

FLORIDA DEFENSE FACTBOOK

Florida Defense Alliance - A program of
Enterprise Florida: Diversifying Florida's Economy

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Executive Summary

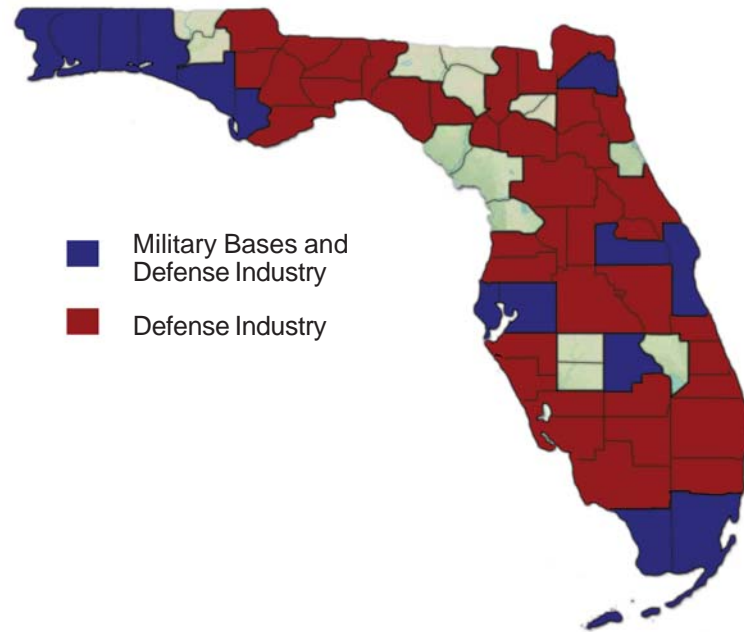
Military activity in Florida has long been a major source of employment for state residents, sales revenue for companies, and tax revenues for state and local government. Aggregate Department of Defense spending flowing directly into the State of Florida during fiscal year 2008 amounted to \$30 billion in wages, pensions and other transfers¹, and goods and services. This includes direct payrolls to servicemen and women, civilians, retirement and veterans' benefits, and contracts with companies doing business in Florida. Fiscal year 2008 defense-related spending was responsible for **\$58.1 billion** in output, or gross state product, in Florida.

- Fiscal year 2008 defense-related spending is directly or indirectly responsible for \$58.1 billion, or 7.5 percent, of Florida's gross state product.
- Fiscal year 2008 defense-related spending accounted for a total of 686,181 direct and indirect jobs.
- State and local tax revenue generated by defense-driven activities is estimated to be \$1.26 billion in fiscal year 2008.
- The military spent about **\$30 billion** across Florida counties in fiscal year 2010. Of this amount, an estimated \$13.1 billion was for goods and services, \$11.6 billion was for pensions and transfer payments, and \$5.3 billion was for salaries and wages.

¹ Transfer payment is defined as a public expenditure made for a purpose other than procuring goods or services.

- The ten largest Florida defense contractors supplied \$5.86 billion or 44.7 percent of the \$13.1 billion value of defense procured goods and services.
- About 25 percent of Northwest Florida regional output is driven by defense spending, versus 13.7 percent for Northeast Florida, 5.3 percent for Central Florida and 2.8 percent for South Florida.
- All counties in Florida benefit from defense-related spending. All but three counties have at least \$4 million per year in direct defense-related spending.
- Military wages have risen over time, so that average earnings per military job in Florida are now at 188 percent of average earnings across all Florida jobs. In 2008, average military earnings per job were \$70,505 compared to an average of \$37,563 for all Florida jobs. In 1970 this ratio was 102 percent when average earnings per military job were \$28,649 compared to an overall Florida average per job of \$27,848.
- Florida has a greater reliance on direct military payroll at 1.8 percent of total earnings, than the nation as a whole, at 1.7 percent.
- Florida has seen less of a drop in military employment over the 1970–2008 time period than the nation as a whole (respective decreases of 22 percent versus 37 percent). Because Florida has created new jobs at a much faster rate than the nation, Florida's military employment has shrunk from 4.5 percent of total employment to 1 percent, versus 3.5 percent and 1.1 percent, respectively, for the nation.

Enterprise Florida, Inc. created the Florida Defense Alliance (FDA) in 1998 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.



