

FLORIDA

Statewide Aviation Economic Impact Study Update



EXECUTIVE SUMMARY

AUGUST 2014

FLORIDA

Introduction

Hearing a plane overhead is an everyday occurrence. But how many people stop to think that what they are really hearing is the sound of Florida's economy in motion? This report summarizes the significant economic benefit that Florida receives each year from aviation. Economic benefits presented in this report were measured in a recent Florida Department of Transportation (FDOT) Aviation Office economic impact study, which is an update to the same study completed in 2010. For readers interested in viewing the full technical report for the economic impact study update, it is available at: <http://www.dot.state.fl.us/aviation/flpub.shtm>.

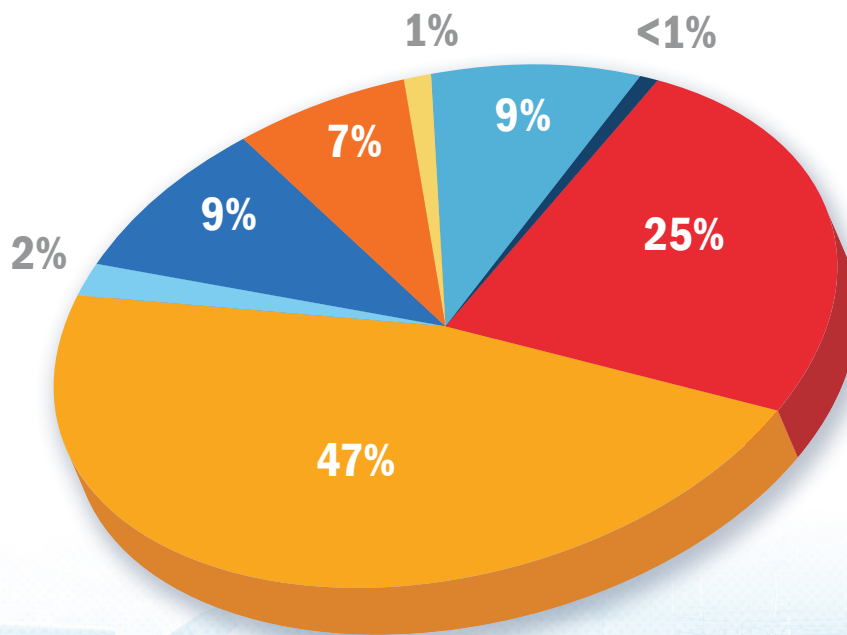


Overview of Aviation's Economic Impact in Florida

The FDOT study update focused on measuring economic impacts associated with 19 commercial and 103 general aviation airports. In addition, the impacts of 11 military airfields were estimated in the study as were the economic impacts of various off-airport aviation-related activities. The study concluded that for all benefit categories measured, aviation in Florida is responsible for an estimated \$144.0 billion in annual economic activity or output. More information on economic impacts associated with each benefit category is presented later in this summary.



Distribution of \$144.0 Billion in Annual Economic Impact by Category



<div></div>	AIRPORTS
<div></div>	\$36.3 billion
<div></div>	VISITORS
<div></div>	\$67.2 billion
<div></div>	CONSTRUCTION
<div></div>	\$2.2 billion
<div></div>	MILITARY
<div></div>	\$12.8 billion
<div></div>	AIR CARGO
<div></div>	\$10.3 billion
<div></div>	AVIATION EDUCATION
<div></div>	\$983 million
<div></div>	AVIATION BUSINESSES
<div></div>	\$13.6 billion
<div></div>	FEDERAL AVIATION ADMINISTRATION (FAA)
<div></div>	\$626 million

Types of Aviation Economic Impact Measured



AIRPORTS



VISITORS



CONSTRUCTION



**MILITARY
AVIATION**



AIR CARGO



**AVIATION
EDUCATION**



**AVIATION
BUSINESSES**



**FEDERAL
AVIATION
ADMINISTRATION**

Economic benefits measured in this FDOT study update focused on the categories in the left column. In most instances, economic impacts measured in this study take place on a commercial or general aviation airport or a military airfield; or in the case of visitor-related impacts, the benefits are directly facilitated by travel supported by an airport. In some instances, aviation-related economic benefits measured in the study take place off-airport. This FDOT study distinguishes between on-airport and off-airport related economic impacts.

