

FLORIDA DEPARTMENT OF TRANSPORTATION

STATEWIDE AVIATION Economic Impact Study



Executive Summary

2019



Executive Summary

THE AVIATION INDUSTRY IS AN

ECONOMIC ENGINE

FOR THE STATE OF FLORIDA

FLORIDA'S STATEWIDE BENEFITS FROM AVIATION

Statewide, the economic impacts of airports consist of four primary categories—On-Airport Activity, Visitor Spending, Industry Reliance, and Military Spending. Together in 2017, these accounted for nearly **\$175 billion** in economic impact for Florida's aviation industry.

On-Airport Activity **\$72,014,206,000**

Visitor Spending **\$90,732,534,000**

Industry Reliance **\$2,281,049,000**

Military Spending **\$9,815,780,000**

Total
Economic
Impact

**\$175
BILLION**

**Totals above may not add due to rounding*

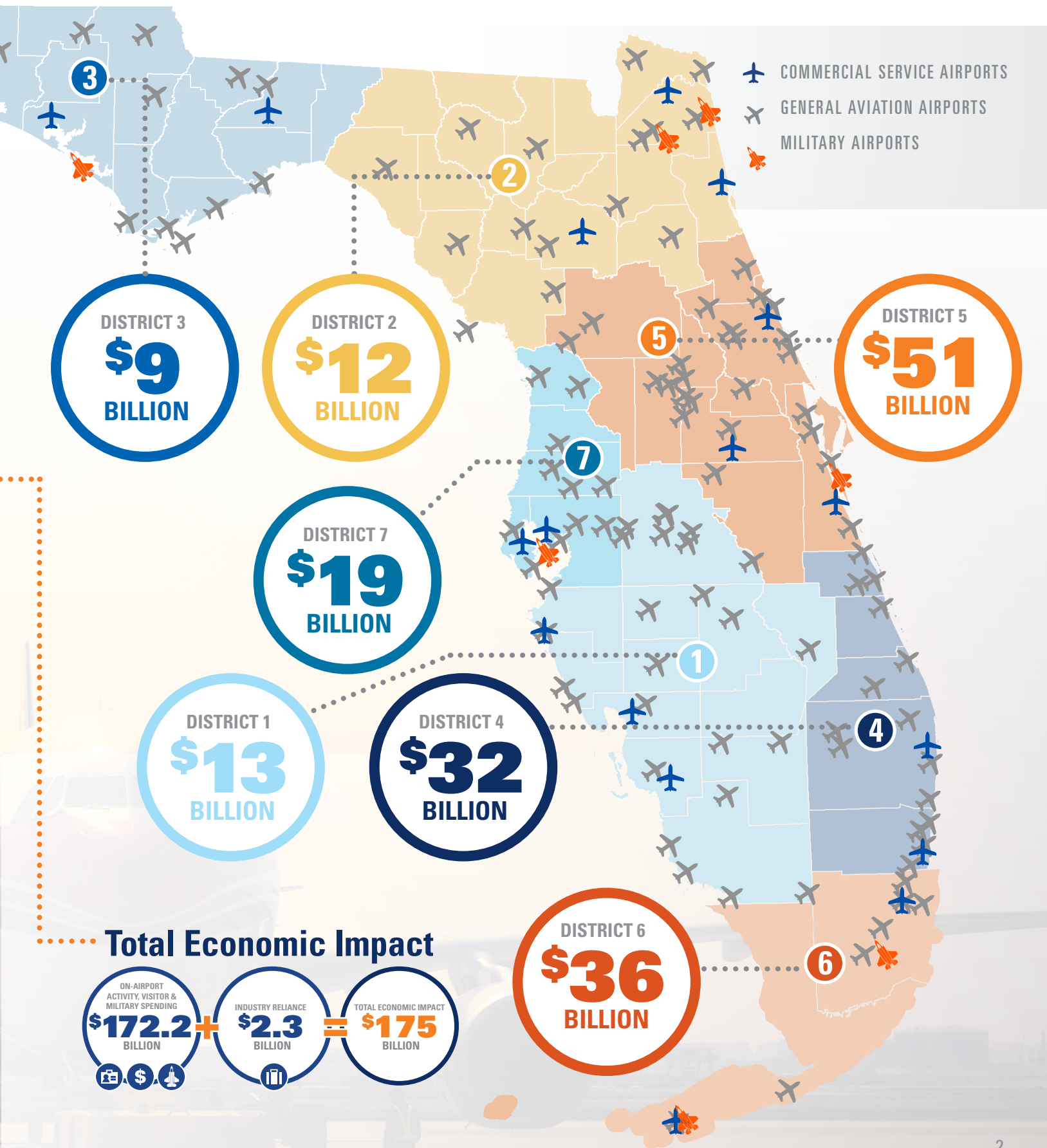
The industry reliance analysis is based on companies identified by airport administration only and is not a statewide assessment of all of the companies in Florida that depend on aviation to conduct business. Multiplier impacts are not calculated. While this approach is very conservative, it is an indicator of how much businesses in Florida depend on aviation.

