Guard Traditional Guardsmen ³ 10,684

Total Veterans Living in Florida ⁴ 1,517,442

Total Military Retirees Living in Florida ⁵ 205,132

¹ Department of Defense, Base Structures Report – FY 2018 Baseline

² Defense Manpower Data Center – Military and Civilian Personnel By Service Agency by State/Country (September 2021)

³ Adjutant General's Report FY 2020, Ready: Home & Abroad

⁴ U.S. Department of Veterans Affairs

⁵ Department of Defense, Office of the Actuary

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

Florida is home to:

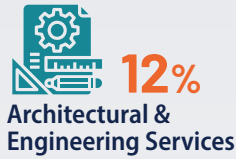
- Three of ten unified combatant command headquarters
- Hosts two (of only four) deep water naval ports with adjacent airfields.
- The military's only east coast space launch facility.
- The Marine Corps's only maritime prepositioning force facility
- One of only three Navy Fleet Readiness Centers.
- 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.

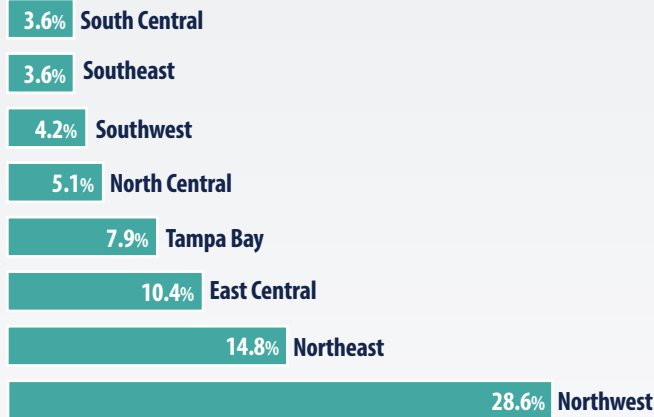
Air, land, and sea training areas and ranges associated with the Joint Gulf Range Complex host large, complex joint exercises that allow the services to train like they fight, thus bringing tremendous advantages to our military. Additionally, the Complex connects test and training ranges that extend 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 Pinycastle 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.

IMPACTS BY THE NUMBERS

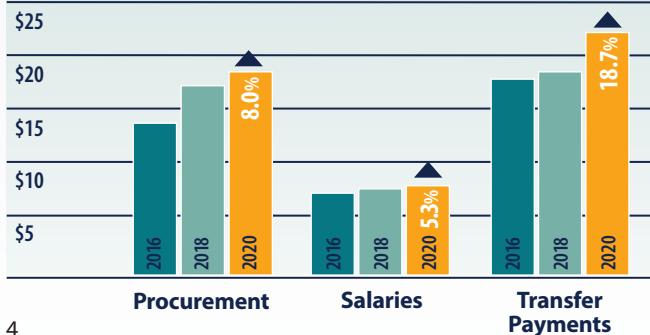
4 Industries make up **50%** of Defense-related contracts



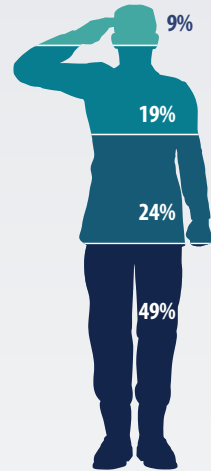
Defense as a Percent of Total Economy for Each Region



Difference in Direct Spending (\$billions)

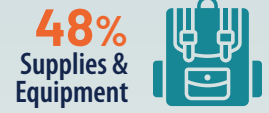


Personnel by Type

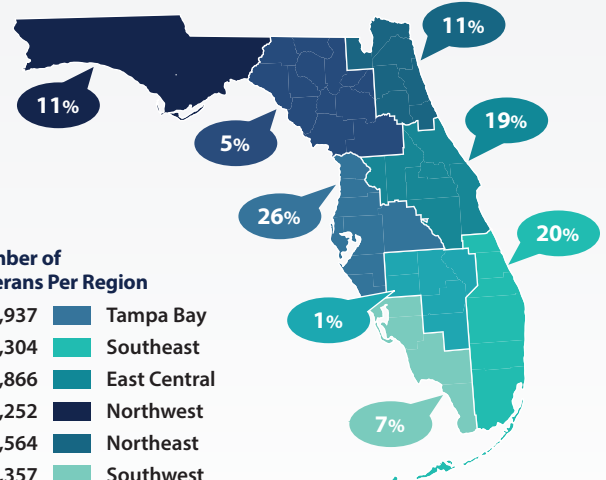


- National Guard
- Reserve
- Civilian
- Active Duty

Contract Values by Type



Veteran Distribution by Region

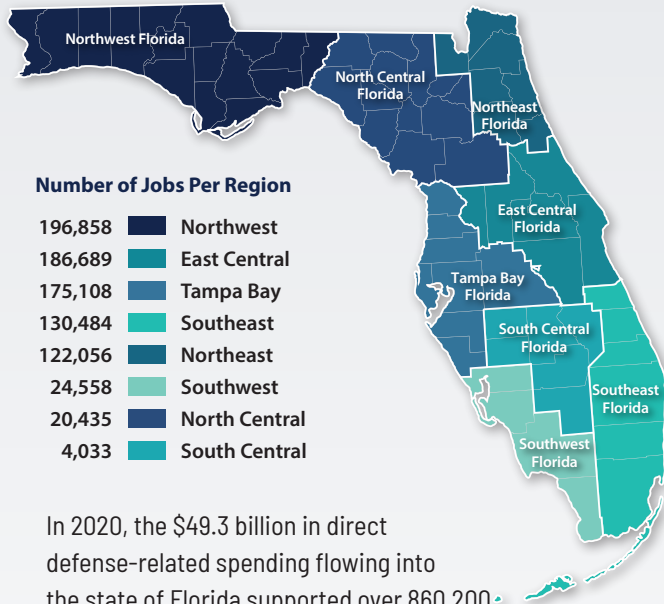


Number of Veterans Per Region

- 391,937 Tampa Bay
- 296,304 Southeast
- 287,866 East Central
- 165,252 Northwest
- 164,564 Northeast
- 111,357 Southwest
- 80,753 North Central
- 19,408 South Central

STATE OF FLORIDA

Total Employment Impacts of Defense Activities



In 2020, the \$49.3 billion in direct defense-related spending flowing into the state of Florida supported over 860,200 jobs and generated \$96.6 billion in value-added economic impacts across the state. As the map above demonstrates, defense spending generated some level of job creation in each of the state's eight economic development regions. Northwest Florida continues to have the highest job impacts associated with the defense industry with nearly 197,000 total jobs (direct, indirect, and induced), but the East Central and Tampa Bay regions are close behind with 186,700 and 175,000, respectively. Even regions with very little military presence experience economic impacts as they are home to small defense contractors as well as veterans and military retirees who spend their veteran benefits and pensions on the local economy.

