

# ELEVATE

2021 ANNUAL REPORT



Florida Department of Transportation  
Aviation Office

# CHARTING THE COURSE FOR SUCCESS

The aviation industry is constantly evolving. Shifting aviation technologies, regulations, global economic conditions, and demands for air service bring both challenges and opportunities to Florida's airports. Together, the Florida Department of Transportation (FDOT), the Continuing Florida Aviation System Planning Process (CFASPP), and our airports are committed to ensure that our aviation system remains safe, highly advanced, and responsive to the state's transportation needs—both today and well into the future.

In support of this commitment, FDOT completed the Florida Aviation System Plan 2035 Update (FASP 2035) in 2017. An aviation-specific extension of the Florida Transportation Plan (FTP), the FASP 2035 is the long-term strategic plan guiding Florida's aviation future over the 20-year planning horizon. This report updates the key measures used to evaluate the system's performance in order to understand how the system has progressed since the FASP 2035 was completed.

Please note, the metrics reported as part of this update reflect changes that occurred in 2020. As such, it is likely that many data points may have been affected by the impacts of COVID-19. FDOT will continue to monitor the state's aviation system and provide data updates as necessary.

The FASP Update can be accessed online at [www.fdot.gov/aviation/FASP2035.shtm](http://www.fdot.gov/aviation/FASP2035.shtm). The FTP is available at [www.floridatransportationplan.com](http://www.floridatransportationplan.com).



## Aviation System Goals

The future of Florida's aviation system is rooted in the decisions we make today. Founded upon this forward-thinking approach, FDOT, CFASPP, and other aviation partners defined seven goals of the Florida aviation system (shown to the right). These key principles serve as the FDOT's compass as it works to ensure Florida's continued aviation leadership.

### Performance Monitoring

These goals have been translated to actionable and informational metrics known as performance measures and indicators (respectively). First assessed during the FASP 2035 Update, these metrics will be regularly evaluated to identify changes over time and support ongoing system improvement.

1. Provide safe, efficient, secure, and convenient service to Florida's citizens, businesses, and visitors.
2. Contribute to operational efficiency, economic growth, and competitiveness while remaining sensitive to Florida's natural environment.
3. Support and enhance the national position of leadership and prominence held by Florida's aviation industry.
4. Protect airspace and promote compatible land uses around airports.
5. Foster technological innovation and support the implementation of new technologies.
6. Promote support for aviation from business, government, and the public.
7. Foster Florida's reputation as a military- and aerospace-friendly state.

A summary of the FASP performance measures and indicators are provided on the following page. Additional details of this data are available in the FASP 2035 Technical Report at [www.fdot.gov/aviation/FASP2035.shtm](http://www.fdot.gov/aviation/FASP2035.shtm).