Florida's airports are vital to daily life and trade. Whether for delivery services, news reporting, personal vacations, or business travel, Floridians rely on the aviation industry to stay connected with each other and economic markets. Florida's extensive aviation system includes 20 public-use commercial service airports, 109 public-use general aviation airports, and hundreds of private airports. These airports support Florida's diverse economy, including tourism, agriculture, aviation and aerospace, and manufacturing, and they are a critical component of essential services such as medical transportation, law enforcement, search and rescue, and disaster response and recovery.

As the link that connects people and businesses, Florida's airports help ensure sustained economic growth.

The state's airports support economic activity by providing access to destinations within the state, throughout the country, and across the globe. Airports also offer significant economic contributions to our communities by supporting jobs, generating income, and triggering spending at the local, regional, and state level.

To understand how Florida's 129 public-use airports contribute to the economy, the Florida Department of Transportation (FDOT) Aviation and Spaceports Office has commissioned the fourth iteration of FDOT's 2019 Statewide Aviation Economic Impact Study (the Study). This study evaluates the impact of the state's aviation system on Florida's economy and supports strategic planning and funding decisions at the state level.



Statewide Impact of Florida's Airports

What is economic impact?

Aviation jobs and commerce on airports create strong economic stimuli for Florida. FDOT periodically conducts the Study to understand the overall role of aviation in supporting the state's economy and to help inform state decision-making.

Several metrics communicate economic impact. Output and the portion of those sales used to pay workers (payroll) drive economic impacts. Output is the total value of goods and services sold, as well as budget expenditures by public entities. Payroll is salaries, wages, profits, and benefits to workers. The third metric is jobs.

To quantify the contribution of Florida's aviation system to the economy, the Study utilizes a variety of primary and secondary data sources and economic modeling techniques. The primary data source was a series of six surveys for airport administration, tenants, visitors, and aviation-reliant businesses to gather key information related to economic metrics. Data were input into Impact Analysis for Planning (IMPLAN), an economic modeling software used to generate the multiplier effect.

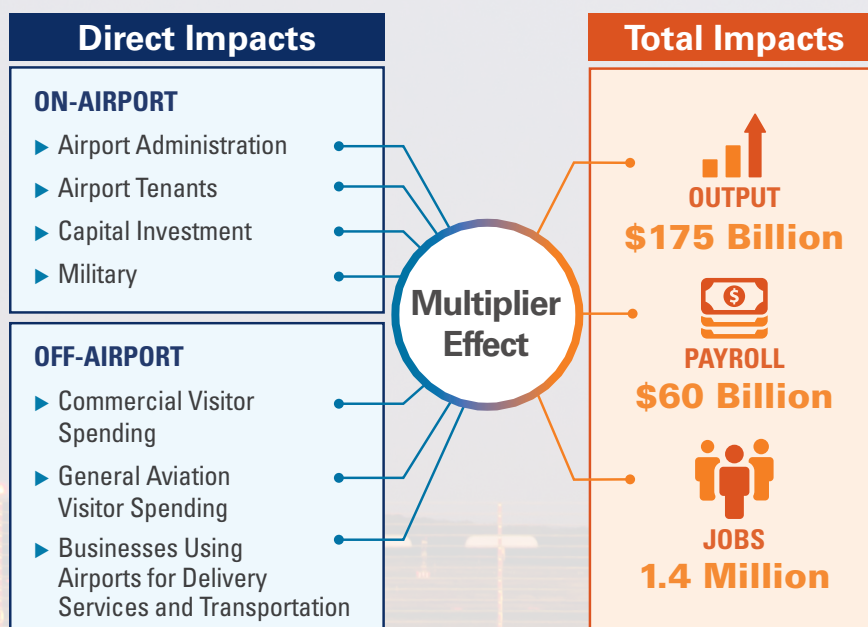
Resulting economic metrics include jobs, payroll, and output for direct impacts, supplier purchases (indirect impacts), and employee spending (induced impacts).



How is economic impact measured?

Direct impacts are related to the provision of aviation services, visitor spending, or the activity of aviation-reliant businesses. Direct impacts of on-airport tenants include the number of persons they employ on the airport, the wages and benefits paid to those workers, and their output. Similarly, the direct impacts of visitors arriving by air transportation include the money they spend on services and goods and the jobs and payroll supported by those expenditures.

Supplier purchases and employee spending (indirect impacts and induced impacts, respectively) are two streams often called multiplier effects. Supplier purchases generate economic impact when directly affected businesses use a portion of direct business revenue to purchase goods and services from other Florida businesses. Employee spending impacts occur when workers who earn income due to direct sales and supplier sales spend their wages in Florida to purchase household goods and services, such as groceries, rent, entertainment, and other goods and services.



