



# Statewide Executive Summary

2022



# FLORIDA AVIATION: EXCELLENCE IN FLIGHT

Florida's Aviation System Remains Dominantly Strong – Setting a New Standard of Excellence for Aviation Systems Across the Globe

Florida is home to numerous world-renowned tourist destinations, diverse economic sectors, and significant military installations, creating a rich environment for tourism, business, and defense activity to flourish in the state. In 2021, Florida attracted almost **122 million visitors, including 4.5 million from international locations**. Of these total visitors, 36 percent arrived through one of Florida's world class airports. So far in 2022, the number of visitors is up 15 percent from 2021, indicating that Florida may finish the year with over 140 million total visitors and over 50 million traveling via air. Additionally, Florida's **22 Fortune 500 companies** and robust workforce of almost **10 million** demonstrates the state's commitment to fostering business growth. The record-level activity that Florida is experiencing has been supported by the state's expansive airport system that not only provides critical transportation services for visitors and residents, but provides employment and economic development opportunities for all Florida businesses.

Florida's aviation system consists of over 125 public-use airports, including 19 primary commercial service airports. These facilities support a wide range of business activity occurring in and around airports, contributing to an environment that is primed for continued economic prosperity. To provide an updated snapshot of the economic contribution of Florida's airport system, the Florida Department of Transportation Aviation Office (FDOT AO) commissioned the 2022 FDOT Aviation Economic Impact Study (2022 AEIS). The 2022 AEIS measured that Florida's airport system contributed **\$336 billion** in total economic impacts (output) to the state's economy. These impacts supported over **two million jobs**, **\$109 billion in payroll**, and **\$170 billion in value added**.



## TOTAL ECONOMIC IMPACT (OUTPUT)

ON-AIRPORT



VISITOR SPENDING



OFF-AIRPORT AIR CARGO



MILITARY AVIATION



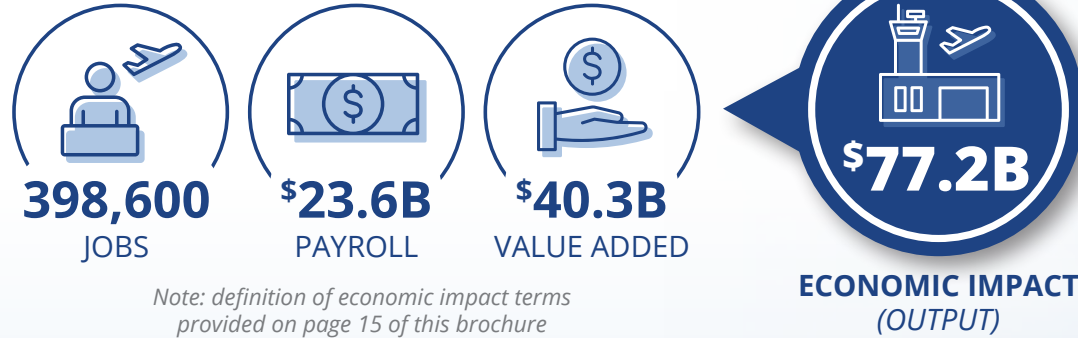
INDUSTRY RELIANCE



## On-Airport Impacts

### Florida's Airport Administration, Tenants, and Capital Improvements are the Foundation of Aviation Economic Impact

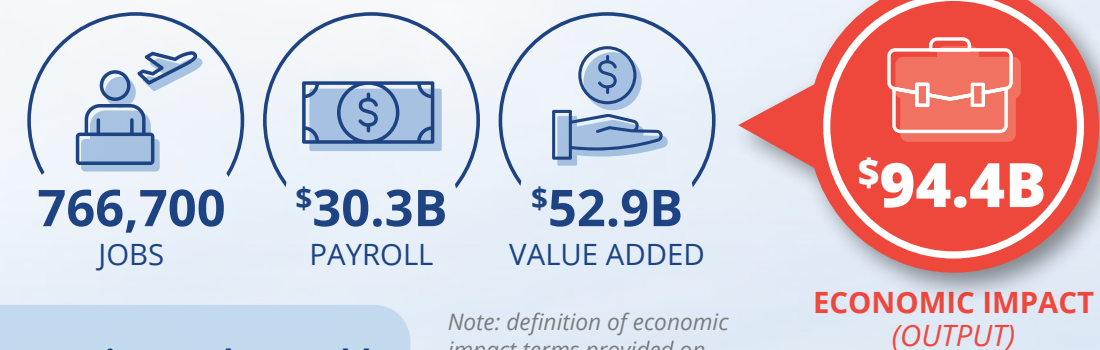
One of the most recognizable components of Florida's aviation economic impact is generated from activity on airport property. This includes the employment and capital spending from airports and on-airport business tenants. Multiplier impacts including supplier sales and income re-spending are also included in the presentation of on-airport economic impacts. Most multiplier impacts generated by on-airport businesses are supplier sales and income re-spending that occur off-airport. Across the state, **Florida's airports directly employ over 18,000 people** and are home to **over 5,000 businesses**. These businesses vary from aviation-related businesses, such as airlines, to non-aviation-related businesses, such as government offices. **These on-airport businesses directly employ an additional 164,000 people.** The 2022 AEIS quantified the impacts of on-airport employment and found that statewide, on-airport impacts generated 398,611 jobs, \$23.6 billion in payroll, \$40.3 billion in value added, and \$77.2 billion in economic impact (output). **These figures include \$10.6 billion in airport administration impacts, \$68.5 billion in airport tenant impacts, and \$6.7 billion in construction impacts.**



