

STATEWIDE AVIATION Economic Impact Study

Primer

2019

FLORIDA'S AIRPORTS ARE VITAL TO DAILY LIFE AND TRADE.

Whether for delivery services, news reporting, personal vacations, or business travel, Floridians rely on the aviation industry to stay connected with each other and economic markets. Florida's extensive aviation system includes 20 public-use commercial service airports, 109 public-use general aviation airports, and hundreds of private airports. These airports support Florida's diverse economy and are a critical component of essential services such as medical transportation, law enforcement, search and rescue, and disaster response and recovery.

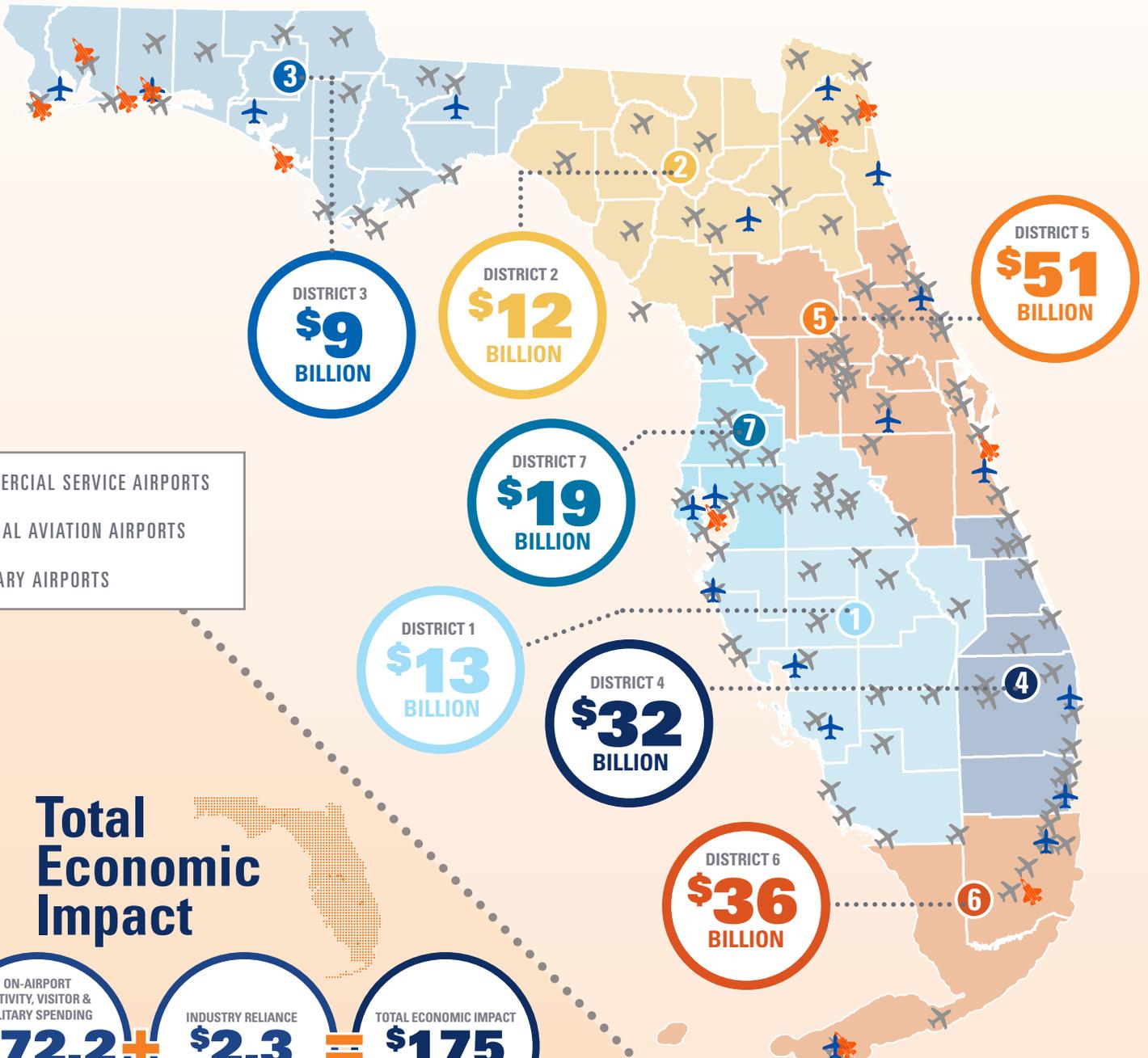
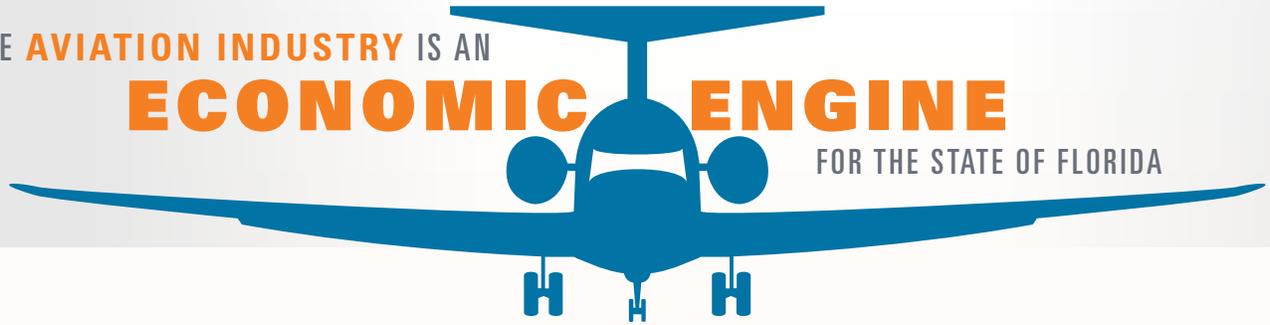
As the link that connects people and businesses, Florida's airports help ensure sustained economic growth by providing access to destinations across the state, country, and globe. Airports also offer significant economic contributions to our communities by supporting jobs, generating income, and triggering spending at the local, regional, and state level.