Defense Economic Impact Estimates

Total State Economic Impacts

State Economic Impact	\$96.6 Billion
Employment	860,221 Jobs
Percent of Economy	8.5%
Consumption	\$59.4 Billion
Capital Investment	\$19.5 Billion

Direct Defense Spending

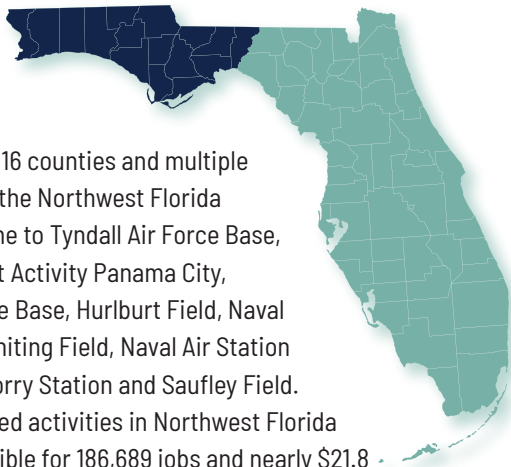
Procurement	\$18.9 Billion
Salaries	\$8.0 Billion
Pensions & Transfers	\$22.4 Billion
Total Defense Spending	\$49.3 Billion

Impacts by Component

Federal Military	
Economic Impact	\$89.1 Billion
Employment	806,538 Jobs
National Guard	
Economic Impact	\$4.7 Billion
Employment	33,845 Jobs
Coast Guard	
Economic Impact	\$2.8 Billion
Employment	19,838 Jobs



NORTHWEST FLORIDA REGION



Consisting of 16 counties and multiple installations, the 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 Station and Saufley Field. Defense related activities in Northwest Florida were responsible for 186,689 jobs and nearly \$21.8 billion in gross regional product (GRP), accounting for 28.6% of the region's 2020 total gross product. The vast majority of these economic impacts were generated by direct federal military spending which produced 176,703 jobs and roughly \$20.3 billion of GRP, followed by the National Guard and Coast Guard who were responsible for 8,718 jobs and 1,268 jobs, respectively.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$21,794.0
Percent of Economy	28.6%
Employment	186,689 Jobs
Consumption	\$12,017.6
Capital Investment	\$3,813.1
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$3,370.3
Salaries	\$3,623.2
Pensions & Transfers	\$3,154.2
Total Defense Spending	\$10,147.8
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$20,278.5
Employment	176,703 Jobs
National Guard	
Economic Impact	\$1,329.1
Employment	8,718 Jobs
Coast Guard	
Economic Impact	\$186.5
Employment	1,268 Jobs

Left: Marine F-35B arrives at Eglin, Photo by Samuel King Jr., 96th Test Wing Public Affairs

Bay County



Home to:

- Naval Support Activity Panama City
- Tyndall Air Force Base

Tyndall AFB Air Park recovery, Photo by Staff Sgt. Alexandre Montes, 325th Fighter Wing Public Affairs

Home to the Tyndall Air Force Base (325th Fighter Wing) and the Naval Support Activity (NSA) Panama City, Bay County supports our nation's defense in multiple capacities. The 325th Fighter Wing trains F-22 Raptor pilots, intelligence officers, and maintainers for assignment to combat Air Force Units, while the NSA Panama City provides defense and physical security of critical infrastructure; operational support to the Fleet, Fighter and Family and supported commands; research and development; testing and evaluation; and Navy diving. Following Hurricane Michael in 2018, construction has been underway to rebuild the Tyndall Air Force Base and shape it into the Air Force's first 21st Century "Installation of the Future".

Escambia County



Home to:

- Naval Air Station Pensacola
- Corry Station
- Saufley Field

NAS Pensacola Memorial, Photo by Chief Petty Officer David Holmes, Navy Public Affairs Support Element East, Detachment Southeast

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 **\$3,148.0**

Percent of Economy 34.6%

Employment 30,013 Jobs

Consumption \$1,661.9

Capital Investment \$547.6

Direct Defense Spending *(in Millions)*

Procurement \$1,333.8

Salaries \$245.0

Pensions & Transfers \$403.9

Total Defense Spending **\$1,982.7**

NORTHWEST FLORIDA REGION

Total County Impact *(in Millions)*

County Economic Impact **\$6,626.1**

Percent of Economy 34.8%

Employment 53,681 Jobs

Consumption \$2,972.4

Capital Investment \$974.4

Direct Defense Spending *(in Millions)*

Procurement \$422.2

Salaries \$1,313.0

Pensions & Transfers \$740.5

Total Defense Spending **\$2,475.7**

NORTHWEST FLORIDA REGION

Okaloosa County



Home to:

- Eglin Air Force Base
- Hurlburt Field

160th SOAR Trains with Air Force Special Operations Command, 160th Special Operations Aviation Regiment (Airborne)

Encompassing 724 square miles, Eglin Air Force Base is the largest military base in the U.S. and home to the 96th Test Wing and various other units. The 96th Test Wing executes developmental test and evaluation, enabling the warfighter to put weapons on target in all battlespace media while also providing support for all other Team Eglin missions as the host wing.

Hurlburt Field today, accommodates the 1st Special Operations Wing, and is home to Air Force Special Operations Command (AFSOC) and a number of associate units. The mission at the base is centered around the training and execution of worldwide aviation special operations.