## Visitor Spending Impacts

### Out-of-State Visitors Contribute Significant Economic Impact

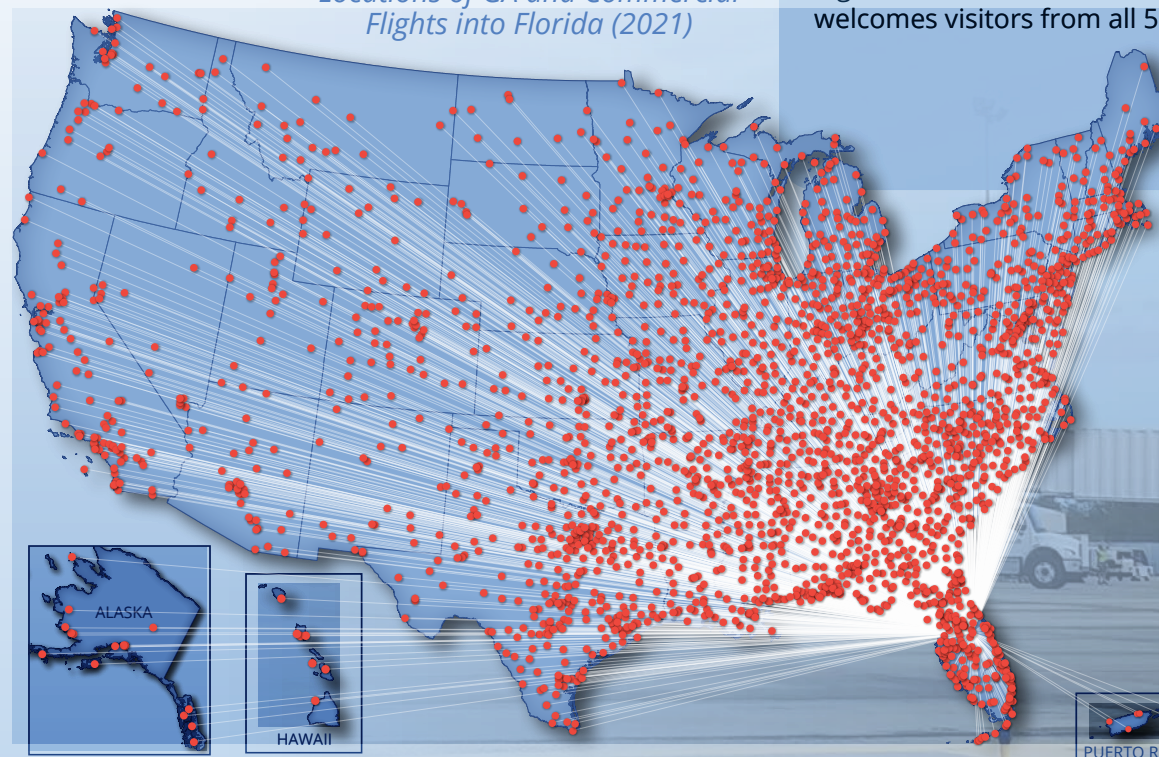
Florida's airports serve as a gateway to the state for business and leisure travelers. Airports are often the first and last impression visitors have of the state and help influence repeat visitors. In 2021, Florida attracted over **122 million visitors, including over 117 million from domestic locations**. Of these visitors, over one-third arrived at one of Florida's commercial service airports and another 4.6 million arrived via one of the state's general aviation airports. Visitors support our state's economy by spending money on a variety of goods and services, including accommodations, food, and entertainment. Visitor spending impacts are reflective only of out-of-state visitors and do not quantify spending by Florida residents. The 2022 AEIS evaluated the impacts of out-of-state visitors and found that, statewide, visitor spending impacts generated 766,721 jobs, \$30.3 billion in payroll, \$52.9 billion in value added, and \$94.4 billion in economic impact (output). **Of the \$94.4 billion in impacts, \$85.9 billion are associated with travelers using one of Florida's commercial service airports while the remaining \$8.5 billion is associated with travelers using a general aviation airport.**



