

Community Benefits and Takeaways

General Aviation

Florida's dynamic network of 108 general aviation airports provides our communities with some of the most important benefits associated with air service. General aviation airports in Florida generate \$7.7 billion in annual economic activity, as well as support 64,000 jobs with \$2.5 billion in annual payroll. The state is ranked third in the U.S. for total gross domestic product and jobs attributable to general aviation. Yet the benefits of general aviation extend farther than economics. These facilities improve the quality of life for millions of Floridians by making our communities safer, more secure, and more resilient when the unexpected occurs.

Commercial, Industrial, and Economic Activities

General aviation airports provide the facilities and services to support a range of business endeavours such as aviation and aerospace research, development, and manufacturing; agricultural support; aerial surveying and observation; air cargo; and flight instruction. Many of these types of activities support high-skill, high-wage jobs critical for Florida's continued economic growth. In just one example, Lake City Gateway Airport (LCQ) supports a 12-acre industrial park anchored by a large maintenance, repair, and overhaul operation with over 1,900 skilled employees.

Emergency Preparedness and Response

When disaster strikes, general aviation airports often offer the quickest access to aid as first responders arrive on the scene or residents are transported to medical care. General aviation airports support aeromedical flights; serve as a base to enforce local, state, and federal laws; and provide staging areas for disaster-recovery efforts. Additionally, over 390 aviation facilities (including six in Florida) are designated by the federal government to support the critical services of U.S. Customs and Border Protection, U.S. Forest Service, U.S. Marshals Service, and other agencies.

Fort Lauderdale Executive Airport (FXE) served as a critical base to transport supplies and personnel between the U.S. and Haiti following the devastating earthquakes in late 2009. General aviation aircraft were able to land at small airports and in very rural areas inaccessible to many large aircraft with the flexibility to provide immediate aid to the areas where it was most needed.



What FASP 2035 Means to You

The FASP 2035 resulted in several key takeaways directly applicable to policymakers for future planning and design efforts, consistent with current FAA guidance.

Design and Capacity Constraints

The FASP 2035 Update examined operational activity at Florida's airports relative to the need to increase capabilities and serve the demand with appropriate capacity.

- The analysis identified 14 airports, including seven commercial service facilities, that experience substantial operational activity beyond what the airports are designed to accommodate. These airports may need to closely examine their activity and ability to meet greater design standards.
- Airports along the state's southeast coast are expected to experience the most severe capacity constraints through 2035, although all airports along the Atlantic Coast are at risk.
- Florida does not require any new airports; instead, the existing airport system can be leveraged to meet current and future demand.

How to Get Involved

Airport planning occurs at federal, state, and local levels, providing policymakers with many opportunities to actively support aviation in Florida:

- Promote the economic and qualitative benefits of commercial service and general aviation to the community and others in leadership positions
- Support airport compatible land use planning, zoning ordinances, and community planning efforts that promote safety and positive community relationships with airports
- Participate in state and local airport planning efforts, including the development of airport master plans, which guide future airport development activities and serve as a resource for other community plans
- Participate in the CFASPP (visit cfaspp.com for more details)

More information about the FASP 2035 Update, including a list of policy and development recommendations, and additional FASP resources are available at fdot.gov/aviation/FASP_details.shtm.



Introduction for Policymakers

Florida's 128 public-use commercial service and general aviation airports are a cornerstone of the state's economy and essential to the safety, resiliency, mobility, and security of residents, visitors, businesses, and the products that fly through our state. To ensure Florida's airports continue to provide a high level of service to all users, the Florida Department of Transportation (FDOT) Aviation and Spaceports Office (ASO), with the assistance of the Continuing Florida Aviation System Planning Process (CFASPP), updated the Florida Aviation System Plan (FASP). The FASP is grounded on the framework of the Florida Transportation Plan (FTP), Florida's statewide plan guiding Florida's transportation future.