Total County Impact *(in Millions)*

County Economic Impact	\$9,185.9
Percent of Economy	63.3%
Employment	73,224 Jobs
Consumption	\$4,007.1
Capital Investment	\$1,272.2

Direct Defense Spending *(in Millions)*

Procurement	\$1,433.5
Salaries	\$1,936.1
Pensions & Transfers	\$873.0
Total Defense Spending	\$4,241.6

NORTHWEST FLORIDA REGION

Santa Rosa County



Home to:

- Naval Air Station Whiting Field

TH-73A Thrasher Arrival at NAS Whiting Field, Photo by Petty Officer 2nd Class Jason Isaacs, Chief of Naval Air Training

Naval Air Station (NAS) Whiting Field operates 56% of the Navy's outlying landing fields, and 17% of all U.S. Navy flight hours are flown out of NAS Whiting. The base's mission is to create the military's best-trained "Aviation Warfighter" and support all the armed forces relying on it. The installation hosts 21 tenant activities, including Training Air Wing FIVE, which produces more than 1,200 pilots a year. NAS Whiting Field is home to the largest air wing in the U.S. Navy and produces 100% of all Navy, Marine Corps and Coast Guard helicopter pilots.

Total County Impact *(in Millions)*

County Economic Impact	\$1,637.0
Percent of Economy	30.4%
Employment	16,331 Jobs
Consumption	\$1,902.9
Capital Investment	\$567.3

Direct Defense Spending *(in Millions)*

Procurement	\$86.5
Salaries	\$57.1
Pensions & Transfers	\$574.7
Total Defense Spending	\$718.2

NORTHWEST FLORIDA REGION



NORTH CENTRAL FLORIDA REGION



Comprised by thirteen counties, North Central Florida is home to Camp Blanding and the Pinecastle Bombing Range. Activities related to defense accounted for 20,435 jobs in 2020 as well as nearly \$1.9 billion in gross regional product (GRP) - making up 5.1% of the region's 2020 total gross regional product. The majority of jobs and GRP produced (19,597 and \$1.78 billion) came as a consequence of federal military spending. Spending by the National Guard and Coast Guard on the other hand, accounted for 656 jobs and 182 jobs in the region, respectively.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$1,867.0
Percent of Economy	5.1%
Employment	20,435 Jobs
Consumption	\$1,895.4
Capital Investment	\$598.9
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$174.8
Salaries	\$102.7
Pensions & Transfers	\$1,303.4
Total Defense Spending	\$1,580.9
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$1,778.4
Employment	19,597 Jobs
National Guard	
Economic Impact	\$69.8
Employment	656 Jobs
Coast Guard	
Economic Impact	\$18.8
Employment	182 Jobs

Left: New York National Guard Artillerymen Fire New Guns At Camp Blanding, New York National Guard

Bradford County



Home to:

- Camp Blanding Joint Training Center

LCSRON 2 Reservists Conduct Weapons Qualifications,
Navy Public Affairs Support Element East, Detachment Southeast

Camp Blanding Joint Training Center is the premier reservation and training site in North Florida for the Florida National Guard, and also hosts other Reserve, Army National Guard, Air National Guard, and some Active Component training for the U.S. Armed Forces. Located in adjacent Clay County, the base measures about 73,000 acres and is composed of forest, lakes, and grassland. Camp Blanding can accommodate more than 3,500 personnel and its several live fire ranges provide training grounds relevant to small arms weapons, mortars, artillery, attack helicopter gunnery and close air support aircraft.

Total County Impact *(in Millions)*

County Economic Impact	\$51.1
Percent of Economy	7.0%
Employment	674 Jobs
Consumption	\$75.0
Capital Investment	\$26.9

Direct Defense Spending *(in Millions)*

Procurement	\$15.9
Salaries	\$1.8
Pensions & Transfers	\$46.4
Total Defense Spending	\$64.2

NORTH CENTRAL FLORIDA REGION



NORTHEAST FLORIDA REGION



The Northeast Florida Region is made up of seven counties and is home to several major installations that include Naval Station Mayport, Naval Air Station Jacksonville, and the Marine Corps Support Facility Blount Island. 2020 defense related spending in the region totaled nearly \$6.5 billion and generated economic impacts of roughly 122,000 jobs and \$14.35 billion of GRP – 14.8% of the region’s total GRP. Spending by the federal military accounted for 112,282 jobs while the National Guard and Coast Guard accounted for 7,468 jobs and 2,306 jobs, respectively.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$14,350.1
Percent of Economy	14.8%
Employment	122,056 Jobs
Consumption	\$8,413.6
Capital Investment	\$2,618.1
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,916.0
Salaries	\$1,861.7
Pensions & Transfers	\$2,704.3
Total Defense Spending	\$6,482.0
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$12,969.6
Employment	112,282 Jobs
National Guard	
Economic Impact	\$1,016.3
Employment	7,468 Jobs
Coast Guard	
Economic Impact	\$364.2
Employment	2,306 Jobs

Left: USS Carney (DDG 64) and Spanish navy Alvaro de Bazan-class frigate ESPS Alvaro de Bazan (F 101) transits the Atlantic Ocean, Photo by U.S. Navy

Clay County



Home to:

- Camp Blanding Joint Training Center

Florida National Guard Soldiers Helo-Casting, Photo by Sgt. Jacob Cherena, 107th Mobile Public Affairs Detachment

Camp Blanding Joint Training Center is the premier reservation and training site in North Florida for the Florida National Guard, and also hosts other Reserve, Army National Guard, Air National Guard, and some Active Component training for the U.S. Armed Forces. The base measures about 73,000 acres and is composed of forest, lakes, and grassland. Camp Blanding can accommodate more than 3,500 personnel and its several live fire ranges provide training grounds relevant to small arms weapons, mortars, artillery, attack helicopter gunnery and close air support aircraft.

Duval County



Home to:

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

USS Vermont Prepares for Overseas Movement, Photo by Lt. j.g. Hunter Jones, Patrol Squadron (VP) 10

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 more than 80 tenant commands including 16 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 the southern tip of Florida at the Jacksonville Air National Guard Base.