### Florida Airports: A Connection to the World

Florida welcomes millions of out-of-state visitors every year, and our airports are there to greet them. The map below shows all of the domestic locations providing flights into the Sunshine State. Across the state, Florida welcomes visitors from all 50 states, including 2,509 unique out of state airports as well as 504 unique international airports.

Locations of GA and Commercial Flights into Florida (2021)



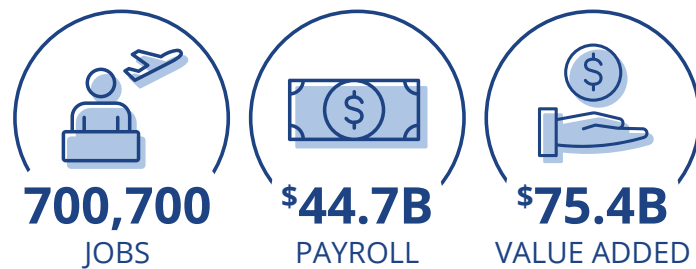
For the first time ever as part of a statewide economic impact study, the 2022 AEIS conducted over 10 weeks of in-person surveying at four general aviation airports. Over 1,100 surveys were collected at Naples Airport (APF), Boca Raton Airport (BCT), Lakeland Linder International Airport (LAL) and Lake City Gateway Airport (LCQ).



