

STATEWIDE AVIATION 
Economic Impact Study



Executive Summary

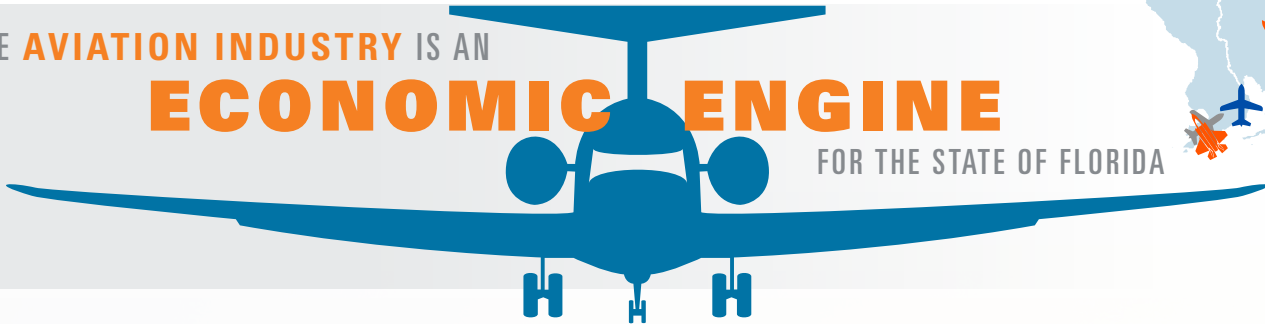
2019



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*

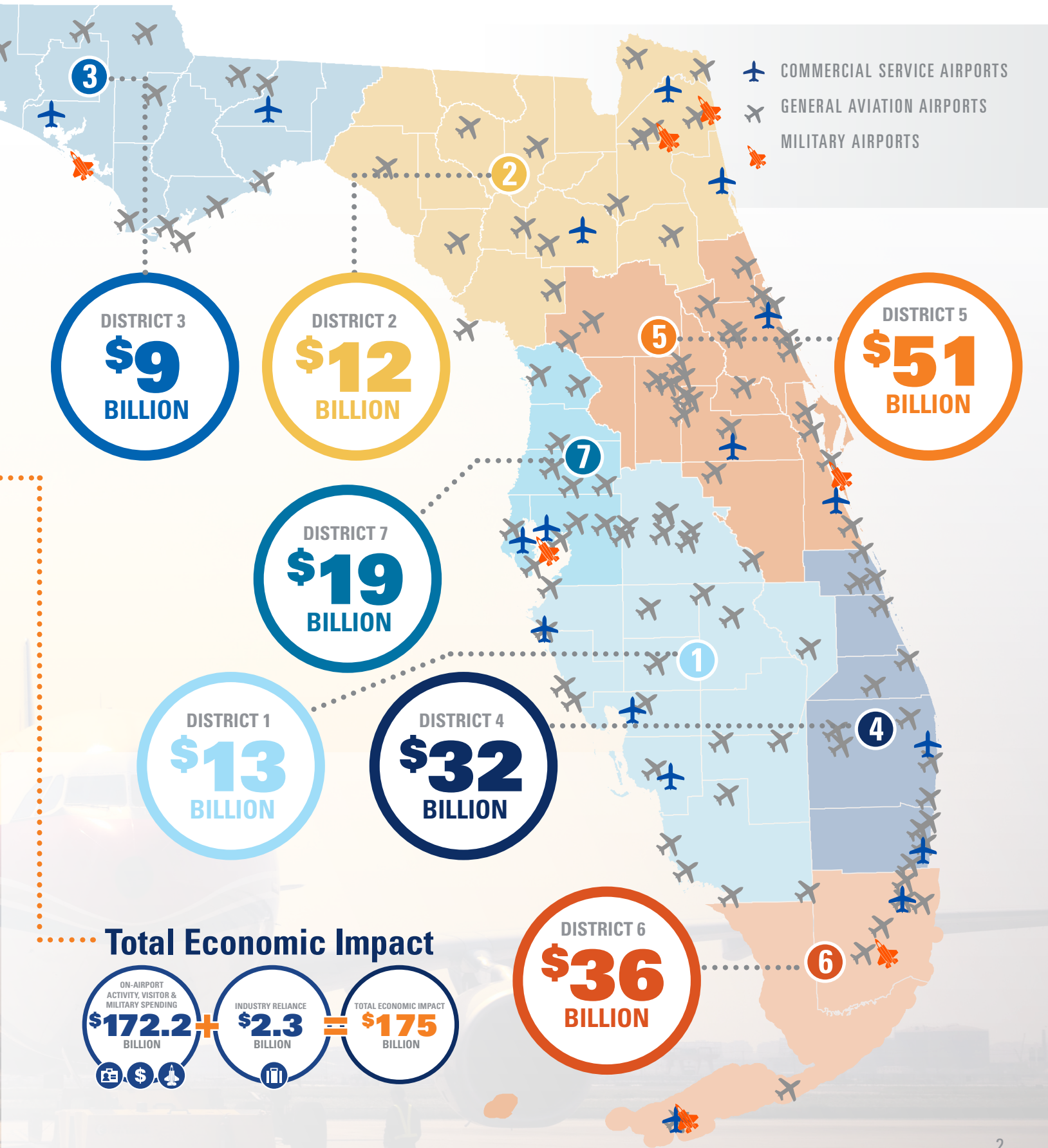
The industry reliance analysis is based on companies identified by airport administration only and is not a statewide assessment of all of the companies in Florida that depend on aviation to conduct business. Multiplier impacts are not calculated. While this approach is very conservative, it is an indicator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