Total County Impact *(in Millions)*

County Economic Impact	\$845.6
Percent of Economy	13.5%
Employment	10,186 Jobs
Consumption	\$1,174.7
Capital Investment	\$333.1

Direct Defense Spending *(in Millions)*

Procurement	\$31.1
Salaries	\$243.4
Pensions & Transfers	\$586.4
Total Defense Spending	\$860.9

NORTHEAST FLORIDA REGION

Total County Impact *(in Millions)*

County Economic Impact	\$12,100.4
Percent of Economy	16.6%
Employment	95,138 Jobs
Consumption	\$5,014.1
Capital Investment	\$1,645.2

Direct Defense Spending *(in Millions)*

Procurement	\$1,757.1
Salaries	\$1,577.2
Pensions & Transfers	\$1,373.6
Total Defense Spending	\$4,708.0

NORTHEAST FLORIDA REGION



EAST CENTRAL FLORIDA REGION



Covering seven counties, the East Central Florida Region is home to Cape Canaveral Space Force Station, Patrick Space Force Base, the Naval Ordnance Test Unit (NOTU), Leesburg Facility (Bugg Spring), and the Naval Support Activity Orlando: Multi-Service Modeling, Simulation, and Training Acquisition. As a consequence of defense activities, the region experienced roughly \$8.77 billion in procurement spending along with \$4.46 billion in transfers and \$633 million in salaries for a total of \$13.86 billion in direct spending. This defense spending was responsible for generating 196,858 jobs in the region as well as \$21.1 billion of GRP - 10.4% of the region total GRP. East Central Florida is unique in that procurement flows fuel the majority of economic impacts, driven by a large presence of industry clusters found to congregate around Brevard and Orange Counties.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$21,100.1
Percent of Economy	10.4%
Employment	196,858 Jobs
Consumption	\$12,810.8
Capital Investment	\$4,432.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$8,768.7
Salaries	\$633.3
Pensions & Transfers	\$4,460.5
Total Defense Spending	\$13,862.6
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$20,394.5
Employment	191,175 Jobs
National Guard	
Economic Impact	\$492.8
Employment	3,991 Jobs
Coast Guard	
Economic Impact	\$212.8
Employment	1,692 Jobs

Left: Space Launch Delta 45 Supports Successful Falcon 9 Starlink 4-1 Launch, Photo by Joshua Conti, Space Launch Delta 45

Brevard County



Home to:

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

Patrick SFB airfield management team enables DOD mission, Photo by Airman 1st Class samuel becker, Space Launch Delta 45

Patrick Space Force Base is a major component of the U.S. Space Force Command. It provides combat capabilities through launch, range and expeditionary operations. The host organization is the 45th Space Delta. Cape Canaveral Space Force Station is controlled by the 45th Space Delta 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 as well as multiple commercial customers. The Naval Ordnance Test Unit (NOTU) serves the country by supporting and testing sea-based weapons systems in a safe environment.

Total County Impact *(in Millions)*

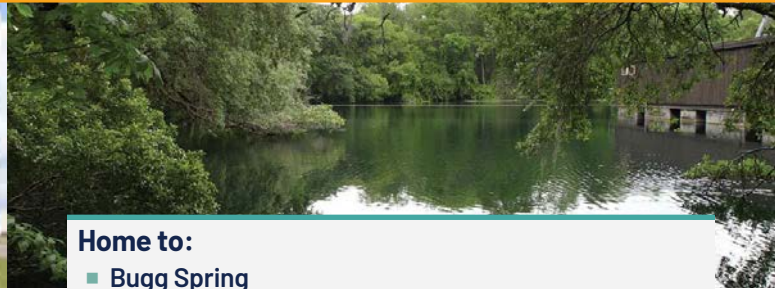
County Economic Impact	\$6,753.4
Percent of Economy	21.5%
Employment	57,247 Jobs
Consumption	\$3,750.5
Capital Investment	\$1,264.4

Direct Defense Spending *(in Millions)*

Procurement	\$3,091.4
Salaries	\$270.5
Pensions & Transfers	\$1,191.1
Total Defense Spending	\$4,553.0

EAST CENTRAL FLORIDA REGION

Lake County



Home to:

- Bugg Spring

Leesburg Facility at Bugg Spring

The Underwater Sound Reference Division (USRD) of the Naval Undersea Warfare Center (NUWC) Division Newport (Rhode Island) maintains the U.S. Naval Research Leesburg Facility, located at Bugg Spring. The open water facility is a prime location for the calibration of submarine and surface ship tactical towed arrays, and is among the quietest Navy open water facilities in the world with low ambient acoustic noise level that is roughly equivalent to that found in the depths of the most remote ocean areas.

Total County Impact *(in Millions)*

County Economic Impact	\$697.7
Percent of Economy	6.5%
Employment	8,855 Jobs
Consumption	\$978.0
Capital Investment	\$295.3

Direct Defense Spending *(in Millions)*

Procurement	\$2.8
Salaries	\$15.8
Pensions & Transfers	\$525.1
Total Defense Spending	\$543.6

EAST CENTRAL FLORIDA REGION

Orange County



Home to:

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

Naval Support Activity Orlando morning colors, U.S. Navy

Naval Support Activity (NSA) Orlando is the home of the Naval Air Warfare Center Training Systems Division (NAWCTSD) Orlando, the Navy's principal center for modeling, simulation, and training systems technologies. The center develops training systems for various military programs, including aircraft, surface ships, submarines, and other specialized requirements. Today, NSA Orlando supports all DoD activities in Central Florida, most of which support military training and simulation missions. The mission at NSA Orlando is to provide consistent, effective and efficient shore installation support services to all tenant DoD agencies enabling their mission accomplishment in a joint services environment.