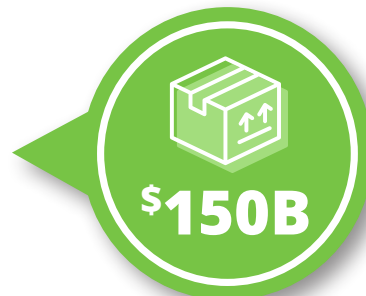
## Off-Airport Air Cargo Impacts

### Florida's Airports Connect the State's Industries to Markets Around the World

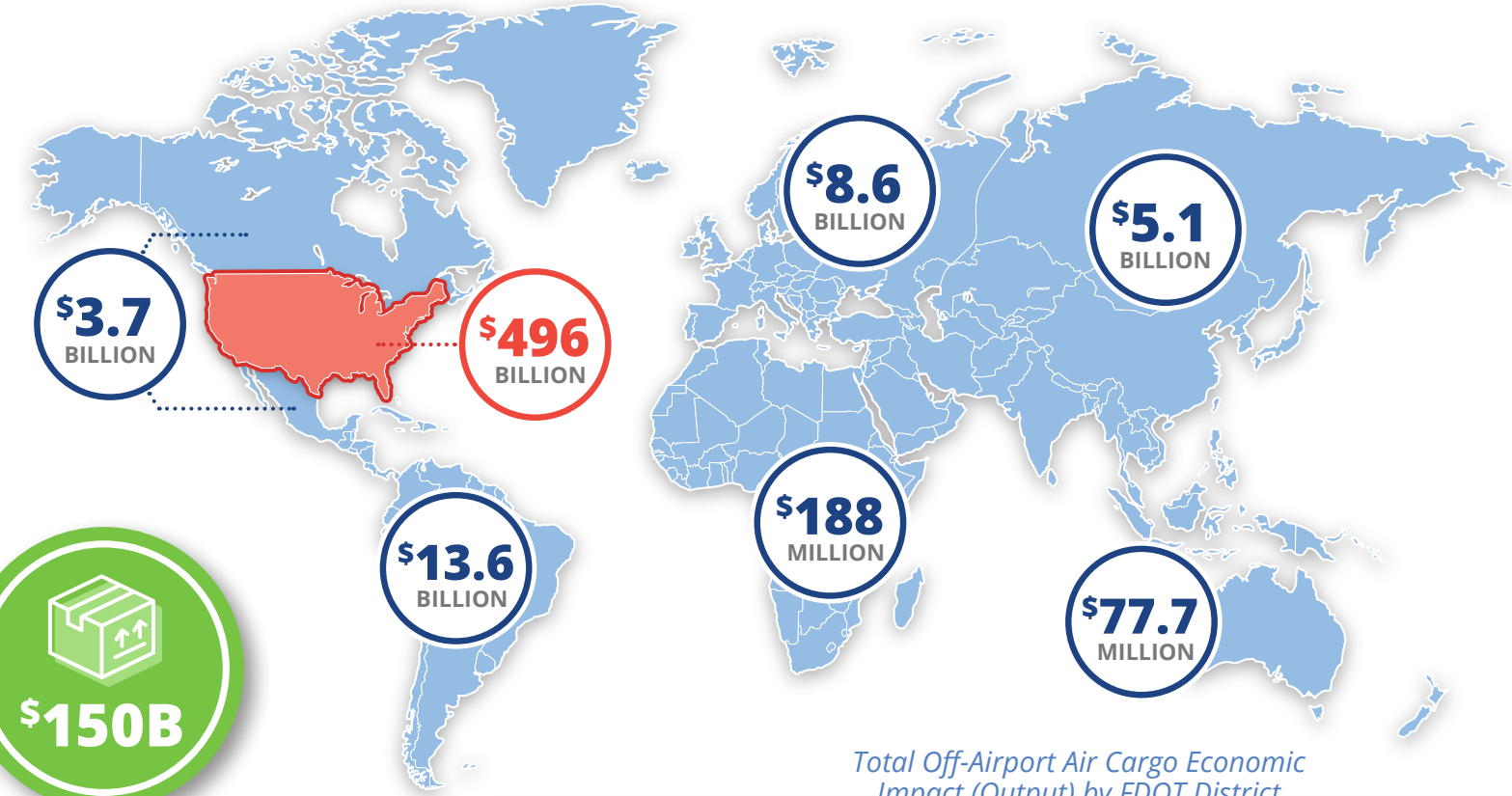
Air cargo is a major economic driver for Florida, with airports providing an efficient and convenient method of transporting a variety of goods in large volumes. FDOT has measured the economic impact and dependency of air cargo to Florida businesses over the past decade, most recently with the 2016 Air Cargo Study. Many of the trends identified in the 2016 study still exist today, like the rise of e-commerce. However, in recent years, improvements in supply chains and logistics have rapidly expanded the use of air cargo across the nation, including in Florida. Across our 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 state's prime location in the southeast U.S. positions us as a **global gateway for air cargo activity with Latin America and the Caribbean.** The 2022 AEIS evaluated how Florida's off-airport industries rely on cargo transported through Florida's airports. The 2022 AEIS examined the economic contribution of air cargo on both the statewide and FDOT District level. Statewide, off-airport air cargo impacts supported 700,738 jobs, \$44.7 billion in payroll, \$75.4 billion in value added, and \$150 billion in economic impact (output).



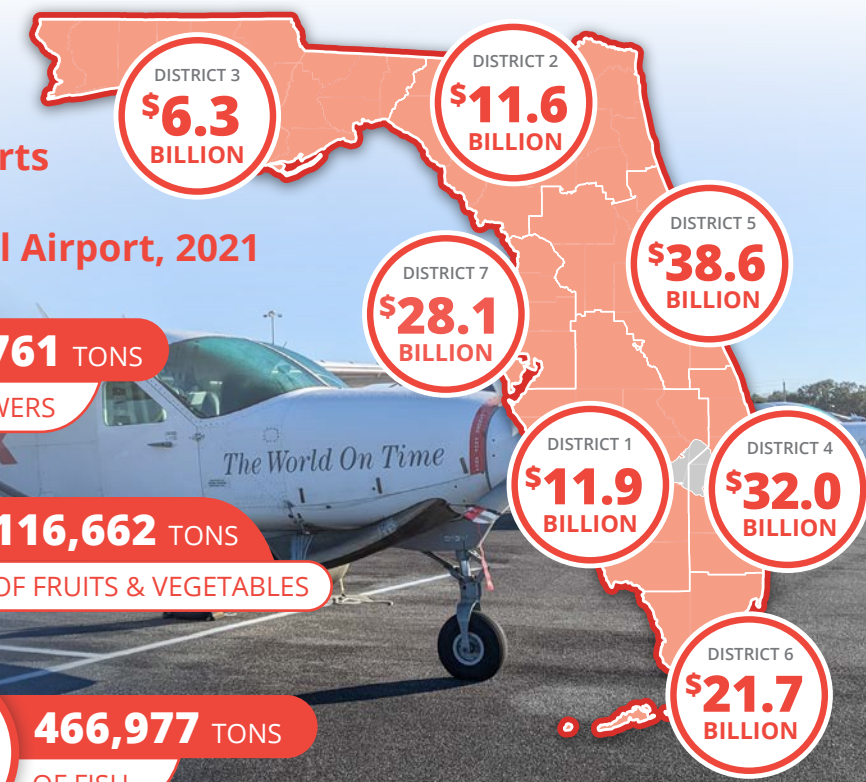
Note: definition of economic impact terms provided on page 15 of this brochure