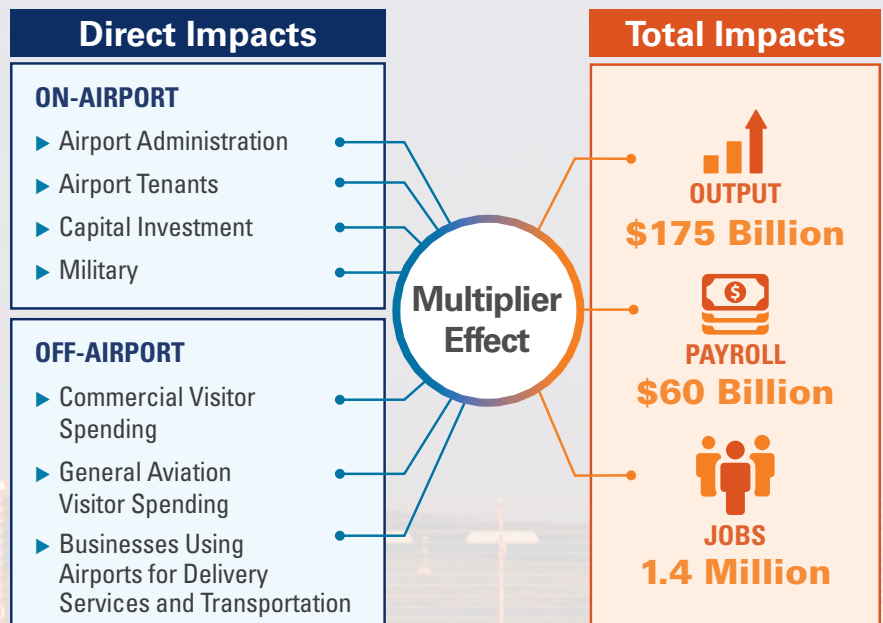


Resulting economic metrics include jobs, payroll, and output for direct impacts, supplier purchases (indirect impacts), and employee spending (induced impacts).