FDA: A Statewide Partnership



- Base Commander's and Representatives
- Local Partners
- FL State Agencies
- FL Senate and House of Representatives
- FL Congressional Delegation
- Governor's Office
- Private Industry

Florida is home to 20 major installations and 3 unified combatant commands, as well as many of the nation's leading defense companies and a large pool of highly skilled workers and veterans.

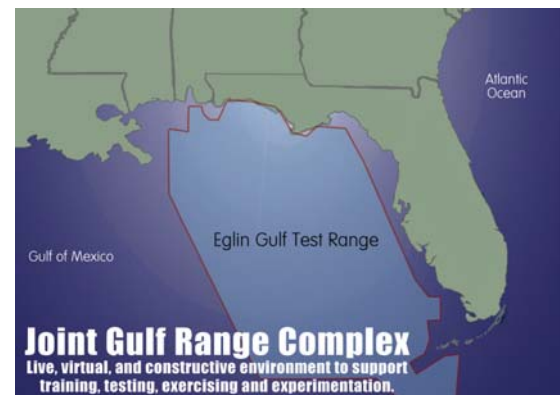
Defense spending impacts all 67 Florida counties. All but 3 counties each have at least \$4 million per year in direct defense-related spending.

In 2005, Florida highlighted the military value its bases provide in critical BRAC areas.



When judged by the **BRAC 2005 Selection Criteria**, Florida's military bases provided immense value. Joint basing, joint usage and ability to host joint training areas are of paramount importance in assessing the future of a base. Air, land and sea training areas and ranges associated with the **Joint Gulf Range Complex** can host large, complex joint exercises. 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' only maritime prepositioning force facility, and one of only three Navy air depots, as well as several critical research, development, training and evaluation (RDT&E) centers. DoD's transformation emphasizes rapidly deployable joint forces, joint training, access to space, special operations, precision strike and research & development.

The Joint Gulf Range Complex connects test & training ranges that extend from Key West to NW 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 Egin 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.¹



Military Value

1. The current and future mission capabilities, including impact on operational readiness, joint war fighting and training
2. Availability and condition of land, facilities, water and airspace, to maintain a diversity of climate and terrain among training areas
3. Ability to accommodate contingency, mobilization and future total force requirements
4. The cost of operations and the manpower implications

Other Considerations

5. Extent and timing of potential budgetary cost and savings
6. Economic Impact to the existing community
7. Communities' ability to support additional forces, mission and personnel
8. Environmental Impact

Defense Spending (\$Billions)¹

Procurement	\$ 13.1
Salaries	5.3
Pensions & Transfers	11.6
Total Defense Spending	\$ 30.0

Average Earnings Per Military Job² \$70,505

State Economic Impact³	\$ 58.1 Billion
Employment	686,181 Jobs
Sales Activity	\$ 63.8 Billion
Consumption	\$ 43.6 Billion
Capital Investment	\$ 6.7 Billion

Fiscal year 2008 defense-related spending is responsible for **\$58.1 Billion**, or **7.5 percent**, of Florida's gross state product.

Fiscal year 2008 defense-related spending accounted for a total of **686,181** direct and indirect jobs.

State and local tax revenue generated by defense-driven activities is estimated to be \$1.26 million in fiscal year 2008.

The **military spent \$30 billion** across Florida counties in fiscal year 2010. Of this amount, an estimated \$13.1 billion was for goods and services, \$11.6 billion was for pensions and transfer payments, and \$5.3 billion was for salaries and wages.

¹ These eight criteria are the BRAC 2005 analysis criteria.

² This report represents defense-related spending in **fiscal year 2008**.

³ Source: 2010 Woods & Poole Economics, Inc.

⁴ For the purposes of this publication, **State Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

The ten largest Florida defense contractors supplied \$5.86 billion or 44.7 percent of the \$13.1 billion value of defense procured goods and services.

For counties that are home to large military installations, defense-related spending provides a substantial portion of county economic activity. In Okaloosa County, for example, defense-related spending accounts for 47.3 percent of economic activity.

All counties in Florida have some reliance on defense-related spending. All but 3 counties each have at least \$4 million per year in direct defense-related spending.

Military wages have risen over time, so that **average earnings per military job** in Florida are now at **188 percent** of average earnings across all Florida jobs.