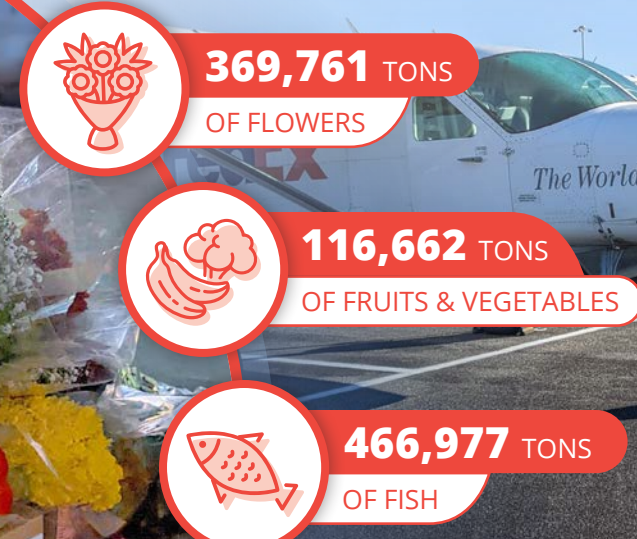
Total Value of International and Domestic Imports and Exports to Florida



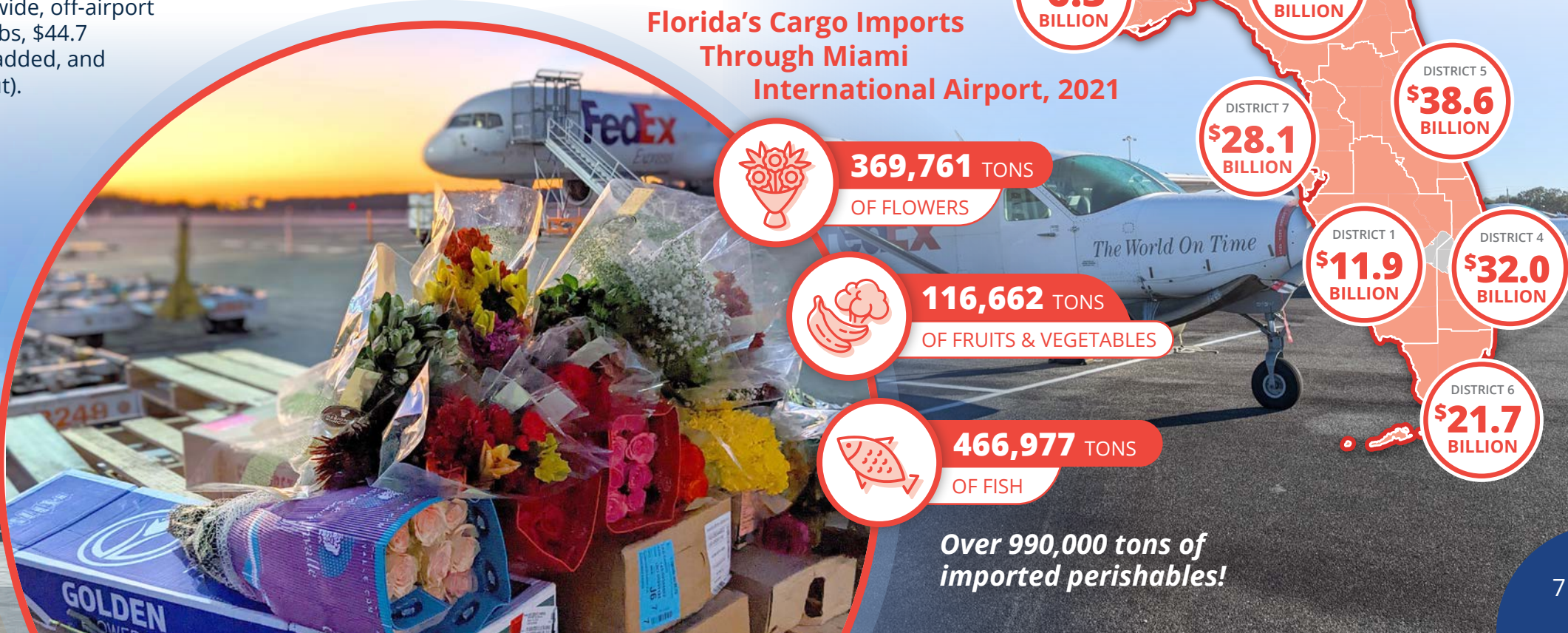
Total Off-Airport Air Cargo Economic Impact (Output) by FDOT District



