

# Executive Summary

District 1 | 2023





## District Overview

### Aviation Facilities in FDOT District 1 Contribute Over \$29 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 1 includes 12 counties in Southwest Florida, spanning nearly 12,000 square miles. The District includes major cities along the Gulf Coast including Sarasota, Punta Gorda, Fort Myers, and Naples, which attract numerous leisure travelers that flock to the famed Gulf beaches. These coastal cities offer a wide range of activities and sights for travelers to experience along with almost year-round warm weather. The northern coasts of District 1 are known as Florida's Cultural Coast, boasting a rich mix of museums, art galleries, theaters, and architecture. In addition to these coastal cities, District 1 also includes many vibrant central Florida cities, such as Lakeland, Winter Haven, and Sebring. These areas host many of their own attractions, including Sun 'N Fun Aerospace Expo, one of the largest weekend fly-in events in the United States (U.S.), held at the Lakeland Linder International Airport (LAL).

Travelers visiting District 1 can utilize any of its 21 public-use airports, including three airports that provide scheduled commercial service through more than a dozen domestic and international carriers. Additionally, District 1's airports support business operations for major employers including Amazon and Publix. 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 1 contributed **\$29.3 billion in total economic impact (output)** to the state's economy. These impacts supported **182 thousand jobs**, **\$9.1 billion in payroll**, and **\$15.2 billion in value added**.