# FLORIDA AVIATION & SOCIOECONOMICS

## AIRPORTS

**Ten**  
National Asset  
General Aviation Airports

**110**  
General Aviation  
Airports



## RESIDENTS

**20** COMMERCIAL SERVICE AIRPORTS

**4** LARGE HUB FACILITIES  
*including More than any other state!*

**Third most-populous state**  
IN THE NATION WITH  
**over 21 million residents**



## PASSENGERS

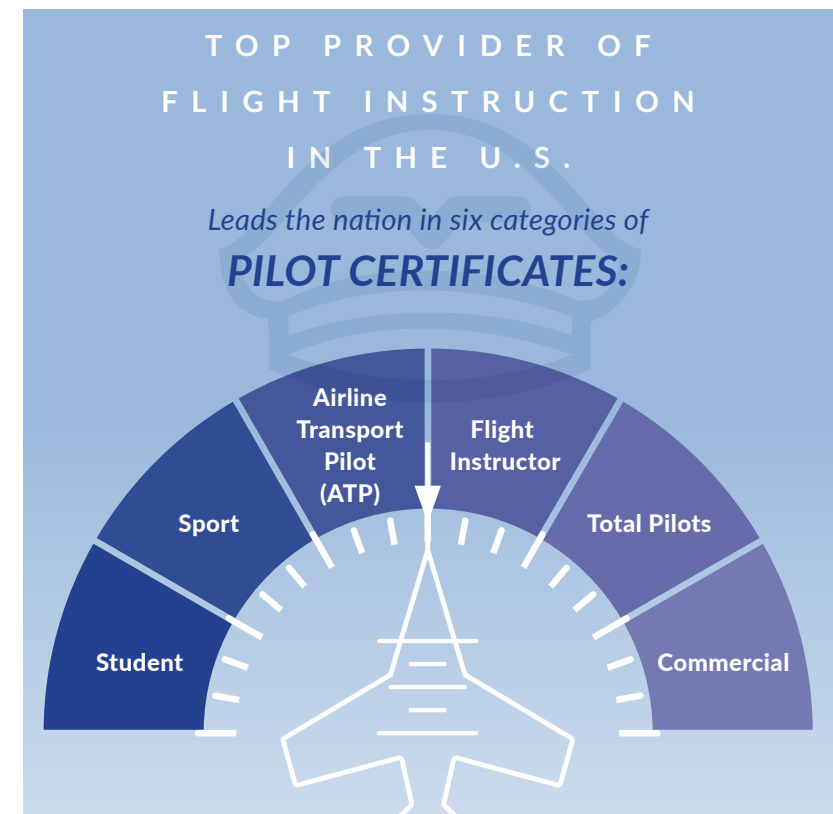
**5%**  
increase in enplanements

91,179,499 in 2018 | 95,765,183 in 2019

**NATIONALLY RANKED #2** for total commercial airline enplanements  
— 95,765,183 enplanements —

**26**  
Part 139 Airports  
including

**20** Commercial Service Airports AND **6** General Aviation Airports



## AIR CARGO

**Largest gateway into the U.S. for Latin American air cargo**

**2.1%** ANNUAL GROWTH → **4.1 TONS** by 2035

About **90%** of all flowers | About **2/3** of all perishables

**IMPORTED INTO THE U.S. THROUGH FLORIDA**

This graphic depicts the percent of Florida's system airports that currently achieve the performance measures and indicators of the FASP 2035 (2021).

**GPS**  
**62%**  
of airports have at least a GPS approach

**eALP**  
**41%**  
of airports have mapping compatible with the FAA's electronic Airport Layout Plan (eALP) standards

**Weather Reporting**  
**66%**  
of airports have either an automated weather observing station (AWOS) or automated surface observing station (ASOS)

**ATCT**  
**47**  
airports have an air traffic control tower (ATCT)

**Statewide Aviation Annual Economic Impact**

2010 2014 2019  
**\$115B → \$144B → \$175B**

**Wildlife Hazard Plans**  
**54%**  
of airports have some form of wildlife hazard plan completed

**Terminal Development**

**29%** of publicly-owned airports have an ongoing or planned terminal-related development

**Airfield Design Deficiencies**

**80%** of airports have one or more airfield design deficiencies

**40** FAA Designated Hot Spots among **22** Airports

Direct Access Conflicts  
**79%**

Three-node Conflicts  
**12%**

Wide Expansion of Pavement  
**33%**

**Based Aircraft**

**11,459** registered in the state of Florida

**Security Plan**  
**100%**  
of Part 139 airports have a security plan

**Demand Capacity**  
**11%** of airports have a demand capacity ratio of 60%+  
**7%** of airports have a demand capacity ratio of 80%+

**14%** Primary runways  
**Runway Safety Area Deficiencies**  
percent of Florida airports that do not meet relevant federal and state Runway Safety Area (RSA) standards  
**8%** Non-primary runways