The FASP 2035 Update is a long-term strategic vision plan to comprehensively assess all public-use airports in Florida and evaluate the existing system's ability to achieve current and anticipated future demands. The FASP 2035 Update is used by FDOT as a tool to maintain a safe, efficient, secure, and reliable system; evaluate future funding decisions; and effectively expand capacity in those areas where it is most needed and beneficial for the continuing improvement of the state aviation system.

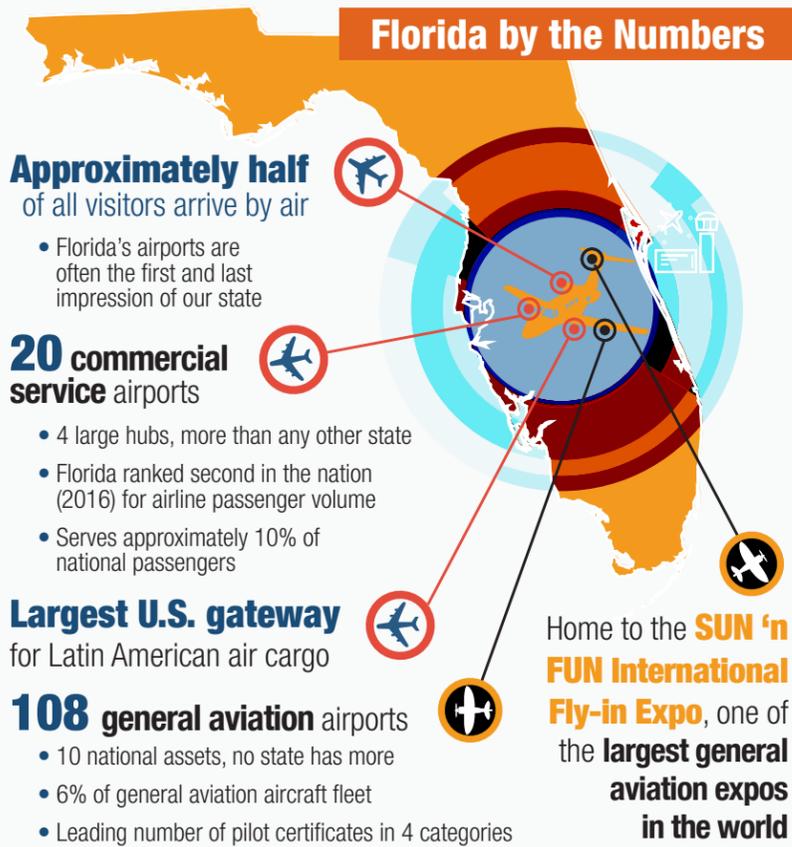


November 2017

Florida Aviation System Plan 2035 Update

Florida's Airports: A Global Asset

Florida offers the world's most dynamic and progressive aviation system. Florida's airports serve as a backbone of our tourism economy and provide critical community services during emergencies. In 2015, aircraft conducted nearly nine million operations in Florida and that number will significantly rise over the next 20 years. Over \$64 billion in international air cargo, and 2.7 million tons of domestic and international cargo passed through Florida's airports in 2014. Florida is also the leading provider of flight instruction in the U.S., with training offered at over 80 airports.



The strength of aviation in Florida is rooted in numerous structural conditions and market opportunities designed to support the continuous evolution and expansion of the system, including:

- Direct access to major international markets
- Skilled labor pool
- Tax incentives and regulations designed to attract high-value jobs and industries
- Robust intermodal network encompassing all modes of transportation
- Proactive funding structure and progressive regulations to support aviation
- Forward-thinking leadership at all levels of government that understand and support aviation's importance to Florida

Aviation Makes the State Money!

For every dollar spent on the Florida Aviation Program, the state receives **\$1.37 in tax revenue in return.**¹ In total, aviation contributes \$144.0 billion to the state.

Return on Investment

The 2014 Statewide Aviation Economic Impact Study determined that the total annual economic impact of aviation-related activities in Florida is an estimated \$144.0 billion. Yet these numbers are only part of the story.