### Florida's Cargo Imports Through Miami International Airport, 2021



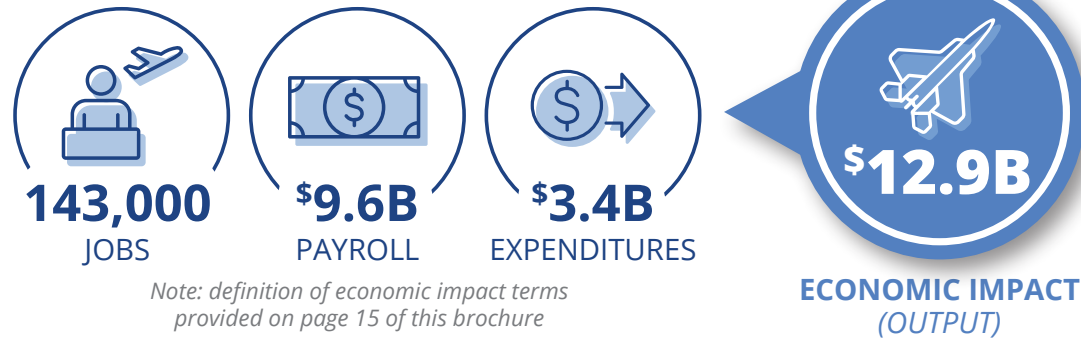
Over 990,000 tons of imported perishables!



## Military Aviation Impacts

### Florida's Military Aviation Installations Contribute to National Defense and the State's Economy

Florida's military system includes 11 military aviation installations, **which each serve a critical role in supporting the United States' national defense system as well as active military troops both at home and abroad.** The favorable year-round climate and considerable room for over-water operations make Florida ideal for military training operations, space launches, and other missions stateside. The U.S. military has a strong history in Florida, beginning with the first ever permanent U.S. Naval Air Station in Pensacola. Florida's modern military aviation installations are situated in every corner of the Sunshine State from the Florida Panhandle, to the north Florida Atlantic coast, down the Space Coast, and all the way to the Florida Keys, protecting the southernmost point of the continental United States. Given the immense military activity occurring across the state, the 2022 AEIS measured the economic impact of Florida's 11 military aviation installations to the state's economy. Statewide, military impacts generated 143,018 jobs, \$9.6 billion in payroll, \$3.4 billion in expenditures, and \$12.9 billion in economic impact (output).



Note: definition of economic impact terms provided on page 15 of this brochure

Note: Value added was not calculated for military aviation impacts. Instead, expenditures are used to describe military aviation impacts, along with jobs, payroll, and economic impact (output).

Eglin Air Force Base hosts over 16,000 personnel as well as some of the Air Force's elite aircraft, including the F-35 Lightning II Joint Strike Fighter. In 2021, Eglin generated over \$2 billion in economic impact for Florida!

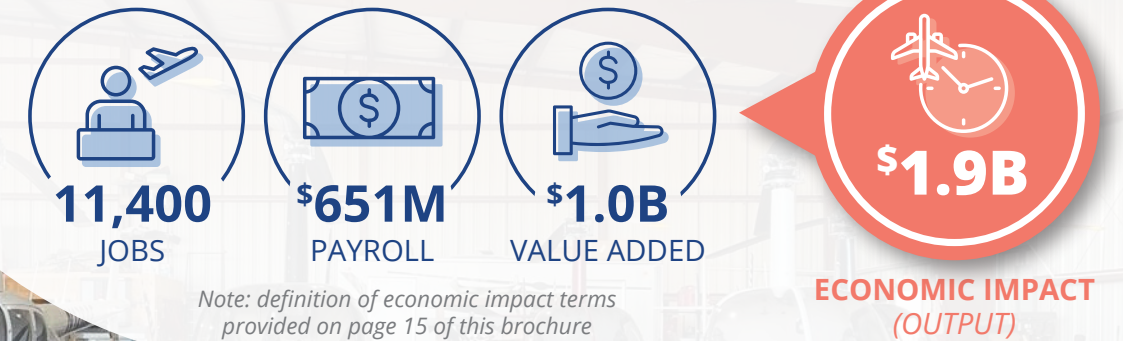
Naval Air Station Pensacola is home to over 23,000 personnel as well as the world-famous Blue Angels, a squadron of F-18 fighters that perform at several airshows across the country. In 2021, NAS Pensacola generated over \$1.3 billion in economic impact for Florida!

