

FLORIDA DEFENSE FACTBOOK

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FLORIDA MILITARY FACTS

Total Statewide Impact	\$84.9 Billion
Percent of Florida Economy	9.2%
Statewide Direct and Indirect Jobs	801,747
Buildings Owned by Military ¹	6,032
Total Acreage (all installations) ¹	521,563
Plant Replacement Value ¹	\$27.6 Billion
Military Personnel ²	56,598
Civilian Personnel ²	30,203
Military Reserve ²	24,155
National Guard Full-time ³	2,184
National Guard Traditional Guardsmen ³	11,274
Total Veterans Living in Florida ⁴	1,559,778
Total Military Retirees Living in Florida ⁵	198,016

¹ Department of Defense, Base Structures Report – FY 2015 Baseline

² Defense Manpower Data Center – Military and Civilian Personnel By Service/ Agency by State/Country (March 2016)

³ Adjutant General's Report FY 2016, Engagement Through Action: Florida's Force – We Work for You

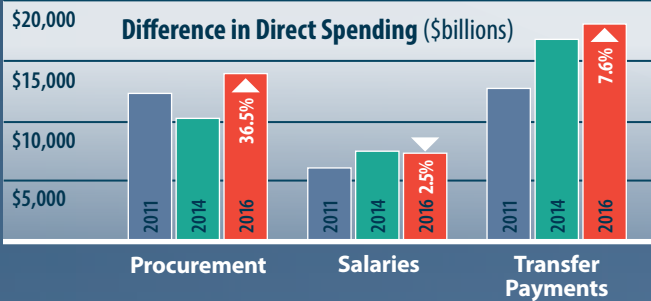
⁴ US Department of Veterans Affairs

⁵ Department of Defense, Office of the Actuary

STUDY OVERVIEW

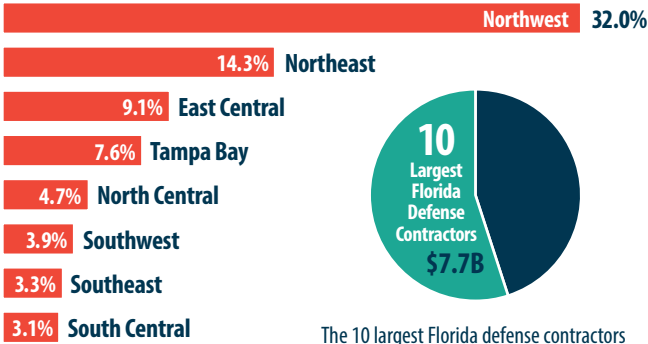
To provide a consistent comparison of Florida’s defense industry over time, this 2017 update utilizes the same econometric forecasting models and defense-related spending flows as previous studies. However, in order to bring higher fidelity to our estimates, this update incorporates distribution data from the U.S. Bureau of Economic Analysis (BEA) for National Guard personnel compensation estimates. Over time, these data are more stable than the U.S. Census data utilized in previous updates. The use of these data do not affect the total statewide impact estimates – only how the impacts associated with the National Guard are distributed across the state; otherwise, this update utilizes the same methodologies, data, and econometric models as in previous updates. This includes using the REMI PI+ 70 sector 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 (USASpending), Department of Defense, Department of Veterans Affairs, Department of Homeland Security, Florida National Guard, DoD Base Structures Report, DoD Green Book, Census Bureau, Bureau of Economic Analysis, and Bureau of Labor Statistics.

The figure below outlines the major differences in direct inputs between the 2011, 2014, and 2016 updates. As the figure shows, procurement (contracts) flows to the state have increased by over 36.5%. Salaries to military personnel remained relatively stable, decreasing overall by 2.5%. And, transfer payments through military retirement checks and Veterans Affairs benefits, increased by 7.6%. Thus, given these overall changes, the impacts presented here are higher than those offered in previous updates.