Florida has a greater reliance on direct military payroll, at 1.8 percent of total earnings, than the nation as a whole, at 1.7 percent.

Florida has seen **less of a drop in military employment** over the 1970-2008 time period than the nation as a whole (-22 percent versus -37 percent).

The NW Florida Region is home to Tyndall Air Force Base, Naval Support Activity Panama City, Eglin Air Force Base, Hurlburt Field, NAS Whiting Field, and NAS Pensacola.



Counties Taylor, Madison, Jefferson, Wakulla, Leon, Franklin, Liberty, Gadsden, Gulf, Calhoun, Jackson, Bay, Washington, Holmes, Walton, Okaloosa, Santa Rosa, and Escambia

Defense Spending (\$Billions)

Procurement	\$ 2.4
Salaries	1.7
Pensions & Transfers	2.1
Total Defense Spending	\$ 6.2

Average Earnings Per Military Job \$83,168

Regional Economic Impact¹ \$ 14.3 Billion

Employment	178,758 Jobs
Sales Activity	\$ 12.8 Billion
Consumption	\$ 10.7 Billion
Capital Investment	\$ 1.9 Billion

¹ For the purposes of this publication, **Regional Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Bay County

Bay County is home to Naval Support Activity Panama City and Tyndall Air Force Base.

Defense Spending (\$Millions)

Procurement	\$ 473.7
Salaries	268.7
Pensions & Transfers	325.8

Total Defense Spending \$ 1,068.2

Average Earnings Per Military Job \$83,790

County Economic Impact¹ \$ 1.8 Billion

Employment	22,493 Jobs
Sales Activity	\$ 1.6 Billion
Consumption	\$ 1.2 Billion
Capital Investment	\$ 260.6 Million



Naval Support Activity Panama City

The mission is to provide research, development, test and evaluation and in-service support for expeditionary, amphibious warfare, diving, maritime special operations, and mine warfare.

Installation Statistics

Buildings	194
Buildings Square Feet	1,514,560
Acreage	669
Active Duty Military	2,172
Civilians	2,619

Tyndall Air Force Base

Tyndall AFB is the home of the 325th Fighter Wing, which conducts advanced training for F/A-22 pilots, air traffic and weapon controllers and F/A-22 specific intelligence personnel.

Installation Statistics

Buildings	1,002
Buildings Square Feet	5,098,182
Acreage	28,824
Active Duty Military	4,930
Civilians	2,357

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Escambia County

Escambia County is home to Naval Air Station Pensacola, Saufley Field, Corry Station, and Naval Hospital Pensacola. NAS Pensacola is host to the Naval Education and Training Command, headquarters for all Navy education and training. Student throughput is approximately 36,000 annually.

County Economic Impact¹	\$ 5.1 Billion
Employment	63,095 Jobs
Sales Activity	\$ 4.8 Billion
Consumption	\$ 3.4Billion
Capital Investment	\$ 633.7 Million

Naval Air Station Pensacola

The mission of NAS Pensacola is to provide superior training support and a quality environment to tenants, military and civilian personnel and their families. There are over 90 tenant commands aboard NAS Pensacola including the Naval Education and Training Command.

Installation Statistics

Buildings	1,149
Buildings Square Feet	11,569,283
Acreage	8,575
Active Duty Military	17,637
Civilian	7,114

Defense Spending (\$Millions)

Procurement	\$ 360.0
Salaries	283.3
Pensions & Transfers	486.4
Total Defense Spending	\$ 1,129.7

Average Earnings Per Military Job \$82,890

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.



Corry Station

Pensacola

The mission of Corry Station is to operate and administer assigned schools, which provide technical training to military and civilian personnel of the Department of Defense and international military students. Inter-service training has been conducted since 1973. Corry Station operates the only cryptologic school in the Department of Defense. In addition, they operate the Electronic Warfare Officers School for Navy and Air Force personnel.

Installation Statistics

Buildings	211
Buildings Square Feet	2,284,108
Acreage	674

Saufley Field

Pensacola

Saufley Field is a multi-purpose facility hosting the Naval Education and Program Management Support Activity, a Federal Prison Camp, Defense Finance and Accounting Service Activity, and the Defense Activity for Nontraditional Education Support (DANTES).