**Pilot Training**  
**68%**  
of airports offer flight training services

**Total Pilots**  
**72,770**  
with 110,081 total certificates

**Strategic Intermodal System (SIS) Airports**  
These airports are critical for the mobility of passengers and freight.

**57%** of SIS Airports have Bus System Connectivity

**19%** of SIS Airports have Rail System Connectivity

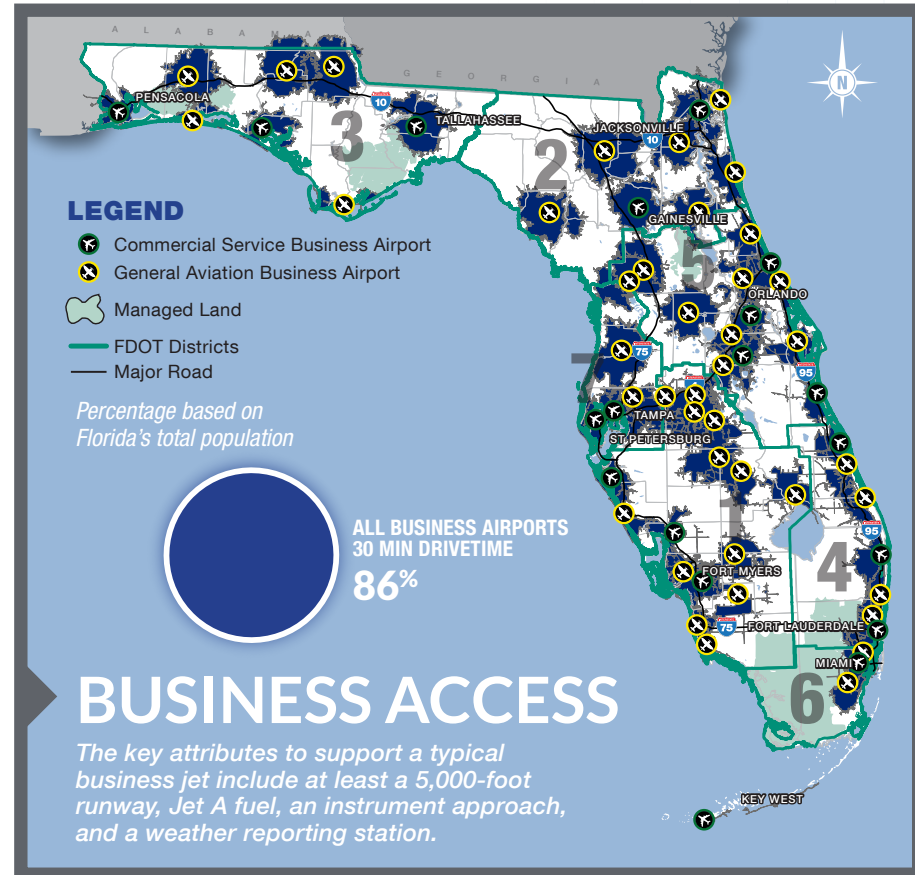
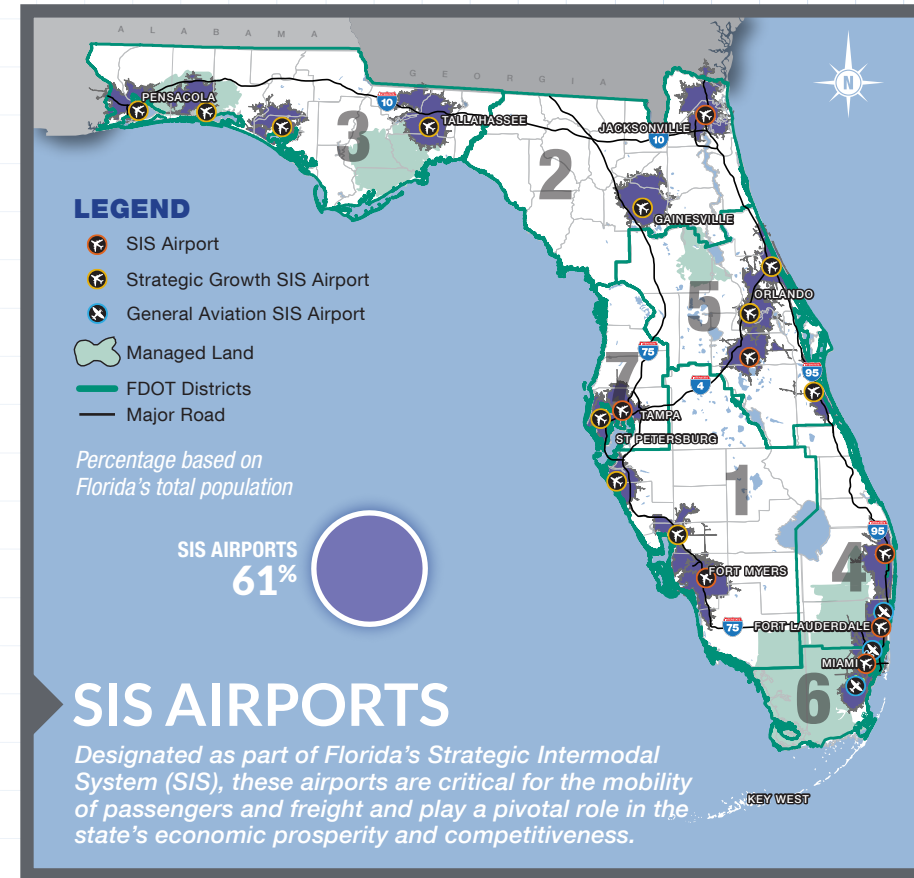
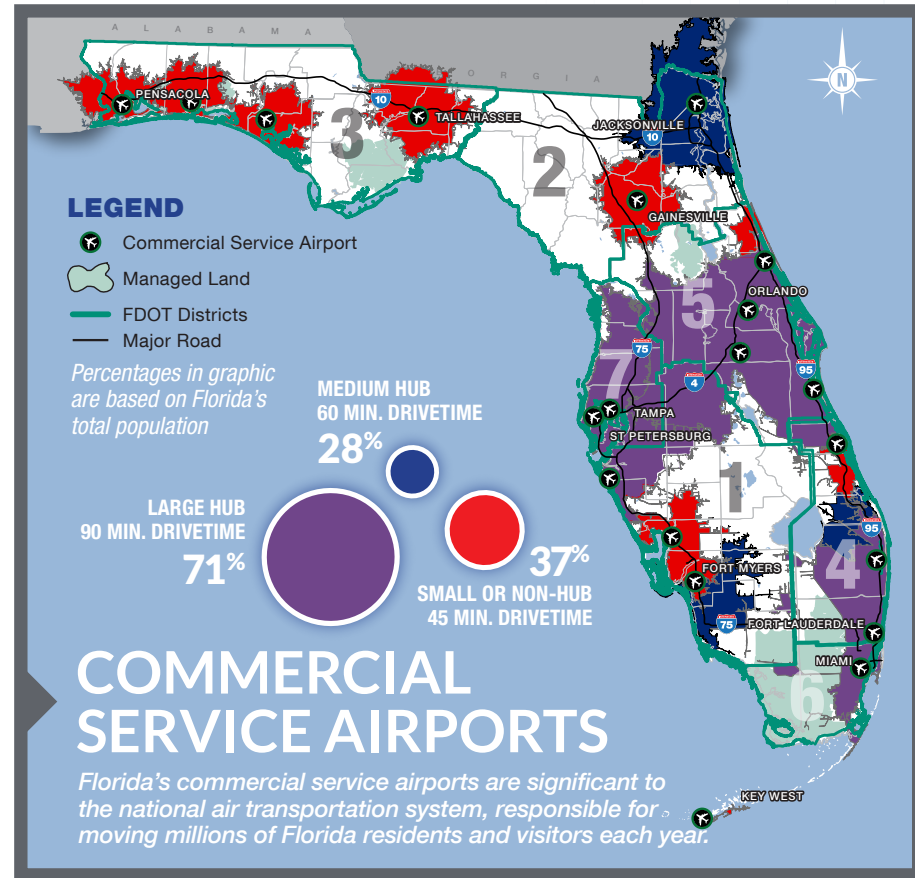
# AVIATION ACCESS

