



Executive Summary

District 7 | 2023





District Overview

Aviation Facilities in FDOT District 7 Contribute over \$48 Billion to Florida's Economy

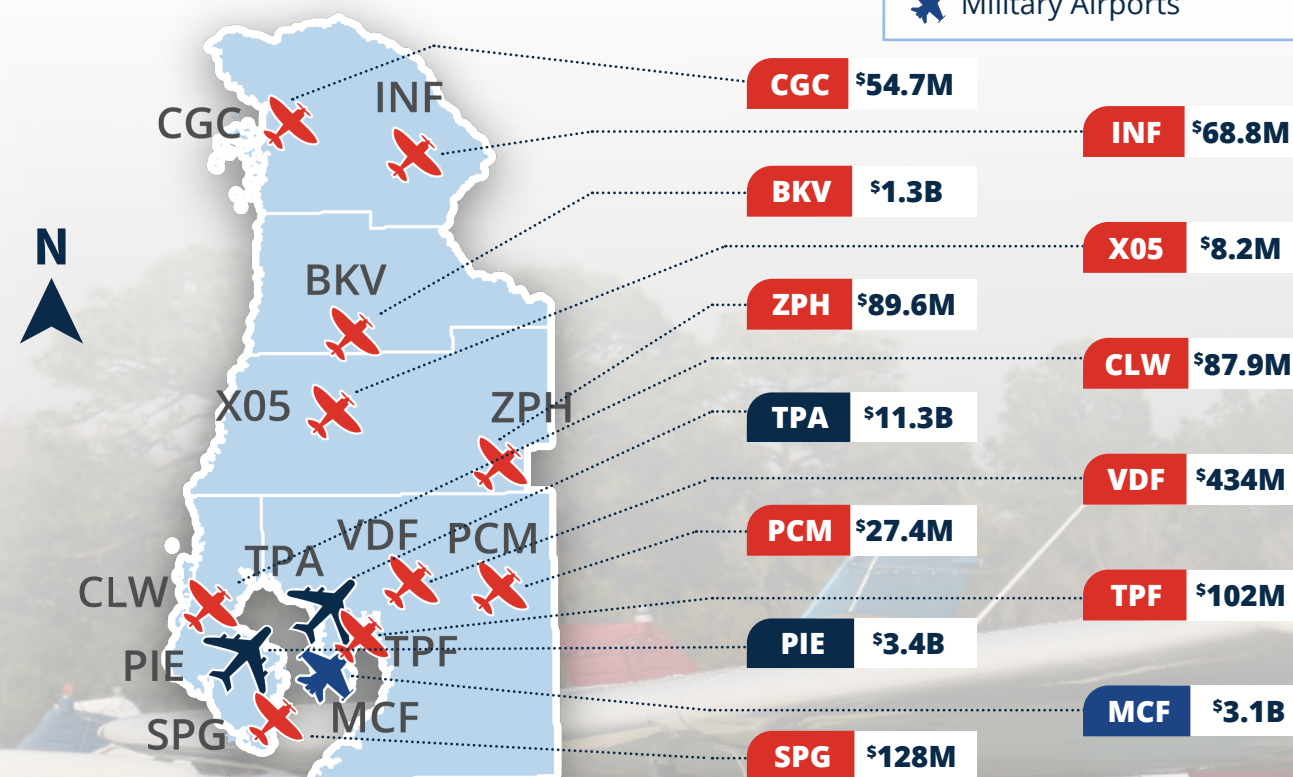
The Florida Department of Transportation (FDOT) manages the state's transportation system through a decentralized model in accordance with state legislative mandates. There are seven districts that each provide individual levels of planning, production, operations, and administrative support to the state's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

FDOT District 7 includes five counties along the southwest Gulf Coast and central Florida. The District's population of just under 3 million is spread across over 3,000 square miles and is most heavily concentrated in the Tampa Bay area, which includes Tampa, Clearwater, and St. Petersburg. Tampa Bay is known as the Sun Coast, named for its beautiful sunsets and large assortment of leisure activities. Several barrier islands make up numerous communities in the Sun Coast, drawing tourists from around the United States as well as abroad. These island communities are home to sunny beaches, world-class shopping, and exciting nightlife, with plenty of other outdoor activities.

Visitors can access District 7 through any of the 12 public-use airports, including two airports providing scheduled commercial service. The largest commercial service airport in the District is Tampa International Airport (TPA), which supports flights through over a dozen airlines and serves millions of passengers annually. 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 7 contributed **\$48.1 billion in total economic impacts (output)** to the state's economy. These impacts supported almost 279 thousand jobs, \$16.3 billion in payroll, and \$24.3 billion in value added.