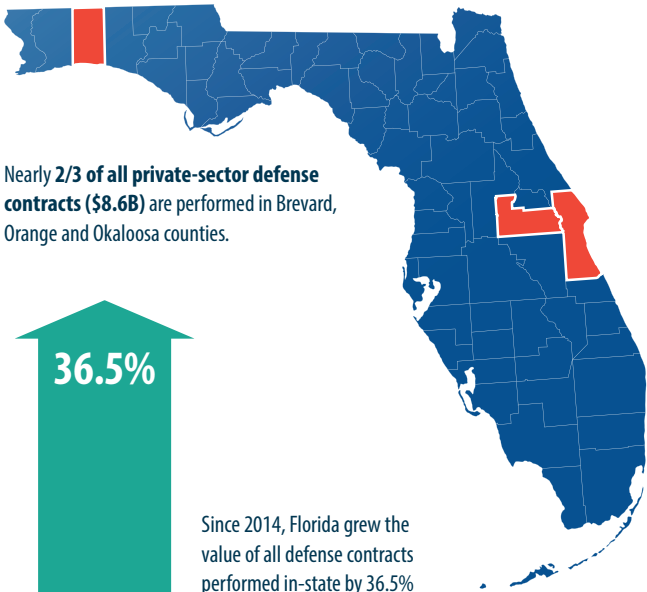


IMPACTS BY THE NUMBERS

Defense as a Percent of Total Economy for Each Region



The 10 largest Florida defense contractors supplied \$7.7 Billion, or roughly 55%, of the \$14.0 Billion value of defense procured goods and services.



Since 2014, Florida grew the value of all defense contracts performed in-state by 36.5% compared to the U.S. at 4.8%.



HOW FLORIDA RANKS IN FY 2016



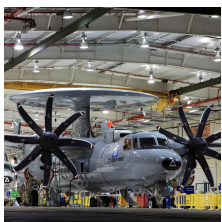
Florida has the

**2nd Largest
MILITARY
RETIREE
population**



Florida has the

**3rd Largest
VETERAN
population**



Florida ranks

**5th in DEFENSE
CONTRACTS with
\$14 Billion**



Florida ranks

**5th in DoD
PERSONNEL
with 124,500**

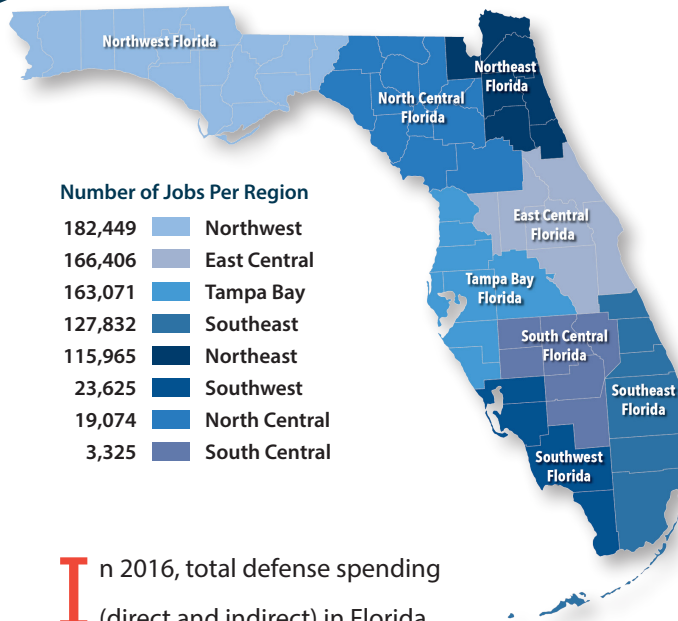
Florida hosts a variety of missions that are critical to our Nation's defense.

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 will fight, thus bringing tremendous advantages to our military.

Florida is home to three of ten unified combatant commands, hosts two of only four Navy deep water ports in the U.S. with adjacent airfields, the military's only east coast space launch facility, the Marine Corps's only maritime prepositioning force facility, and one of only three Navy Fleet Readiness Centers, as well as 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.

Additionally, the Joint Gulf Range 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.

Total Employment Impacts of Defense Activities



In 2016, total defense spending (direct and indirect) in Florida was responsible for \$84.9 Billion, or 9.2 percent, of Florida's gross state product. Total defense spending also accounted for just over 800,000 jobs across the state - many of which are associated with a wage premium. For example, over \$4.4 Billion was directly spent in Aerospace Product and Parts Manufacturing. This accounts for over 10,000 direct jobs, which pay an average salary of over \$89,000. This industry pays approximately 85% higher than the state average of \$47,055. Defense spending creates jobs in every county in Florida. The map above displays total job impacts (direct and indirect) across the state.