ECONOMIC IMPACTS OF ON-AIRPORT ACTIVITY

The economic contribution of airport administration and business tenants and their capital improvements are on-airport economic impacts. While the category is called on-airport activity, supplier purchases and employee spending may be generated off-airport.



**Statewide
On-Airport
Impacts**

\$72B
OUTPUT

\$22B
PAYROLL

393,879
EMPLOYEES



Fixed base operators (FBOs) provide key services on airports such as fueling, hangar storage, tie-downs and parking, aircraft rentals, flight training, and aircraft maintenance, among other similar services.

Florida's airports are often home to emergency medical aviation teams that provide critical services when ambulances cannot quickly reach a location.



**AIRPORT
ADMINISTRATION**
generated
20% (\$14 Billion)
of on-airport output



accounted for
23% (\$5 Billion)
of payroll and

26% (101,033)
of employees

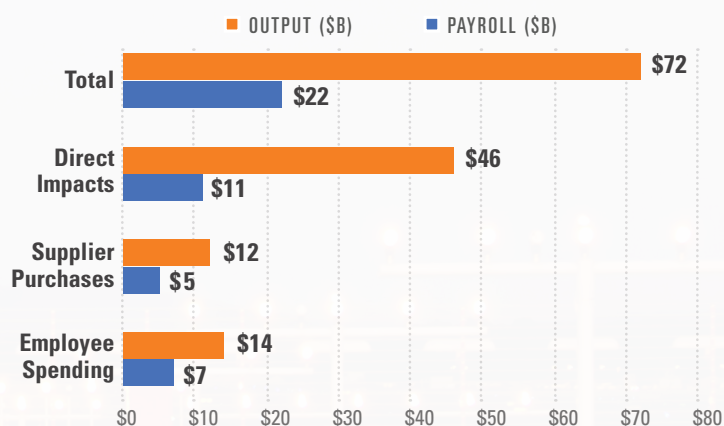
**BUSINESS
TENANTS**
generated
80% (\$58 Billion)
of on-airport output



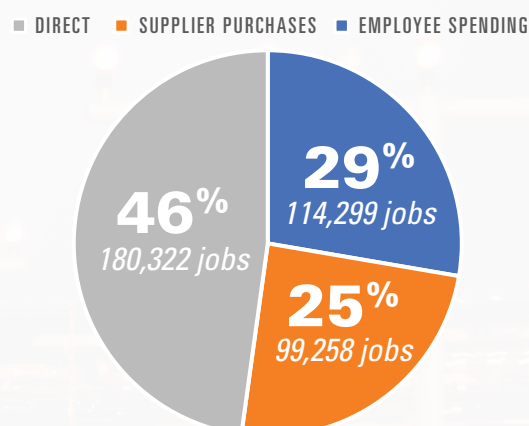
accounted for
77% (\$17 Billion)
of payroll and

74% (292,846)
of employees

ON-AIRPORT OUTPUT AND PAYROLL



ON-AIRPORT JOBS



ECONOMIC IMPACTS OF VISITOR SPENDING

The aviation system is a key supporter of tourism, one of Florida's main industries. According to Visit Florida, over 110 million out-of-state visitors came to Florida in 2017, with more than half arriving by air transportation.

The FDOT Aviation and Spaceports Office conducted a comprehensive survey effort of commercial service and general aviation passengers to gather travel details such as average number of travelers, spending habits, length of stay, destination, and state of origin. Surveyors collected data from international and domestic travelers over a period of several days at most commercial service airports. Posters with a link to online surveys were available at general aviation airports, and surveyors went to select general aviation airports to gather surveys in person as well.

Of the over 5,000 visitors surveyed as part of this study, 77 percent came to Florida for pleasure, 16 percent came for business, and the remainder came for other reasons. Economic impacts are related to visitors' spending on goods and services at hospitality businesses and the jobs and payroll supported by those expenditures.



COMMERCIAL SERVICE OUTPUT

\$86B

GENERAL AVIATION OUTPUT

\$4B

TOTAL OUTPUT

\$91B

92 percent of survey respondents were domestic visitors, while the rest were international visitors