## Industry Reliance Impacts

### Numerous Industries in the State Rely on Florida's Airports to Conduct Business

Florida provides a nationally-recognized environment to conduct business. Home to 22 Fortune 500 companies, the third largest workforce, and the second largest foreign trade zone network in the U.S., Florida provides a robust climate for businesses to flourish in the state. Florida's airports provide a key resource to businesses by enabling quick transportation of company personnel for Florida-based businesses.

The 2022 AEIS quantified this reliance through an online surveying effort completed among businesses that either base an aircraft at a Florida airport and/or frequently use an airport to access the state. Statewide, industry reliance impacts generated 11,387 jobs, \$650 million in payroll, \$1.0 billion in value added, and \$1.9 billion in economic impact (output). The top five industries that rely on airports are provided below along with the corresponding economic impact that airports support for that industry.



Note: definition of economic impact terms provided on page 15 of this brochure

### TOP AVIATION RELIANT BUSINESSES



Airport Name	FAA ID	Associated City	Jobs	Payroll	Value Added	Economic Impact (Output)
North Palm Beach County General Aviation Airport	F45	West Palm Beach	467	\$22.4M	\$36.5M	\$77.3M
North Perry Airport	HWO	Pembroke Pines	2,090	\$93.9M	\$150M	\$285M
Palm Beach County Glades Airport	PHK	Pahokee	33	\$1.7M	\$2.6M	\$5.7M
Palm Beach County Park Airport	LNA	Lantana	772	\$41.7M	\$67.7M	\$144M
Palm Beach International Airport	PBI	West Palm Beach	31,596	\$1.5B	\$2.5B	\$4.6B
Pompano Beach Airpark	PMP	Pompano Beach	2,597	\$126M	\$210M	\$410M
Sebastian Municipal Airport	X26	Sebastian	281	\$16.1M	\$24.6M	\$54.2M
Treasure Coast International Airport	FPR	Fort Pierce	3,356	\$164M	\$269M	\$547M
Vero Beach Regional Airport	VRB	Vero Beach	5,914	\$317M	\$488M	\$933M
Witham Field	SUA	Stuart	6,858	\$362M	\$599M	\$1.3B
<b>TOTALS</b>			<b>191,945</b>	<b>\$9.1B</b>	<b>\$15.6B</b>	<b>\$28.5B</b>
Arthur Dunn Air Park	X21	Titusville	88	\$4.3M	\$6.5M	\$12.3M
Bob White Field	X61	Mount Dora	5	\$215K	\$310K	\$694K
Daytona Beach International Airport	DAB	Daytona Beach	13,551	\$542M	\$953M	\$1.8B
Deland Municipal - Sidney H Taylor Field	DED	Deland	2,231	\$112M	\$200M	\$381M
Executive Airport	ORL	Orlando	4,078	\$186M	\$309M	\$577M
Flagler Executive Airport	FIN	Palm Coast	2,588	\$113M	\$234M	\$455M
Halifax River Sea Plane Base	F15	Holly Hill	5	\$260K	\$355K	\$702K
Kissimmee Gateway Airport	ISM	Kissimmee	6,346	\$293M	\$485M	\$946M
Leesburg International Airport	LEE	Leesburg	514	\$26.6M	\$41.1M	\$83.7M
Marion County Airport	X35	Dunnellon	784	\$40.8M	\$70.0M	\$140M
Massey Ranch Airpark	X50	Edgewater	30	\$1.7M	\$2.3M	\$4.6M
Melbourne Orlando International Airport	MLB	Melbourne	17,886	\$978M	\$1.7B	\$3.1B
Merritt Island Airport	COI	Merritt Island	451	\$21.2M	\$33.6M	\$62.0M
Mid-Florida Airport	X55	Eustis	7	\$183K	\$254K	\$493K
New Smyrna Beach Municipal Airport	EVB	New Smyrna Beach	1,701	\$79.5M	\$129M	\$241M
Ocala International-Jim Taylor Field	OCF	Ocala	1,274	\$56.1M	\$95.9M	\$181M
Orlando Apopka Airport	X04	Apopka	56	\$2.9M	\$4.2M	\$8.2M
Orlando International Airport	MCO	Orlando	309,918	\$13.0B	\$23.0B	\$41.4B
Orlando Sanford International Airport	SFB	Sanford	24,223	\$1.1B	\$1.9B	\$3.5B
Ormond Beach Municipal Airport	OMN	Ormond Beach	514	\$23.5M	\$37.9M	\$73.6M
Pierson Municipal Airport	2J8	Pierson	7	\$205K	\$255K	\$364K
Space Coast Regional Airport	TIX	Titusville	2,589	\$113M	\$189M	\$346M
St Cloud Seaplane Base	3FL	Saint Cloud	2	\$141K	\$197K	\$388K
Tavares Seaplane Base	FA1	Tavares	37	\$1.9M	\$2.7M	\$5.3M
Umatilla Municipal Airport	X23	Umatilla	129	\$8.8M	\$17.7M	\$31.0M
Valkaria Airport	X59	Valkaria	644	\$27.8M	\$46.0M	\$81.4M
<b>TOTALS</b>			<b>389,658</b>	<b>\$16.7B</b>	<b>\$29.4B</b>	<b>\$53.4B</b>