Total State Economic Impacts

State Economic Impact **\$ 84.9 Billion**

Employment	801,747 Jobs
Sales Activity	\$92.3 Billion
Consumption	\$48.8 Billion
Capital Investment	\$17.8 Billion

Direct Defense Spending

Procurement	\$14.0 Billion
Salaries	\$7.4 Billion
Pensions & Transfers	\$18.2 Billion
Total Defense Spending	\$39.6 Billion

Impacts by Component

Federal Military	
Economic Impact	\$78.2 Billion
Employment	741,024 Jobs
National Guard	
Economic Impact	\$4.6 Billion
Employment	36,978 Jobs
Coast Guard	
Economic Impact	\$2.2 Billion
Employment	23,745 Jobs



The 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 182,449 jobs and account for over \$22.1 Billion in gross regional product (GRP), which is 32% of the region's total gross product. The bulk of the impacts are generated by direct federal military spending, which accounts for nearly 170,269 total (direct and indirect) jobs, followed by the National Guard with 9,791 and Coast Guard with 2,389 total jobs respectively in this region.

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$22,124.5
Employment	182,449 Jobs
Sales Activity	\$13,911.4
Consumption	\$10,764.2
Capital Investment	\$3,884.3
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$2,069.1
Salaries	\$3,345.8
Pensions & Transfers	\$2,590.8
Total Defense Spending	\$8,005.7
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$20,431.9
Employment	170,269 Jobs
National Guard	
Economic Impact	\$1,486.3
Employment	9,791 Jobs
Coast Guard	
Economic Impact	\$206.3
Employment	2,389 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.

Total County Impact <i>(in Millions)</i>	
County Economic Impact	\$2,527.8
Employment	22,720 Jobs
Sales Activity	\$2,051.8
Consumption	\$1,268.3
Capital Investment	\$460.6
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$401.1
Salaries	\$330.4
Pensions & Transfers	\$359.2
Total Defense Spending	\$1,090.7

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 <i>(in Millions)</i>	
County Economic Impact	\$7,614.4
Employment	60,589 Jobs
Sales Activity	\$4,389.5
Consumption	\$3,026.8
Capital Investment	\$1,149.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$309.0
Salaries	\$1,254.4
Pensions & Transfers	\$628.0
Total Defense Spending	\$2,191.4

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 US

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 <i>(in Millions)</i>	
County Economic Impact	\$9,739.5
Employment	72,097 Jobs
Sales Activity	\$5,123.7
Consumption	\$3,799.2
Capital Investment	\$1,361.4
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,254.3
Salaries	\$1,652.1
Pensions & Transfers	\$724.3
Total Defense Spending	\$3,630.8

NORTHWEST FLORIDA REGION

SANTA ROSA COUNTY

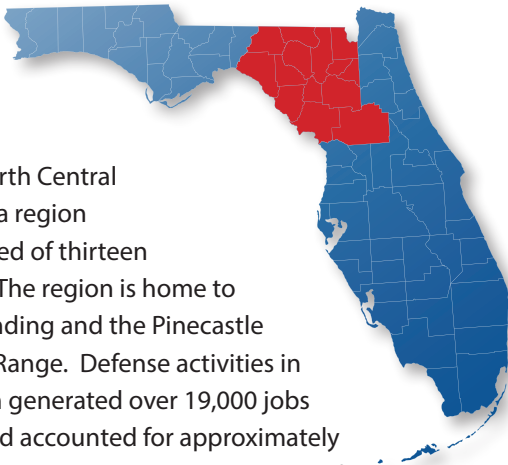


Home to:

- *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 produces over 700 pilots a year. NAS Whiting Field owns 61% of Navy outlying landing fields, and 11% of all DoD flight hours are flown out of NAS Whiting annually.

Total County Impact <i>(in Millions)</i>	
County Economic Impact	\$1,438.5
Employment	15,826 Jobs
Sales Activity	\$1,496.9
Consumption	\$2,078.3
Capital Investment	\$701.5
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$51.0
Salaries	\$52.2
Pensions & Transfers	\$417.7
Total Defense Spending	\$520.9



The 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 over 19,000 jobs in 2016 and accounted for approximately \$1.4 Billion in GRP. This is roughly 4.7% of the region’s total GRP. The bulk of the jobs – 18,156 – flow through from federal military spending. Total spending by the National Guard accounts for over 707 jobs, and the Coast Guard accounts for 211 jobs in this region.