Total County Impact *(in Millions)*

County Economic Impact **\$10,132.5**

Percent of Economy 10.1%

Employment 91,358 Jobs

Consumption \$4,380.5

Capital Investment \$1,715.1

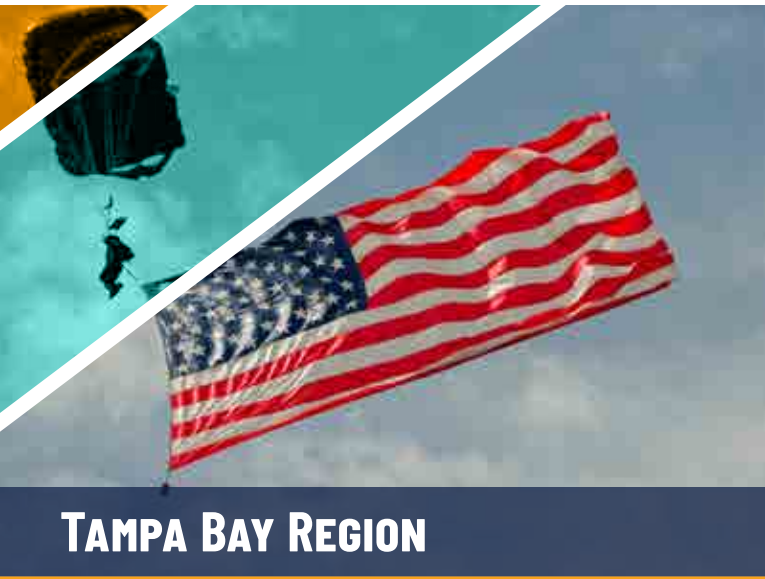
Direct Defense Spending *(in Millions)*

Procurement \$5,521.4

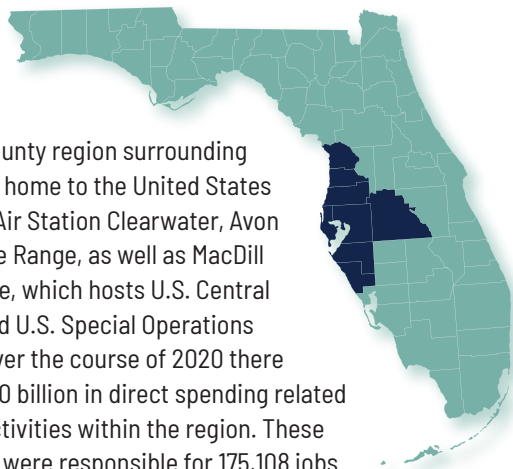
Salaries \$121.9

Pensions & Transfers \$1,131.8

Total Defense Spending **\$6,775.2**



TAMPA BAY REGION



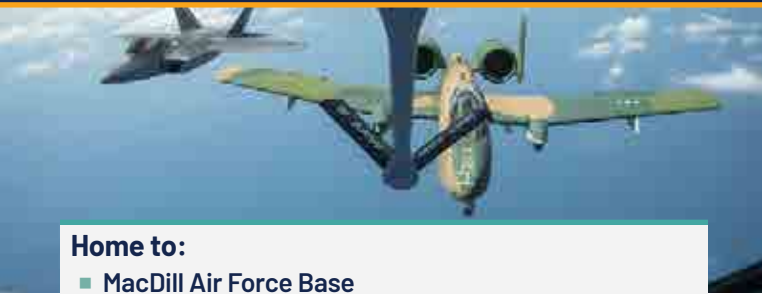
The seven-county region surrounding Tampa Bay is home to the United States Coast Guard Air Station Clearwater, Avon Park Air Force Range, as well as MacDill Air Force Base, which hosts U.S. Central Command and U.S. Special Operations Command. Over the course of 2020 there was nearly \$10 billion in direct spending related to defense activities within the region. These expenditures were responsible for 175,108 jobs and accounted for \$20.2 billion of GRP, 7.9% of the region's 2020 total GRP. The majority of defense spending in the Tampa Bay region came in the form of transfer payments to veterans and retirees. As expected, the bulk of the economic impacts in the region came as a result of federal dollars flowing through the military – roughly \$18.6 billion of the \$20.2 billion total GRP impact and 163,645 jobs out of the 175,108 total. The National Guard and Coast Guard on the other hand accounted for 6,414 jobs and 5,049 jobs, respectively.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$20,200.79
Percent of Economy	7.9%
Employment	175,108 Jobs
Consumption	\$13,327.52
Capital Investment	\$4,404.87
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$2,847.02
Salaries	\$953.49
Pensions & Transfers	\$6,178.39
Total Defense Spending	\$9,978.89
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$18,619.87
Employment	163,645 Jobs
National Guard	
Economic Impact	\$894.93
Employment	6,414 Jobs
Coast Guard	
Economic Impact	\$685.99
Employment	5,049 Jobs

Left: Tampa Bay AirFest 2016, Photo by Senior Airman Alex Echols, 325th Fighter Wing Public Affairs

Hillsborough County



Home to:

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

91st ARS refuels F-22, A-10 for Florida air shows,
Photo by Airman 1st Class David McLoney, 6th Air Refueling Wing Public Affairs

MacDill Air Force Base's host command is the 6th Air Mobility Wing; the primary mission is airlift and aerial refueling. MacDill hosts U.S. Central Command and U.S. Special Operations Command.

U.S. Central Command is one of seven 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.

Pinellas County



Home to:

- Unified States Coast Guard Air Station Clearwater

Coast Guard prepares for Hurricane Sally,
Photo by Petty Officer 3rd Class John Michelli, U.S. Coast Guard District 8

Coast Guard Air Station Clearwater, based out of Clearwater International Airport, is the largest and busiest Air Station in the Coast Guard. The Area of Operations includes the local area, the Gulf of Mexico, the Caribbean basin, and the Bahamas. The station maintains deployed H-60 helicopters for anti-drug and migrant smuggling operation in the Bahamas and Turks and Caicos. The station also has C-130s deployed in support of Joint Interagency Task Force operations in the Caribbean. This is done while simultaneously patrolling and performing search and rescue operations in Search Zone Bravo, the area around Florida and The Gulf of Mexico.

Total County Impact *(in Millions)*

County Economic Impact **\$11,196.4**

Percent of Economy 10.8%

Employment 87,320 Jobs

Consumption \$5,725.1

Capital Investment \$1,931.8

Direct Defense Spending *(in Millions)*

Procurement \$1,720.9

Salaries \$702.0

Pensions & Transfers \$2,183.3

Total Defense Spending **\$4,606.2**

TAMPA BAY REGION

Total County Impact *(in Millions)*

County Economic Impact **\$4,558.6**

Percent of Economy 7.9%

Employment 40,212 Jobs

Consumption \$2,901.0

Capital Investment \$1,010.4

Direct Defense Spending *(in Millions)*

Procurement \$952.7

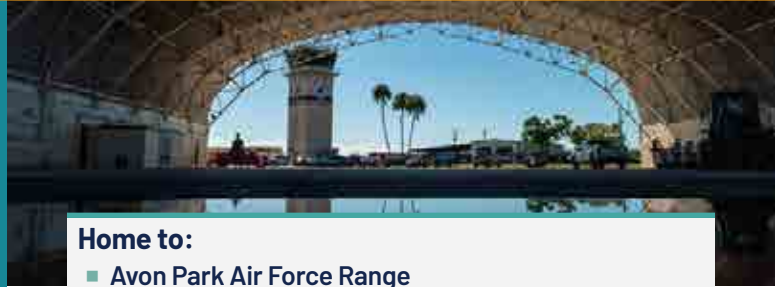
Salaries \$125.9

Pensions & Transfers \$1,303.5

Total Defense Spending **\$2,382.2**

TAMPA BAY REGION

Polk County



Home to:

- Avon Park Air Force Range

823 BDG practice airfield defense at Avon Park,
Photo by Airman 1st Class Courtney Sebastianelli, 23rd Wing Public Affairs

Avon Park Air Force Range (APAFR) is a 106,000-acre military training facility located in Polk and Highlands Counties with 82,000 acres open to the public for recreation. APAFR is the largest live ordnance bombing and gunnery range east of the Mississippi River (400 square miles of restricted airspace, 1,000 square miles of military operating area), and serves as the primary training range for Homestead Air Reserve Base, and also is an important range for Patrick Space Force Base as well as MacDill, and Moody Air Force Bases. APAFR provides an important training facility for Active, Guard, and Reserve military units from the Army, Navy, Air Force, Space Force, Marines, and Coast Guard, and for special operations and Homeland Security personnel.

Total County Impact *(in Millions)*

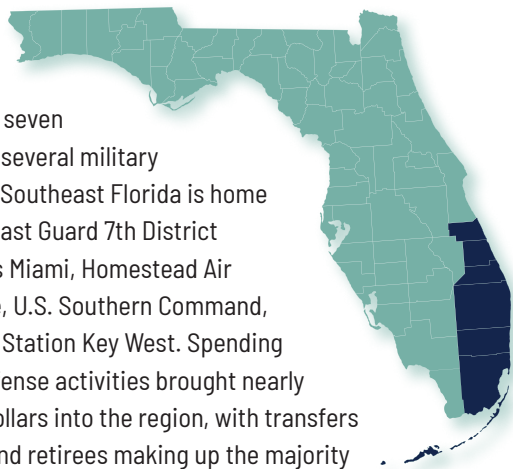
County Economic Impact	\$1,372.6
Percent of Economy	4.5%
Employment	13,343 Jobs
Consumption	\$1,156.9
Capital Investment	\$377.7

Direct Defense Spending *(in Millions)*

Procurement	\$27.3
Salaries	\$34.0
Pensions & Transfers	\$637.9
Total Defense Spending	\$699.2



SOUTHEAST FLORIDA REGION



Consisting of seven counties and several military installations, Southeast Florida 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. Spending related to defense activities brought nearly \$5.5 billion dollars into the region, with transfers to veterans and retirees making up the majority of that spending at roughly \$3.3 billion. These spending inputs, in turn, generated 130,484 jobs in the region and accounted for almost \$14.6 billion in GRP – 3.6% of the region’s 2020 total GRP. Unsurprisingly, the vast majority of the economic impacts observed in Southeast Florida were a consequence of spending by the federal military which was responsible for 115,702 jobs out of the 130,484 total and \$12.5 billion worth of the \$14.6 billion total GRP impact.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$14,598.1
Percent of Economy	3.6%
Employment	130,484 Jobs
Consumption	\$8,626.3
Capital Investment	\$2,927.5
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,478.7
Salaries	\$719.3
Pensions & Transfers	\$3,290.1
Total Defense Spending	\$5,488.2
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$12,494.8
Employment	115,702 Jobs
National Guard	
Economic Impact	\$771.9
Employment	5,770 Jobs
Coast Guard	
Economic Impact	\$1,331.4
Employment	9,012 Jobs

Left: 106th Rescue Wing trains at Homestead Air Reserve Base, Photo by Staff Sgt. Christopher Muncy, 106th Rescue Wing/Public Affairs

Miami-Dade County



Home to:

- United States Southern Command
- Homestead Air Reserve Base
- 7th Coast Guard District HQ

Coast Guard load supplies to bring to Hurricane Dorian effected areas, Photo by Petty Officer 2nd Class Jonathan Lally, U.S. Coast Guard District 7

United States Southern Command is responsible for providing contingency planning, operations, and security cooperation throughout Central and South America and the Caribbean. Homestead Air Reserve base and its tenant unit, the 482nd Fighter Wing of the Air Force Reserve, are responsible for the training and provision of Air Force Reservists to respond to wartime and peacetime taskings as directed by higher headquarters. The Coast Guard's 7th District HQ in Miami conducts the Coast Guard activities throughout a 1.7 million square mile area including Puerto Rico, Florida, Georgia, South Carolina and 34 foreign nations and territories.

Total County Impact *(in Millions)*

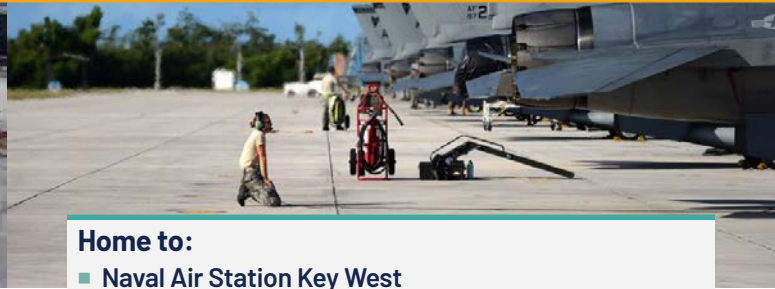
County Economic Impact	\$6,785.6
Percent of Economy	3.9%
Employment	57,138 Jobs
Consumption	\$3,138.9
Capital Investment	\$1,136.3

Direct Defense Spending *(in Millions)*

Procurement	\$731.3
Salaries	\$373.2
Pensions & Transfers	\$852.3
Total Defense Spending	\$1,956.9

SOUTHEAST FLORIDA REGION

Monroe County



Home to:

- Naval Air Station Key West

177th Fighter Wing trains in Key West, Photo by Senior Master Sgt. Andrew Moseley, 177th Fighter Wing - NJ Air National Guard

Naval Air Station Key West is the host facility for numerous tenant activities, including Joint Interagency Task Force South (JIATF), U.S. Coast Guard, and U.S. Army Special Forces Underwater Training School. Due to its perfect year-round flying weather and unparalleled aerial ranges, NAS Key West provides an extensive air-to-air training venue for transient tactical aviation squadrons with the aim of molding the best sailors, soldiers, airmen, marines and coast guardsmen in the world. The mission within JIATF South includes the operations for detection, monitoring and deterrence of drug smuggling.