Installation Statistics

Buildings	69
Buildings Square Feet	691,863
Acreage	895



Okaloosa County is home to Eglin Air Force Base and Hurlburt Field.

Defense Spending (\$Millions)

Procurement	\$ 1,431.0
Salaries	677.3
Pensions & Transfers	645.7
Total Defense Spending	\$ 2,754.0

Average Earnings Per Military Job \$87,300

County Economic Impact¹ \$ 5.2 Billion

Employment	58,811 Jobs
Sales Activity	\$ 4.0 Billion
Consumption	\$ 3.3 Billion
Capital Investment	\$ 495.1 Million

Eglin Air Force Base Valparaiso

Eglin is primarily noted for hosting the Air Armament Center. Eglin is the largest military base in the Department of Defense with 724 square miles of land range. Eglin hosts the Joint Gulf Range Complex which is a key training location due to its tremendous capabilities and solid commitment to partnering for joint training.

Installation Statistics

Buildings	2,233
Buildings Square Feet	12,049,563
Acreage	455,571
Active Duty Military	9,283
Civilians	5,710

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Hurlburt Field Mary Esther

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

Hurlburt Field serves as home for the Special Operations Wing and the 16th Special Operations Squadron.

Installation Statistics

Buildings	617
Buildings Square Feet	5,088,103
Acreage	6,634
Active Duty Military	8,000
Civilians	700



Santa Rosa County

Santa Rosa County is home to Naval Air Station Whiting Field.

Defense Spending (\$Millions)

Procurement	\$ 49.7
Salaries	25.5
Pensions & Transfers	320.3
Total Defense Spending	\$ 395.5

Average Earnings Per Military Job \$112,600

County Economic Impact¹ \$ 965.3 Million

Employment	14,683 Jobs
Sales Activity	\$ 960.5 Million
Consumption	\$ 1,398.1 Million
Capital Investment	\$ 227.4 Million

Naval Air Station Whiting Field Milton

The mission of NAS Whiting Field is to provide the best services and material support for the training of U.S. Navy, Marine Corps, Air Force, Coast Guard, and International student aviators.

Installation Statistics

Buildings	424
Buildings Square Feet	1,840,299
Acreage	9,070
Active Duty Military	1,507
Civilians	1,373

Naval Air Station Whiting Field is host to Training Air Wing 5 which is responsible for 43 percent of the Chief of Naval Air Training Command's total flight time. They account for over 11 percent of all Navy and Marine Corps flight hours worldwide and train over 1,200 student pilots annually.



¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.



The Northeast Central Florida Region consists of 18 counties and is home to the Camp Blanding Joint Training Center, Naval Station Mayport, Blount Island Command, Fleet Readiness Center SE, Naval

Air Station Jacksonville, Florida National Guard's Headquarters in St. Augustine and the 125th Fighter Squadron at Jacksonville International Airport.

Counties Marion, Flagler, Levy, Dixie, Gilchrist, Alachua, Putnam, St. Johns, Clay, Bradford, Union, Duval, Nassau, Baker, Columbia, Lafayette, Suwannee, and Hamilton

Defense Spending (\$Billions)

Procurement	\$ 1.2
Salaries	1.0
Pensions & Transfers	1.9
Total Defense Spending	\$ 4.1

Average Earnings Per Military Job \$77,504

Regional Economic Impact \$ 14.2 Billion

Employment	162,302 Jobs
Sales Activity	\$ 15.4 Billion
Consumption	\$ 10.5 Billion
Capital Investment	\$ 1.6 Billion

¹ For the purposes of this publication, **Regional Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Defense Spending (\$Millions)

Procurement	\$ 8.9
Salaries	7.8
Pensions & Transfers	355.9
Total Defense Spending	\$ 372.6

Average Earnings Per Military Job \$37,000

County Economic Impact² \$ 481.3 Million

Employment	8,217 Jobs
Sales Activity	\$ 659.8 Million
Consumption	\$ 1,010.0 Million
Capital Investment	\$ 137.6 Million

Camp Blanding Joint Training Center

Camp Blanding, the primary training facility for the Florida Army National Guard, serves the training needs for active Army and Reserve units as well as Army and Air National Guard units. It is capable of billeting 3,000 soldiers and has over 50 live-fire ranges that can accommodate light weapons and crew served weapons, including mortars and artillery.