Total Regional Impact *(in Millions)*

Regional Economic Impact	\$1,433.3
Employment	19,074 Jobs
Sales Activity	\$1,804.5
Consumption	\$1,549.1
Capital Investment	\$523.7

Direct Defense Spending *(in Millions)*

Procurement	\$166.3
Salaries	\$94.4
Pensions & Transfers	\$1,090.2
Total Defense Spending	\$1,350.9

Impacts by Component *(in Millions)*

Federal Military	
Economic Impact	\$1,358.4
Employment	18,156 Jobs
National Guard	
Economic Impact	\$59.7
Employment	707 Jobs
Coast Guard	
Economic Impact	\$15.2
Employment	211 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 <i>(in Millions)</i>	
County Economic Impact	\$26.8
Employment	537 Jobs
Sales Activity	\$40.4
Consumption	\$55.3
Capital Investment	\$16.9
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$9.5
Salaries	\$1.0
Pensions & Transfers	\$40.7
Total Defense Spending	\$51.1



The 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 \$5.2 Billion in 2016 from all sources. These spending flows generated over 116,000 total jobs in the region and accounted for 14.3% of the region's GRP (\$12.3 Billion). Impacts related to federal military spending accounted for 105,046 jobs. The National Guard and Coast Guard accounted for 8,776 jobs and 2,142 jobs, respectively, in this region.

Total Regional Impact <i>(in Millions)</i>	
Regional Economic Impact	\$12,339.4
Employment	115,965 Jobs
Sales Activity	\$12,299.9
Consumption	\$6,971.9
Capital Investment	\$2,504.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,396.9
Salaries	\$1,690.0
Pensions & Transfers	\$2,130.1
Total Defense Spending	\$5,217.1
Impacts by Component <i>(in Millions)</i>	
Federal Military	
Economic Impact	\$11,113.1
Employment	105,046 Jobs
National Guard	
Economic Impact	\$1,032.2
Employment	8,776 Jobs
Coast Guard	
Economic Impact	\$194.1
Employment	2,142 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 <i>(in Millions)</i>	
County Economic Impact	\$634.0
Employment	9,317 Jobs
Sales Activity	\$789.8
Consumption	\$986.3
Capital Investment	\$312.6
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$40.4
Salaries	\$178.1
Pensions & Transfers	\$466.6
Total Defense Spending	\$685.2

NORTHEAST FLORIDA REGION

DUVAL COUNTY



Home to:

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

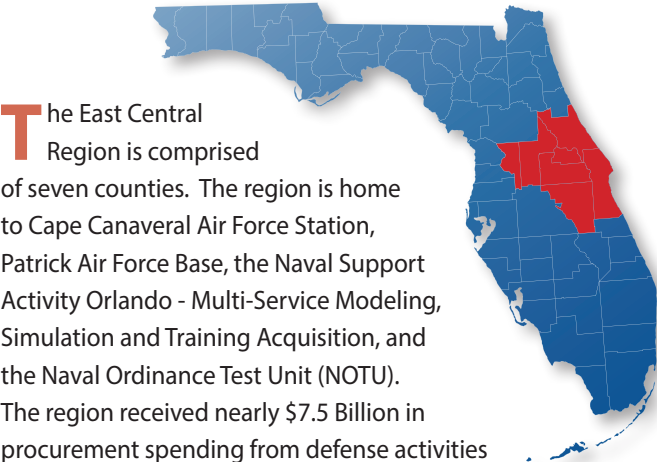
Naval Air Station Jacksonville is a multi-mission base, which hosts more than 100 tenant organizations and is the third largest naval installation in the US.

Naval Station Mayport is host to 83 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 US from Charleston, SC to the southern tip of Florida at the Jacksonville Air National Guard Base.

Total County Impact <i>(in Millions)</i>	
County Economic Impact	\$10,971.8
Employment	94,886 Jobs
Sales Activity	\$10,669.5
Consumption	\$4,521.0
Capital Investment	\$1,720.5
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,217.0
Salaries	\$1,47.26
Pensions & Transfers	\$1,136.8
Total Defense Spending	\$3,829.8



The 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 \$7.5 Billion in procurement spending from defense activities along with \$3.6 Billion in transfers and \$560 Million in salaries for a total of \$11.7 Billion in direct spending. These inputs generated more than 166,000 jobs in the region - a majority of which are associated with federal procurement flows. Indeed, federal procurement dollars account for almost 75,000 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 \$7.3 Billion in procurement for manufacturing alone - over half of those funds were within the Aerospace industry.