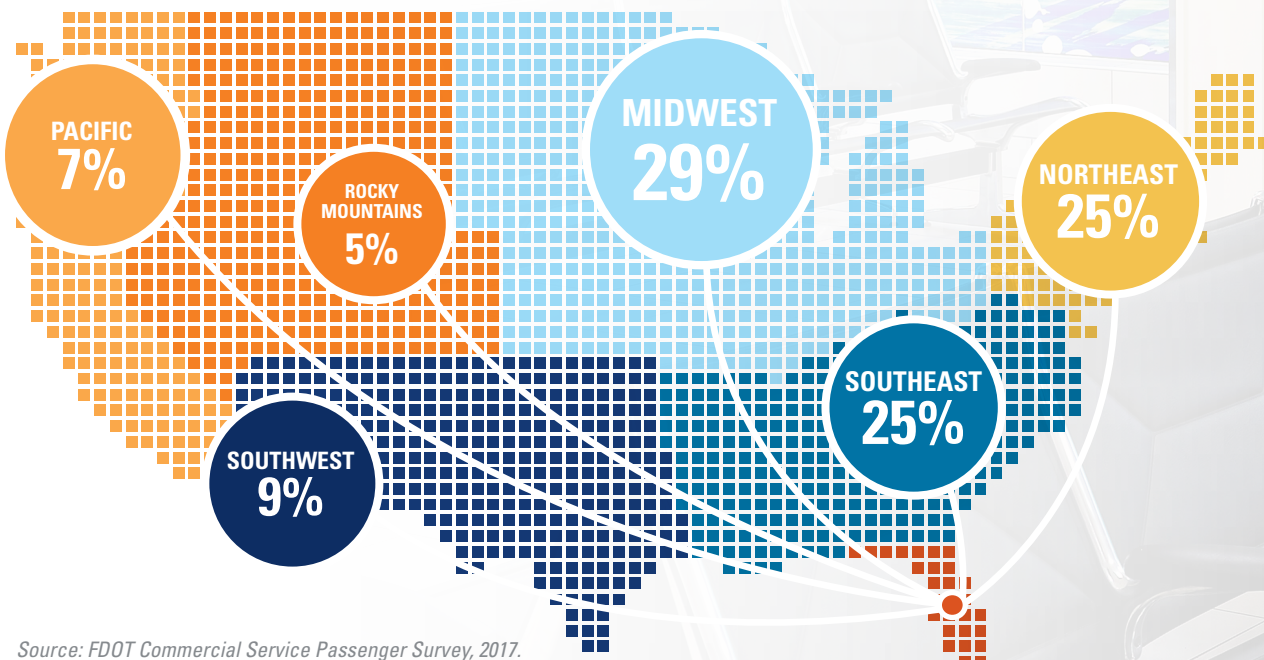
91 percent of the **92 percent** of domestic travelers were from the United States

Visitor spending generated over **\$90 Billion in output** and **\$31 Billion in payroll** for about **894,081 employees**

Five percent of the statewide total output was associated with general aviation visitors, while **95 percent** of the statewide total was due to commercial service passengers

**Totals above may not add due to rounding*

The map below shows where visitors originated from within the United States.



Source: FDOT Commercial Service Passenger Survey, 2017.



ECONOMIC IMPACTS OF INDUSTRY RELIANCE

Airports within the state play a vital role in supporting the state economy by enabling business travel as well as air cargo shipments for Florida-based businesses. Businesses rely on air transportation to conduct long-distance business trips, bring clients and colleagues to Florida, acquire the efficiency of air cargo shipments for inputs to production, or to transport finished goods to customers in domestic and international markets. To quantify this dependence, FDOT asked airport managers to identify businesses that rely on their airport, consisting of companies that base aircraft on airports or are frequent users of commercial or cargo services. Then, surveys were distributed to these companies asking them to indicate the percentage of their revenues considered to rely on air transportation. As presented in Table 1, the percentage of jobs reliant on Florida airports for the top seven industries range from **21 percent** (finance and insurance) to **55 percent** (professional services). These results are based on survey responses, and do not expand the results to the rest of the state economy. However, these results are illustrative of how businesses in Florida rely on aviation to enter long-distance markets and acquire materials to enable production and sales of competitively priced goods.

TABLE 1: ECONOMIC PROFILE OF INDUSTRIES RELIANT ON AVIATION

| INDUSTRY | Reliant Jobs | % Total Jobs | Payroll | Output |
|-----------------------|---------------|--------------|----------------------|------------------------|
| Construction | 5,521 | 43% | \$255,199,000 | \$760,143,000 |
| Finance and Insurance | 2,850 | 55% | \$222,145,000 | \$441,477,000 |
| Professional Services | 2,492 | 23% | \$83,379,000 | \$200,296,000 |
| Real Estate | 1,227 | 21% | \$95,678,000 | \$262,136,000 |
| Retail | 741 | 52% | \$10,947,000 | \$124,414,000 |
| Business Services | 506 | 48% | \$14,696,000 | \$34,805,000 |
| Manufacturing | 728 | 31% | \$37,225,000 | \$119,063,000 |
| All Others | 2,155 | 11% | \$120,600,000 | \$338,716,000 |
| TOTAL RELIANCE | 16,220 | 25% | \$839,867,000 | \$2,281,049,000 |

Source: Airport manager survey. Calculations by EDR Group using Bureau of Labor (BLS) and Bureau of Economic Analysis (BEA) data within IMPLAN. Totals may not add due to rounding.