Total County Impact *(in Millions)*

County Economic Impact	\$885.0
Percent of Economy	18.6%
Employment	5,966 Jobs
Consumption	\$392.2
Capital Investment	\$120.9

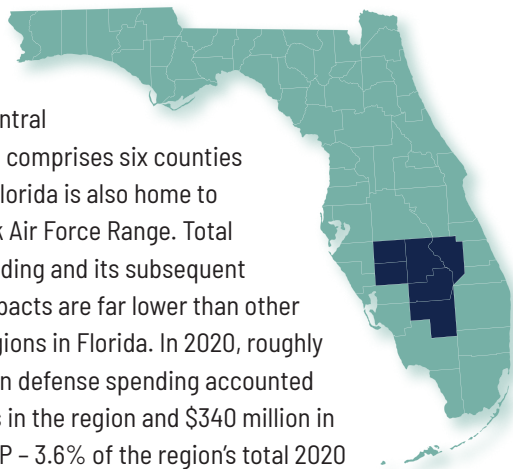
Direct Defense Spending *(in Millions)*

Procurement	\$73.2
Salaries	\$111.7
Pensions & Transfers	\$94.0
Total Defense Spending	\$278.9

SOUTHEAST FLORIDA REGION



SOUTH CENTRAL FLORIDA REGION



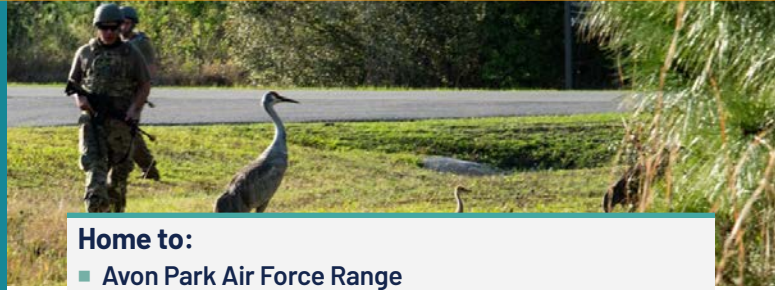
The South Central Region which comprises six counties in Southern Florida is also home to the Avon Park Air Force Range. Total defense spending and its subsequent economic impacts are far lower than other economic regions in Florida. In 2020, roughly \$350 million in defense spending accounted for 4,033 jobs in the region and \$340 million in additional GRP – 3.6% of the region’s total 2020 GRP. The majority of defense spending and its impacts observed in South Central Florida were fueled by federal military spending which created 3,922 of the 4,033 jobs and \$327 million of the total \$350 million of defense related GRP. The National Guard and Coast Guard were responsible for 111 jobs and \$12.83 million of GRP, combined, in 2020.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$340.2
Percent of Economy	3.6%
Employment	4,033 Jobs
Consumption	\$334.5
Capital Investment	\$100.1
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$105.0
Salaries	\$13.5
Pensions & Transfers	\$230.6
Total Defense Spending	\$349.1
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$327.3
Employment	3,922 Jobs
National Guard	
Economic Impact	\$10.3
Employment	84 Jobs
Coast Guard	
Economic Impact	\$2.5
Employment	27 Jobs

Left: Mosaic Tiger 22-1: Avon Park Air Force Range, Photo by Airman 1st Class Courtney Sebastianelli, 23rd Wing Public Affairs

Highlands County



Home to:

- Avon Park Air Force Range

23d WG Airmen participate in Mosaic Tiger at Avon Park, Photo by Staff Sgt. Carly Kavish, 23rd Wing Public Affairs

Avon Park Air Force Range (APAFR) is a 106,000-acre military training facility located in Polk and Highlands Counties with 82,000 acres open to the public for recreation. APAFR is the largest live ordnance bombing and gunnery range east of the Mississippi River (400 square miles of restricted airspace, 1,000 square miles of military operating area), and serves as the primary training range for Homestead Air Reserve Base, and also is an important range for Patrick Space Force Base as well as MacDill, and Moody Air Force Bases. APAFR provides an important training facility for Active, Guard, and Reserve military units from the Army, Navy, Air Force, Space Force, Marines, and Coast Guard, and for special operations and Homeland Security personnel.

Total County Impact *(in Millions)*

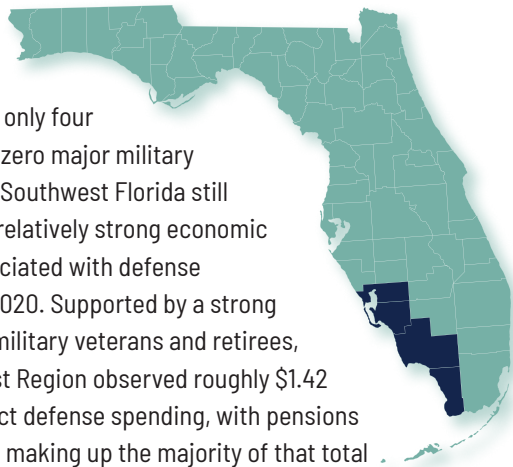
County Economic Impact	\$130.3
Percent of Economy	4.0%
Employment	1,487 Jobs
Consumption	\$156.4
Capital Investment	\$45.9

Direct Defense Spending *(in Millions)*

Procurement	\$2.0
Salaries	\$6.8
Pensions & Transfers	\$126.2
Total Defense Spending	\$135.0



SOUTHWEST FLORIDA REGION



Composed of only four counties and zero major military installations, Southwest Florida still experienced relatively strong economic impacts associated with defense spending in 2020. Supported by a strong presence of military veterans and retirees, the Southwest Region observed roughly \$1.42 billion of direct defense spending, with pensions and transfers making up the majority of that total at nearly \$1.05 billion. The region's close proximity to both the Southeast and Tampa Bay regions generated economic spill-over effects that also helped to sustain the region's respectable defense economy. 2020 defense spending in the region generated 24,558 jobs and accounted for over \$2.37 billion in GRP – 4.2% of the region's total GRP.