Total Regional Impact (in Millions)

Regional Economic Impact	\$17,395.6
Employment	166,406 Jobs
Sales Activity	\$26,136.6
Consumption	\$9,612.2
Capital Investment	\$3,619.6

Direct Defense Spending (in Millions)

Procurement	\$7,478.7
Salaries	\$557.4
Pensions & Transfers	\$3,640.9
Total Defense Spending	\$11,697.0

Impacts by Component (in Millions)

Federal Military	
Economic Impact	\$16,828.1
Employment	160,895 Jobs
National Guard	
Economic Impact	\$412.3
Employment	3,835 Jobs
Coast Guard	
Economic Impact	\$155.2
Employment	1,676 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 <i>(in Millions)</i>	
County Economic Impact	\$5,267.1
Employment	49,568 Jobs
Sales Activity	\$7,228.4
Consumption	\$2,903.9
Capital Investment	\$1,064.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$2,995.9
Salaries	\$244.9
Pensions & Transfers	\$992.8
Total Defense Spending	\$4,233.5

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 <i>(in Millions)</i>	
County Economic Impact	\$8,756.9
Employment	74,581 Jobs
Sales Activity	\$14,145.4
Consumption	\$3,194.8
Capital Investment	\$1,355.3
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$4,356.1
Salaries	\$115.7
Pensions & Transfers	\$963.4
Total Defense Spending	\$5,435.2



The seven-county Tampa Bay Region is home to MacDill Air Force Base, which hosts US Central Command, US Special Operations Command, and Coast Guard Air Station Clearwater. Defense activities account for roughly \$7.5 Billion in total direct spending in the Tampa Bay Region. These expenditures generated 163,000 jobs in 2016 and accounted for \$17.1 Billion of the region's Gross Regional Product (7.6% of the region's total GRP). Salaries paid to federal military and civilian employees accounted for 53,000 total jobs, while federal procurement dollars accounted for over 33,000 jobs. 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 \$15.7 Billion of the \$17.1 Billion impact. The Coast Guard accounted for more than 6,800 total jobs and the National Guard for an additional 6,149 total jobs in this region.

Total Regional Impact *(in Millions)*

Regional Economic Impact	\$17,073.0
Employment	163,071 Jobs
Sales Activity	\$21,189.5
Consumption	\$10,837.7
Capital Investment	\$3,929.8

Direct Defense Spending *(in Millions)*

Procurement	\$1,725.3
Salaries	\$868.1
Pensions & Transfers	\$4,940.2
Total Defense Spending	\$7,533.5

Impacts by Component *(in Millions)*

Federal Military	
Economic Impact	\$15,666.7
Employment	150,066 Jobs
National Guard	
Economic Impact	\$832.6
Employment	6,856 Jobs
Coast Guard	
Economic Impact	\$573.7
Employment	6,149 Jobs

TAMPA BAY REGION

HILLSBOROUGH COUNTY



- Home to:
- *MacDill Air Force Base*
 - *US Central Command*
 - *US Special Operations Command*

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

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

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

Total County Impact <i>(in Millions)</i>	
County Economic Impact	\$9,749.8
Employment	78,250 Jobs
Sales Activity	\$11,196.0
Consumption	\$4,675.5
Capital Investment	\$1,725.1
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$1,032.7
Salaries	\$637.4
Pensions & Transfers	\$1,638.9
Total Defense Spending	\$3,308.9

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 <i>(in Millions)</i>	
County Economic Impact	\$4,066.1
Employment	40,887 Jobs
Sales Activity	\$5,285.6
Consumption	\$2,602.4
Capital Investment	\$962.1
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$596.7
Salaries	\$112.5
Pensions & Transfers	\$1,239.9
Total Defense Spending	\$1,949.0



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 <i>(in Millions)</i>	
County Economic Impact	\$935.4
Employment	11,673 Jobs
Sales Activity	\$1,425.9
Consumption	\$847.5
Capital Investment	\$308.2
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$28.8
Salaries	\$29.9
Pensions & Transfers	\$479.1
Total Defense Spending	\$537.7



The six-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 \$4.5 Billion in direct spending. These inputs, in turn, generated nearly 130,000 total jobs in the region and accounted for \$12.5 Billion in GRP in 2016. This was roughly 3.3% of the region's total 2016 GRP. Transfer payments to the region generated just over 46,000 jobs and procurement flows generated approximately 18,700 jobs. Federal military spending for procurement, salaries, and transfers generated roughly \$10.9 Billion of the \$12.5 Billion total impact (GRP), with the National Guard accounting for an additional \$650 Million. The Coast Guard accounted for roughly \$1.0 Billion in GRP.