To understand how Florida's 129 public-use airports contribute to the economy, the Florida Department of Transportation (FDOT) Aviation and Spaceports Office has commissioned the fourth iteration of FDOT's Statewide Aviation Economic Impact Study. This study evaluates the state aviation system's impact on Florida's economy and supports state-level strategic planning and funding decisions.

THE AVIATION INDUSTRY IS AN

ECONOMIC ENGINE

FOR THE STATE OF FLORIDA

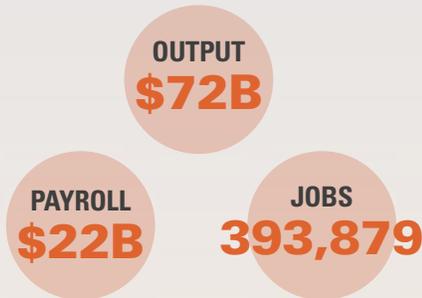


- COMMERCIAL SERVICE AIRPORTS
- GENERAL AVIATION AIRPORTS
- MILITARY AIRPORTS

Total Economic Impact



Statewide Impact of Florida's Airports

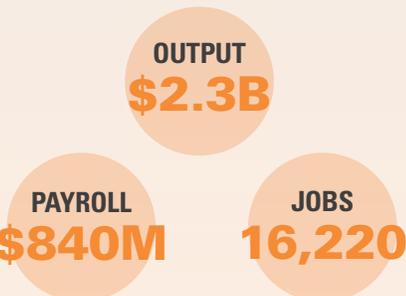
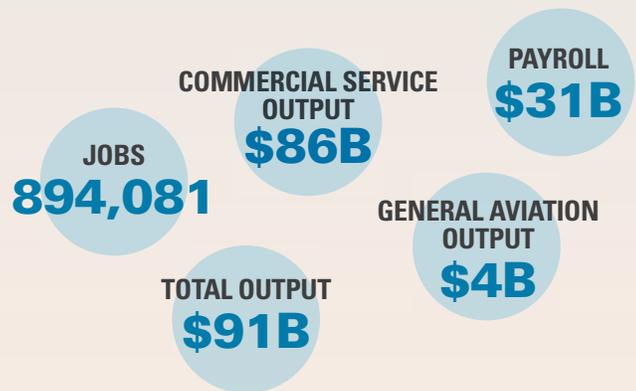