Airports vary widely in terms of the facilities and services available to aircraft, pilots, and their passengers. Airports such as Orlando International, Tampa International, and Miami International have the capability to support demanding passenger and cargo aircraft traveling to global destinations. These commercial service airports require long runways, air traffic control towers (ATCTs), Jet A fuel, and other features to support safe and efficient operations.

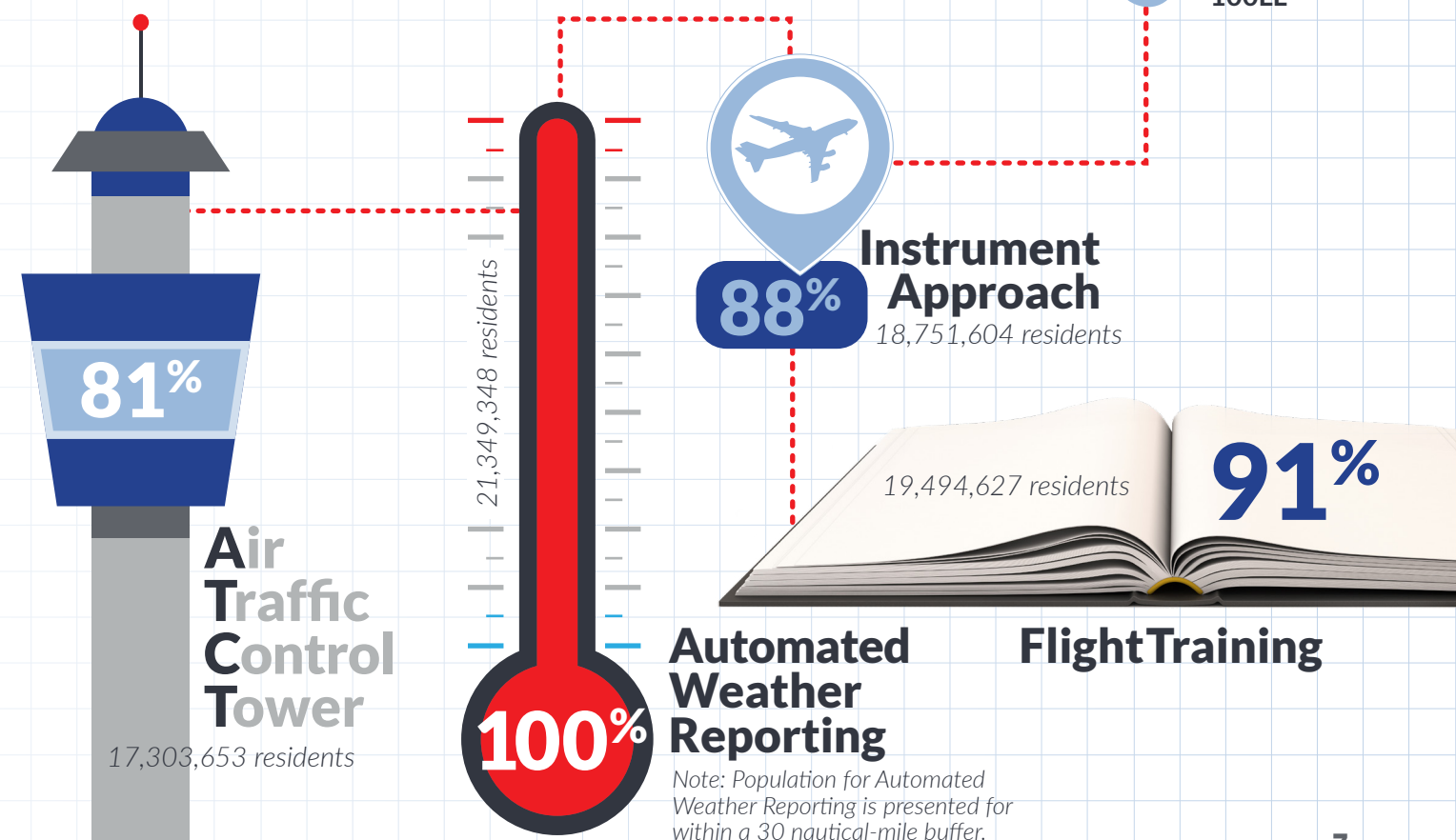
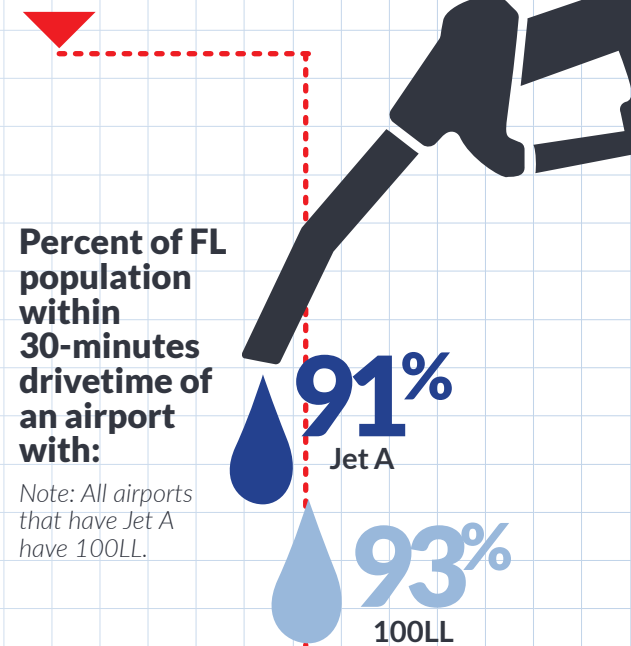
On the other end of the spectrum, some general aviation airports offer shorter runways and fewer support facilities. These airports are designed for small jet- and piston-powered aircraft typically operated by recreational aviators. Furthermore, certain activities such as business flying and flight training demand their own unique sets of airport attributes.

A truly robust aviation system provides residents with reasonable access to the entire spectrum of aviation facilities, services, and activities. As such, FDOT conducted a series of analyses to determine the percent of Florida's population within a 30-minute drive-time of various types of airports. These analyses help identify areas of comprehensive airport coverage and pinpoint the regions that could most significantly benefit from additional investments in Florida's aviation assets.

*With 95% of the population having access to a public-use airport within a 30-minute drive, Florida's residents have exceptional access to the benefits of air transportation.*