Total Regional Impact *(in Millions)*

Regional Economic Impact	\$12,449.5
Employment	127,832 Jobs
Sales Activity	\$14,448.9
Consumption	\$7,330.7
Capital Investment	\$2,742.7

Direct Defense Spending *(in Millions)*

Procurement	\$1,087.5
Salaries	\$648.2
Pensions & Transfers	\$2,822.9
Total Defense Spending	\$4,558.6

Impacts by Component *(in Millions)*

Federal Military	
Economic Impact	\$10,799.4
Employment	111,134 Jobs
National Guard	
Economic Impact	\$654.8
Employment	6,062 Jobs
Coast Guard	
Economic Impact	\$995.3
Employment	10,636 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	\$5,459.4
Employment	52,904 Jobs
Sales Activity	\$5,776.6
Consumption	\$2,566.5
Capital Investment	\$998.4
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$274.2
Salaries	\$336.8
Pensions & Transfers	\$725.1
Total Defense Spending	\$1,336.1

SOUTHEAST FLORIDA REGION

MONROE COUNTY



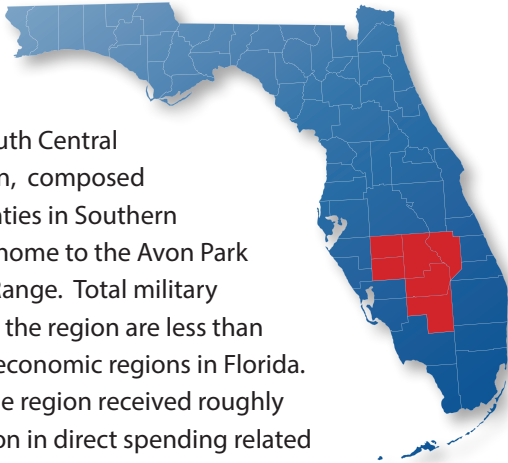
- Home to:
- *Naval Air Station Key West*

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 <i>(in Millions)</i>	
County Economic Impact	\$928.9
Employment	8,292 Jobs
Sales Activity	\$551.3
Consumption	\$526.0
Capital Investment	\$198.8
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$63.0
Salaries	\$99.4
Pensions & Transfers	\$85.1
Total Defense Spending	\$247.5



The 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 2016, the region received roughly \$243 Million in direct spending related to defense activities. These dollars accounted for approximately 3,300 jobs and generated just over \$200 Million in GRP. The vast majority of all impacts were driven by federal military spending with 3,184 total jobs. The National Guard and Coast Guard accounted for only 141 total jobs, or 4.2% of all impacts.



Total Regional Impact *(in Millions)*

Regional Economic Impact	\$210.4
Employment	3,325 Jobs
Sales Activity	\$261.3
Consumption	\$238.7
Capital Investment	\$87.5

Direct Defense Spending *(in Millions)*

Procurement	\$45.2
Salaries	\$13.0
Pensions & Transfers	\$184.9
Total Defense Spending	\$243.1

Impacts by Component *(in Millions)*

Federal Military	
Economic Impact	\$200.4
Employment	3,184 Jobs
National Guard	
Economic Impact	\$7.4
Employment	97 Jobs
Coast Guard	
Economic Impact	\$2.7
Employment	44 Jobs



SOUTH CENTRAL FLORIDA REGION

HIGHLANDS COUNTY



Home to:

- **Avon Park Air Force Range**

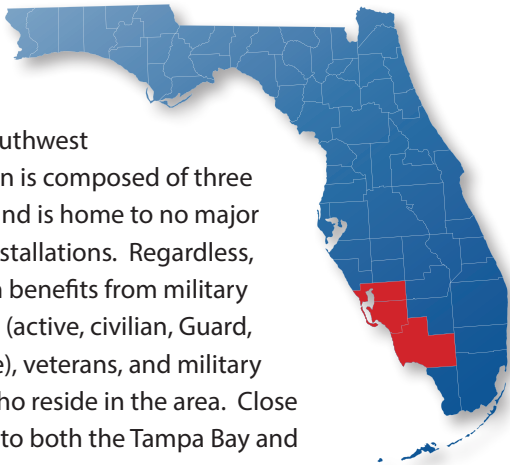
Avon Park Air Force Range (APAFR) (Highlands and Polk Counties) is the largest

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 <i>(in Millions)</i>	
County Economic Impact	\$94.6
Employment	1,498 Jobs
Sales Activity	\$108.6
Consumption	\$118.9
Capital Investment	\$39.3
Direct Defense Spending <i>(in Millions)</i>	
Procurement	\$8.5
Salaries	\$6.0
Pensions & Transfers	\$97.4
Total Defense Spending	\$111.9



The 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 \$965 Million in total dense spending during 2016. These revenues, in turn, generated more than 23,600 jobs and accounted for \$1.9 Billion in Gross Regional Product, which is roughly 3.9% of the region’s total.



Total Regional Impact *(in Millions)*

Regional Economic Impact	\$1,933.7
Employment	23,625 Jobs
Sales Activity	\$2,168.6
Consumption	\$1,485.8
Capital Investment	\$527.1

Direct Defense Spending *(in Millions)*

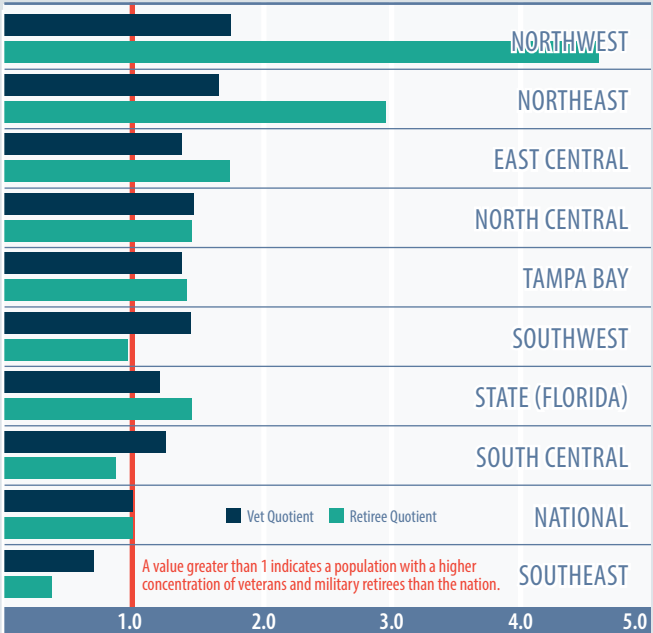
Procurement	\$59.0
Salaries	\$124.9
Pensions & Transfers	\$780.7
Total Defense Spending	\$964.6

Impacts by Component *(in Millions)*

Federal Military	
Economic Impact	\$1,818.4
Employment	22,273 Jobs
National Guard	
Economic Impact	\$74.7
Employment	854 Jobs
Coast Guard	
Economic Impact	\$40.6
Employment	498 Jobs

IMPACT OF FLORIDA VETERANS AND MILITARY RETIREES

Concentration of Veterans and Military Retirees by Region, 2016



With over 1.5 million veterans and nearly 200,000 military retirees, Florida maintains the 3rd and 2nd largest veteran and retiree population in the U.S., respectively. In addition to the \$18 Billion in transfer payments these special populations attract to the state annually, veterans and military retirees provide a competitive advantage to Florida's workforce. Due to their knowledge, skills, and leadership abilities, many national firms, such as Amazon, focus on hiring former military. High concentrations of veterans and military retirees can act as business recruitment tools for states and local economic development organizations.

Florida maintains a veteran population 20% more concentrated than the U.S. and a military retiree population that is 50% more concentrated – thus making Florida a highly desirable state for businesses to expand and/or relocate due to its workforce competitiveness.