For all benefit categories included in the study, economic impacts are expressed using three measures:



JOBS



PAYROLL



OUTPUT

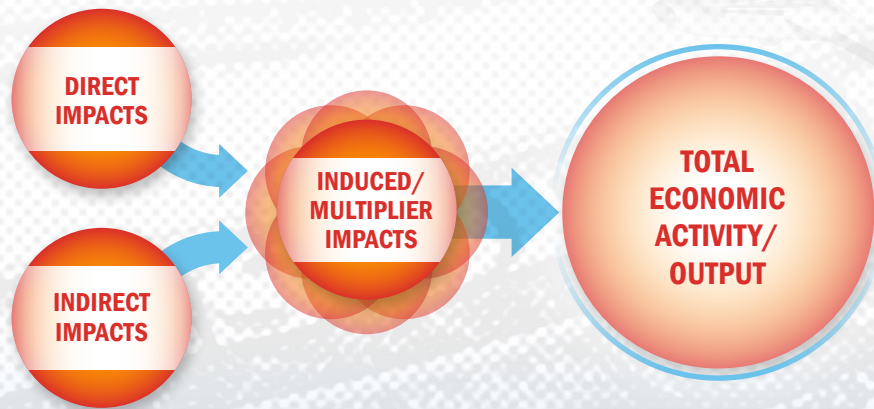


Approach to Measuring Aviation Economic Impact in Florida

The approach for measuring aviation-related economic impacts in Florida followed a methodology prescribed by the FAA. All aviation-related economic impacts that take place on an airport were classified in this FDOT study as direct impacts. Within the direct impact category are activities associated with on-airport tenants (businesses and government agencies), airport construction, and airport management. Off-airport impacts, such as those that are associated with visitor spending, were classified as indirect impacts.

Once all direct and indirect aviation-related economic impacts were calculated, an input-output model was

used to show how initial direct and indirect economic impacts continue to re-circulate through Florida's economy. For this study, the Impact Analysis for Planning (IMPLAN) model was used to measure additional impacts. These additional impacts are referred to as multiplier or induced impacts. For this FDOT study, multipliers specific to Florida were used to estimate all induced impacts. All economic impacts presented in this summary report reflect total impacts which include direct and indirect impacts along with induced or multiplier impacts.



AIRPORTS

Airport Economic Impacts



Commercial and general aviation airports in Florida are the backbone of the economic impacts measured in this FDOT study update. Economic impacts that take place on one of the study airports fall into the direct impact category. On-airport related economic impacts presented in this section are related to the activities of some on-airport tenants (businesses and government agencies). Examples of tenants included in this study include: airport management, fixed base operators (FBOs), airlines, and various airport concessionaires. Other economic impacts that take place on airports in the construction, air cargo, aviation education, aviation business, and FAA categories are discussed in subsequent sections. Annual economic impacts for selected on-airport tenants at all study airports follow:

JOBS	
ANNUAL PAYROLL	170,107
ANNUAL ECONOMIC ACTIVITY (OUTPUT)	\$8.1 BILLION
	\$36.3 BILLION

VISITORS

Visitor Economic Impacts



Each year, millions of visitors arrive in Florida by air. While most visitors arrive on commercial airlines, many also arrive on general aviation aircraft at both commercial and general aviation airports. Approximately 43.1 million visitors come to Florida each year on commercial airlines, while 2.9 million arrive on general aviation aircraft. Visit Florida estimates that approximately half of all visitors who come to Florida each year arrive by air. While in Florida, these visitors have expenditures for lodging, food, retail, transportation, recreation, and entertainment. In this study, spending by visitors arriving by air is equivalent to total annual visitor output, which is classified as an indirect impact. Visitor spending helps to support many jobs in Florida and the annual payroll associated with these jobs. Total annual economic impacts associated with visitors arriving by air follow:

JOBS	
ANNUAL PAYROLL	765,225
ANNUAL ECONOMIC ACTIVITY (OUTPUT)	\$20.7 BILLION
	\$67.2 BILLION

CONSTRUCTION

Construction Economic Impacts

Annually, a variety of both large and small improvement projects are undertaken at the commercial and general aviation airports in Florida. Investment/spending is needed to support the development of new airport facilities, as well as to renovate and/or rehabilitate existing facilities. Over the duration of each project, construction-related spending helps to support additional jobs and the annual payroll associated with these jobs. For this study, average investment for construction at all airports over a multi-year period was considered to estimate average annual economic impacts from on-airport construction projects; these construction impacts follow:

JOBS	
ANNUAL PAYROLL	17,388
ANNUAL ECONOMIC ACTIVITY (OUTPUT)	\$617 MILLION
	\$2.2 BILLION



MILITARY AVIATION

Military Aviation Economic Impacts

As a result of its strategic location, excellent weather, and topography, the military has many active airfields in Florida. In fact, many of the state's commercial and general aviation airports were once airfields that the military used to train pilots during WW I and WW II. Similar to the civilian airports included in this study, there are 11 military airfields in Florida that provide significant aviation-related economic impact. Economic impacts for military airfields in Florida follow:

JOBS	
ANNUAL PAYROLL	137,482
ANNUAL ECONOMIC ACTIVITY (OUTPUT)	\$6.4 BILLION
	\$12.8 BILLION




AIR CARGO

Air Cargo Economic Impacts

Many businesses in Florida rely on air cargo. As the gateway to Latin America, Florida airports are responsible for significant volumes of air cargo. A total of 30 commercial and general aviation airports in Florida accommodate scheduled air cargo activity; other airports support the movement of air cargo on an on-demand basis. Air cargo operators are important on-airport tenants for several airports in Florida. The economic impacts associated with on-airport air cargo tenants are presented in this section. In addition, there are many other off-airport businesses in Florida dedicated to the sorting, storing, and ground

movement of air cargo. Off-airport air cargo-related businesses play an important role in the economic impact of aviation in Florida. While these additional air cargo impacts take place off-airport, their benefits were assigned to one of the system airports accommodating scheduled air cargo activity. First Class mail originating in Florida or destined to the state moves by air. As a result, a portion of the economic activity of the United State Postal Service (USPS) is supported by aviation. The economic impact of this activity was estimated in this study. The economic impact of all facets of air cargo activity in Florida follows:



ON-AIRPORT AIR CARGO	Jobs	Annual Payroll	Annual Economic Activity
OFF-AIRPORT AIR CARGO*	22,527	\$811 MILLION	\$1.4 BILLION
OFF-AIRPORT USPS	30,336	\$1.3 BILLION	\$3.8 BILLION
TOTAL	76,724	\$3.0 BILLION	\$5.1 BILLION
	129,587	\$5.0 BILLION	\$10.3 BILLION

* Even though this impact is reported as being off-airport, for this study, these impacts were assigned to an individual system airport.

AVIATION EDUCATION

Aviation Education Economic Impacts

Florida is a world leader in providing aviation-related education; this includes the training of pilots, mechanics, flight attendants, air traffic controllers, and those in aviation management and other aspects of the aviation industry. Some aviation-related schools are located on airports in Florida, while others are located off-airport. Economic impacts related to aviation-related schools are associated with: spending associated with the schools to support their operations, maintenance, and development; employment at all levels and the payroll associated with this employment; and spending by domestic and international students who are non-residents. On- and off-airport economic impacts related to aviation-related educational schools follows:

ON-AIRPORT	Jobs	Annual Payroll	Annual Economic Activity
OFF-AIRPORT	10,700	\$428 MILLION	\$851 MILLION
TOTAL	1,191	\$60 MILLION	\$132 MILLION
	11,891	\$488 MILLION	\$983 MILLION



AVIATION-RELATED BUSINESSES

Aviation-Related Businesses Economic Impacts

Throughout Florida, there are many businesses that are engaged in the production or the manufacture of aircraft or various aircraft components. Other businesses repair or perform different types of maintenance on commercial or general aviation aircraft. Some of these aviation-related businesses are located on airports, while others are located off-airport. These businesses help to supply aircraft and aircraft components to the nation and the world. The economic impacts of aviation-related businesses, both on- and off-airport, follow:

ON-AIRPORT	Jobs	Annual Payroll	Annual Economic Activity
OFF-AIRPORT	32,098	\$1.4 BILLION	\$4.4 BILLION
TOTAL	44,119	\$1.4 BILLION	\$9.2 BILLION
	76,217	\$2.8 BILLION	\$13.6 BILLION





Federal Aviation Administration Economic Impacts



The FAA is the federal agency charged with developing, monitoring, and prescribing safety guidelines for our nation's public airports and airways. Because of the number of active commercial and general aviation airports, along with Florida's complex airspace system, the FAA is very active in Florida. In fact, the FAA has more activity in Florida that is off-airport than is on a system airport. Economic impacts for the FAA in Florida follow:

ON-AIRPORT	Jobs	Annual Payroll	Annual Economic Activity
OFF-AIRPORT	1,844	\$141 MILLION	\$240 MILLION
TOTAL	2,690	\$218 MILLION	\$385 MILLION
	4,534	\$359 MILLION	\$625 MILLION

TOTAL

Total Annual Economic Impacts of Commercial and General Aviation Airports in Florida

Preceding sections of this summary have documented the significant economic impact that aviation has in Florida. When all on-airport activities, tenants, and visitors are considered, commercial and general aviation airports in Florida are responsible for \$116.3 billion in annual economic activity or output. This economic activity helps to support over one million jobs that have an annual payroll estimated at \$33.4 billion. The total annual economic impact for all commercial and general aviation airports in Florida follows:

GENERAL AVIATION AIRPORTS	Jobs	Annual Payroll	Annual Economic Activity
COMMERCIAL AIRPORTS	64,512	\$2.5 BILLION	\$7.7 BILLION
TOTAL	985,713	\$30.9 BILLION	\$108.6 BILLION
	1,050,225	\$33.4 BILLION	\$116.3 BILLION



Annual Economic Impact of COMMERCIAL AIRPORTS

Associated City	Airport Name	Total Employment	Total Payroll	Total Output
Daytona Beach	Daytona Beach International Airport	11,316	\$313,999,000	\$1,105,118,000
Fort Lauderdale	Ft. Lauderdale/Hollywood International Airport	139,920	\$3,856,536,000	\$13,205,571,000
Fort Myers	Southwest Florida International Airport	45,562	\$1,227,071,000	\$4,337,489,000
Gainesville	Gainesville Regional Airport	3,153	\$96,563,000	\$303,689,000
Jacksonville	Jacksonville International Airport	21,529	\$670,942,000	\$2,194,579,000
Key West	Key West International Airport	9,089	\$237,986,000	\$788,481,000
Melbourne	Melbourne International Airport	17,989	\$664,903,000	\$1,594,693,000
Miami	Miami International Airport	289,085	\$11,412,009,000	\$35,149,403,000
Orlando	Orlando International Airport	267,819	\$7,395,281,000	\$31,460,449,000
Orlando	Orlando Sanford International Airport	23,494	\$726,858,000	\$3,161,745,000
Panama City	Northwest Florida-Beaches International Airport	6,735	\$183,971,000	\$629,337,000
Pensacola	Pensacola International Airport	5,883	\$164,209,000	\$653,787,000
Punta Gorda	Punta Gorda Airport	1,971	\$59,038,000	\$219,975,000
Sarasota	Sarasota/Bradenton International Airport	9,399	\$256,619,000	\$901,395,000
St. Petersburg/Clearwater	St. Pete-Clearwater International Airport	8,214	\$266,708,000	\$752,447,000
Tallahassee	Tallahassee Regional Airport	3,698	\$115,705,000	\$399,045,000
Tampa	Tampa International Airport	81,471	\$2,217,685,000	\$7,816,468,000
Valparaiso	Northwest Florida Regional Airport/Eglin AFB	5,338	\$140,897,000	\$499,931,000
West Palm Beach	Palm Beach International Airport	34,048	\$951,297,000	\$3,425,068,000
COMMERCIAL SERVICE AIRPORTS TOTAL		985,713	\$30,958,277,000	\$108,598,670,000