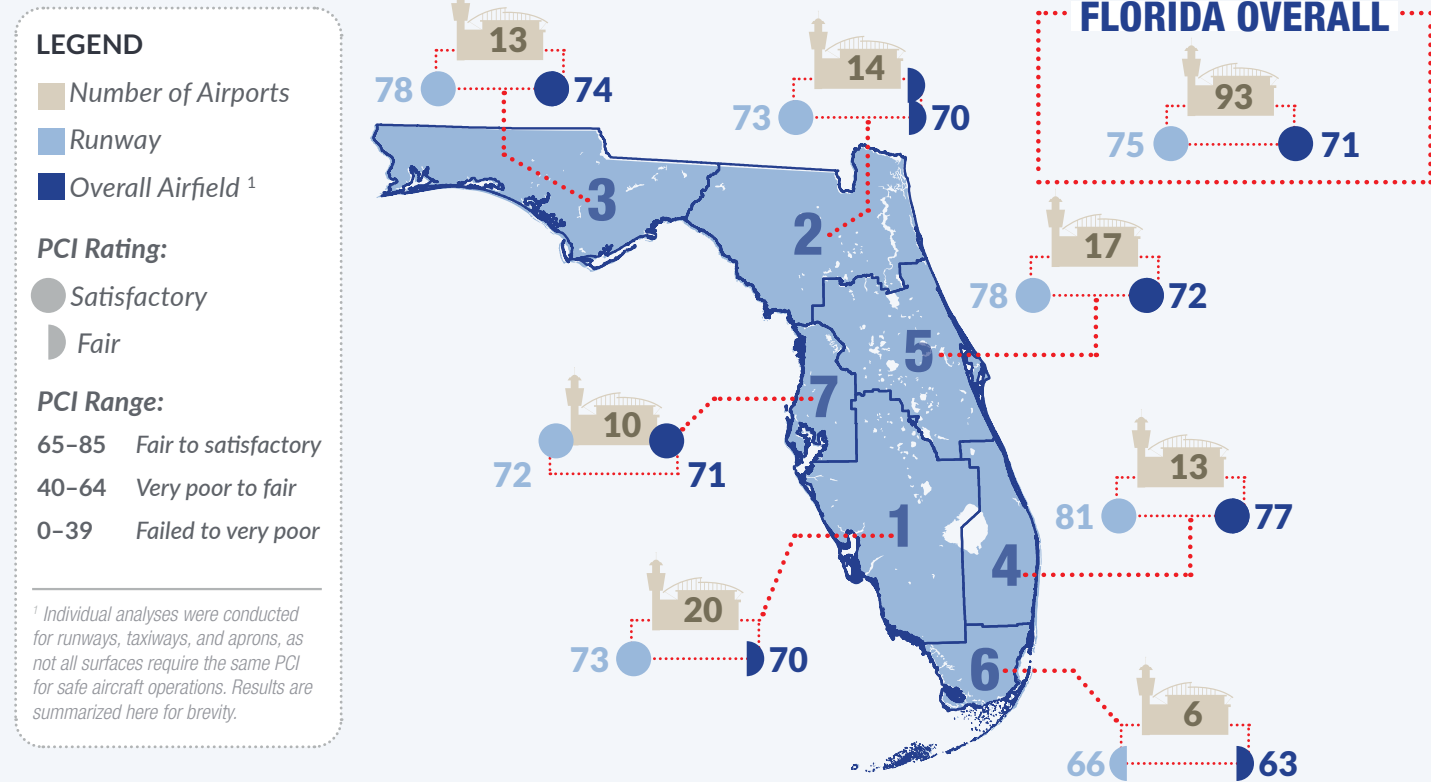


Additional drivetime reports were conducted for other attributes of Florida's aviation system to determine population coverage and access within a 30-minute drivetime of Florida's airports. This data is summarized in the graphics below.

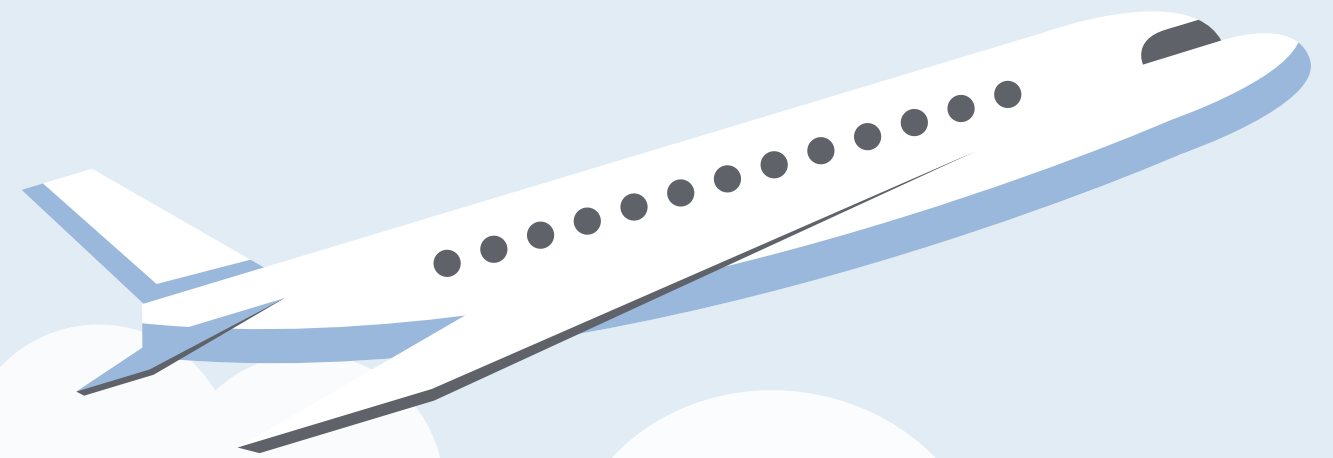


# AIRPORT PAVEMENT REPORT

Airfield pavement is a critical element of safe aircraft operations and is often one of the most significant expenses an airport faces each year. On a continuous 3-year cycle, the FDOT Aviation Office evaluates the pavement condition index (PCI) of airfields across the state. As an indicator of the general surface condition of pavement, the PCI assessment helps the FDOT Aviation Office and airports know when and where maintenance is required to prioritize project funds and keep airports safe. The following graphic reflects the average PCI values recorded among the airports located in each of the seven FDOT districts. The values presented below are from the 2017 PCI report. It is anticipated that new PCI data will be available in mid-2021.