### FDOT District 1 has One of the Fastest Growing Visitor Spending Impacts in the State

#### ON-AIRPORT

**\$5.9B**

#### VISITOR SPENDING

**\$11.5B**

#### OFF-AIRPORT AIR CARGO

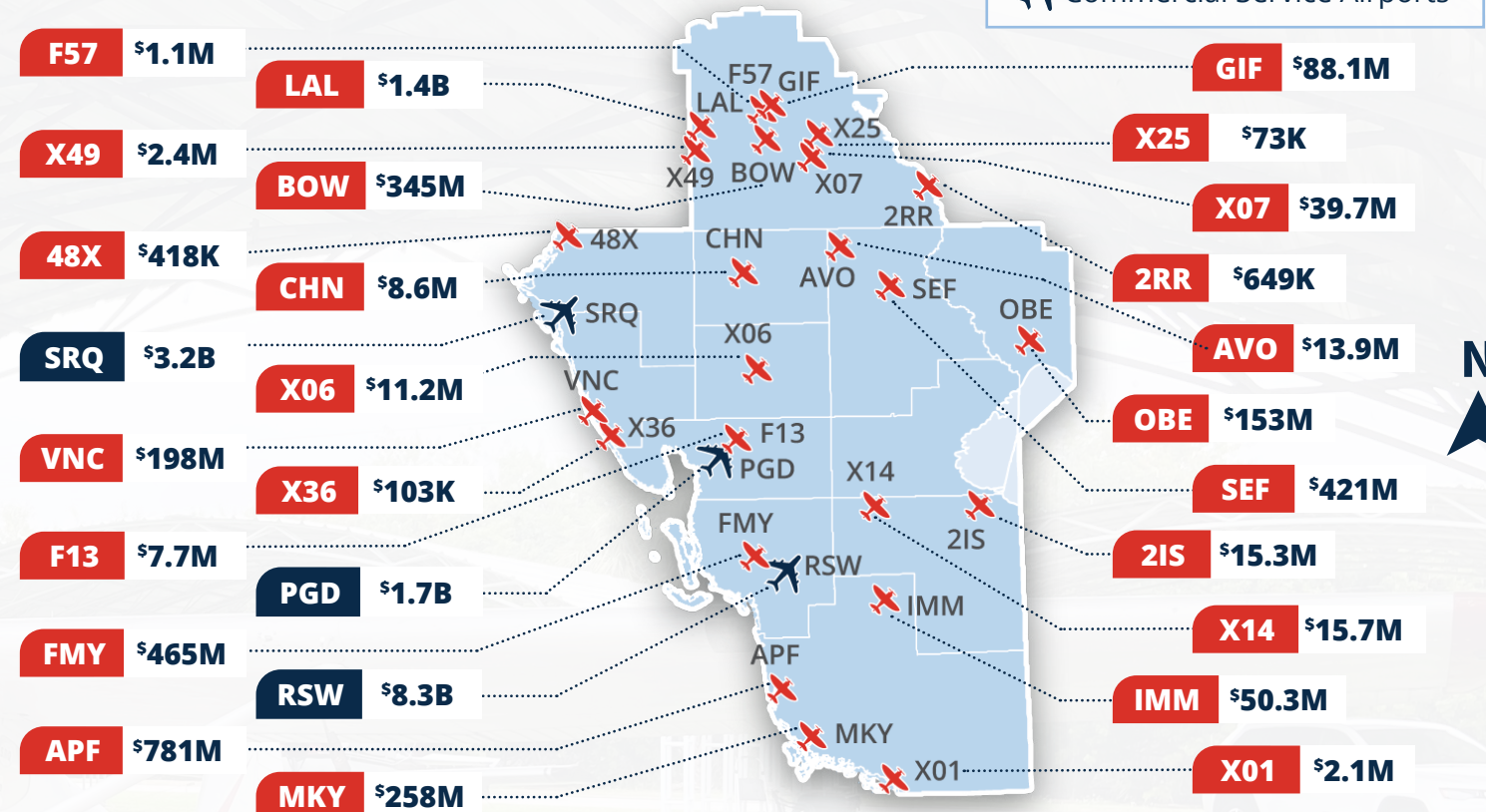
**\$11.9B**

#### TOTAL ECONOMIC IMPACT (OUTPUT)

**\$29.3B**

### Economic Impact (Output) of Individual Airports

- ✂ General Aviation Airports
- ✈ Commercial Service Airports



Source: Naples Airport Authority

Source: USA Today

### Florida's Airports Assist in Hurricane Ian Recovery Efforts

Florida is frequently struck by major hurricanes, which force residents to evacuate and leave tremendous damage to communities. With every hurricane that impacts Florida and/or surrounding communities, Florida's airports jump into action to host relief efforts and serve as an air travel gateway for residents. Ahead of Hurricane Ian, a Category 4 storm making landfall in the Fort Myers area in 2022, residents used airports such as Southwest Florida International (RSW), Page Field (FMY), and Naples Airport (APF) to evacuate from the disaster area. After the storm passed, residents used these airports to return to their homes. Remarkably, APF was quickly able to return to limited operations just 48 hours after the entire airfield flooded! With the hurricane cutting off ground access to several areas, the airports were critical sites for hosting first responders surveying the disaster area and as staging grounds providing access to equipment and supplies across the greater Fort Myers area. Through the collective efforts of over 200 pilots and 75 ground volunteers, over 10,000 hot meals and 10,000 pounds of donations flew into airports to be distributed to residents and communities!

Note: District 1 does not have any military aviation facilities that were included in this study. Off-Airport Air Cargo and Visitor Spending impacts, District 1's largest impact categories, will be discussed further on pages 4 and 5.



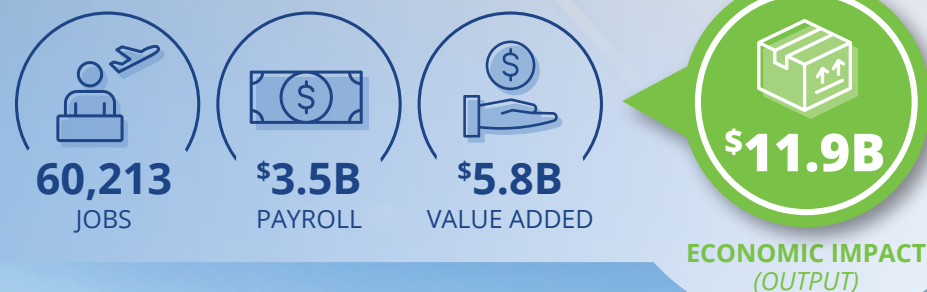
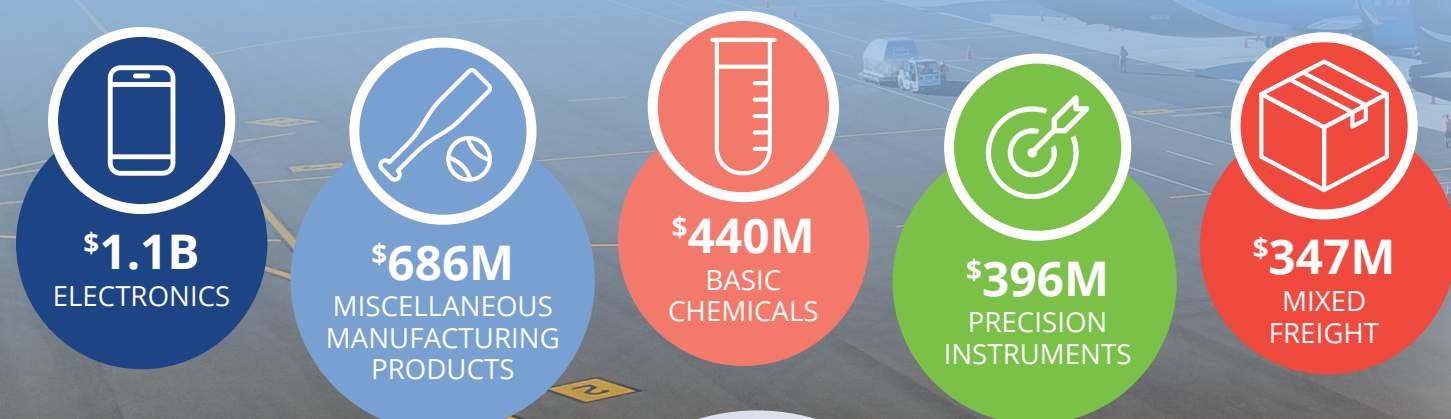
## Off-Airport Air Cargo Impacts

