



Executive Summary

District 5 | 2023



District Overview

Aviation Facilities in FDOT District 5 Contribute \$93 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 5 includes nine counties in central Florida, spanning nearly 9,000 square miles. Orlando is the District's primary population center, with nearly half a million of the District's 4.1 million total residents. Other major cities in District 5 include Daytona Beach and Melbourne. The Atlantic coastline of District 5 is known as the Space Coast, named for the local Kennedy Space Center and Cape Canaveral Space Force Station. Tourists from around the world flock to District 5 for the area's wide range of leisure activities, world-renowned theme parks, miles of pristine Atlantic beaches, and the unique chance to see a rocket launch. Daytona Beach International Airport (DAB) also welcomes tourists to another unique attraction, the Daytona International Speedway. As one of the largest motorsports venues in the country, the Daytona International Speedway consistently draws hundreds of thousands of NASCAR and other motorsports fans.

Visitors can access District 5 through any of its 21 public-use airports, including four airports providing scheduled commercial service, which also support hundreds of businesses and thousands of jobs. District 5 is also home to several lakes and waterways that support three public-use seaplane bases, the most of any District. 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 5 contributed \$93.0 billion in total economic impacts (output) to the state's economy. These impacts supported over **575 thousand jobs**, **\$28.7 billion in payroll**, and **\$49.2 billion in value added**.

Aviation Activity in District 5 Generates the Highest Economic Impact of any District in Florida



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

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



Daytona Beach International Airport (DAB) Attracts Race Fans and Eager Pilots From Around the World

Daytona Beach hosts a wealth of special events and activities in and around DAB. Located immediately adjacent to Daytona International Speedway, DAB provides unrivaled air travel access for thousands of visiting race fans attending the Daytona 500, Coke Zero Sugar 400, and the Rolex 24. Daytona International Speedway also hosts other popular events annually including Welcome to Rockville, the largest outdoor rock concert in the United States (U.S.), with over 80 bands performing. Visitors have the option to travel through DAB using two commercial service carriers (Delta Air Lines and American Airlines) providing nonstop connectivity to major hubs such as Hartsfield-Jackson Atlanta International Airport (ATL) and Charlotte Douglas International Airport (CLT). Alternatively, DAB welcomes general aviation (GA) visitors with one of three fixed-base operators (FBOs) located on-site.

Daytona Beach is also world-renowned for Embry Riddle Aeronautical University (ERAU), the largest university specializing in aviation and aerospace in the world. This private university is located adjacent to DAB and attracts students from over 148 counties seeking one of over 100 undergraduate and graduate degrees, including 60 associated with aviation and aerospace. Many students aspire to be airline pilots and complete flight training at ERAU using one of over 70 aircraft based at DAB. Nearly 400 training flights utilize DAB every day and result in the airport being recognized as one of the busiest facilities for GA activity in Florida!





Visitor Spending

Orlando International Airport (MCO) – Florida’s Busiest Airport

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. Out-of-state visitors spend money on food, lodging, entertainment, and transportation, generating revenue for Florida’s businesses and supporting jobs for Florida’s residents.

Visitor spending impacts are exemplified by MCO. Orlando’s world-renowned reputation as a hub for theme parks, events, and business activity has

contributed to MCO being Florida’s busiest airport, and the seventh busiest airport in the U.S., in terms of enplanements. In 2021, MCO recorded 40,351,068 passengers supported by over 30 unique air carriers providing nonstop connectivity to over 130 destinations globally. In the face of increased congestion in the existing North Terminal Complex, MCO recently completed construction of the South Terminal Complex in 2022. The new \$3 billion terminal provides greater capacity to the airport and a better experience for MCO’s growing number of passengers. As airlines have entered the new terminal and increased flights through MCO, passenger traffic has grown considerably. The airport recorded over 50 million passengers in 2022, a 24 percent increase from 2021 and only the second time MCO has achieved this milestone!

The 2022 AEIS measured that on-airport activities in FDOT District 4 **contributed \$36.1 billion in economic impact (output) to the state’s economy. These impacts supported 298,971 jobs, \$11.3 billion in payroll, and \$20.2 billion in value added.**

Flying Racehorses Through Ocala International Airport – Jim Taylor Field (OCF)

Ocala International Airport - Jim Taylor Field (OCF) is a GA airport well-known for facilitating a special type of air cargo. Located in “The Horse Capital of the World,” racehorses frequently fly through OCF from around the world. In fact, Ocala’s famed World Equestrian Center, the largest equestrian complex in the U.S., is located only minutes from the airport. The World Equestrian Center is home to over 35,000 thoroughbred horses, the largest population of horses and ponies in the U.S. OCF helps facilitate quick air travel for racehorses and other cargo, contributing to District 5 recording the most international air cargo exports of any District in the state (valued at over \$4.2 billion in 2021)!