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

- General Aviation Airports
- Commercial Service Airports
- Military Airports



Visitor Spending and Off-Airport Air Cargo Activity in FDOT District 7 Generate over \$37 Billion for Florida's Economy



Note: Off-Airport Air Cargo and Visitor Spending impacts, District 7's largest impact categories, will be discussed further on pages 4 and 5.



Agriculture Roots to Diverse General Aviation Activity at Plant City Municipal (PCM)

Plant City Municipal Airport (PCM) has experienced considerable transformation throughout its 60-year history. Located just east of Tampa, PCM has long prided itself on supporting Plant City's agriculture industry. Plant City is known as the Winter Strawberry Capital of the World, currently shipping over 75 percent of the United States' supply of winter strawberries. PCM is an integral part of this activity by supporting aerial shipments of strawberries across the United States. PCM is not limited to just strawberry shipments—it also supports a vast array of other unique GA activities. The airport is host to an avionics training program, which partners with the University of Central Florida to provide Federal Aviation Administration (FAA) training, testing preparation, certification, and job placement for aspiring avionics technicians. Additionally, the airport hosts Planes, Trains, and Automobiles, an annual community event attracting over 5,000 attendees on average. PCM welcomed full-service fixed-base operator (FBO) Atlas Aviation in 2019, which provides aircraft maintenance services and flight instruction and promises to further increase general aviation (GA) activity at the airport.



AVIATION

FDOT District 7 Executive Summary



Off-Airport Air Cargo Impacts

District 7 Supports over \$28 Billion in Off-Airport Air Cargo Impacts

Off-airport industries in Florida rely on cargo transported through the 12 public-use airports in District 7. 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 7 contributed **\$28.1 billion in economic impact (output)** to the state's economy. These impacts supported **131,596 jobs, \$8.5 billion in payroll, and \$14.5 billion in value added.**

Value of Top Commodities Imported to and Exported from District 7



Tampa International Airport (TPA) Records the Third Largest Air Cargo Volume in Florida

TPA may be best known for providing air travel to millions of visitors each year, but it also records the third largest air cargo volume of any airport in Florida! In 2021, over 660,000 tons of air cargo flowed through TPA. Serving the greater Tampa Bay region and Florida's West Coast, TPA's proximity to eight counties and 4.2 million people make it an ideal location for air cargo activity. Seven all-cargo carriers regularly utilize TPA, including based tenants UPS, FedEx, and Amazon, who collectively employ nearly 450 people. Looking ahead, TPA is constructing a new \$74 million air cargo facility on the east side of the airfield to welcome additional activity from UPS.



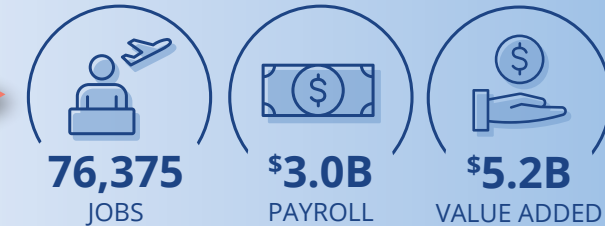
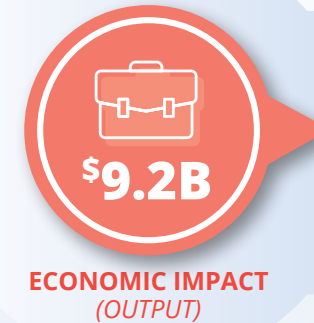
Visitor Spending Impacts

St. Pete-Clearwater International Airport (PIE) Experiencing Record-Breaking Passenger Activity

Visitor spending impacts are comprised of impacts attributable to spending from out-of-state visitors arriving in Florida via GA or commercial service. Out-of-state visitors rely on airports for quick access to all regions in Florida and provide an influx of new dollars into the state's economy. Spending on goods and services such as lodging, food, and entertainment generate revenue for Florida's businesses, which in turn supports jobs for residents.

Florida has several commercial service airports that primarily support leisure traffic, such as St. Pete-Clearwater International Airport (PIE). Located in the Tampa Bay region, PIE is a hub for Allegiant Airlines and is best known for providing ultra low-cost carrier service for leisure visitors seeking Gulf Coast beaches and the area's many attractions. Since 2017, PIE has welcomed two new airlines and has added 20 new nonstop destinations, including nonstop flights to Hamilton, Ontario to attract new "snowbird" activity from Canada. This new addition, combined with the growing popularity of the Tampa Bay area, resulted in PIE recording over 2.4 million passengers in 2022, a new record for the airport! To accommodate future growth, PIE has expanded the existing terminal by 12,000 sq. ft., including five new gates and newly renovated concessions options.