### Southwest Florida Supports Nearly \$12 Billion in Off-Airport Air Cargo Impacts

Off-airport industries in Florida rely on cargo transported through the 21 public-use airports in District 1. 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 the 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 1 contributed **\$11.9 billion in economic impact (output)** to the state's economy. These impacts supported **60,213 jobs**, **\$3.5 billion in payroll**, and **\$5.8 billion in value added**.

#### Value of Top Commodities Imported to and Exported from District 1



## Visitor Spending Impacts

### Tourism is Soaring in Southwest Florida

Visitor spending impacts are comprised of impacts attributable to spending from out-of-state visitors arriving in Florida via general aviation (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.

Visitor spending impacts are plentiful across Southwest Florida. With year-round warm weather, miles of Gulf Coast beaches, pristine golf courses, and world-renowned entertainment venues, Southwest Florida is a desirable destination for out-of-state and international visitors. Supporting this, Sarasota-Bradenton International Airport (SRQ) and Southwest Florida International Airport (RSW) have witnessed record levels of passenger activity. In 2021, SRQ recorded 3,163,543 passengers – a 57 percent increase compared to 2019. As of February 2023, the airport hosts 11 airlines providing nonstop connectivity to over 50 destinations in the U.S. and Canada. RSW, District 1's largest commercial service airport, reported 10,322,434 passengers in 2021 and welcomed new low-cost airlines including Breeze Airways, Avelo Airlines, and Eurowings Discover, an international carrier providing nonstop service to Frankfurt, Germany.

The 2022 AEIS evaluated the spending activities of out-of-state visitors traveling through public-use airports to measure the influx of new dollars into Florida's economy. Visitor spending activity relying on airports in FDOT District 1 contributed **\$11.5 billion in economic impact (output)** to the state's economy. These impacts supported **91,314 jobs**, **\$3.6 billion in payroll**, and **\$6.2 billion in value added**.

<sup>1</sup>"SRQ Airport Finishes 2021 With Record-Breaking Numbers," *Sarasota*, January 14, 2022

<sup>2</sup>"Southwest Florida International Airport Reports Record-Breaking December and Year-End Traffic," *Lee County Port Authority*



Source: Lee County Port Authority

## Lakeland Linder International Airport's Air Cargo Hub Primed for Growth

Lakeland Linder International Airport (LAL) is a large GA airport located along the I-4 corridor between Tampa to the west and Orlando to the east. LAL's prime location has been extremely lucrative to tenant Amazon Air, an air cargo operator that has established a regional base at LAL for cargo sorting. Amazon Air currently leases approximately 48 acres of airport property that includes over 250,000 sq. ft. of cargo sorting space and approximately 1,200 employees. Amazon's presence is a major contributor to Polk County, handling over \$875 million in air cargo in 2020. Amazon is continuing to expand at LAL, with plans to add an additional 60 acres of space, contributing to LAL being one of the fastest-growing cargo airports in the U.S.