Installation Statistics

Buildings	570
Acreage	72,000
Active Duty Military	888
Civilian	1

² For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Jacksonville, in Duval County, is home to Naval Air Station Jacksonville, Naval Station Mayport, Marine Corps Blount Island Command and Naval Aviation Depot Jacksonville.

Defense Spending (\$Millions)

Procurement	\$ 794.7
Salaries	737.3
Pensions & Transfers	860.4
Total Defense Spending	\$ 2,392.4

Average Earnings Per Military Job \$88,101

County Economic Impact¹ \$ 10.7 Million

Employment	110,713 Jobs
Sales Activity	\$ 11.7 Billion
Consumption	\$ 5.7 Billion
Capital Investment	\$ 1.0 Billion

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Fleet Readiness Center Southeast

Fleet Readiness Center Southeast (FRCSE) is the largest tenant command aboard Naval Air Station Jacksonville, FL., with several offsite locations. Established in 1940, the facilities at FRCSE have turned out almost every type of Navy aircraft - fighter and attack planes, patrol, antisubmarine, reconnaissance, transport, trainer, special configuration and helicopters. The overall workload for FRCSE has expanded to include the rework of engines, components, and ground support equipment, plus other support functions vital to the Fleet.

Installation Statistics

Active Duty Military	3,000
Civilians	1,000
Contractors	1,000



Naval Air Station Jacksonville

Naval Air Station Jacksonville is a multi-mission base hosting more than 100 tenant organizations and is the third largest naval installation in the United States. NAS Jacksonville has the busiest airfield in the Navy, supports a significant Naval Hospital and a Fleet Supply Center, and is host to Commander, Navy Region South East and home to VP-30, the largest squadron in the Navy.¹

Installation Statistics

Buildings	643
Buildings Square Feet	8,673,088
Acreage	24,629
Active Duty Military	12,548
Civilians	7,070



¹ Source: City of Jacksonville.

Naval Station Mayport

NS Mayport is a major air operations center supporting over 100,000 helicopter & fixed wing flights each year. Mayport hosts 4 guided missile cruisers, 4 guided missile destroyers, 13 guided missile frigates, and the Commander of Naval Forces South.



Installation Statistics

Buildings	643
Buildings Square Feet	8,583,106
Acreage	3,400
Active Duty Military	13,000
Civilians	444

Marine Corps Blount Island Command

Blount Island Command plans, coordinates, and executes the logistic efforts necessary to support Maritime Prepositioning Ships (MPS) squadrons.

Installation Statistics

Buildings	20
Buildings Square Feet	670,425
Acreage	1,235
Active Duty Military	100
Civilians	842



The Central Florida Region consists of 19 counties and is home to the U.S. Central Command, U.S. Special Operations Command, MacDill Air Force Base, Avon Park Air Force Range, Patrick Air Force Base, Team Orlando (Florida Simulation Center) and Cape Canaveral Air Force Station.

Counties Sarasota, De Soto, Highlands, Manatee, Hardee, Indian River, Hillsborough, Polk, Osceola, Brevard, Pinellas, Pasco, Hernando, Orange, Lake, Sumter, Citrus, Seminole, and Volusia

Defense Spending (\$Billions)

Procurement	\$ 8.4
Salaries	1.4
Pensions & Transfers	4.1
Total Defense Spending	\$ 13.9

Average Earnings Per Military Job \$60,971

Regional Economic Impact \$ 19.4 Billion

Employment	226,458 Jobs
Sales Activity	\$ 23.9 Billion
Consumption	\$ 15.2 Billion
Capital Investment	\$ 2.2 Billion

Brevard County is home to Patrick Air Force Base and Cape Canaveral Air Force Station.

Defense Spending (\$Millions)

Procurement	\$ 2,113.2
Salaries	214.6
Pensions & Transfers	585.7
Total Defense Spending	\$ 2,913.5

Average Earnings Per Military Job \$80,000

County Economic Impact¹ \$ 1.8 Billion

Employment	21,848 Jobs
Sales Activity	\$ 2.0 Billion
Consumption	\$ 1.6 Billion
Capital Investment	\$ 217.3 Million

Patrick Air Force Base

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.



Installation Statistics

Buildings	1,124
Buildings Square Feet	7,752,650
Acreage	19,375
Active Duty Military	3,014
Civilians	7,450



Cape Canaveral Air Force Station

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.