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

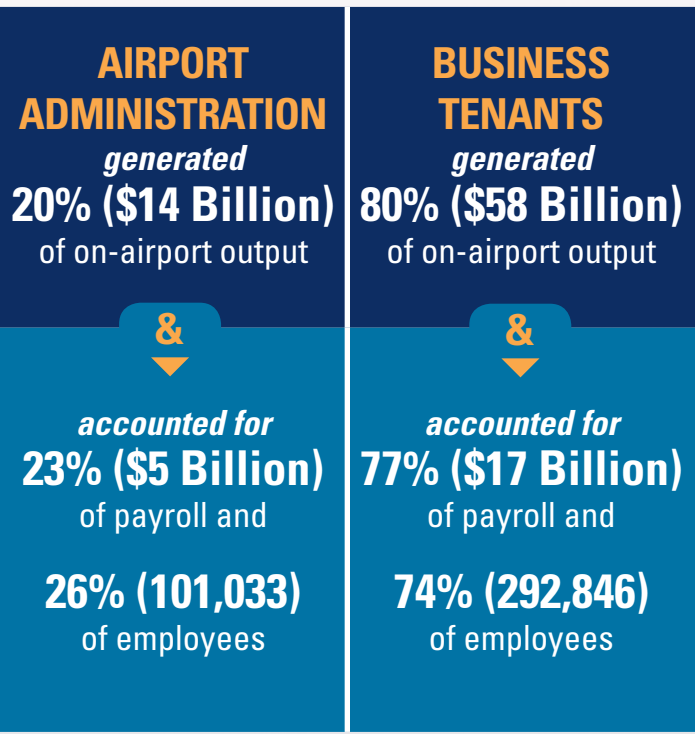
393,879
EMPLOYEES



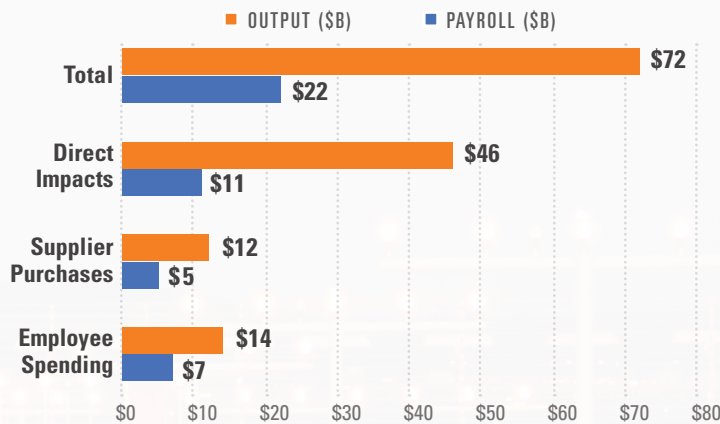
Fixed base operators (FBOs) provide key services on airports such as fueling, hangar storage, tie-downs and parking, aircraft rentals, flight training, and aircraft maintenance, among other similar services.



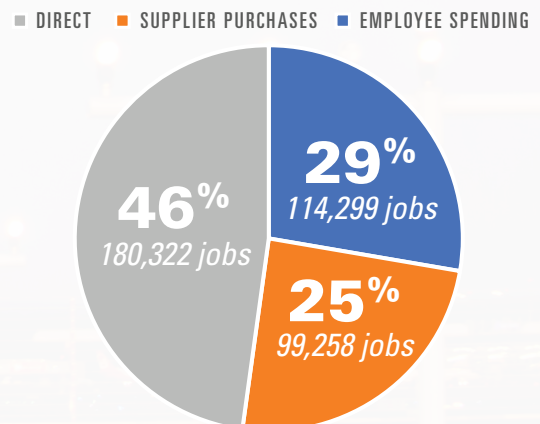
Florida's airports are often home to emergency medical aviation teams that provide critical services when ambulances cannot quickly reach a location.



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

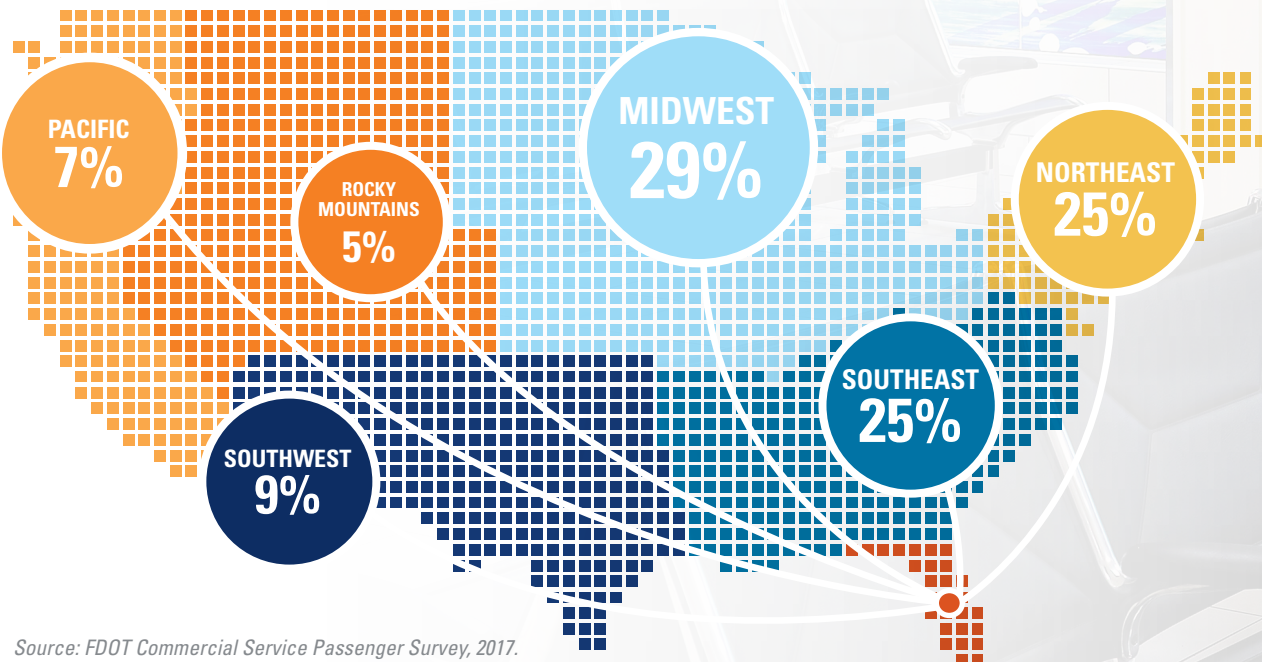
91 percent of the **92 percent** of domestic travelers were from the United States

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
3	Northeast Florida Regional Airport	St. Augustine	5,624	\$343,082,000	\$1,472,434,000
	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	\$2,109,597,000
	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.