Annual Economic Impact of GENERAL AVIATION AIRPORTS

Associated City	Airport Name	Total Employment	Total Payroll	Total Output
Apalachicola	Apalachicola Regional - Cleve Randolph Field	57	\$1,437,000	\$5,484,000
Apalachicola	St. George Island Airport	5	\$123,000	\$402,000
Apopka	Orlando Apopka Airport	172	\$5,102,000	\$18,166,000
Arcadia	Arcadia Municipal Airport	3	\$68,000	\$272,000
Archer	Flying Ten Airport	4	\$96,000	\$329,000
Avon Park	Avon Park Executive Airport	190	\$6,186,000	\$19,026,000
Bartow	Bartow Municipal Airport	308	\$11,490,000	\$39,328,000
Belle Glade	Belle Glade State Municipal Airport	64	\$1,874,000	\$10,428,000
Blountstown	Calhoun County Airport	46	\$1,395,000	\$4,686,000
Boca Raton	Boca Raton Airport	1,426	\$49,757,000	\$173,825,000
Bonifay	Tri-County Airport	33	\$883,000	\$3,056,000
Brooksville	Brooksville - Tampa Bay Regional Airport	738	\$29,374,000	\$102,642,000
Brooksville	Pilot Country Airport	4	\$100,000	\$335,000
Carrabelle	Carrabelle - Thompson Airport	7	\$257,000	\$666,000
Cedar Key	George T. Lewis Airport	8	\$221,000	\$881,000
Clearwater	Clearwater Air Park	88	\$2,356,000	\$11,804,000
Clewiston	Airglades Airport	84	\$2,514,000	\$12,243,000
Crestview	Bob Sikes Airport	2,791	\$108,208,000	\$293,693,000
Cross City	Cross City Airport	32	\$690,000	\$2,798,000
Crystal River	Crystal River Airport	60	\$1,705,000	\$5,376,000
DeFuniak Springs	DeFuniak Springs Airport	46	\$1,631,000	\$4,950,000
DeLand	Bob Lee Flight Strip	Less than 1	\$11,000	\$49,000
DeLand	DeLand Municipal - Sidney H. Taylor Field	2,613	\$68,482,000	\$243,097,000
Destin	Destin - Ft. Walton Beach Airport	525	\$12,922,000	\$47,786,000
Dunnellon	Marion County Airport	97	\$2,933,000	\$10,165,000
Englewood	Buchan Airport	4	\$448,000	\$575,000
Everglades	Everglades Airpark	11	\$354,000	\$1,148,000
Fernandina Beach	Fernandina Beach Municipal Airport	337	\$8,806,000	\$30,674,000
Fort Lauderdale	Downtown Fort Lauderdale Heliport	2	\$50,000	\$250,000
Fort Lauderdale	Ft. Lauderdale Executive Airport	5,178	\$203,238,000	\$839,137,000
Fort Myers	Page Field	1,101	\$34,521,000	\$109,284,000
Fort Pierce	St. Lucie County International Airport	1,282	\$50,216,000	\$155,820,000
High Springs	Oak Tree Landing Airport	Less than 1	\$2,000	\$5,000
Hilliard	Hilliard Airpark	3	\$94,000	\$444,000
Hollywood	North Perry Airport	908	\$33,526,000	\$83,082,000
Homestead	Homestead General Aviation Airport	55	\$2,700,000	\$3,941,000
Immokalee	Immokalee Regional Airport	130	\$4,922,000	\$27,696,000
Indiantown	Indiantown Airport	60	\$2,034,000	\$7,040,000
Inverness	Inverness Airport	53	\$1,553,000	\$6,553,000
Jacksonville	Cecil Airport	6,974	\$353,581,000	\$720,506,000
Jacksonville	Herlong Recreational Airport	235	\$6,697,000	\$22,219,000
Jacksonville	Jacksonville Executive At Craig Airport	1,123	\$42,225,000	\$131,920,000
Keystone Heights	Keystone Airpark	39	\$873,000	\$3,796,000
La Belle	La Belle Municipal Airport	20	\$711,000	\$2,936,000
Lake City	Lake City Gateway Airport	2,189	\$116,276,000	\$316,551,000
Lake Wales	Chalet Suzanne Air Strip	54	\$1,622,000	\$6,830,000
Lake Wales	Lake Wales Municipal Airport	9	\$245,000	\$1,058,000
Lakeland	Lakeland Linder Regional Airport	2,422	\$91,455,000	\$284,709,000
Leesburg	Leesburg International Airport	582	\$23,169,000	\$75,375,000
Live Oak	Suwannee County Airport	21	\$809,000	\$3,194,000
Marathon	The Florida Keys Marathon Airport	418	\$13,535,000	\$47,489,000
Marco Island	Marco Island Airport	297	\$8,153,000	\$27,622,000
Marianna	Marianna Municipal Airport	77	\$2,907,000	\$13,351,000
Merritt Island	Merritt Island Airport	393	\$11,997,000	\$41,877,000
Miami	Dade-Collier Training and Transition Airport	6	\$300,000	\$0

