



Florida Military & Defense Economic Impact Summary

JANUARY 2024

FLORIDACOMMERCE

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STUDY OVERVIEW

As part of their ongoing support of Florida's military personnel, military families, and defense industry, the Florida Defense Support Commission authorized this biennial update to the defense economic impact analysis report. This booklet provides a summary of the updated findings based on the latest personnel and spending data. As in previous years, this study relies on data from the U.S. Department of Defense (DoD), the U.S. Department of Veterans Affairs, the U.S. Department of the Treasury, the U.S. Department of Homeland Security, and the U.S. Bureau of Economic Analysis.

From 2020 to 2022, the state experienced a 21% nominal increase in total direct defense spending, growing from \$53.9 billion to \$65.3 billion. This total growth comprised a 21% increase in personnel compensation (despite a slightly reduced number of personnel), a 16% increase in defense procurement, and a 26% increase in retiree pensions and veterans transfer payments (despite a decrease in total veterans). The increase in overall spending permeated Florida's economy and resulted in an additional 865,937 jobs (a nearly 6,000 increase from the previous update) and \$102.6 billion in economic impact (a 6.2% increase from the previous update).

Conflicts across the globe, including in Ukraine, Southeast Asia, and the Middle East, require steadfast preparedness on the part of our nation's defense industry. The Florida Defense Support Commission's efforts have helped ensure Florida remains one of the best and most supportive states in the nation for our military installations, defense contractors, and veterans and military retirees.

FLORIDA MILITARY FACTS

**Total Statewide Economic Impact
\$102.6 Billion**

Percent of Florida Economy 7.3%

Statewide Direct and Indirect Jobs 865,937

Buildings Owned by Military ¹ 6,677

Total Acreage (all installations) ¹ 521,839

Plant Replacement Value ¹ \$44.5 billion

Active Military Personnel ² 66,971

Civilian Personnel ² 32,950

Military Reserve ² 24,965

National Guard Full-time ³ 1,305

National Guard Traditional Guardsmen ³ 10,781

Total Veterans Living in Florida ⁴ 1,450,597

Total Military Retirees Living in Florida ⁵ 214,569

¹ Department of Defense, Base Structure Report FY22

² Defense Manpower Data Center, Number of Military and DoD Appropriated Fund (APF) Civilian Personnel, Septmber 2022)

³ Adjutant General's Report FY 2022, Overcoming New Challenges

⁴ Department of Veterans Affairs, FY22 Summary of Expenditures by State

⁵ Department of Defense, Statistical Report on the Military Retirement System FY22

Florida Hosts a Variety of Missions Critical to Our Nation's Defense

Florida is home to:

- Three of eleven unified combatant command headquarters.
- Two (of only four) deep water naval ports with adjacent airfields.
- The military's only east coast space launch facility.
- The Marine Corps' only maritime prepositioning force facility.
- Fleet Readiness Center Southeast (FRCSE), one of the Navy's largest FRCs.
- The Eastern Gulf Test & Training Range.
- 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 and development, all of which are found in Florida. Air, land, and sea training areas and ranges associated with the Eastern Gulf Test & Training Range (EGTTR) host large, complex joint exercises that allow the services to train like they fight, thus bringing tremendous advantages to our military. Additionally, the EGTTR 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 two 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 this partnership, the EGTTR is an integral part of the DoD's Training Resources Strategy.

IMPACTS BY THE NUMBERS

4 Industries Make up 50% of Defense-Related Contracts



Aerospace



Architectural & Engineering Services

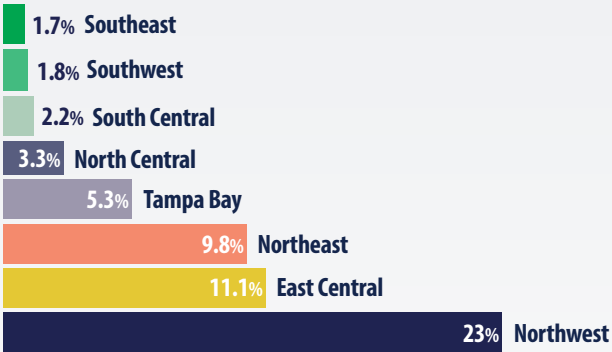


Scientific Research & Development Services

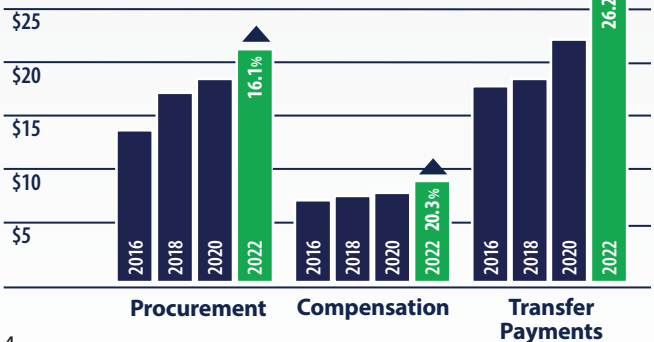


Computer Systems Design

Defense as a Percent of Total Economy for Each Region



Difference in Direct Spending (\$billions)



Personnel by Type



- National Guard
- Reserve
- Civilian
- Active Duty

How Florida Ranks in FY 2021-2022



Florida has the **2nd Largest MILITARY RETIREE** population



Florida has the **3rd Largest VETERAN** population

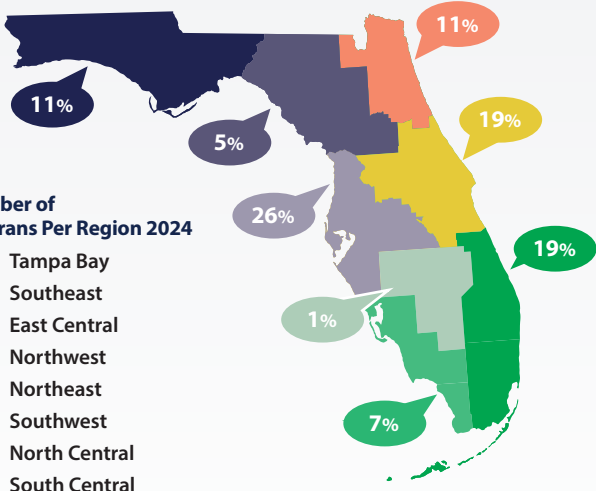


Florida ranks **4th in DEFENSE SPENDING**



Florida ranks **5th in DOD PERSONNEL** with 137,365

Veteran Distribution by Region

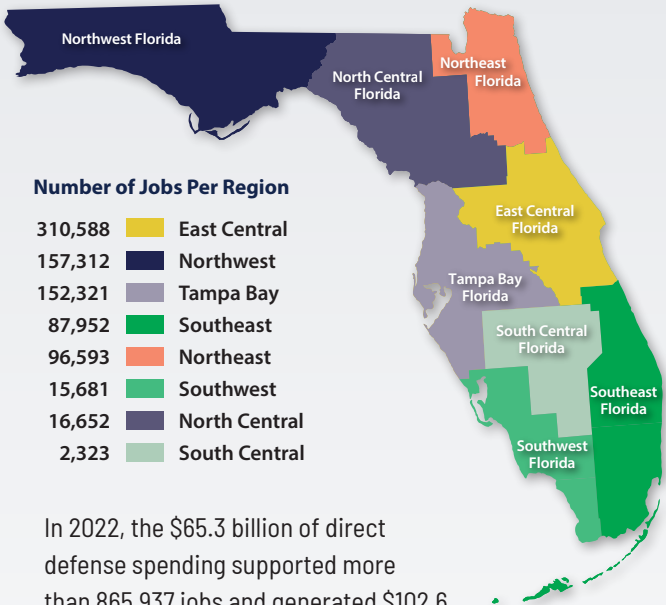


Number of Veterans Per Region 2024

- Tampa Bay
- Southeast
- East Central
- Northwest
- Northeast
- Southwest
- North Central
- South Central