The 2022 AEIS measured that on-airport activities in FDOT District 7 contributed **\$9.2 billion in economic impact (output)** to the state's economy. These impacts supported **76,375 jobs, \$3.0 billion in payroll, and \$5.2 billion in value added.**



Peter O. Knight Airport (TPF) Provides Convenient Access to Tampa

Peter O. Knight Airport (TPF) is popular amongst business travelers, VIPs, and high-profile visitors, who prefer the private and less-congested air travel experience. As the closest airport to downtown Tampa, TPF prides itself on providing quick access to the area's attractions, including Tampa's business district, the Florida State Fairgrounds, Seminole Hard Rock Hotel, and the MidFlorida Central Credit Union Amphitheatre. TPF welcomed visitors arriving from 26 states and over 250 unique airports in 2021, including as far as Wyoming and Maine. Visitors into TPF have over 55,000 sq. ft. of hangar and office space available including 75 T-hangars, 32 shade hangar spaces, and 110 tie-downs. Full-service amenities include Jet A fuel, crew shower facilities, aircraft maintenance service, and courtesy/rental car service.



Investments to District 7's Airports Bolster Diverse GA Activities

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 the Tampa Bay region, FDOT has made tremendous investment in District 7. Between 2018-2021, the Work Program identified \$337 million for capital improvements across the District. When compared to investment, for every dollar spent on airport projects in District 7, there is an estimated **\$571 in total output supporting Florida's economy!**

Tampa Executive Airport (VDF)

Tampa Executive Airport (VDF) completed several improvements over the past several years to support the activities of Hillsborough County and bolster air travel accessibility in the Tampa Bay region. Located less than 10 miles northeast of downtown Tampa, VDF provides convenient access to Tampa and contributes to the local community by being home to Hillsborough County mosquito control operations and the Hillsborough County Sheriff's Office (HCSO) Aviation Unit. Between 2018 and 2021, over \$3.7 million in improvements were identified in the FDOT's Work Program including \$2.3 million for a rehabilitation of the runway and taxiway completed in 2021.

Additionally, the airport completed a rehabilitation of the terminal building in 2020, including interior and exterior renovations. Continued investment into VDF contributes to the airport supporting **\$434 million in economic impact (output) for Florida!**



FDOT Work Program Investment Drives Economic Activity

FDOT WORK PROGRAM SUPPORTS AIRPORT IMPROVEMENTS.

VDF receives \$2.3 million for rehabilitation of runway 05/23 and associated taxiways.

BKV receives \$1.3 million for extending runway 09/27.



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



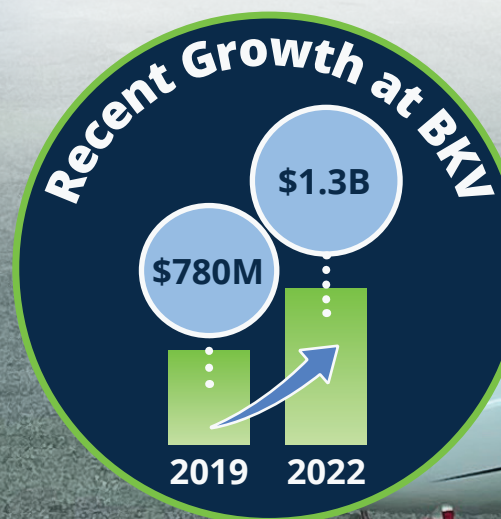
AIRPORT ECONOMIC IMPACT INCREASES!

VDF economic impact (output) increases by \$286 million.

BKV economic impact (output) increases by \$519 million.

Brooksville – Tampa Bay Regional Airport (BKV)

Originally constructed as a military airfield in World War II, Brooksville – Tampa Bay Regional Airport (BKV) is now a public-use airport supporting a wealth of GA activities including aircraft maintenance, repair, and overhaul (MRO) services, corporate/business aviation, flight training, and military training. The airport's two paved runways, one of which measures over 7,000 feet, are able to support the demanding business jets and military training aircraft that frequent the airport. BKV has made major steps to continue supporting these activities and expand capabilities by extending runway 09/27 by 999 feet to accommodate even more demanding aircraft. The FDOT Work Program identified \$1.3 million for this extension in 2020, along with several other improvements at BKV, amounting to over \$13.0 million between 2018 and 2021. These investments have contributed to the airport generating **\$1.3 billion of economic impact (output) to Florida!** Looking ahead, BKV has business tenants completing other improvements including a new 65,000 square foot facility to accommodate the growth of Pem Air Turbine Engine Services, a fast-growing MRO business servicing commercial and military aircraft engines.



"Brooksville affords us the opportunity to expand without boundaries in terms of production workspace. They have a suitable airport here for us. We've had anywhere from C-130, [Boeing] 767, [Boeing] 757 come in and out of here for engine maintenance..."

– President and CEO, Pem Air Turbine Engine Services



AEIS 2022

Florida Aviation Economic Impact Study . . .