** The total shown (\$2.1 B) includes economic impacts taken from an outside study completed by Embry-Riddle. Though these Embry-Riddle specific numbers are shown in the total here, they are not included in the statewide figures due to the fact that the school is not located on airport owned property.



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
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	
2	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.

Executive Summary

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
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

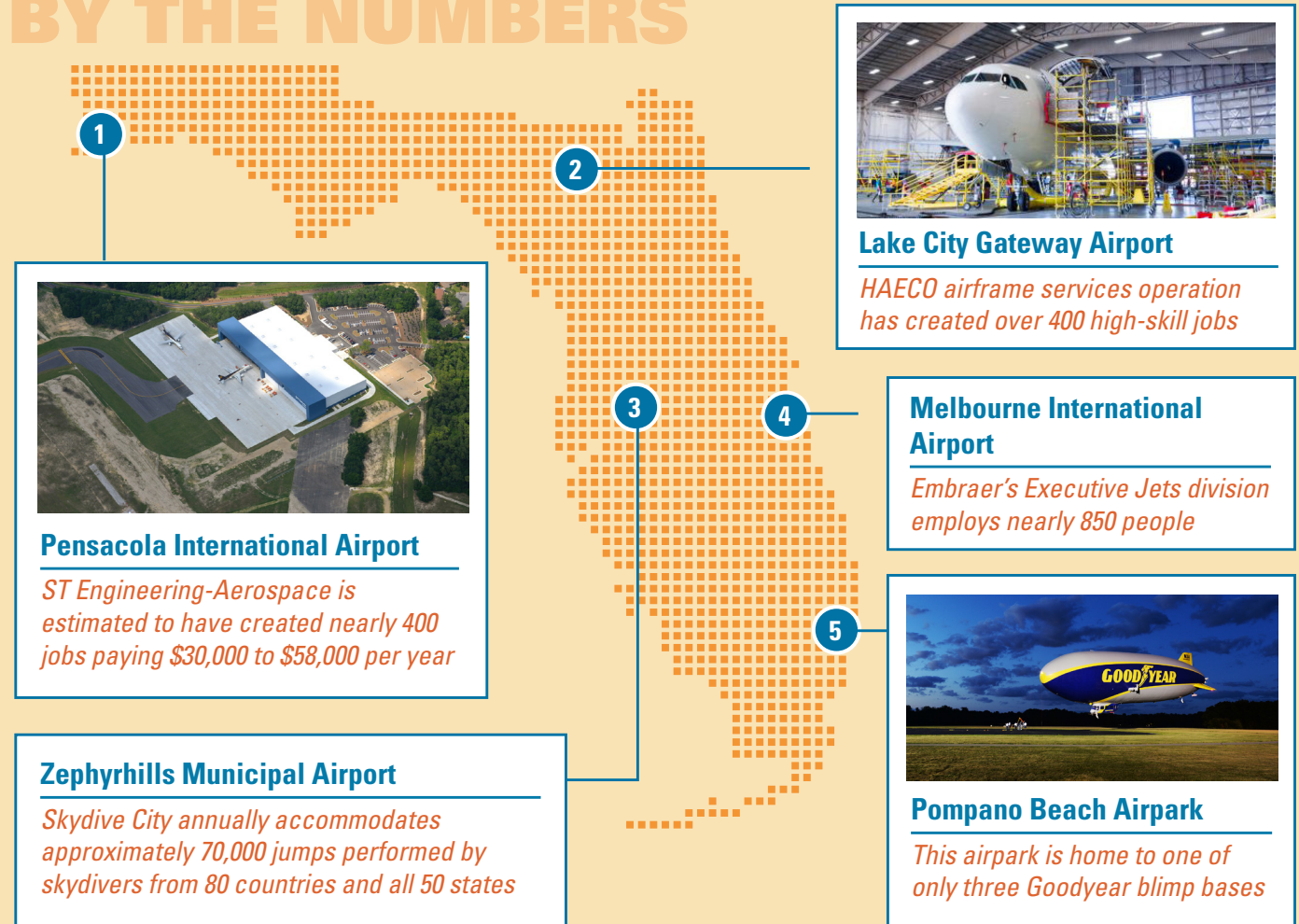


Image Sources: HAECO Americas, Goodyear, Pensacola News Journal, Skydive City. For more information regarding the results and methodology of this economic impact study, please visit <https://www.fdot.gov/aviation/economicimpact.shtm>