STATE OF FLORIDA

Total Employment Impacts of Defense Activities



In 2022, the \$65.3 billion of direct defense spending supported more than 865,937 jobs and generated \$102.6 billion in economic impact across the state, representing 7.3% of Florida's economy. East Central Florida experienced the greatest regional increase in economic impact due to the growing importance of Cape Canaveral and the space industry to national security. Even regions with relatively low military presence benefited from the spending flows of contractors, veterans and retirees, which create jobs and other opportunities far outside the fenceline.

Defense Economic Impact Estimates

Total State Economic Impacts

State Economic Impact **\$102.6 Billion**

Employment 865,937 Jobs

Percent of Economy 7.3%

Income \$69.3 Billion

State and Local Taxes \$4.6 Billion

Direct Defense Spending

Procurement \$21.93 Billion

Compensation \$15.16 Billion

Pensions & Transfers \$28.23 Billion

Total Defense Spending **\$65.32 Billion**

Impacts by Component

Federal Military

Economic Impact \$94.6 Billion

Employment 811,897 Jobs

National Guard

Economic Impact \$5.0 Billion

Employment 34,070 Jobs

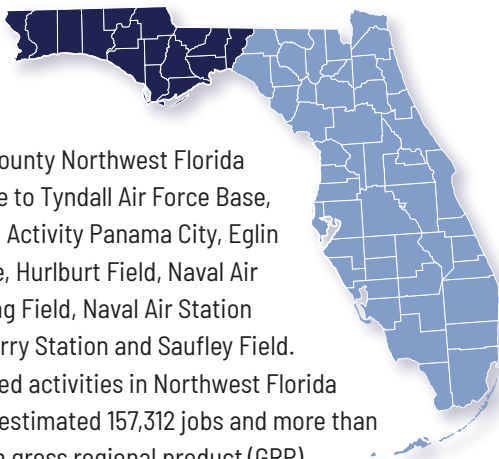
Coast Guard

Economic Impact \$3.0 Billion

Employment 19,970 Jobs



NORTHWEST FLORIDA REGION



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 Station and Saufley Field. Defense-related activities in Northwest Florida generated an estimated 157,312 jobs and more than \$20.6 billion in gross regional product (GRP), which accounted for 23.0% of the region's 2022 total gross product. Most of these economic impacts were generated by direct federal military spending, which produced 148,897 jobs and approximately \$19.1 billion of GRP, followed by the National Guard and Coast Guard who were responsible for 7,346 jobs and 1,068 jobs, respectively.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact **\$20.6 Billion**

Percent of Economy 23.0%

Employment 157,312

Income \$14.4 Billion

State and Local Taxes \$785 Million

Direct Defense Spending

Procurement \$4.8 Billion

Compensation \$6.7 Billion

Pensions & Transfers \$3.9 Billion

Total Defense Spending **\$15.4 Billion**

Impacts by Component

Federal Military

Economic Impact \$19.2 Billion

Employment 148,897 Jobs

National Guard

Economic Impact \$1.3 Billion

Employment 7,346 Jobs

Coast Guard

Economic Impact \$176 Million

Employment 1,068 Jobs

Left page photo: Eglin AFB Night Flights,
Photo by Tech. Sgt. John Raven, 40th Flight Test Squadron



Bay County

Home to:

- Naval Support Activity Panama City
- Tyndall Air Force Base

Tyndall Aircraft Takeoffs,
 Photo by Airman 1st Class Bailee Darbasie, 325th Fighter Wing Public Affairs

Naval Support Activity Panama City is host to the Naval Surface Warfare Center–Panama City Division, Naval Diving and Salvage Training Center, Navy Experimental Diving Unit, and U.S. Coast Guard Station Panama City. Its missions are to provide, operate and maintain facilities; provide defense and physical security of critical infrastructure; and provide operational support to the Fleet, Fighter, and Family and supported commands.

Tyndall Air Force Base is home to the 325th Fighter Wing and 19 other tenant units. The 325th Fighter Wing’s primary mission is to project unrivaled combat airpower for America as it transitions to the F-35A Lightning II. Tyndall Air Force Base is undergoing a \$4.7 billion dollar rebuild after sustaining significant damage from Hurricane Michael in 2018; upon completion, Tyndall will be the Air Force’s first 21st Century “Installation of the Future.”

Total County Impact

County Economic Impact **\$4.3 Billion**

Percent of Economy	37.7%
Employment	33,339 Jobs
Income	\$3.1 Billion
State and Local Taxes	\$137 Million

Direct Defense Spending

Procurement	\$2.7 Billion
Compensation	\$509 Million
Pensions & Transfers	\$385 Million
Total Defense Spending	\$3.6 Billion



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, known as the “Cradle of Naval Aviation,” is the initial primary training base for all Navy, Marine, and Coast Guard aviators, as well as home to the Navy Flight Demonstration Squadron (Blue Angels) and other tenant units.

Corry Station hosts the headquarters of the Center for Information Warfare Training, which is responsible for the development of education and training policies in areas such as cryptology and cyber.

Saufley Field is a joint use facility and home to several DoD and other U.S. government organizations, including the Defense Activity for Nontraditional Education Support, Naval Reserve Center, and Bureau of Prisons.

Total County Impact

County Economic Impact **\$4.0 Billion**

Percent of Economy	19.5%
Employment	31,651 Jobs
Income	\$2.9 Billion
State and Local Taxes	\$129 Million

Direct Defense Spending

Procurement	\$650 Million
Compensation	\$2.5 Billion
Pensions & Transfers	\$911 Million
Total Defense Spending	\$4.0 Billion



Okaloosa County

Home to:

- Eglin Air Force Base
- Hurlburt Field

Airborne Operations,

Photo by 2nd Lt. Karissa Rodriguez, 96th Test Wing Public Affairs

Eglin Air Force Base is home to the 96th Test Wing and various other units, including Air Force Materiel Command (AFMC), Air Force Armament Directorate, the 33rd Fighter Wing, and the Army's 6th Ranger Training Battalion and 7th Special Forces Group. The 96th Test Wing executes developmental tests and evaluations for Air Force weapons. Eglin also offers one of the nation's most comprehensive land/air/sea training areas in the Joint Gulf Range Complex, which extends from the coast into the Gulf of Mexico.