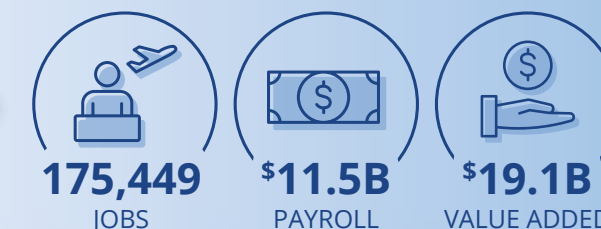


Off-Airport Air Cargo Impacts

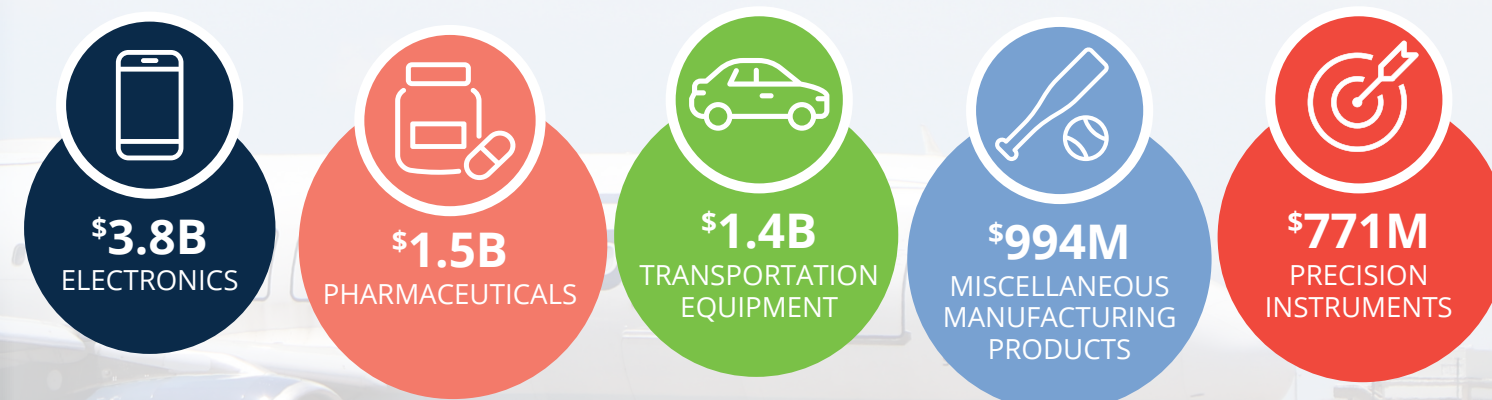
District 5 Supports over \$38 Billion in Off-Airport Air Cargo Impacts

Off-airport industries in Florida rely on cargo transported through the 27 public-use airports in District 5. 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 5 contributed **\$38.6 billion in economic impact (output)** to the state’s economy. These impacts supported **175,449 jobs, \$11.5 billion in payroll, and \$19.1 billion in value added.**



Value of Top Commodities Imported to and Exported from District 5



International Air Cargo is Thriving in Brevard County

Of the \$4.2 billion in international air cargo exports in District 5, Brevard County alone exports nearly \$2 billion in value – the greatest amount recorded of any county in Florida! This international air cargo value includes electronics and transport equipment traveling through airports such as Melbourne Orlando International Airport (MLB) and Space Coast Regional Airport (TIX). Brevard County alone accounts for nearly half of all air cargo value exported internationally through all of District 5. When international imports and exports are considered together, airports in Brevard County record \$3.1 billion in air cargo value – second only to Miami-Dade County.



Investments in District 5 Fuel Airport Activity

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 central Florida, the FDOT Work Program has made tremendous investments in District 5. Between 2018-2021, the Work Program indicates that \$469 million were invested into capital improvements across the District. When compared to investment, for every dollar spent on airport projects in District 5, there is an estimated **\$793 in total output supporting Florida's economy!**

Umatilla Municipal Airport (X23)

Located approximately 30 miles northwest of Orlando, Umatilla Municipal Airport (X23) is a cornerstone of the City of Umatilla. The airport has an on-site flight school and prides itself on inspiring local youth to pursue a career in aviation. X23 has several opportunities for high school students, including flight simulators and fly-ins organized by the Experimental Aircraft Association (EAA) Young Eagles program. Over the past several years, X23 completed improvements to continue growing the airport's impact on the surrounding community. According to the FDOT's Work Program, between 2018 and 2021, nearly \$4.4 million has been invested at the airport. This includes \$1.2 million for constructing new aircraft hangars to attract more aviation activity to the region. Through the continued investment of public funds, X23 generates **\$31 million in economic impact for Umatilla and all of Florida!**



Orlando Sanford International Airport (SFB)

Orlando Sanford International Airport (SFB) provides an alternative to the busier nearby MCO for leisure traffic. Located northeast of the Orlando metropolitan area and less than an hour drive from Walt Disney World and Universal Studios, SFB is a hub for exclusively low-cost leisure carriers like Allegiant Airlines and Sun Country Airlines. To accommodate additional leisure activity, the airport recently completed a \$74 million renovation and expansion of the main terminal, which included adding four gates. Nearly \$28 million of the project cost was identified in FDOT's Work Program between 2018 and 2021. This influx of public investment helped the airport welcome two new carriers providing a unique type of air service. In 2021, low-cost carriers Flair Airlines and Swoop Airlines introduced year-round nonstop connectivity to several Canadian markets. SFB's boost in leisure options has helped the airport support **\$3.5 billion in economic impact to Florida!**

"There is a reason why [airlines] are choosing the Orlando Sanford International Airport. They have recognized the fact that we're in the metro Orlando area... And passengers have a quicker experience at our airport."

- Orlando Sanford International Airport Spokeswoman

FDOT Work Program Investment Drives Economic Activity

FDOT WORK PROGRAM SUPPORTS AIRPORT IMPROVEMENTS.

X23 receives \$1.2 million for aircraft hangar development.
SFB receives \$28.0 million for terminal expansion, renovations, and upgrades.

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

AIRPORT ECONOMIC IMPACT INCREASES!

X23 economic impact (output) increases by \$11.1 million.
SFB economic impact (output) increases by \$900 million.

Source: ORL, Orlando Executive Airport



AEIS 2022

Florida Aviation Economic Impact Study . . .