Annual Economic Impact of General Aviation Airports (Continued)

Associated City	Airport Name	Total Employment	Total Payroll	Total Output
Miami	Kendall-Tamiami Executive Airport	1,016	\$45,553,000	\$61,195,000
Miami	Miami Seaplane Base	11	\$266,000	\$491,000
Miami	Opa-Locka Executive Airport	5,732	\$313,594,000	\$597,396,000
Milton	Peter Prince Field	30	\$892,000	\$4,739,000
Naples	Naples Municipal Airport	2,191	\$75,614,000	\$283,505,000
Navarre	Ft. Walton Beach Airport	28	\$423,000	\$894,000
New Smyrna Beach	New Smyrna Beach Municipal Airport	887	\$26,942,000	\$100,426,000
Ocala	Ocala International-Jim Taylor Field	634	\$23,171,000	\$73,556,000
Okeechobee	Okeechobee County Airport	97	\$2,736,000	\$10,022,000
Orlando	Executive Airport	1,559	\$49,324,000	\$158,000,000
Orlando	Kissimmee Gateway Airport	1,121	\$32,359,000	\$116,752,000
Ormond Beach	Ormond Beach Municipal Airport	518	\$17,830,000	\$51,929,000
Pahokee	Palm Beach County Glades Airport	19	\$488,000	\$1,973,000
Palatka	Palatka Municipal-Lt. Kay Larkin Field	86	\$2,609,000	\$9,432,000
Palm Coast	Flagler County Airport	613	\$17,766,000	\$61,125,000
Panacea	Wakulla County Airport	1	\$16,000	\$62,000
Pensacola	Coastal Airport	5	\$162,000	\$610,000
Pensacola	Ferguson Airport	50	\$1,388,000	\$4,767,000
Perry	Perry-Foley Airport	21	\$566,000	\$2,250,000
Pierson	Pierson Municipal Airport	4	\$96,000	\$324,000
Plant City	Plant City Airport	85	\$2,457,000	\$10,610,000
Pompano Beach	Pompano Beach Airpark	893	\$29,400,000	\$101,022,000
Port St. Joe	Costin Airport	9	\$234,000	\$773,000
Punta Gorda	Shell Creek Airpark	26	\$725,000	\$2,641,000
Quincy	Quincy Municipal Airport	24	\$740,000	\$2,584,000
Sebastian	Sebastian Municipal Airport	364	\$12,234,000	\$45,165,000
Sebring	Sebring Regional Airport	335	\$10,915,000	\$41,492,000
St. Augustine	Northeast Florida Regional Airport	4,007	\$125,951,000	\$409,573,000
St. Petersburg	Albert Whitted Airport	465	\$14,410,000	\$52,009,000
Stuart	Witham Field	2,310	\$66,044,000	\$616,397,000
Tampa	Peter O. Knight Airport	297	\$8,062,000	\$31,559,000
Tampa	Tampa Executive Airport	470	\$14,187,000	\$44,236,000
Tampa	Tampa North Aero Park	31	\$591,000	\$1,691,000
Tavares	Tavares Seaplane Base	36	\$1,106,000	\$3,912,000
Titusville	Arthur Dunn Air Park	53	\$1,553,000	\$7,040,000
Titusville	Space Coast Regional Airport	1,639	\$67,554,000	\$179,932,000
Umatilla	Umatilla Municipal Airport	8	\$222,000	\$1,012,000
Valkaria	Valkaria Airport	196	\$8,268,000	\$20,624,000
Venice	Venice Municipal Airport	426	\$10,857,000	\$43,219,000
Vero Beach	New Hibiscus Airpark	12	\$424,000	\$2,210,000
Vero Beach	Vero Beach Municipal Airport	3,515	\$124,166,000	\$468,541,000
Wauchula	Wauchula Municipal Airport	25	\$679,000	\$2,081,000
West Palm Beach	North Palm Beach County General Aviation Airport	549	\$15,582,000	\$52,938,000
West Palm Beach	Palm Beach County Park Airport	242	\$8,617,000	\$26,996,000
Williston	Williston Municipal Airport	65	\$2,238,000	\$7,737,000
Winter Haven	Winter Haven's Gilbert Airport	182	\$5,437,000	\$20,808,000
Zellwood	Bob White Field	18	\$539,000	\$1,615,000
Zephyrhills	Zephyrhills Municipal Airport	223	\$7,209,000	\$24,729,000
GENERAL AVIATION AIRPORTS TOTAL		64,512	\$2,479,030,000	\$7,739,163,000