Hurlburt Field is home to the Air Force Special Operations Command (AFSOC), 1st Special Operations Wing, the USAF Special Operations School, and several associated units. Hurlburt delivers special operations aviation capabilities globally to the joint force.

Total County Impact

County Economic Impact **\$5.4 Billion**

Percent of Economy 32.9%

Employment 38,149 Jobs

Income \$3.9 Billion

State and Local Taxes \$147 Million

Direct Defense Spending

Procurement \$1.3 Billion

Compensation \$3.4 Billion

Pensions & Transfers \$973 Million

Total Defense Spending **\$5.6 Billion**



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 is home to Training Air Wing FIVE and comprises 12 outlying fields with three separate and fully operational airfields over 12,000 acres. Its mission is to produce the best-trained "Aviation Warfighter." More than 1,200 pilots graduate here each year, including all Navy, Marine, and Coast Guard helicopter pilots. Approximately 12% of all Navy and Marine flight hours are flown at NAS Whiting Field; all flight hours combined make the installation busier than Hartsfield-Jackson Atlanta International Airport. Training Air Wing FIVE is transitioning the advanced helicopter training program to the new TH-73A Thrasher helicopter.

Total County Impact

County Economic Impact **\$1.2 Billion**

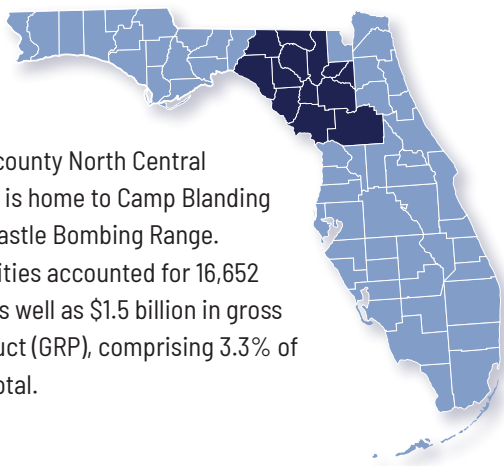
Percent of Economy	19.2%
Employment	9,476 Jobs
Income	\$733 Million
State and Local Taxes	\$84 Million

Direct Defense Spending

Procurement	\$86 Million
Compensation	\$351 Million
Pensions & Transfers	\$784 Million
Total Defense Spending	\$1.2 Billion



NORTH CENTRAL FLORIDA REGION



The thirteen-county North Central Florida region is home to Camp Blanding and the Pinecastle Bombing Range. Defense activities accounted for 16,652 jobs in 2022 as well as \$1.5 billion in gross regional product (GRP), comprising 3.3% of the regional total.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact	\$1.5 Billion
Percent of Economy	3.3%
Employment	16,652 Jobs
Income	\$824 Million
State and Local Taxes	\$130 Million

Direct Defense Spending

Procurement	\$72 Million
Compensation	\$154 Million
Pensions & Transfers	\$2.0 Billion
Total Defense Spending	\$2.3 Billion

Impacts by Component

Federal Military	
Economic Impact	\$1.4 Billion
Employment	15,970 Jobs
National Guard	
Economic Impact	\$55 Million
Employment	535 Jobs
Coast Guard	
Economic Impact	\$15 Million
Employment	148 Jobs

Left page photo: 3rd CAB Kicks Up Some Dust,
Photo by Sgt. William Begley, 3rd Combat Aviation Brigade



Bradford County

Home to:

- Camp Blanding Joint Training Center

Camp Blanding CPX, Photo by Scarlet Sharp, 2nd Marine Logistics Group

Camp Blanding Joint Training Center is the primary training site for the Florida National Guard. The reservation comprises 73,000 acres of forests, lakes, and grasslands. Camp Blanding also provides training areas for US Army Reserve, other Army and Air National Guard, Civil Air Patrol, and ROTC units. Camp Blanding can accommodate more than 3,500 personnel and can support live fire training for small arms, mortars, artillery, helicopters, and fixed wing aircraft.

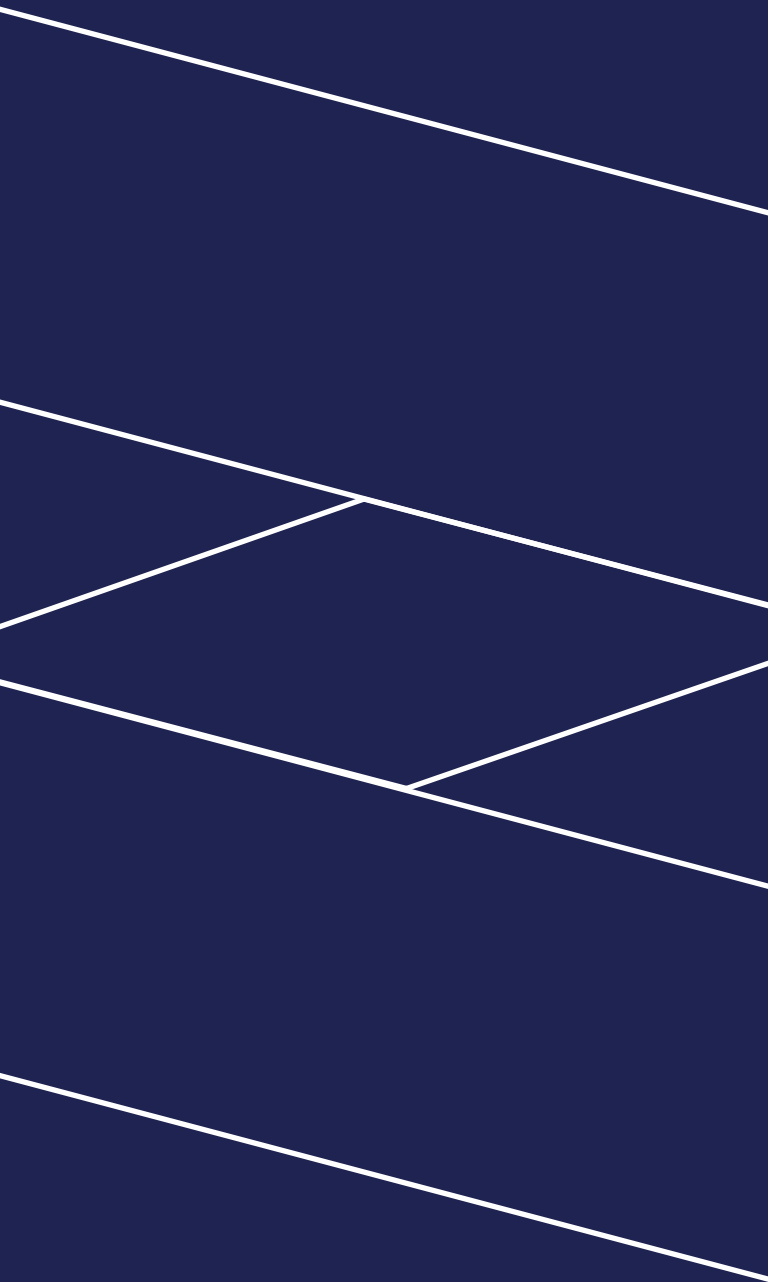
Total County Impact

County Economic Impact **\$29 Million**

Percent of Economy	3.3%
Employment	349 Jobs
Income	\$15 Million
State and Local Taxes	\$3 Million