Airport Name	FAA ID	Associated City	Jobs	Payroll	Value Added	Economic Impact (Output)
Dade-Collier Training And Transition Airport	TNT	Ochopee	6	\$322K	\$444K	\$859K
Key West International Airport	EYW	Key West	11,086	\$527M	\$911M	\$1.6B
Miami Executive Airport	TMB	Miami	3,320	\$157M	\$260M	\$498M
Miami Homestead General Aviation Airport	X51	Homestead	276	\$13.5M	\$21.2M	\$38.4M
Miami International Airport	MIA	Miami	221,966	\$11.2B	\$19.8B	\$35.3B
Miami Seaplane Base	X44	Miami	14	\$1.1M	\$1.5M	\$2.4M
Miami-Opa Locka Executive Airport	OPF	Opa-Locka	5,288	\$271M	\$438M	\$841M
The Florida Keys Marathon International Airport	MTH	Marathon	1,713	\$80.2M	\$131M	\$235M
<b>TOTALS</b>			<b>243,669</b>	<b>\$12.3B</b>	<b>\$21.5B</b>	<b>\$38.4B</b>
Albert Whitted Airport	SPG	St. Petersburg	948	\$42.9M	\$68.6M	\$128M
Brooksville-Tampa Bay Regional Airport	BKV	Brooksville	6,091	\$327M	\$598M	\$1.3B
Clearwater Air Park	CLW	Clearwater	685	\$29.0M	\$48.2M	\$87.9M
Crystal River-Captain Tom Davis Field	CGC	Crystal River	476	\$21.1M	\$33.4M	\$54.7M
Inverness Airport	INF	Inverness	543	\$23.6M	\$38.7M	\$68.8M
Peter O Knight Airport	TPF	Tampa	759	\$31.8M	\$52.5M	\$102M
Pilot Country Airport	X05	Spring Hill	48	\$2.3M	\$3.4M	\$8.2M
Plant City Airport	PCM	Plant City	214	\$9.5M	\$14.8M	\$27.4M
St Pete-Clearwater International Airport	PIE	Clearwater	20,774	\$1.0B	\$1.8B	\$3.4B
Tampa Executive Airport	VDF	Tampa	3,411	\$133M	\$226M	\$434M
Tampa International Airport	TPA	Tampa	82,136	\$3.7B	\$6.3B	\$11.3B
Zephyrhills Municipal Airport	ZPH	Zephyrhills	490	\$28.3M	\$43.5M	\$89.6M
<b>TOTALS</b>			<b>116,575</b>	<b>\$5.3B</b>	<b>\$9.2B</b>	<b>\$17.0B</b>

The economic impacts of each airport and the state are defined by the total jobs, payroll, value added, and economic impact (output) generated by aviation in the state. These are defined as:



**JOBS**

The sum of full-time and part-time employees, and account for the total number of people employed as a result of the airport or company within a defined geography or industry.



**PAYROLL**

Total compensation for work, including gross wages, salaries, employer-provided benefits and taxes paid to governments on behalf of employees.



**VALUE ADDED**

Consists of compensation of employees, taxes paid on production and imports, and gross operating surplus. Value added equals the difference between an industry's gross output and the cost of its intermediate inputs.



**ECONOMIC IMPACT (OUTPUT)**

The value of sales or receipts and other operating income along with any inventory change (e.g., spoilage, breakage, or theft). It is the equivalent of value added plus the cost of all intermediate inputs (including energy, raw materials, semi-finished goods, and services) that are purchased from all sources/locations.