ECONOMIC IMPACTS OF MILITARY SPENDING

Military aviation is a key component of Florida's economy. Due to its geographic location, favorable weather, and over-water airspace, Florida is an ideal location for many military aviation installations. The State of Florida recognizes the importance of military aviation through the Florida Aviation System Plan's (FASP) goal to "Foster Florida's reputation as a military-friendly state."

Military aviation in Florida is a major contributor to the state and local economies, employing more than **108,172 workers** and contributing over **\$9.8 billion** in economic activity in the form of expenditures and payroll. Table 2 summarizes payroll and expenditures for military airports by FDOT District.



TABLE 2: ECONOMIC IMPACTS OF MILITARY SPENDING

| District* | Payroll | Expenditures | Total Spending |
|------------------|------------------------|------------------------|------------------------|
| 2 | \$1,809,599,000 | \$659,848,000 | \$2,469,447,000 |
| 3 | \$3,846,630,000 | \$1,046,772,000 | \$4,893,403,000 |
| 5 | \$379,553,000 | \$470,946,000 | \$850,500,000 |
| 6 | \$272,351,000 | \$311,602,000 | \$583,953,000 |
| 7 | \$273,346,000 | \$745,132,000 | \$1,018,478,000 |
| STATEWIDE | \$6,581,480,000 | \$3,234,300,000 | \$9,815,780,000 |

* The scope of this study does not include any military installations in FDOT Districts 1, 4, and 7.

Source: Department of Defense (DOD) economic impact publications, the Base Closure and Realignment Commission (BRAC), and other state and local economic impact sources developed between 2014 and 2016. Refer to the Statewide Aviation Economic Impact Study Technical Report for a full list of sources. Totals may not add due to rounding.

Executive Summary

TABLE 3: TOTAL IMPACTS BY AIRPORT – COMMERCIAL SERVICE

| District # | Airport Name | Associated City | Total Jobs | Total Payroll | Total Economic Impact (Output) |
|------------------------------------------|-------------------------------------------------|---------------------------|------------|------------------|--------------------------------|
| 1 | Southwest Florida International Airport | Fort Myers | 83,290 | \$2,846,339,000 | \$8,405,324,000 |
| | Punta Gorda Airport | Punta Gorda | 12,392 | \$418,762,000 | \$1,275,088,000 |
| | Sarasota/Bradenton International Airport | Sarasota/Bradenton | 12,130 | \$465,502,000 | \$1,333,583,000 |
| 2 | Gainesville Regional Airport | Gainesville | 2,964 | \$113,074,000 | \$374,006,000 |
| | Jacksonville International Airport | Jacksonville | 26,396 | \$993,638,000 | \$3,194,422,000 |
| | Northeast Florida Regional Airport | St. Augustine | 5,624 | \$343,082,000 | \$1,472,434,000 |
| 3 | Northwest Florida Beaches International Airport | Panama City Beach | 7,602 | \$235,213,000 | \$771,907,000 |
| | Pensacola International Airport | Pensacola | 11,497 | \$397,184,000 | \$1,266,616,000 |
| | Tallahassee International Airport | Tallahassee | 5,202 | \$187,906,000 | \$599,879,000 |
| | Destin-Fort Walton Beach Airport | Valparaiso | 7,682 | \$249,831,000 | \$814,149,000 |
| 4 | Fort Lauderdale/Hollywood International Airport | Fort Lauderdale | 156,200 | \$6,674,292,000 | \$20,803,987,000 |
| | Palm Beach International Airport | West Palm Beach | 48,602 | \$1,851,444,000 | \$5,642,274,000 |
| 5 | Daytona Beach International Airport | Daytona Beach | 6,431 | \$242,673,000 | \$737,597,000 |
| | Melbourne International Airport | Melbourne | 15,059 | \$957,793,000 | \$2,771,364,000 |
| | Orlando International Airport | Orlando | 343,576 | \$13,539,181,000 | \$41,128,183,000 |
| | Orlando Sanford International Airport | Orlando | 21,179 | \$818,972,000 | \$2,600,786,000 |
| 6 | Key West International Airport | Key West | 7,185 | \$296,469,000 | \$856,687,000 |
| | Miami International Airport | Miami | 263,953 | \$11,380,900,000 | \$33,195,200,000 |
| 7 | St. Pete-Clearwater International Airport | St. Petersburg/Clearwater | 21,365 | \$827,905,000 | \$2,579,499,000 |
| | Tampa International Airport | Tampa | 121,159 | \$4,507,716,000 | \$14,451,785,000 |
| TOTAL COMMERCIAL SERVICE AIRPORT IMPACTS | | | 1,179,488 | \$47,347,876,000 | \$144,274,770,000 |

▲ *All values presented in 2017 dollars. Sources: Economic Impact Study (EIS) Surveys (Kimley-Horn), 2017; Calculations by EDR Group in 2018 using the 2016 IMPLAN model. Table includes only on-airport activity and visitor spending impacts.