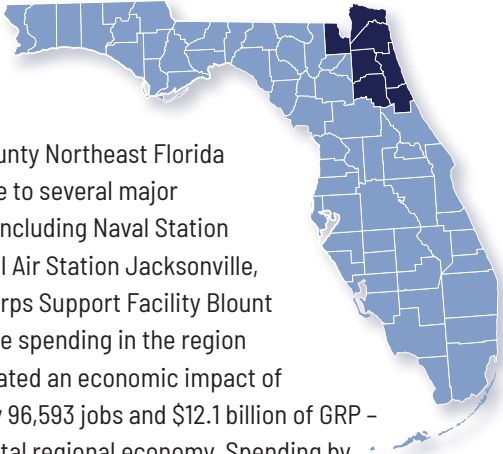
Direct Defense Spending

Procurement	\$3 Million
Compensation	\$4 Million
Pensions & Transfers	\$50 Million
Total Defense Spending	\$58 Million





NORTHEAST FLORIDA REGION



The seven-county Northeast Florida region is home to several major installations, including Naval Station Mayport, Naval Air Station Jacksonville, and Marine Corps Support Facility Blount Island. Defense spending in the region in 2022 generated an economic impact of approximately 96,593 jobs and \$12.1 billion of GRP – 9.8% of the total regional economy. Spending by the federal military accounted for 88,858 jobs while the National Guard and Coast Guard accounted for 5,910 jobs and 1,825 jobs, respectively.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact **\$12.1 Billion**

Percent of Economy	9.8%
Employment	96,593 Jobs
Income	\$8.2 Billion
State and Local Taxes	\$541 Million

Direct Defense Spending

Procurement	\$1.9 Billion
Compensation	\$3.0 Billion
Pensions & Transfers	\$3.4 Billion
Total Defense Spending	\$8.3 Billion

Impacts by Component

Federal Military

Economic Impact	\$10.9 Billion
Employment	88,858 Jobs

National Guard

Economic Impact	\$855 Million
Employment	5,910 Jobs

Coast Guard

Economic Impact	\$306 Million
Employment	1,825 Jobs

Left page photo: Naval Station Mayport,
Photo by Seaman Andrew Schneider, Navy Public Affairs Support Element East – (Reserve)



Clay County

Home to:

- **Camp Blanding Joint Training Center**

Florida Guardsmen Fire HIMARs for The First Time at Camp Blanding, Photo by Master Sgt. Thomas Kielbasa, Florida National Guard Public Affairs Office

Camp Blanding Joint Training Center is the primary training site for the Florida National Guard. The reservation comprises 73,000 acres of forests, lakes, and grasslands. Camp Blanding also provides training areas for US Army Reserve, other Army and Air National Guard, Civil Air Patrol, and ROTC units. Camp Blanding can accommodate more than 3,500 personnel and can support live fire training for small arms, mortars, artillery, helicopters, and fixed wing aircraft.

Total County Impact

County Economic Impact **\$690 Million**

Percent of Economy	9.6%
Employment	8,785 Jobs
Income	\$405 Million
State and Local Taxes	\$59 Million

Direct Defense Spending

Procurement	\$42 Million
Compensation	\$31 Million
Pensions & Transfers	\$611 Million
Total Defense Spending	\$683 Million



Duval County

Home to:

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

NAVSTA Mayport Prepares for Hurricane Idalia
Photo by PO1 Brandon Vinson

Naval Air Station Jacksonville is the largest installation in Navy Region Southeast and includes three bombing ranges, seven active-duty Maritime Patrol squadrons, three reserve squadrons, five helicopter squadrons, and one unmanned aircraft system squadron, totaling more than 100 aircraft. Naval Station Mayport is home to a major seaport, an air facility, the Navy's 4th Fleet, and more than 70 tenant commands including 21 naval ships and four helicopter squadrons.

Marine Corps Support Facility Blount Island is the hub of the Marine Corps' prepositioning programs and serves as the home of Blount Island Command. The 125th Fighter Wing is based at Jacksonville International Airport and stands ready to provide air defense for the southeastern United States.

Total County Impact

County Economic Impact **\$9.1 Billion**

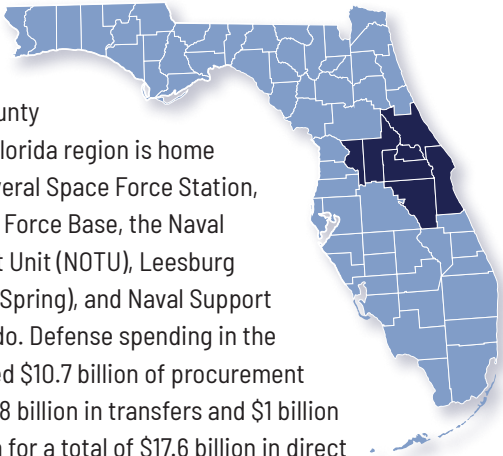
Percent of Economy	10.4%
Employment	68,060 Jobs
Income	\$6.4 Billion
State and Local Taxes	\$293 Million

Direct Defense Spending

Procurement	\$1.8 Billion
Compensation	\$2.9 Billion
Pensions & Transfers	\$1.8 Billion
Total Defense Spending	\$6.5 Billion



EAST CENTRAL FLORIDA REGION



The seven-county 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 Naval Support Activity Orlando. Defense spending in the region included \$10.7 billion of procurement along with \$5.8 billion in transfers and \$1 billion compensation for a total of \$17.6 billion in direct spending. This defense spending was responsible for generating 310,588 jobs in the region as well as \$28.1 billion of GRP – 11.1% of the total regional GRP. East Central Florida’s procurement flows are driven largely by the aerospace industry cluster in Brevard and Orange Counties.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact	\$28.2 Billion
Percent of Economy	11.1%
Employment	310,588 Jobs
Income	\$19.4 Billion
State and Local Taxes	\$1.2 Billion

Direct Defense Spending

Procurement	\$10.7 Billion
Compensation	\$1.0 Billion
Pensions & Transfers	\$5.8 Billion
Total Defense Spending	\$17.6 Billion

Impacts by Component

Federal Military	
Economic Impact	\$27.2 Billion
Employment	301,622 Jobs
National Guard	
Economic Impact	\$657 Million
Employment	6,297 Jobs
Coast Guard	
Economic Impact	\$284 Million
Employment	2,670 Jobs

Left page photo: Space Launch Delta 45 Supports Successful GOES-T Launch, Photo by Airman 1st Class Thomas Sjoberg, 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 home to Space Launch Delta 45, the US Space Force organization that manages all space launch operations on Cape Canaveral and the Eastern Range, including launch activities from the Department of Defense, NASA, and other private companies. Patrick Space Force Base is also home to the Air Force Technical Applications Center, which monitors international compliance with nuclear treaties, and the 920th Rescue Wing. Cape Canaveral Space Force Station is located 10 miles from Patrick SFB and is the primary launch site for the Space Force's Eastern Range. The Naval Ordnance Test Unit (NOTU) serves the country by supporting and testing sea-based weapons systems. The command directly supports mission capability and readiness of the US Navy's Trident Submarines as well as the Fleet Ballistic Missile program of the United Kingdom.