Installation Statistics

Buildings	600
Acreage	17,034
Active Duty Military	311
Civilians	273

Defense Spending (\$Millions)

Procurement	\$ 28.1
Salaries	3.7
Pensions & Transfers	46.8

Total Defense Spending \$ 78.6

Average Earnings Per Military Job \$36,990

County Economic Impact¹ \$ 73.9 Million

Employment	1,359 Jobs
Sales Activity	\$ 87.5 Million
Consumption	\$ 107.8 Million
Capital Investment	\$ 14.7 Million

Avon Park Air Force Range

Avon Park Air Force Range is home to a Deployed Unit Complex of the 23rd Wing detachment, reporting to Moody Air Force Base, Georgia. It provides a variety of air-to-ground targets in support of air and ground operations.

Installation Statistics

Buildings	52
Buildings Square Feet	182,072
Acreage	106,035
Military	2
Civilians	112

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Hillsborough County

Within Hillsborough County, the City of Tampa is home to MacDill Air Force Base, the U.S. Central Command and the U.S. Special Operations Command.

Defense Spending (\$Millions)

Procurement	\$ 1,064
Salaries	627.0
Pensions & Transfers	784.0
Total Defense Spending	\$ 2,475.0

Average Earnings Per Military Job \$94,137

County Economic Impact¹ \$ 6.7 Billion

Employment	64,763 Jobs
Sales Activity	\$ 7.5 Billion
Consumption	\$ 3.5 Billion
Capital Investment	\$ 527.9 Million

MacDill Air Force Base

City of Tampa

MacDill's host command is the 6th Air Mobility Wing, whose primary mission is airlift and aerial refueling. MacDill hosts many tenant organizations including U.S. Central Command and U.S. Special Operations Command, defining MacDill as "Joint" in the purest sense of the word.²

Installation Statistics

Buildings	323
Buildings Square Feet	3,923,589
Acreage	5,866
Active Duty Military	1,200
Civilians	1,300

United States Central Command

USCENTCOM is one of 5 geographically defined unified commands within the Department of Defense.

USCENTCOM is responsible for protecting U.S. security interests in 25 nations in Northeast Africa, Southwest and Central Asia & the island nation of Seychelles, including their leadership of military operations in the Middle East.



United States Special Operations Command

The primary military mission of USSOCOM is to conduct the Global War on Terrorism, with the intent to disrupt, defeat and destroy terrorist networks that threaten the U.S., citizens and interests worldwide. USSOCOM, generally, takes the lead in preparing our nation's active-duty and reserve special forces for worldwide special operations, civil affairs, and psychological operations in both peace and war-time.

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

² Source: City of Tampa.

Defense Spending (\$Millions)

Procurement	\$ 3,461.9
Salaries	180.7
Pensions & Transfers	473.2
Total Defense Spending	\$ 4,115.9

Average Earnings Per Military Job \$50,600

County Economic Impact¹ \$ 2.9 Billion

Employment	29,723 Jobs
Sales Activity	\$ 4.0 Billion
Consumption	\$ 1.7 Billion
Capital Investment	\$ 296.2 Million

Team Orlando (Florida Simulation Center)

Team Orlando consists of all of the military services, plus several joint defense commands and laboratories working together in support of research, development, acquisition and support of training devices and simulators, testing and instrumentation, and related technologies and products supporting warfighters worldwide. These military commands are supported by the University of Central Florida and a large cluster of defense industry partners, principally clustered in and around the Central Florida Research Park.



Pinellas County hosts the US Coast Guard Air Station Clearwater. It produces a substantial amount of goods and services consumed by the defense industry and a considerable number of defense employees reside in the area.



Defense Spending (\$Millions)

Procurement	\$ 1,204.6
Salaries	282.6
Pensions & Transfers	451.4
Total Defense Spending	\$ 1,938.6

Average Earnings Per Military Job \$55,900

County Economic Impact¹ \$ 3.2 Billion

Employment	38,704 Jobs
Sales Activity	\$ 3.8 Billion
Consumption	\$ 2.4 Billion
Capital Investment	\$ 277.6 Million

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Polk and Highlands Counties are home to the Avon Park Air Force Range.