TABLE 4: TOTAL IMPACTS BY AIRPORT – GENERAL AVIATION

| District # | Airport Name | Associated City | Total Jobs | Total Payroll | Total Economic Impact (Output) |
|------------|-----------------------------------------|------------------|------------|---------------|--------------------------------|
| 1 | Arcadia Municipal Airport | Arcadia | 34 | \$1,944,000 | \$4,953,000 |
| | Avon Park Executive Airport | Avon Park | 70 | \$3,537,000 | \$9,610,000 |
| | Bartow Municipal Airport | Bartow | 1,501 | \$75,783,000 | \$222,429,000 |
| | Airglades Airport | Clewiston | 124 | \$5,942,000 | \$18,093,000 |
| | Buchan Airport | Englewood | 8 | \$164,000 | \$370,000 |
| | Everglades Airpark | Everglades City | 15 | \$701,000 | \$2,287,000 |
| | Page Field | Fort Myers | 3,328 | \$135,336,000 | \$385,068,000 |
| | Immokalee Regional Airport | Immokalee | 247 | \$11,517,000 | \$39,056,000 |
| | La Belle Municipal Airport | La Belle | 68 | \$2,342,000 | \$7,112,000 |
| | Lake Wales Municipal Airport | Lake Wales | 145 | \$5,263,000 | \$15,296,000 |
| | Lakeland Linder International Airport | Lakeland | 4,408 | \$203,693,000 | \$574,814,000 |
| | South Lakeland Airport | Lakeland | 6 | \$200,000 | \$590,000 |
| | Marco Island Executive Airport | Marco Island | 294 | \$11,180,000 | \$31,709,000 |
| | Naples Municipal Airport | Naples | 3,367 | \$152,296,000 | \$440,173,000 |
| | Okeechobee County Airport | Okeechobee | 374 | \$13,050,000 | \$37,332,000 |
| | Airport Manatee | Palmetto | 7 | \$235,000 | \$706,000 |
| | River Ranch Resort Airport | River Ranch | 289 | \$20,700,000 | \$46,693,000 |
| | Sebring Regional Airport | Sebring | 2,649 | \$111,457,000 | \$368,436,000 |
| | Venice Municipal Airport | Venice | 420 | \$17,835,000 | \$53,577,000 |
| | Wauchula Municipal Airport | Wauchula | 23 | \$1,004,000 | \$3,627,000 |
| 2 | Jack Browns Seaplane Base | Winter Haven | 33 | \$757,000 | \$1,776,000 |
| | Winter Haven Regional Airport | Winter Haven | 622 | \$22,029,000 | \$66,640,000 |
| | Flying Ten Airport | Archer | 1 | \$31,000 | \$93,000 |
| | George T Lewis Airport | Cedar Key | 40 | \$1,316,000 | \$3,948,000 |
| | Cross City Airport | Cross City | 77 | \$2,626,000 | \$7,955,000 |
| | Fernandina Beach Municipal Airport | Fernandina Beach | 350 | \$12,137,000 | \$41,087,000 |
| | Oak Tree Landing Airport | High Springs | 21 | \$827,000 | \$2,565,000 |
| | Hilliard Airpark | Hilliard | 4 | \$178,000 | \$536,000 |
| | Cecil Airport | Jacksonville | 11,084 | \$694,250,000 | \$2,839,786,000 |
| | Herlong Recreational Airport | Jacksonville | 379 | \$16,205,000 | \$52,471,000 |
| | Jacksonville Executive At Craig Airport | Jacksonville | 885 | \$33,027,000 | \$103,545,000 |
| | Keystone Airpark | Keystone Heights | 127 | \$6,763,000 | \$17,785,000 |
| | Lake City Gateway Airport | Lake City | 4,079 | \$243,024,000 | \$1,004,033,000 |
| | Suwannee County Airport | Live Oak | 96 | \$3,917,000 | \$14,475,000 |
| | Palatka Municipal - Lt Kay Larkin Field | Palatka | 207 | \$8,192,000 | \$29,357,000 |
| | Perry-Foley Airport | Perry | 10 | \$421,000 | \$1,286,000 |
| | Williston Municipal Airport | Williston | 1,719 | \$78,190,000 | \$309,763,000 |

▲ *All values presented in 2017 dollars. Sources: EIS Surveys (Kimley-Horn), 2017; Calculations by EDR Group in 2018 using the 2016 IMPLAN model. Table includes only on-airport activity and visitor spending impacts.