Total County Impact

County Economic Impact **\$7.8 Billion**

Percent of Economy	22.8%
Employment	63,316 Jobs
Income	\$5.6 Billion
State and Local Taxes	\$251 Million

Direct Defense Spending

Procurement	\$4.7 Billion
Compensation	\$452 Million
Pensions & Transfers	\$1.3 Billion
Total Defense Spending	\$6.4 Billion



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 maintains an open water facility at Bugg Spring. The low ambient noise, lack of recreational boating, dense vegetation, and low reverberation make this a prime facility for calibration of submarine and surface ship tactical towed arrays. It is the only facility of its kind with year-round warm weather.

Total County Impact

County Economic Impact **\$627 Million**

Percent of Economy	4.5%
Employment	7,481 Jobs
Income	\$363 Million
State and Local Taxes	\$54 Million

Direct Defense Spending

Procurement	\$4 Million
Compensation	\$53 Million
Pensions & Transfers	\$690 Million
Total Defense Spending	\$747 Million



Orange County

Home to:

- Naval Support Activity Orlando

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. NSA Orlando supports all DoD activities in Central Florida, most of which support military training and simulation missions. It has added the Army's Program Executive Office for Simulation, Training, and Instrumentation and other joint and interagency organizations as major tenant units.

Total County Impact

County Economic Impact **\$11.6 Billion**

Percent of Economy 9.1%

Employment 118,194 Jobs

Income \$8.2 Billion

State and Local Taxes \$347 Million

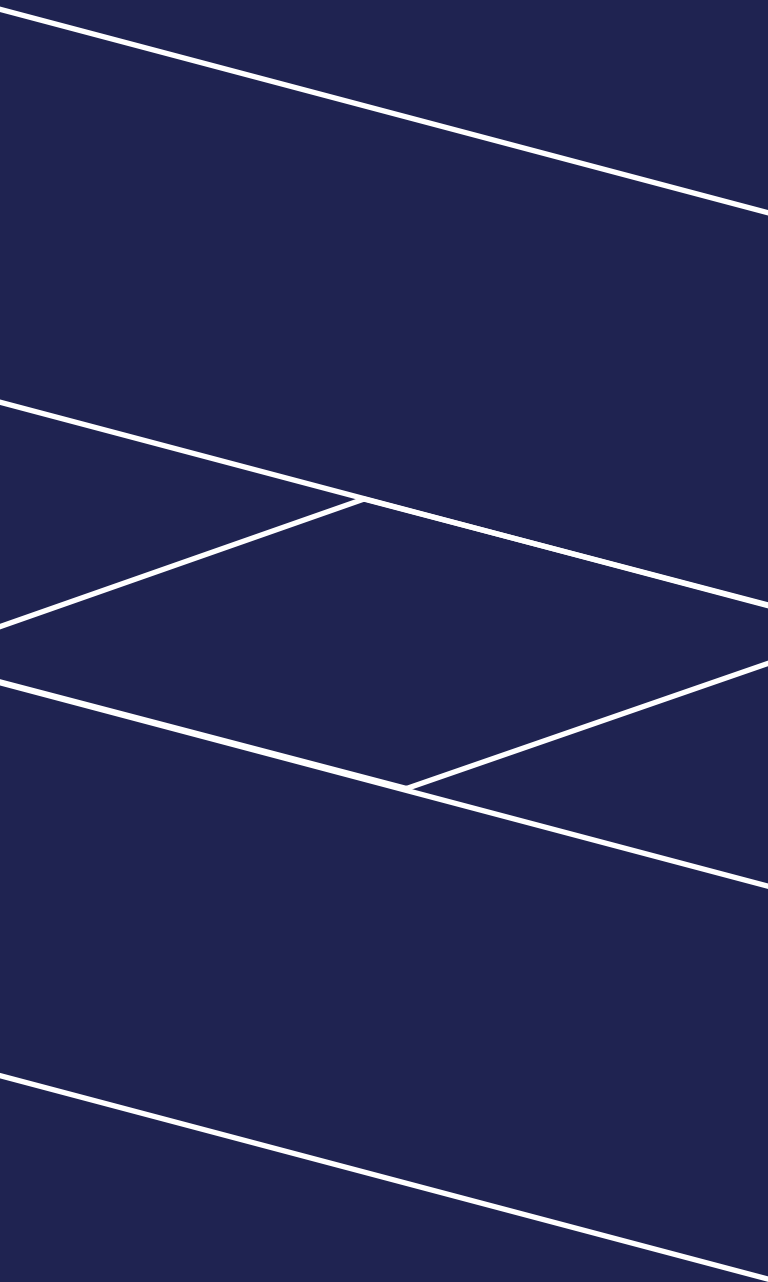
Direct Defense Spending

Procurement \$5.9 Billion

Compensation \$274 Million

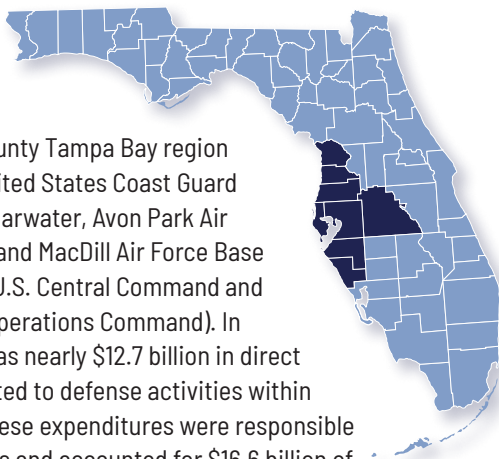
Pensions & Transfers \$1.8 Billion

Total Defense Spending **\$8.0 Billion**





TAMPA BAY FLORIDA REGION



The seven-county Tampa Bay region is home to United States Coast Guard Air Station Clearwater, Avon Park Air Force Range, and MacDill Air Force Base (which hosts U.S. Central Command and U.S. Special Operations Command). In 2022, there was nearly \$12.7 billion in direct spending related to defense activities within the region. These expenditures were responsible for 152,321 jobs and accounted for \$16.6 billion of GRP, or 5.3% of the region's total GRP. Most defense spending in the Tampa Bay region (more than 60%) came in the form of transfer payments to veterans and retirees. The bulk of the economic impacts in the region resulted from federal dollars flowing through the military – approximately \$15.3 billion GRP impact and 142,349 jobs. The National Guard and Coast Guard accounted for 5,579 jobs and 4,392 jobs, respectively.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact	\$16.6 Billion
Percent of Economy	5.3%
Employment	152,321
Income	\$10.8 Billion
State and Local Taxes	\$928 Million