## DATA DICTIONARY



### Work Program

The FDOT's Work Program has programmed and planned funding of \$6.9 billion for Florida's airports for projects beginning in 2015 and running through to 2025. The chart below shows the breakdown for funding.

PROJECT TYPE	2015-2025	PERCENT
Buildings	\$1,804,832,234	26%
Pavement	\$1,572,625,189	23%
Planning	\$439,686,380	6%
Roadway	\$263,319,647	4%
Other <sup>1</sup>	\$136,869,763	2%
Misc. <sup>2</sup>	\$2,661,959,648	39%
<b>TOTALS</b>	<b>\$6,879,292,861*</b>	<b>100%</b>



<sup>1</sup>Other: ARFF Facilities, Security, Weather (AWOS/ASOS), and Land Acquisition.  
<sup>2</sup> Misc: Various Airport Improvement Projects.  
 \* Totals include FDOT, FAA and local funds.

Data Element	Page of Report	2021 Value	2020 Value	Change from 2020 to 2021*	Updated Data Collection Effort	2021 Data Source	2020 Data Source	Data Source / Date Change
National Asset General Aviation Airports	3	10	9	1	Yes - new year of data	NPIAS 2021-2025	NPIAS 2019-2023	Yes
General Aviation Airports	3	110	109	1	Yes - new year of data	FAD	FAD	Yes
Commercial Service Airports	3	20	20	None	Yes - new year of data	FAA CY 2019 Enplanement Data	FAA CY 2018 Enplanement Data	Yes
Large Hub Commercial Service Airports	3	4	4	None	Yes - new year of data	FAA CY 2019 Enplanement Data	FAA CY 2018 Enplanement Data	Yes
Part 139 Airports	3	26	N/A (new addition)	N/A (new addition)	N/A (new addition)	Part 139 Airport Certification Status List	N/A (new addition)	N/A (new addition)
Pilot Categories	3	Top in 6 categories	Top in 6 categories	None	Yes - new year of data	FAA registry	FAA registry	Yes
Percent Increase in Enplanements	3	5%	7%	-2%	Yes - new year of data	FAA CY 2019 and CY 2018 Enplanement Data	FAA CY 2018 and CY 2017 Enplanement Data	Yes
National Rank for Airline Passengers	3	#2	#2	None	Yes - new year of data	FAA CY 2019 Enplanement Data	FAA Enplanement Data	Yes
Air Cargo Growth	3	No Update to Data	2.1% annual growth	N/A	No	FDOT Air Cargo Study	FDOT Air Cargo Study	No
Weather Reporting	4	66%	67%	-1%	Yes - new year of data	FAA ASOS Site	FAA ASOS Site	Yes
eALP	4	No Update to Data	41%	N/A	No	2017 FASP Survey	2017 FASP Survey	No
GPS	4	62%	64%	-2%	Yes - new year of data	FAA MasterRNAV	FAA MasterRNAV	Yes
ATCT	4	Unchanged	37% (47)	N/A	No	NFDC	NFDC	No
Direct Access Conflicts	4	79%	76%	3%	Yes - new year of data	Aerial Inspection	Aerial Inspection	Yes
Wide Expansion of Pavement	4	33%	23%	10%	Yes - new year of data	Aerial Inspection	Aerial Inspection	Yes
Three-Node Conflict	4	12%	17%	-5%	Yes - new year of data	Aerial Inspection	Aerial Inspection	Yes
FAA Designated Hot Spots	4	40 among 22 airports	41 among 22 airports	-1	Yes - new year of data	FAA Hot Spots List	FAA Hot Spots List	Yes
Airfield Design Deficiencies	4	80%	78%	2%	Yes	Aerial Inspection	Aerial Inspection	Yes

\*St. Cloud Seaplane Base (3FL) was added to the study between 2020 and 2021.