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TABLE 4 CONTINUED FROM PREVIOUS PAGE

| District # | Airport Name | Associated City | Total Jobs | Total Payroll | Total Economic Impact (Output) |
|------------|--------------------------------------------------|-------------------------|------------|---------------|--------------------------------|
| 3 | Apalachicola Regional-Cleve Randolph Field | <i>Apalachicola</i> | 133 | \$4,387,000 | \$13,963,000 |
| | St. George Island Airport | <i>Apalachicola</i> | 0 | \$11,000 | \$35,000 |
| | Calhoun County Airport | <i>Blountstown</i> | 37 | \$1,539,000 | \$5,618,000 |
| | Tri-County Airport | <i>Bonifay</i> | 102 | \$3,675,000 | \$12,168,000 |
| | Carrabelle-Thompson Airport | <i>Carrabelle</i> | 6 | \$228,000 | \$666,000 |
| | Bob Sikes Airport | <i>Crestview</i> | 3,056 | \$159,345,000 | \$755,708,000 |
| | Defuniak Springs Airport | <i>Defuniak Springs</i> | 139 | \$5,370,000 | \$18,216,000 |
| | Destin Executive Airport | <i>Destin</i> | 1,309 | \$40,856,000 | \$144,030,000 |
| | Marianna Municipal Airport | <i>Marianna</i> | 317 | \$12,945,000 | \$44,314,000 |
| | Peter Prince Field | <i>Milton</i> | 422 | \$11,522,000 | \$37,309,000 |
| | Fort Walton Beach Airport | <i>Navarre</i> | 4 | \$93,000 | \$309,000 |
| | Wakulla County Airport | <i>Panacea</i> | 0 | \$14,000 | \$43,000 |
| | Ferguson Airport | <i>Pensacola</i> | 89 | \$4,729,000 | \$17,689,000 |
| | Costin Airport | <i>Port St. Joe</i> | 1 | \$33,000 | \$106,000 |
| | Quincy Municipal Airport | <i>Quincy</i> | 27 | \$996,000 | \$3,327,000 |
| 4 | Belle Glade State Municipal Airport | <i>Belle Glade</i> | 108 | \$5,247,000 | \$16,422,000 |
| | Boca Raton Airport | <i>Boca Raton</i> | 3,055 | \$135,203,000 | \$433,992,000 |
| | Downtown Fort Lauderdale Heliport | <i>Fort Lauderdale</i> | 7 | \$278,000 | \$713,000 |
| | Fort Lauderdale Executive Airport | <i>Fort Lauderdale</i> | 12,708 | \$578,721,000 | \$2,091,276,000 |
| | Treasure Coast International Airport | <i>Fort Pierce</i> | 3,403 | \$154,388,000 | \$509,649,000 |
| | North Perry Airport | <i>Hollywood</i> | 1,163 | \$40,254,000 | \$119,123,000 |
| | Palm Beach County Glades Airport | <i>Pahokee</i> | 201 | \$7,559,000 | \$22,032,000 |
| | Pompano Beach Airpark | <i>Pompano Beach</i> | 1,054 | \$44,575,000 | \$133,843,000 |
| | Sebastian Municipal Airport | <i>Sebastian</i> | 426 | \$17,602,000 | \$54,268,000 |
| | Witham Field | <i>Stuart</i> | 3,222 | \$204,932,000 | \$786,440,000 |
| | New Hibiscus Airpark | <i>Vero Beach</i> | 4 | \$147,000 | \$395,000 |
| | Vero Beach Regional Airport | <i>Vero Beach</i> | 5,522 | \$338,820,000 | \$1,321,201,000 |
| | North Palm Beach County General Aviation Airport | <i>West Palm Beach</i> | 312 | \$13,708,000 | \$44,910,000 |
| | Palm Beach County Park Airport | <i>West Palm Beach</i> | 523 | \$22,024,000 | \$74,386,000 |
| 5 | Orlando Apopka Airport | <i>Apopka</i> | 8 | \$260,000 | \$788,000 |
| | Bob White Field | <i>Deland</i> | 13 | \$509,000 | \$1,672,000 |
| | Deland Municipal-Sidney H. Taylor Field | <i>Deland</i> | 3,839 | \$259,736,000 | \$713,705,000 |
| | Marion County Airport | <i>Dunnellon</i> | 333 | \$13,320,000 | \$44,432,000 |
| | Leesburg International Airport | <i>Leesburg</i> | 556 | \$31,190,000 | \$109,522,000 |
| | Merritt Island Airport | <i>Merritt Island</i> | 501 | \$20,507,000 | \$62,551,000 |
| | New Smyrna Beach Municipal Airport | <i>New Smyrna Beach</i> | 1,281 | \$61,700,000 | \$171,903,000 |