Direct Defense Spending

Procurement	\$2.8 Billion
Compensation	\$2.1 Billion
Pensions & Transfers	\$7.7 Billion
Total Defense Spending	\$12.7 Billion

Impacts by Component

Federal Military	
Economic Impact	\$15.3 Billion
Employment	142,349 Jobs
National Guard	
Economic Impact	\$737 Million
Employment	5,579 Jobs
Coast Guard	
Economic Impact	\$565 Million
Employment	4,392 Jobs

Left page photo: Tampa Bay AirFest, Photo by Airman 1st Class Lauren Cobin, 6th Air Refueling Wing Public Affairs



Hillsborough County

Home to:

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

MacDill KC-135 Stratotanker Refueling F-16 Fighting Falcon
 Photo by Senior Airman Shannon Bowman, 6th Air Refueling Wing Public Affairs

MacDill Air Force Base is home to the 6th Air Refueling Wing, a 3,000-person force capable of rapidly projecting air refueling power anywhere in the world. MacDill is also host to U.S. Central Command, U.S. Special Operations Command, and 51 other tenant units from all service branches.

U.S. Central Command is one of eleven unified combatant commands of the DoD. It is responsible for coordinating all military activity between US and allied nations in 21 countries spanning the Middle East, Central Asia, and parts of South Asia.

U.S. Special Operations Command is the unified combatant command that develops and employs special operations forces to protect and advance U.S. policies and objectives.

Total County Impact

County Economic Impact **\$8.5 Billion**

Percent of Economy	6.9%
Employment	65,291 Jobs
Income	\$5.8 Billion
State and Local Taxes	\$333 Million

Direct Defense Spending

Procurement	\$2.0 Billion
Compensation	\$1.4 Billion
Pensions & Transfers	\$2.8 Billion
Total Defense Spending	\$6.3 Billion



Pinellas County

Home to:

- Coast Guard Air Station Clearwater

USCG Jayhawk Crew Conducts Training Flight,
Photo by Lisa Ferdinando, U.S. Coast Guard District 7

Coast Guard Air Station Clearwater, based out of Clearwater International Airport, is the largest and busiest air station in the Coast Guard and is responsible for operations in the Gulf of Mexico, the Caribbean basin, and the Bahamas. The station maintains deployed H-60 helicopters for joint anti-drug and anti-migrant smuggling operations with the DEA and Bahamian authorities in the Bahamas. 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 around the Florida coast.

Total County Impact

County Economic Impact **\$3.4 Billion**

Percent of Economy 5.3%

Employment 32,247 Jobs

Income \$2.2 Billion

State and Local Taxes \$183 Million

Direct Defense Spending

Procurement \$721 Million

Compensation \$320 Million

Pensions & Transfers \$1.5 Billion

Total Defense Spending **\$2.6 Billion**



Polk County

Home to:

- Avon Park Air Force Range

156 CRG Operations at Avon Park during SSTK22,
Photo by Master Sgt. Rafael Rosa, 102nd Public Affairs Detachment

Avon Park Air Force Range (APAFR) consists of 106,000 acres, 20,000 square miles of special use airspace and a fully operational 8,000-foot runway, making it the largest training range east of the Mississippi River. It is located in Polk and Highlands Counties and managed by the Air Force's 598th Range Squadron, and it serves as an important training range for Homestead Air Reserve Base, Patrick SFB, MacDill AFB, and Moody AFB.

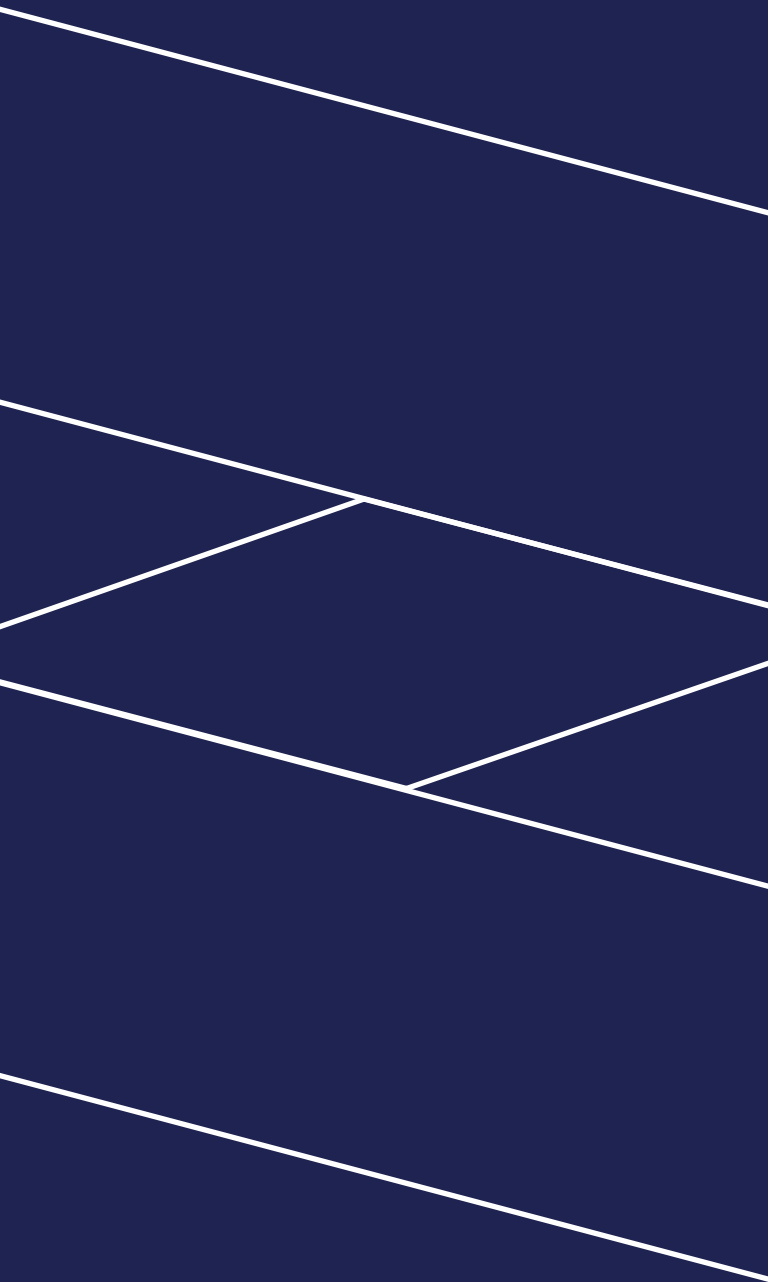
Total County Impact

County Economic Impact **\$891 Million**

Percent of Economy	2.4%
Employment	10,137 Jobs
Income	\$526 Million
State and Local Taxes	\$74 Million