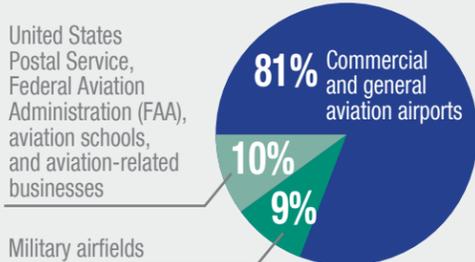
In addition to providing a 1.37 return on investment to the state, annual spending on the Aviation Program:¹

- Increases real disposable personal income by \$9.9 billion
- Increases the gross domestic product by \$9.1 billion

Total Economic Impact



Economic Impact by Activity



1. Florida Office of Economic & Demographic Research (December 2016). Return on Investment for the Department of Transportation's Work Program.

Aviation's Future

FDOT, the Federal Aviation Administration (FAA), airport sponsors, and the many communities our airports serve ensure Florida's aviation infrastructure and services continue to meet the needs of all users. Over the past several years, a number of major shifts have affected the aviation industry. Considering the potential implications of these trends helps FDOT and airports understand and plan for future aviation facility and service needs, as well as prioritize projects so funds can be allocated most efficiently.

General Aviation Operations and Based Aircraft Forecasts

Based on industry trends, historical activity, FAA and state activity forecasts, and other factors, the FASP 2035 Update developed aviation forecasts to determine anticipated levels of aviation demand over the planning horizon. Commercial operations were excluded from this evaluation because drivers of commercial activity at airports can significantly vary, often based on factors outside of an airport's control. Based on this analysis:

- Annual general aviation operations are anticipated to increase 23.8 percent between 2014 and 2035. By 2035, an additional 1.6 million general aviation operations are anticipated to annually occur in Florida to reach 8,204,503 per year.
- The number of based aircraft in Florida is projected to increase by 31.1 percent between 2014 and 2035, adding over 3,950 based aircraft to the state for a total of 16,580 in 2035.
- Much of the growth in general aviation operations and based aircraft is anticipated to occur along Florida's southern and central Atlantic coastal areas.

Demand Capacity Analysis

The FASP 2035 Update assessed the ability of Florida's airports to meet current and projected levels of aircraft operations in 2035. The FAA recommends planning for capacity improvements when the ratio of aircraft operations to Annual Service Volume (ASV) reaches 60 percent, and implementation of these improvements should occur when ratio reaches 80 percent. By 2035, 20 of Florida's airports, including seven commercial service facilities, are anticipated to exceed the FAA's recommended improvement thresholds.

Based on this statewide demand capacity analysis, one recommendation out of the FASP 2035 Update to conduct District-specific airport capacity analyses for Districts 4, 5, and 6.

Aviation Funding

Funding for Florida's aviation system is available from a variety of federal, state, and local sources. FDOT allocates funds through the Florida Aviation Grant Program, Strategic Intermodal System (SIS), and several other mechanisms. Florida Aviation Grant Funds are available to all publicly owned, public-use commercial service and general aviation airports for planning, capital improvement, land acquisition, economic development, and other types of airport improvement projects. SIS funds are available to the 20 SIS or Emerging SIS airports deemed critical to the state's economic competitiveness and transportation mobility.

Example National/Global Trends

- Airline consolidations and the emergence of ultra-low-cost carriers (ULCCs)
- Larger, lighter aircraft capable of longer flights
- Unmanned vehicles, including unmanned aerial systems (UAS) and automated/autonomous/connected vehicles
- Air traffic control system changes including enhancements from NextGen and potential privatization
- Oil prices
- Regulatory changes and volatility impacting immigration, customs, border protection, and air safety

Example Florida-specific Trends

- Aging population
- International pilot shortage
- Intermodal connectivity
- Population and tourism growth
- Intercontinental visitors and freight