| District # | Airport Name | Associated City | Total Jobs | Total Payroll | Total Economic Impact (Output) |
|------------|-------------------------------------------------|-----------------|------------|-----------------|--------------------------------|
| 5 | Ocala International-Jim Taylor Field | Ocala | 613 | \$22,950,000 | \$69,068,000 |
| | Kissimmee Gateway Airport | Orlando | 1,576 | \$62,280,000 | \$190,943,000 |
| | Executive Airport | Orlando | 4,537 | \$210,216,000 | \$622,914,000 |
| | Ormond Beach Municipal Airport | Ormond Beach | 426 | \$18,654,000 | \$56,309,000 |
| | Flagler Executive Airport | Palm Coast | 1,343 | \$48,744,000 | \$150,017,000 |
| | Pierson Municipal Airport | Pierson | 9 | \$297,000 | \$778,000 |
| | Tavares Seaplane Base | Tavares | 161 | \$9,493,000 | \$39,349,000 |
| | Arthur Dunn Air Park | Titusville | 76 | \$2,856,000 | \$8,266,000 |
| | Space Coast Regional Airport | Titusville | 826 | \$36,844,000 | \$120,329,000 |
| | Umatilla Municipal Airport | Umatilla | 112 | \$5,455,000 | \$19,871,000 |
| | Valkaria Airport | Valkaria | 435 | \$18,460,000 | \$58,483,000 |
| 6 | Homestead General Aviation Airport | Homestead | 87 | \$3,900,000 | \$6,900,000 |
| | The Florida Keys Marathon International Airport | Marathon | 785 | \$38,537,000 | \$106,239,000 |
| | Dade-Collier Training and Transition Airport | Miami | 30 | \$1,280,000 | \$2,428,000 |
| | Miami Homestead General Aviation Airport | Miami | 993 | \$51,700,000 | \$81,300,000 |
| | Miami Seaplane Base | Miami | 66 | \$3,460,000 | \$10,884,000 |
| | Miami-Opa Locka Executive Airport | Miami | 6,867 | \$388,700,000 | \$1,096,800,000 |
| 7 | Pilot Country Airport | Brooksville | 4,431 | \$209,061,000 | \$780,229,000 |
| | Brooksville-Tampa Bay Regional Airport | Brooksville | 3 | \$134,000 | \$374,000 |
| | Clearwater Air Park | Clearwater | 169 | \$6,250,000 | \$20,449,000 |
| | Crystal River-Captain Tom Davis Field | Crystal River | 78 | \$2,861,000 | \$8,042,000 |
| | Inverness Airport | Inverness | 83 | \$3,417,000 | \$9,657,000 |
| | Plant City Airport | Plant City | 327 | \$17,858,000 | \$38,515,000 |
| | Albert Whitted Airport | St. Petersburg | 665 | \$26,529,000 | \$79,703,000 |
| | Peter O. Knight Airport | Tampa | 857 | \$47,135,000 | \$114,400,000 |
| | Tampa Executive Airport | Tampa | 1,297 | \$55,122,000 | \$147,686,000 |
| | Zephyrhills Municipal Airport | Zephyrhills | 629 | \$30,360,000 | \$106,276,000 |
| | TOTAL GENERAL AVIATION AIRPORT IMPACTS | | 108,473 | \$5,417,045,000 | \$18,471,965,000 |



Case Study Highlights

The FDOT Aviation and Spaceports Office developed ten case studies describing real-life examples of the economic impact that Florida's airports have on their communities. These case studies highlight unique aspects of Florida's aviation industry and provide a qualitative description of how the aviation industry impacts Florida's businesses and communities. A sample of these case studies is below. Other examples include ST Engineering-Aerospace at Pensacola International Airport, Embraer at Melbourne International Airport, Goodyear Blimp at Pompano Beach Airpark, and Skydive City at Zephyrhills Municipal Airport.

ANCHOR TENANTS

LAKE CITY GATEWAY AIRPORT - BIG BUSINESS AT FLORIDA AIRPORTS

Many of Florida's smaller airports often have one or two major anchor tenants that drive economic development and growth. Anchor tenants come in many shapes and sizes and offer a variety of services to the aviation community in Florida. Lake City Gateway Airport is home to HAECO, a maintenance, repair, and overhaul (MRO) provider with four major locations in the U.S. At their Lake City location, HAECO provides airframe services and a strip-and-paint shop. Facilities include over 600 thousand square feet of covered hangars, 1.3 million square feet in ramp area, six MRO hangars, and a paint hangar. Additionally, an expansion of service in 2016 resulted in the addition of over 400 new high-skill, high-paying jobs—located right in Lake City! In partnership with the Columbia County School District and Northeast Florida Education Consortium, HAECO implemented the North Florida Aviation Academy to train a workforce for their Lake City location or for any similar company across the country.

BY THE NUMBERS

1



Pensacola International Airport

ST Engineering-Aerospace is estimated to have created nearly 400 jobs paying \$30,000 to \$58,000 per year

2



Lake City Gateway Airport

HAECO airframe services operation has created over 400 high-skill jobs

3

4

Melbourne International Airport

Embraer's Executive Jets division employs nearly 850 people

5



Pompano Beach Airpark

This airpark is home to one of only three Goodyear blimp bases

Zephyrhills Municipal Airport

Skydive City annually accommodates approximately 70,000 jumps performed by skydivers from 80 countries and all 50 states