

# Executive Summary

District 6 | 2023





## District Overview

### Aviation Facilities in FDOT District 6 Contribute Nearly \$61 Billion to Florida's Economy

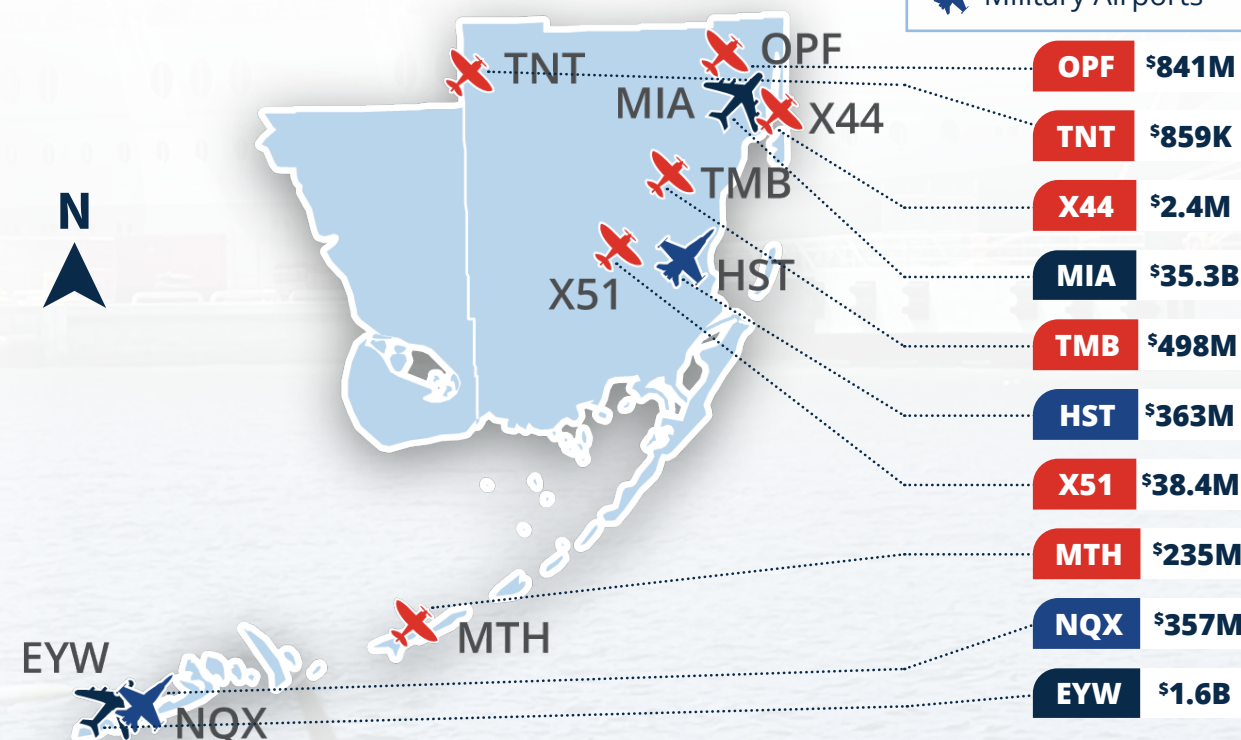
The Florida Department of Transportation (FDOT) manages the state's transportation system through a decentralized model in accordance with state legislative mandates. There are seven districts that each provide individual levels of planning, production, operations, and administrative support to the state's diverse transportation system and users.

FDOT District 6 is located in south Florida and includes Miami-Dade and Monroe Counties. The District is home to more than 2.7 million residents, with the majority of the population located in the greater Miami area. Other population centers include Key West, Kendall, and Homestead, with most of the remaining District covered by the Everglades National Park. Tourists flock from around the country and world to the District's beautiful and unique Everglades and sandy beaches on the Atlantic coast, as well as to the glamorous urban lifestyle of downtown Miami. The District is also home to the unique tourist destination of Key West, which in addition to being the southernmost point in the continental United States (U.S.), offers diving, snorkeling, and numerous other leisure activities.

Residents and visitors can access District 6 through any of the eight public-use airports, including two airports providing scheduled commercial service. The largest commercial service airport in District 6 is Miami International Airport (MIA). With tens of millions of travelers passing through MIA each year, District 6 is a large tourist destination, supporting both the aviation industry and Florida's economy as a whole. To provide an updated snapshot of the economic contribution of Florida's airport system, the FDOT Aviation Office (FDOT AO) commissioned the 2022 FDOT Aviation Economic Impact Study (2022 AEIS). The 2022 AEIS measured that the aviation activity in FDOT District 6 contributed **\$60.9 billion in total economic impacts (output) to the state's economy**. These impacts supported almost **353 thousand jobs**, **\$19.3 billion in payroll**, and **\$32.8 billion in value added**.