**Florida
Airports
Total**



**Total Employment
1,050,225**



**Total Payroll
\$33,437,307,000**



**Total Output
\$116,337,833,000**

Summary

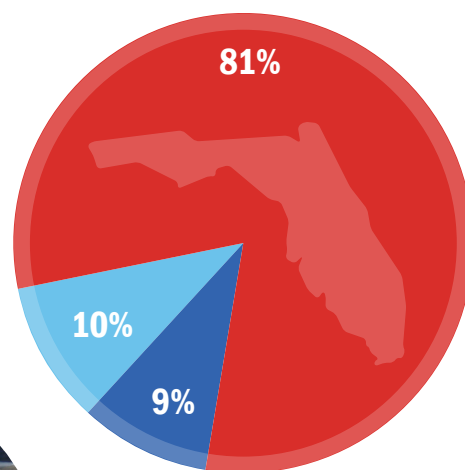
The FDOT economic impact study concluded that aviation activities in Florida support more than 1.3 million jobs and that these jobs have an annual payroll of \$44.5 billion. The annual economic impact of aviation-related activities in Florida is estimated at \$144.0 billion.

Of the \$144.0 billion that aviation contributes to Florida's economy annually, 81 percent of this impact is associated with the commercial and general aviation airports. The military airfields support nine percent of the total impact, while off-airport activities associated

with the United States Postal Service, the FAA, aviation schools, and aviation-related businesses account for the remaining 10 percent of the total impact.

Based on these findings, it is clear that aviation and the airports and military airfields in Florida that support aviation-related activities have a significant positive impact on Florida's economy. Now when you hear that same plane overhead, what you may also hear is the sound of billions of dollars that aviation is contributing to Florida's economy each year.

Distribution of Total Annual Economic Aviation Output in Florida



**AIRPORT
SUPPORTED OUTPUT
\$116.3 billion**

**OFF-AIRPORT AVIATION
SUPPORTED OUTPUT
\$14.9 billion**

**MILITARY AIRFIELD
SUPPORTED OUTPUT
\$12.8 billion**





Florida Department of Transportation
Aviation and Spaceports Office
www.dot.state.fl.us/aviation



This report was prepared as an effort of the Continuing Florida Aviation System Planning Process under the sponsorship of the Florida Department of Transportation. A full technical report containing information on data collection, methodologies, and approaches for estimating statewide and airport specific economic impacts is available at www.dot.state.fl.us/aviation/economicimpact.shtm. More information on the Florida's Aviation Economic Impact Study can be obtained from the Aviation Office by calling 850-414-4500.