Defense Spending (\$Millions)

Procurement	\$ 53.3
Salaries	2.9
Pensions & Transfers	235.8
Total Defense Spending	\$ 292.0

Average Earnings Per Military Job \$38,400

County Economic Impact¹ \$ 729.5 Million

Employment	10,488 Jobs
Sales Activity	\$ 1,012.0 Million
Consumption	\$ 799.6 Million
Capital Investment	\$ 113.9 Million

Avon Park Air Force Range

Avon Park Air Force Range is home to a Deployed Unit Complex of the 23rd Wing detachment, reporting to Moody Air Force Base, Georgia. It provides a variety of air-to-ground targets in support of air and ground operations.

Installation Statistics

Buildings	52
Buildings Square Feet	182,072
Acreage	106,035
Military	2
Civilians	112

The South Florida Region consists of 12 counties and is home to the U.S. Southern Command, Homestead Air Reserve Base, and Naval Air Station-Key West.

Counties Miami-Dade, Monroe, Collier, Broward, Hendry, Palm Beach, Lee, Charlotte, Glades, Martin, St. Lucie, and Okeechobee

Defense Spending (\$Billions)

Procurement	\$ 1.2
Salaries	0.5
Pensions & Transfers	1.4
Total Defense Spending	\$ 3.1

Average Earnings Per Military Job \$50,053

Regional Economic Impact¹ \$ 10.2 Billion

Employment	118,659 Jobs
Sales Activity	\$ 11.7 Billion
Consumption	\$ 7.2 Billion
Capital Investment	\$ 977.6 Million

¹ For the purposes of this publication, **Regional Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.



Miami-Dade County

Miami-Dade County is home to the USSOUTHCOM and Homestead Air Reserve Base. USSOUTHCOM's mission is to embrace the concept of preventive defense through constructive engagement.

Defense Spending (\$Millions)

Procurement	\$ 464.5
Salaries	254.6
Pensions & Transfers	251.3
Total Defense Spending	\$ 970.5



Average Earnings Per Military Job \$65,700

County Economic Impact¹ \$ 4.0 Billion

Employment	43,229 Jobs
Sales Activity	\$ 4.3 Billion
Consumption	\$ 1.9 Billion
Capital Investment	\$ 260.5 Million

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

United States Southern Command

Miami

USSOUTHCOM is assigned an area of responsibility encompassing the landmass of Latin America south of Mexico; the waters adjacent to Central and South America; the Caribbean Sea and its 13 island nations; the Gulf of Mexico; and a portion of the Atlantic Ocean. USSOUTHCOM's mission is to embrace the concept of preventive defense through constructive engagement. It promotes democracy, establishes good working relationships among all the countries of the region, and engenders a true respect for human rights. USSOUTHCOM has approximately 960 active-duty military men and women of all services and approximately 1000 civilians.



Homestead Air Reserve Base

The primary mission of Homestead is to host the 482nd Fighter Wing of the Air Force Reserve. The mission of the 482nd is to provide a fully combat-ready unit capable of providing F-16 multi-purpose fighter aircraft, along with mission-ready pilots and support personnel, for short notice, worldwide deployment.



Installation Statistics

Buildings	121
Buildings Square Feet	970,999
Acreage	1,943
Active Duty Military	1,200
Civilians	325



Monroe County is home to the Naval Air Station Key West.

Defense Spending (\$Millions)

Procurement	\$ 50.2
Salaries	38.9
Pensions & Transfers	34.3
Total Defense Spending	\$ 123.3

Average Earnings Per Military Job \$82,800

County Economic Impact¹ \$ 486.9 Million

Employment	5,600 Jobs
Sales Activity	\$ 332.9 Million
Consumption	\$ 342.3 Million
Capital Investment	\$ 39.4 Million

¹ For the purposes of this publication, **County Economic Impact** refers to the **Gross Product** which is the sum of the money values of all final goods and services produced in the economy and sold on organized markets during a specified period of time.