### Economic Impact (Output) of Individual Airports and Military Aviation Facilities

- General Aviation Airports
- Commercial Service Airports
- Military Airports



### FDOT District 6 has the Largest On-Airport Impact in the State



Note: Off-Airport Air Cargo and On-Airport impacts, District 6's largest impact categories, will be discussed further on pages 4 and 5.

### Growing Seaplane Market in South Florida

Florida's geography and weather enable year-round access to water, a fact that the seaplane bases in the state know all too well. As one of six public-use seaplane bases, Miami Seaplane Base (X44) accommodates a variety of general aviation (GA) traffic as well as scheduled flights to the Bahamas and aerial seaplane tours. Located only minutes from downtown Miami, X44 has a history dating back over 100 years, when Chalk Ocean Airways used the seaplane base to fly the likes of Ernest Hemingway and Howard Hughes. In recent years, X44 has received a public-use designation and begun a \$100 million redevelopment to support increased seaplane activity. The multi-phase project will modernize the existing GA terminal, add an immigration pre-clearance area for passengers departing to the Bahamas, and add approximately 80,000 sq. ft. of commercial space, among other improvements. As the seaplane base manager observes the local GA market growing significantly as a result of increased number of out-of-state visitors, X44 is hoping that the redevelopment project can capitalize on the growth to turn South Florida into a hub for seaplane activity.





## Off-Airport Air Cargo Impacts

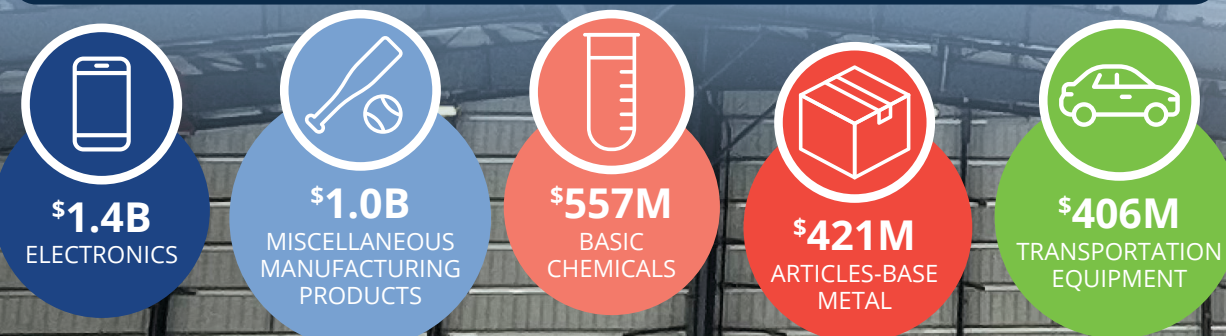
District 6 Supports over \$21 Billion in Off-Airport Air Cargo Impacts

Off-airport industries in Florida rely on cargo transported through the eight public-use airports in District 6. This includes raw materials

used for manufacturing or transporting finished products from producers to consumers. The 2022 AEIS completed a targeted evaluation that measures the economic impact of air cargo flow through Florida's airports and interacts with off-airport industries. Air cargo that doesn't interact with Florida's economy was excluded from the evaluation. Across our state, airports deliver critical support to industries by enabling businesses to transport commodities and finished goods both from suppliers and to customers. Air cargo services provided by Florida's airports connect both long-distance domestic and international markets to companies in the state – positioning Florida as a global business leader. These services enable Florida-based companies to expand customer markets and acquire commodities used for production or to create opportunities for sales around the world. Expanding customer markets through outgoing air cargo generates increased business sales, which in turn brings dollars from other states or nations into Florida.

The 2022 AEIS measured that off-airport air cargo activity in FDOT District 6 contributed **\$21.7 billion in economic impact (output)** to the state's economy. These impacts supported **103,138 jobs**, **\$6.5 billion in payroll**, and **\$11.0 billion in value added**.

### Value of Top Commodities Imported to and Exported from District 6



## Miami International Airport (MIA) is the Busiest International Air Cargo Hub in the United States

MIA is not only one of Florida's four large hub commercial service airports, but also serves as the busiest international air cargo hub in the U.S.! In 2021, MIA recorded 2.25 million tons of international air cargo, the most of any airport in the country. Primarily as a result of its ideal geographic location, the airport facilitates the majority of air cargo activity between the U.S. and the Latin America/Caribbean region – 85 percent of imports and 80 percent of exports. Over 90 airlines facilitate air cargo activity between MIA and destinations around the globe. These airlines rely on dedicated air cargo facilities and services at MIA, including a U.S. Customs and Border Protection (CBP) cargo clearance center and the Animal & Plant Health Inspection Service (APHIS) facility. To expedite perishable air cargo, MIA adopted the Ocean-to-Air Transshipment Program to provide a time and cost savings for air cargo users. The airport supports numerous air cargo operators that have over 500 employees based at MIA.