Data Element	Page of Report	2021 Value	2020 Value	Change from 2020 to 2021*	Updated Data Collection Effort	2021 Data Source	2020 Data Source	Data Source / Date Change
Based Aircraft	4	11,459	11,239	220	Yes - new year of data	Basedaircraft.com, non-primary CS NPIAS; 5010, non-NPIAS and primary CS airports	Basedaircraft.com, non-primary CS NPIAS; 5010, non-NPIAS and primary CS airports	Yes
Pilot Training	4	68%	68%	0%	Yes - new year of data	5010	5010	Yes
Total Pilots	4	72,770	69,339	3,431	Yes - new year of data	FAA registry	FAA registry	Yes
Total Certificates	4	110,081	101,613	8,468	Yes - new year of data	FAA registry	FAA registry	Yes
Wildlife Hazard Plans	5	No Update to Data	54%	N/A	No	2017 FASP Survey	2017 FASP Survey	No
Statewide Aviation Annual Economic Impact	5	No Update to Data	\$175 billion	N/A	No	2019 Economic Impact Study	2019 Economic Impact Study	No
Terminal Development	5	29%	26%	3%	Yes - new year of data	FDOT Work Program 2015-2025	FDOT Work Program 2014-2024	Yes
Security Plan	5	100%	73%	27%	Yes - new year of data	FDOT Reporting	FAD	Yes
Demand Capacity, 60%	5	No Update to Data	11%	N/A	No	2017 FASP Survey	2017 FASP Survey	No
Demand Capacity, 80%	5	No Update to Data	7%	N/A	No	2017 FASP Survey	2017 FASP Survey	No
Primary Runway RSA Deficiency	5	14%	18%	-4%	Yes - new year of data	Inspection Reports	Inspection Reports	Yes
Non-Primary Runway RSA Deficiency	5	8%	19%	-11%	Yes - new year of data	Inspection Reports	Inspection Reports	Yes
Bus System Connectivity	5	57%	60%	-3%	Yes - new year of data	Route maps	Route maps	Yes
Rail System Connectivity	5	19%	20%	-1%	Yes - new year of data	Route maps	Route maps	Yes
Jet A Population Percentage	7	91%	90%	1%	Yes - new year of data	5010, ArcGIS Drivetime Analysis	AirNav, ArcGIS Drivetime Analysis	Yes
100 LL Population Percentage	7	93%	92%	1%	Yes - new year of data	5010, ArcGIS Drivetime Analysis	AirNav, ArcGIS Drivetime Analysis	Yes
Instrument Approach Percentage	7	88%	88%	0%	Yes - new year of data	FAA MasterRNAV, ArcGIS Drivetime Analysis	FAA MasterRNAV, ArcGIS Drivetime Analysis	Yes
Instrument Approach Population	7	18,751,604	18,686,266	65,338	Yes - new year of data	FAA MasterRNAV, ArcGIS Drivetime Analysis	FAA MasterRNAV, ArcGIS Drivetime Analysis	Yes

\*St. Cloud Seaplane Base (3FL) was added to the study between 2020 and 2021.

Data Element	Page of Report	2021 Value	2020 Value	Change from 2020 to 2021*	Updated Data Collection Effort	2021 Data Source	2020 Data Source	Data Source / Date Change
Flight Training Percentage	7	91%	89%	2%	Yes - new year of data	5010, ArcGIS Drivetime Analysis	5010, ArcGIS Drivetime Analysis	Yes
Flight Training Population	7	19,494,627	18,926,915	567,712	Yes - new year of data	5010, ArcGIS Drivetime Analysis	5010, ArcGIS Drivetime Analysis	Yes
Weather Reporting Percentage	7	100%	100%	0%	Yes - new year of data	FAA ASOS Site, ArcGIS Drivetime Analysis	FAA ASOS Site, ArcGIS Drivetime Analysis	Yes
Weather Reporting Population	7	21,349,348	21,299,863	49,485	Yes - new year of data	FAA ASOS Site, ArcGIS Drivetime Analysis	FAA ASOS Site, ArcGIS Drivetime Analysis	Yes
ATCT Percentage	7	81%	80%	1%	Yes - new year of data	5010, ArcGIS Drivetime Analysis	2017 FASP Survey, ArcGIS Drivetime Analysis	Yes
ATCT Population	7	17,303,653	17,046,651	257,002	Yes - new year of data	5010, ArcGIS Drivetime Analysis	2017 FASP Survey, ArcGIS Drivetime Analysis	Yes
Florida Overall Airports in Pavement Report	8	No Update to Data	93%	N/A	No	FDOT Pavement Report	FDOT Pavement Report	No
Florida Overall Aviation Runway PCI	8	No Update to Data	75/Satisfactory	N/A	No	FDOT Pavement Report	FDOT Pavement Report	No
Florida Overall Average Airfield PCI	8	No Update to Data	71/Satisfactory	N/A	No	FDOT Pavement Report	FDOT Pavement Report	No
Work Program Project Funding - Total	8	\$6,879,292,861	\$7,573,198,743	-\$693,905,882	Yes - new year of data	FDOT Work Program 2015-2025	FDOT Work Program 2014-2024	Yes

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