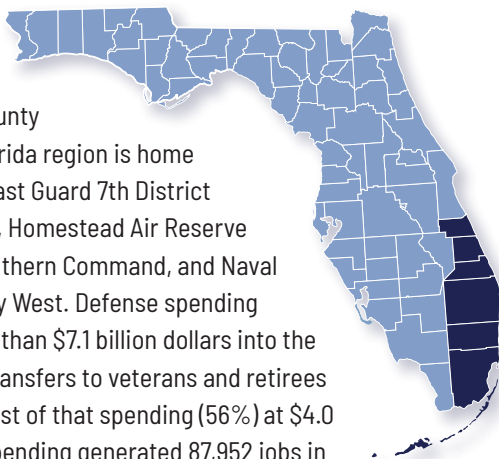
Direct Defense Spending

Procurement	\$18 Million
Compensation	\$109 Million
Pensions & Transfers	\$948 Million
Total Defense Spending	\$1.1 Billion





SOUTHEAST FLORIDA REGION



The seven-county Southeast Florida region is home to the U.S. Coast Guard 7th District Headquarters, Homestead Air Reserve Base, U.S. Southern Command, and Naval Air Station Key West. Defense spending brought more than \$7.1 billion dollars into the region, with transfers to veterans and retirees making up most of that spending (56%) at \$4.0 billion. This spending generated 87,952 jobs in the region and accounted for almost \$8.9 billion in GRP – 1.7% of the region’s 2022 total GRP. Most of the economic impacts observed in Southeast Florida were a consequence of spending by the military, which was responsible for 77,989 jobs and \$7.6 billion of GRP impact. The National Guard spending generated \$468 million and 3,889 jobs while the Coast Guard accounted for \$808 million and 6,075 jobs.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact	\$8.9 Billion
Percent of Economy	1.7%
Employment	87,952 Jobs
Income	\$5.9 Billion
State and Local Taxes	\$421 Million

Direct Defense Spending

Procurement	\$1.3 Billion
Compensation	\$1.9 Billion
Pensions & Transfers	\$4.0 Billion
Total Defense Spending	\$7.1 Billion

Impacts by Component

Federal Military

Economic Impact	\$7.6 Billion
Employment	77,989 Jobs

National Guard

Economic Impact	\$468 Million
Employment	3,889 Jobs

Coast Guard

Economic Impact	\$808 Million
Employment	6,075 Jobs

Left page photo: U.S. Soldiers Arrive at Homestead Air Reserve Base, Photo by Tech. Sgt. Paul Cook



Miami-Dade County

Home to:

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

Sunset F-16,
Photo by TSgt Lionel Castellano

U.S. Southern Command is the geographic combatant command responsible for providing contingency planning, operations, and security cooperation throughout Central and South America and the Caribbean.

Homestead Air Reserve Base is home to the 482nd Fighter Wing and the headquarters of Special Operations Command South. In addition to providing trained and proficient F-16 pilots, Homestead ARB serves as a strategic staging location for US Northern Command and US Southern Command operations in the Caribbean Basin.

The Seventh Coast Guard District HQ works with other governmental entities and partner nations to safeguard US maritime interests in the southeastern US and Caribbean.

Total County Impact

County Economic Impact **\$3.1 Billion**

Percent of Economy 1.5%

Employment 27,673 Jobs

Income \$2.1 Billion

State and Local Taxes \$123 Million

Direct Defense Spending

Procurement \$480 Million

Compensation \$887 Million

Pensions & Transfers \$1.1 Billion

Total Defense Spending **\$2.4 Billion**



Monroe County

Home to:

- Naval Air Station Key West

Super Hornets in Key West,
 Photo by Petty Officer 2nd Class Nicholas Huynh, Naval Air Station Key West

Naval Air Station Key West is host to several tenant commands, including Fighter Squadron Composite 111, Strike Fighter Squadron 106 Detachment Key West, the US Army Special Forces Underwater Operations School, and Joint Interagency Task Force South. NAS Key West offers an air-to-air combat training facility for fighter aircraft from all services, and its national security mission supports operational and readiness requirements for DoD, USCG, Army and Air National Guard units, and other federal agencies.

Total County Impact

County Economic Impact **\$362 Million**

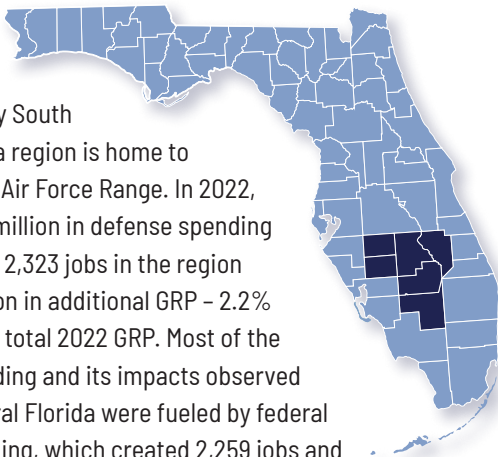
Percent of Economy	5.3%
Employment	2,637 Jobs
Income	\$261 Million
State and Local Taxes	\$10 Million

Direct Defense Spending

Procurement	\$67 Million
Compensation	\$260 Million
Pensions & Transfers	\$84 Million
Total Defense Spending	\$411 Million



SOUTH CENTRAL FLORIDA REGION



The six-county South Central Florida region is home to the Avon Park Air Force Range. In 2022, roughly \$336 million in defense spending accounted for 2,323 jobs in the region and \$196 million in additional GRP – 2.2% of the region’s total 2022 GRP. Most of the defense spending and its impacts observed in South Central Florida were fueled by federal military spending, which created 2,259 jobs and \$188 million in economic impact. The National Guard and Coast Guard combined were responsible for 64 jobs and \$7.4 million of GRP.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact	\$196 Million
Percent of Economy	2.2%
Employment	2,323 Jobs
Income	\$118 Million
State and Local Taxes	\$15 Million

Direct Defense Spending

Procurement	\$30 Million
Compensation	\$41 Million
Pensions & Transfers	\$265 Million
Total Defense Spending	\$336 Million

Impacts by Component

Federal Military	
Economic Impact	\$188 Million
Employment	2,259 Jobs
National Guard	
Economic Impact	\$6 Million
Employment	48 Jobs
Coast Guard	
Economic Impact	\$1 Million
Employment	16 Jobs

Left page photo: HMLA-167 DFT, Avon Park, Florida, Photo by Cpl. Morgan Woods, 2nd Marine Aircraft Wing



Highlands County

Home to:

- Avon Park Air Force Range

VMU-2 Refines Operational Readiness at Avon Park,
Photo by Cpl. J. R. Heins, II Marine Expeditionary Force

Avon Park Air Force Range (APAFR) consists of 106,000 acres, 20,000 square miles of special use airspace and a fully operational 8,000-foot runway, making it the largest training range east of the Mississippi River. It is located in Polk and Highlands Counties and managed by the Air Force's 598th Range Squadron, and it serves as an important training range for Homestead Air Reserve Base, Patrick SFB, MacDill AFB, and Moody AFB.