## On-Airport Impacts

Miami-Opa Locka Executive Airport (OPF) Supports Thousands of On-Airport Jobs

On-airport impacts are comprised of impacts attributable to airport employment, including airport administration and on-airport businesses, construction, and contract employees. On-airport impacts are some of the most recognizable components of Florida's economic impact. One airport with considerable on-airport impacts is Miami-Opa Locka Executive Airport (OPF), which is an Federal Aviation Administration (FAA)-designated Reliever for MIA and supports a variety of aeronautical and non-aeronautical activities on site. Providing convenient access to several nearby attractions such as Miami Beach and Hard Rock Stadium, OPF is a popular airport for GA activity and has attracted over 80 businesses to locate onsite. Businesses include three fixed-base operators (FBOs), six aviation-related manufacturing and repair companies (MRO), and five flight training schools. Collectively, OPF's on-airport businesses employ nearly 1,300 people directly! OPF has recently supported incredible developments at the airport, including the construction of a 280,000-square-foot Amazon distribution center that can process over a million packages a day. Combined with employment by the airport, OPF's on-airport activities support \$516 million in economic impact to Florida!

The 2022 AEIS measured that on-airport activities in FDOT District 6 contributed **\$23.4 billion in economic impact (output)** to the state's economy. These impacts supported **128,006 jobs**, **\$7.1 billion in payroll**, and **\$12.7 billion in value added**.



## Miami Executive Airport (TMB) Fosters an Ideal Business Environment

Miami Executive Airport (TMB) is an FAA-designated Reliever for MIA and provides convenient access to the Miami metro area. The airport is consistently recognized as one of the most popular GA facilities in Florida. The airport's ideal location near the Florida Turnpike makes TMB an attractive environment for businesses seeking quick transportation accessibility. In 2021, there were 20 on-site businesses employing nearly 300 people! This includes five new tenants since the previous aviation economic impact study, including aviation manufacturing/repair, fire rescue, law enforcement, and real estate, who added 153 new jobs. Construction activities are also driving TMB's on-airport impacts with the airport reporting completion of over \$7 million in improvements between 2018 and 2021. The airport's employment, business tenants, and construction projects mean TMB generates **\$150 million of on-airport impacts to Florida!**



## Investments in District 6's Support Key Improvements

The FDOT's Work Program identifies funding for capital improvement projects on a rolling five-year basis. The 2022 AEIS identified FDOT Work Program obligated funds for Fiscal Years (FYs) 2018 through 2021. Investment is primarily driven by public funds from the FDOT to preserve existing infrastructure, modernize airport facilities, and increase airport capacity across the District. In conjunction with the recent large influx of tourism into south Florida, FDOT has made tremendous investment in District 6. Between 2018-2021, the Work Program indicates that \$168 million were identified for capital improvements funded across the District. When compared to investment, for every dollar spent on airport projects in District 6, there is an estimated **\$1,451 in total output supporting Florida's economy!**

### The Florida Keys Marathon International Airport (MTH)

The Florida Keys Marathon International Airport (MTH) is a Part 139 certified airport serving as a primary air travel gateway for the Florida Keys. One of the airport's critical roles is to support hurricane recovery efforts and emergency medical flights for residents. As a result, according to the FDOT Work Program, nearly \$31 million was identified at MTH between 2018 to 2021. Most of this investment (\$21.5 million) was directed to a multi-purpose non-aeronautical facility hosting a 911 call center, fire rescue administration, and emergency management services. As

MTH continues to support increasing levels of activity, the airport's economic impact has increased considerably with a **122 percent increase between 2019 and 2022.**



### Key West International Airport (EYW)

The increasingly popularity of Key West and the area's natural wonders has resulted in Key West International Airport (EYW) experiencing record-setting activity. In 2022, 1.4 million passengers flew through EYW, breaking the previous record of over 969,000 set in 2019. With the airport's commercial service activity projected to continue increasing, EYW has made significant steps to expand airline capacity. This includes a \$100 million expansion of Concourse A, which will add nearly 50,000 square feet of space for the six airlines currently serving EYW. The \$100 million price tag includes \$7.5 million identified in the FDOT Work Program in 2022. Between 2018 and 2021, over \$19.1 million total was identified at EYW in the FDOT Work Program, which includes \$3.5 million for constructing a new maintenance building and \$2.7 million for construction of an access road. These investments have set up EYW for continued passenger growth for the future and support **\$1.6 billion in economic impact to Florida!**



Source: Monroe County Tourist Development Council



"Once again, these [economic impact] numbers reflect continued growth at Key West International Airport. The future is bright."

- Director of Airports, Key West International Airport

### FDOT Work Program Investment Drives Economic Activity

#### FDOT WORK PROGRAM SUPPORTS AIRPORT IMPROVEMENTS.

MTH receives \$21.5 million for a new multi-purpose non-aeronautical facility.  
EYW receives \$6.2 million for constructing a new access road and maintenance building.



Airport improvements increase aviation activity, which results in greater on-airport employment and visitor spending.



#### AIRPORT ECONOMIC IMPACT INCREASES!

MTH economic impact (output) increases by \$129 million.  
EYW economic impact (output) increases by \$715 million.





# AEIS 2022

Florida Aviation Economic Impact Study . . .