Naval Air Station Key West

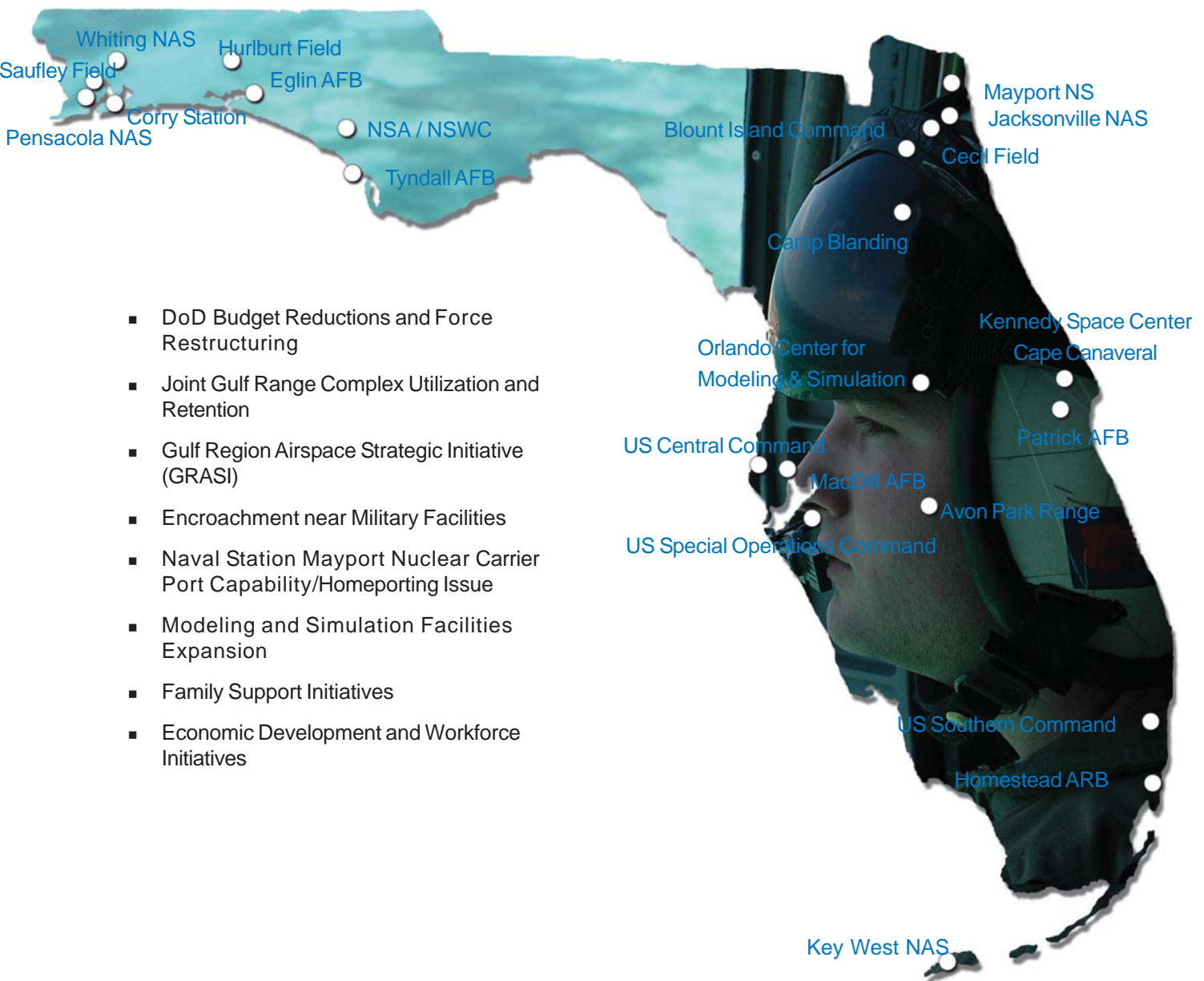
NAS Key West provides an extensive air-to-air training venue for transient tactical aviation squadrons. It is home to the Joint Interagency Task Force - South whose mission is to provide the necessary operations for detection, monitoring, and deterrence of drug smuggling operations. Major tenants include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

Installation Statistics

Buildings	683
Buildings Square Feet	3,880,750
Acreage	5,615
Active Duty Military	1,570
Civilians	1,372



Florida Defense Challenges



SOURCES

Breitenfeld Consulting

Florida Defense Industry Economic

Impact Analysis, The University of
West Florida, Haas Center for
Business Research and Economic
Development

Florida Military Installation Commands

Holland and Knight Base Assessment

Team Study

2010 Woods & Poole Economics, Inc.

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