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

- Defense Infrastructure Grants - \$1.6M per year
- Defense Reinvestment Grants - \$850K per year
- FDSTF Grants – \$11M over the last 5 years

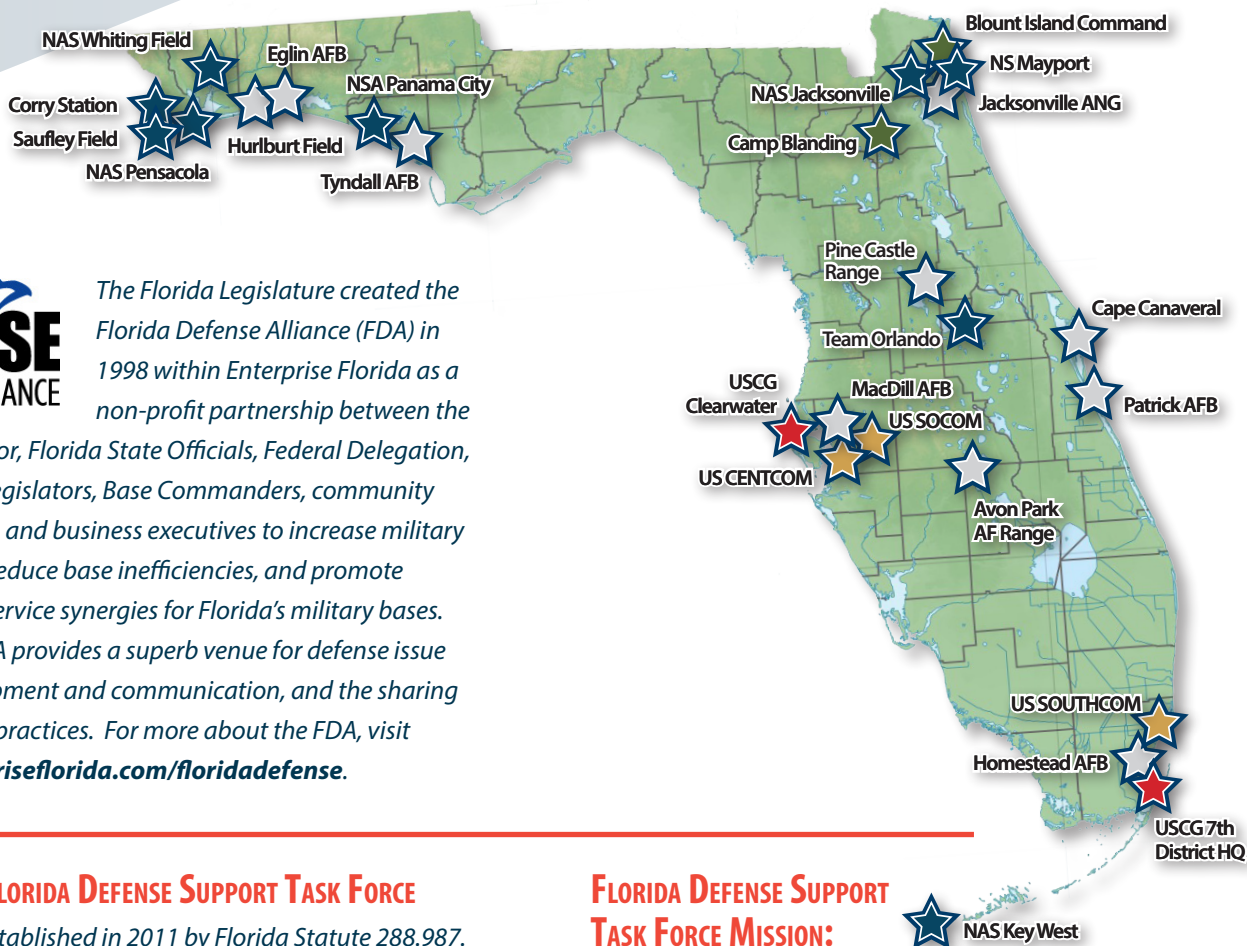
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PARTNERSHIPS



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 enterprise florida.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 Scott notes that "The work of the Task Force...in reviewing and evaluating Florida's military installations, ranges and airspace will help make sure Florida has the best facilities, and reinforce the essential role that they play in defending America's interests throughout the world."

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 enterprise florida.com/fdstf.



This study was commissioned and sponsored by the Florida Defense Support Task Force. For information, please visit www.enterpriseflorida.com/fdstf.