Defense Economic Impact Estimates

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$2,373.8
Percent of Economy	4.2%
Employment	24,558 Jobs
Consumption	\$1,944.7
Capital Investment	\$617.5
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$229.4
Salaries	\$140.9
Pensions & Transfers	\$1,045.3
Total Defense Spending	\$1,415.5
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$2,262.4
Employment	23,512 Jobs
National Guard	
Economic Impact	\$80.3
Employment	744 Jobs
Coast Guard	
Economic Impact	\$31.2
Employment	302 Jobs

Left: 910th spearheads spray course in Florida, Photo by Senior Airman Noah Tancer, 910th Airlift Wing Public Affairs

**Working to Keep Florida
the Best Place for the
Department of Defense
to do Business**

The Florida Model

GOVERNOR'S OFFICE • LEGISLATURE

Defense Grant Programs

Florida Defense Alliance

Florida Defense Support
Task Force

Governor's Meetings with
Base Commanders

Military Friendly Florida

Advantages*

- No State Income Tax
- Support for Military Spouses (Employment/Licensure)
- In-state College Tuition for Military Family Members
- Purple Star Schools
- 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 2020 Defense Infrastructure Grants = \$1.5M
- FY 2020 Defense Reinvestment Grants = \$765K
- FY 2020 FDSTF Grants = \$ 1.45M

* www.enterpriseflorida.com/wp-content/uploads/Florida-Military-Friendly-Guide.pdf

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.



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.

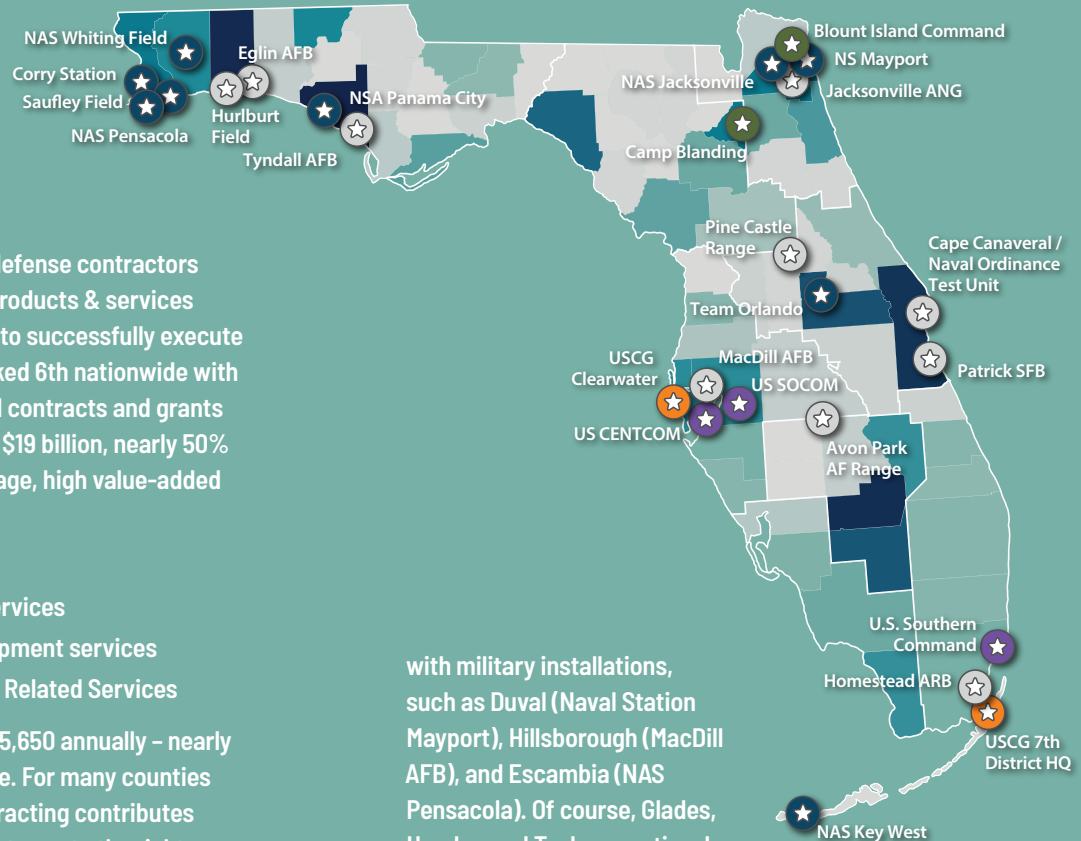
FLORIDA'S FOCUS ON ENHANCING ITS DEFENSE CONTRACTING COMMUNITY

The State of Florida understands the critical role defense contractors play in the broader defense industry. While military installations and the service men and women stationed at each drive the Florida defense economy, it is defense contractors who play a vital role providing the products & services necessary for military installations to successfully execute their missions. In 2020, Florida ranked 6th nationwide with nearly \$19 billion in defense-related contracts and grants performed across the state. Of this \$19 billion, nearly 50% were performed in just four high-wage, high value-added industries:

- Aerospace
- Architectural & Engineering Services
- Scientific research and development services
- Computer Systems Design and Related Services

These industries pay on average \$95,650 annually – nearly 80% higher than the Florida average. For many counties throughout the state, defense contracting contributes significant economic value. The heat map to the right presents the level of dependency each county has on defense contracting – the darker the color, the greater the level of dependency. By dependency, we mean the amount of defense contracting performed in that county relative to the overall size of that county's total economy. From this map, it is clear that many counties across the state are reliant on defense contracting, several of which are in rural communities without an installation.

For those counties with a military installation, having a robust contracting community is mostly known; however, rural counties such as Glades, Hendry, and Taylor are often overlooked as being economically dependent on defense contracting activity. In 2020, all three counties had a higher dependency on defense contracting than some counties



with military installations, such as Duval (Naval Station Mayport), Hillsborough (MacDill AFB), and Escambia (NAS Pensacola). Of course, Glades, Hendry, and Taylor counties do not perform more contracts, but given the size of their overall economy, defense contracting constitutes a larger proportion of their overall economy than Duval, Hillsborough, and Escambia counties.

Recognizing the extraordinary value defense contracting plays in economies across the state, Enterprise Florida and the Florida Defense Support Task Force are working closely with the FloridaMakes network to support and grow Florida's defense contracting community. Throughout 2022, tools to help communities identify their defense contracting base and assist local contractors with partnering opportunities will be rolled out to defense communities statewide.

For more information, please visit: www.floridamakes.com/featured-programs/connex-florida# and www.FL-Cyber.com.



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

For information, please visit www.enterpriseflorida.com/fdstf



in association with