ECONOMIC IMPACTS OF ON-AIRPORT ACTIVITY

Airports are economic generators because of the jobs and income generated by providing air travel and aviation-related services at airports. The activity generated by airport administration, business tenants, and capital improvements on-airport property is called on-airport impacts. While the category is named on airport, supplier purchases and employee spending may be generated off-airport.

ECONOMIC IMPACTS OF VISITOR SPENDING

According to Visit Florida, over half of Florida's 110 million out-of-state visitors in 2017 arrived by air transportation. FDOT conducted a comprehensive survey of international and domestic travelers at commercial service and general aviation airports to gather travel details such as average number of travelers, spending habits, length of stay, destination, and state of origin. Of the over 5,000 visitors surveyed, 77 percent came to Florida for recreation, 16 percent came for business, and the remainder came for other reasons. Economic impacts are related to visitors' spending on goods and services at hospitality businesses and the jobs and payroll supported by those expenditures.



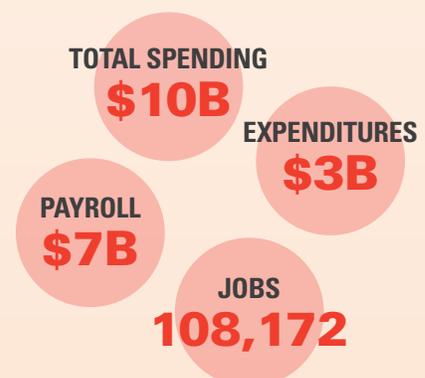
ECONOMIC IMPACTS OF INDUSTRY RELIANCE

Airports within Florida play a vital role in supporting the state economy by enabling business travel and air cargo shipments for Florida-based businesses. Businesses rely on air transportation to conduct long-distance business trips, bring clients and colleagues to Florida, acquire materials to enable production and sales of competitively-priced goods, and enter national and international markets.

To quantify this dependence, FDOT surveyed business that were identified by airport managers to be reliant on Florida airports by basing aircraft on airports or frequently using commercial or cargo services. The companies were asked to indicate the percentage of their revenues considered to rely on air transportation. For the top seven industries, the percentage of jobs reliant on Florida airports range from 21 percent (finance and insurance) to 55 percent (professional services).

ECONOMIC IMPACTS OF MILITARY SPENDING

Military aviation is a key component in Florida's economy, recognized by the State's goal to "Foster Florida's reputation as a military-friendly state." Due to its geographic location, favorable weather, and over-water airspace, Florida is an ideal location for many military aviation installations. A major contributor to the state and local economies, military aviation employed over 108,172 workers and contributed over \$9.8 billion in economic activity in the form of expenditures and payroll in 2017.



Case Study Highlights

The FDOT Aviation and Spaceports Office developed ten case studies describing real-life examples of the economic impact that Florida’s airports have on their communities. These case studies highlight unique aspects of Florida’s aviation industry and provide a qualitative description of how the aviation industry impacts Florida’s businesses and communities. A sample of these case studies is below. Other examples include Phoenix East at Flagler Executive Airport, Eagle Vistas at Arcadia Municipal Airport, and Bartow Flying Services at Bartow Municipal Airport.