Source: "Amazon Air operates out of multiple Florida airports, competing with FedEx, UPS and DHL," *The Ledger*, March 2022

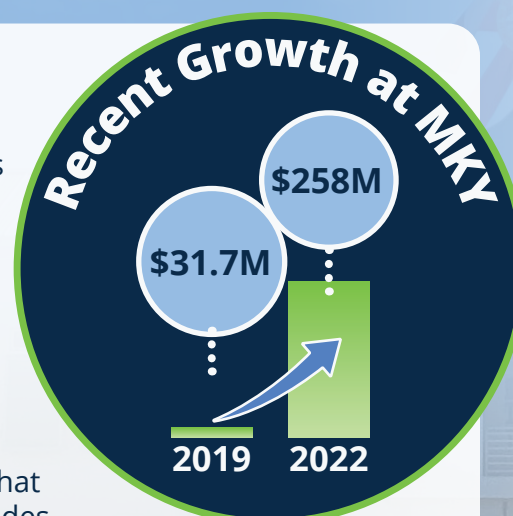


## Investments at District 1 Airports are Fueling Tourism in Southwest Florida

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 southwest Florida, FDOT has made tremendous investments in District 1. Between 2018-2021, the Work Program identified \$308 million for capital improvements across the District. Public investment has also encouraged more business activity at airports. Since 2017, there has been an estimated 31 percent increase in employment for on-airport business tenants. When compared to investment, for every dollar identified in the FDOT Work Program for airport projects in District 1, there is an estimated **\$381 in total output supporting Florida's economy!**

### Marco Island Airport (MKY)

GA airports, such as Marco Island Airport, have also been able to capitalize on renewed activity in Southwest Florida, welcoming visitors flocking to the area to enjoy world-renowned beaches and golf courses. Situated just 15 miles south of Naples, MKY prides itself on providing congestion-free air travel access and a 5,000-foot runway, Jet A fuel, and aircraft parking options. As the Naples area has grown in popularity, MKY has made strides to improve the airport with the support of over \$14 million in investment between 2018 and 2021 (as identified in the FDOT Work Program). Over \$9.5 million was invested in a new 16,500 sq. ft. terminal that opened in 2021. The new terminal includes amenities such as a pilot/passenger lounge and lease space available for aeronautical businesses based at MKY. By elevating the passenger experience at MKY, the airport has been able to attract additional users, including passengers arriving from 40 different states in 2021. Visitor spending was the largest contributor to MKY's economic impact (output) with **\$258 million!**



### Punta Gorda Airport (PGD)

Southwest Florida is a popular hub for leisure travelers seeking warmer weather in the winter travel season. These "snowbirds" are often seeking the low-cost air travel options that Punta Gorda Airport (PGD) provides to the area. Providing exclusively low-cost air carrier service from Allegiant Airlines and Sun County Airlines, PGD was able to record over 1.8 million passengers in 2022 representing a 12 percent increase from 2019! With the airport expecting tremendous growth in the future, the FDOT has made strides to support several capital improvement projects to maintain existing critical facilities and expand the airport's capacity. As identified in the FDOT Work Program, nearly \$21 million was identified for capital improvements between 2018 and 2021 including \$9.6 million for the extension and rehabilitation of runway 15/33. Additionally, over \$3 million

was invested into expanding the ramp area dedicated to air carrier operations. These construction activities and expanded capabilities have helped PGD generate **\$1.7 billion in total economic impact (output) for District 1 and Florida!**



"This project has been quite an endeavor, requiring extensive coordination of dozens of parties from funding and design to construction. I want to thank the team that worked together to make it all happen, and I am thrilled to be able to open it up to the General Aviation community that has been eagerly awaiting this moment."

– CEO of Punta Gorda Airport



Source: Punta Gorda Airport

**2021 Commercial Service Airport Project of the Year (PGD Runway 15/33 Extension and Rehabilitation)**  
Florida Department of Transportation

### FDOT Work Program Investment Drives Economic Activity

#### FDOT WORK PROGRAM SUPPORTS AIRPORT IMPROVEMENTS.

MKY receives \$9.5 million for constructing a new 16,500 sq. ft. terminal.  
PGD receives \$9.6 million for the extension and rehabilitation of runway 15/33.



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



#### AIRPORT ECONOMIC IMPACT INCREASES!

MKY economic impact (output) increases by \$226 million.  
PGD economic impact (output) increases by \$400 million.





# AEIS 2022

Florida Aviation Economic Impact Study . . .