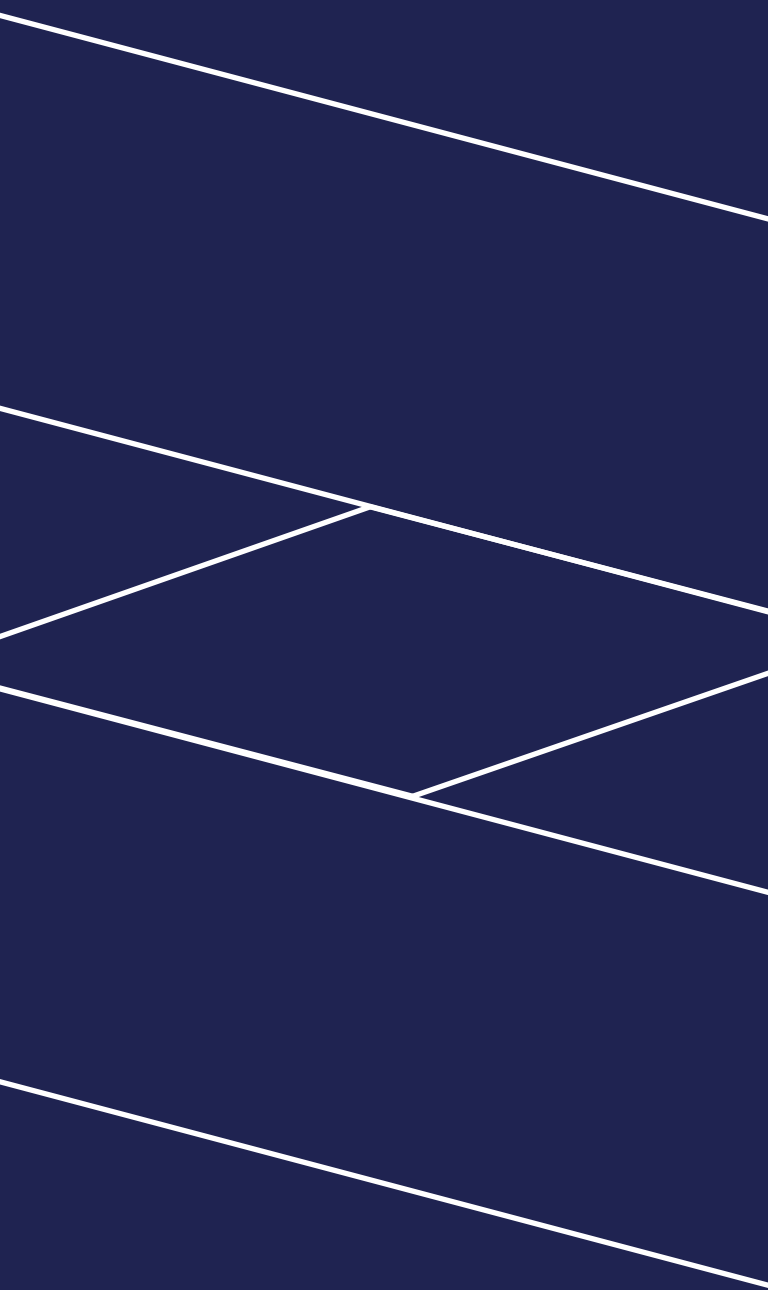
Total County Impact

County Economic Impact **\$77 Million**

Percent of Economy	2.4%
Employment	889 Jobs
Income	\$44 Million
State and Local Taxes	\$7 Million

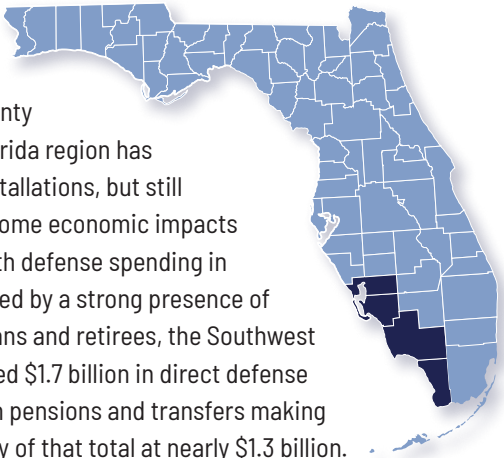
Direct Defense Spending

Procurement	\$4 Million
Compensation	\$15 Million
Pensions & Transfers	\$137 Million
Total Defense Spending	\$155 Million





SOUTHWEST FLORIDA REGION



The three-county Southwest Florida region has no military installations, but still experienced some economic impacts associated with defense spending in 2022. Supported by a strong presence of military veterans and retirees, the Southwest Region received \$1.7 billion in direct defense spending, with pensions and transfers making up the majority of that total at nearly \$1.3 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. 2022 defense spending in the region generated 15,681 jobs and accounted for more than \$1.3 billion in GRP – 1.8% of the region's total GRP.

Defense Economic Impact Estimates

Total Regional Impact

Regional Economic Impact	\$1.3 Billion
Percent of Economy	1.8%
Employment	15,681
Income	\$833 Million
State and Local Taxes	\$91 Million

Direct Defense Spending

Procurement	\$222 Million
Compensation	\$210 Million
Pensions & Transfers	\$1.3 Billion
Total Defense Spending	\$1.7 Billion

Impacts by Component

Federal Military	
Economic Impact	\$1.3 Billion
Employment	15,013 Jobs
National Guard	
Economic Impact	\$45 Million
Employment	475 Jobs
Coast Guard	
Economic Impact	\$17 Million
Employment	193 Jobs

Left page photo: USS Florida,
Photo by Christopher Johnson, U.S. Navy

MILITARY & DEFENSE SUPPORT

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

The Florida Model

GOVERNOR'S OFFICE • LEGISLATURE

- FloridaCommerce Office of Military and Defense
 - Florida Defense Support Commission
 - 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
- 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 (FY21-22)

- Defense Infrastructure Grants: \$1.6M
- Defense Reinvestment Grants: \$800K
- Other Grants: \$1.2M

* Florida's 2021 Military-Friendly Guide

PARTNERSHIPS

FloridaCommerce established the Office of Military and Defense on July 1, 2023. Housed within



the Division of Economic Development, the office enables FloridaCommerce to engage with Florida's military and defense communities to streamline business and economic development efforts, provide further support for Florida's military families, and protect military installations. For more information, visit <https://www.floridajobs.org/office-directory/division-of-economic-development/office-of-military-and-defense>.

FLORIDA DEFENSE SUPPORT COMMISSION MISSION

- To make recommendations to preserve and protect military installations.
- To assist Veterans Florida with economic and workforce development efforts in military communities.
- To conduct planning and research and development to support military missions, businesses, and military families.
- 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 Commission, visit <https://www.selectflorida.org/military-defense/>



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