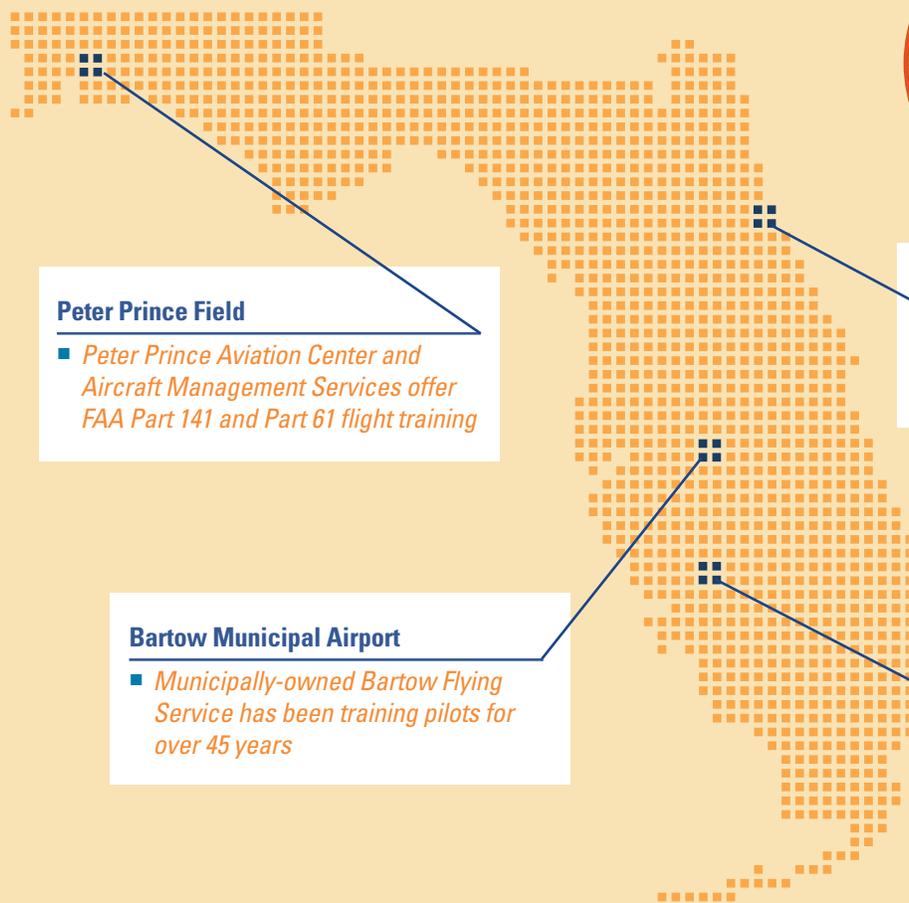
FLIGHT TRAINING

PETER PRINCE FIELD - PANHANDLE AIRPORT PROVIDES A VARIETY OF COURSES

Peter Prince Field has two fixed-base operators (FBOs), Peter Prince Aviation Center (PPAC) and Aircraft Management Services (AMS), which offer FBO services such as fueling, aircraft maintenance, and flight training. Both schools offer full flight training for a breadth of fields, including Private and Commercial Licenses, Instrument, Multi-Engine, and Certified Flight Instructor (CFI). Peter Prince Aviation Center, one of the fastest growing full service FBOs in the U.S., hosts Trident Aircraft, a fully-certified FAA Part 141 and Part 61 Flight School. Trident Aircraft offers all-inclusive packages for certificates and ratings, including offering a short syllabus for Navy Initial Flight Screening (IFS) personnel who would like to use their military flying experience to obtain their Private Pilot’s License. AMS has an FAA Certified Part 141 Flight School and offers a full curriculum of aviation flight courses. AMS Flight School boasts over 25 years of experience in flight training for both military and civilian students, with a proven track record as one of the best Part 141 flight schools in Florida and the Southeastern U.S.



BY THE NUMBERS



Peter Prince Field

- Peter Prince Aviation Center and Aircraft Management Services offer FAA Part 141 and Part 61 flight training

Bartow Municipal Airport

- Municipally-owned Bartow Flying Service has been training pilots for over 45 years

Flagler Executive Airport

- Phoenix East Aviation has trained over 12,000 pilots who have flown over 30,000 hours as students

Arcadia Municipal Airport

- Specializing in agricultural flight training, Eagle Vistas has trained over 125 pilots in its 10-year existence

Image sources: Eagle Vistas, Peter Prince Aviation Center, Crystal Aero Group, Phoenix East Aviation. For more information regarding the results and methodology of this economic impact study, please visit: www.fdot.gov/aviation/economicimpact.shtm