

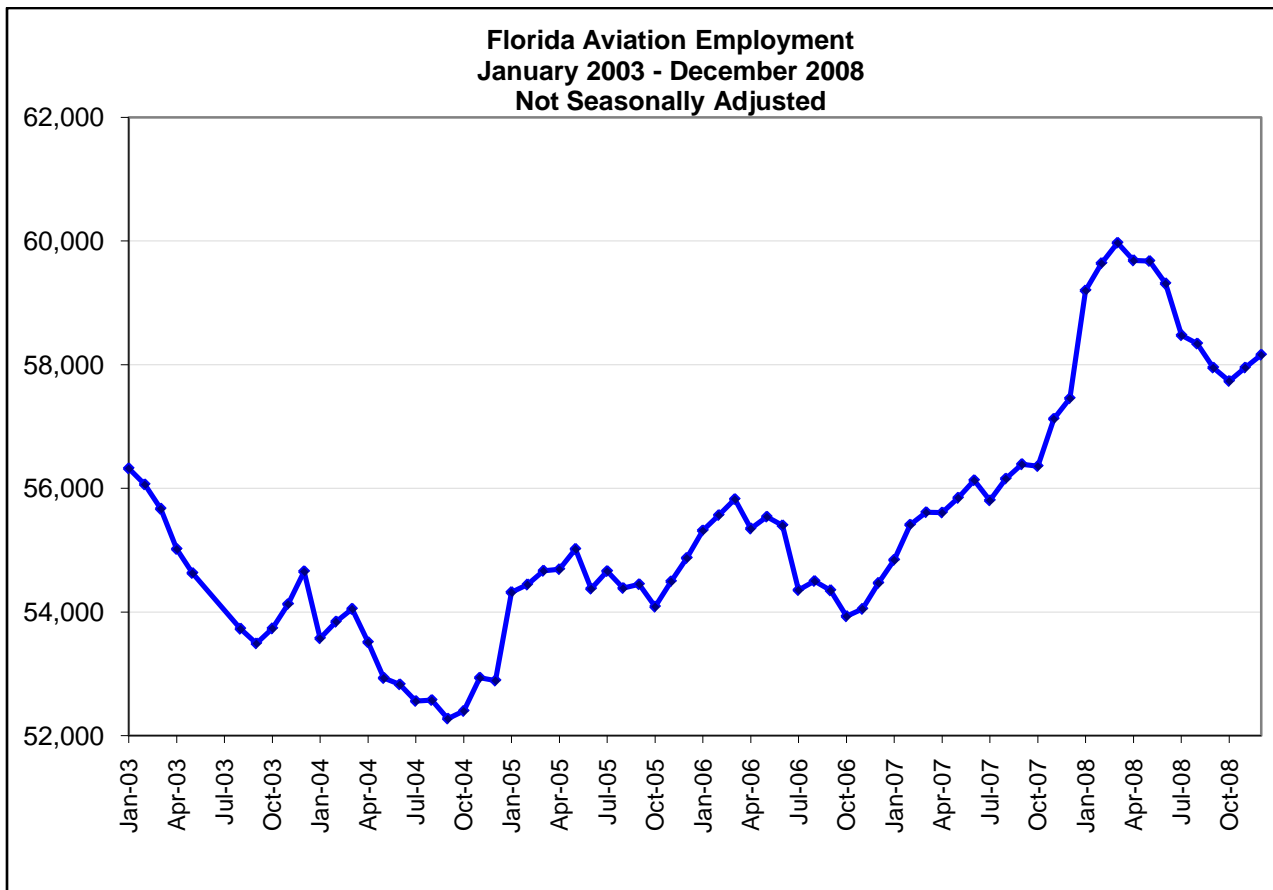
Florida Aviation & Aerospace Industry



Florida Aviation Industry

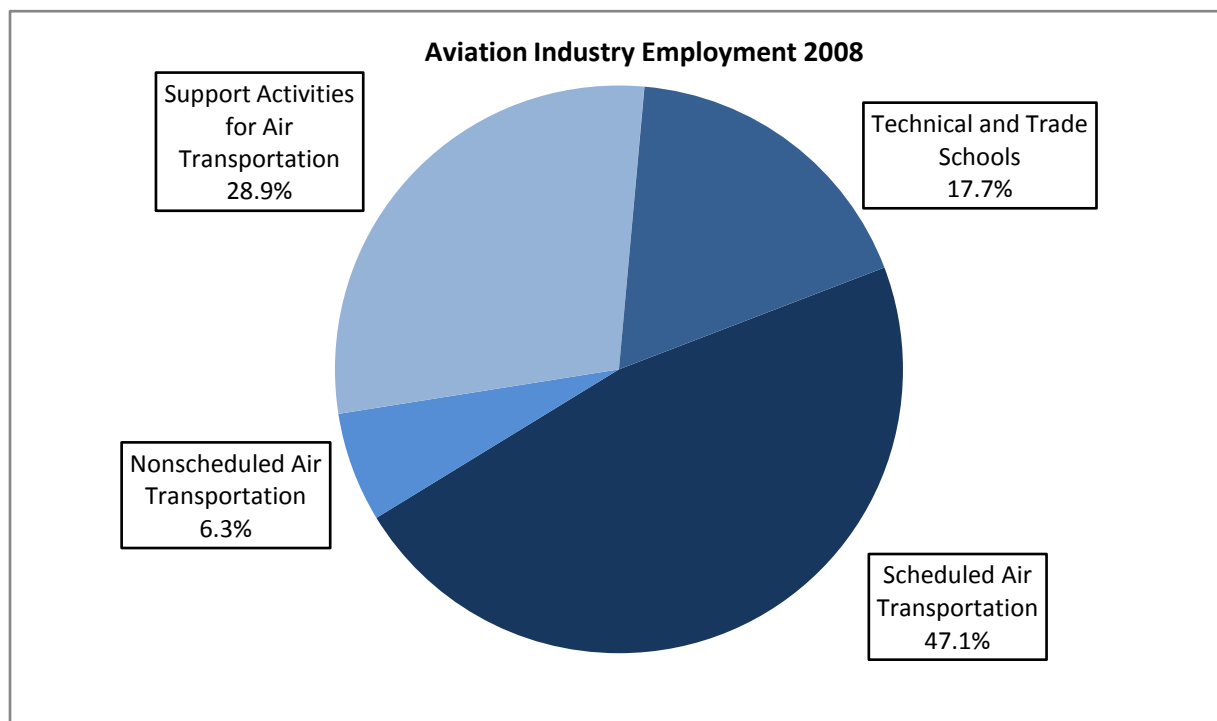
Florida has a rich history of aviation firsts, being the site of the first night flight in aviation history (Tampa, 1911) and having the world's first scheduled airline service (St. Petersburg to Tampa, 1914). According to Enterprise Florida, Inc., Florida is the birthplace of commercial aviation and the air transportation hub of the Western Hemisphere. There are 3.2 million takeoffs and landings each year in Florida. The aviation industry in Florida includes air transportation, support activities for air transportation and flight training.

- The aviation industry cluster includes the following detailed subsectors: scheduled passenger and freight air transportation, nonscheduled chartered passenger and freight air transportation, other nonscheduled air transportation, air traffic control, other airport operations, other support activities for air transportation, and technical and trade schools.
- The aviation industry sector had 1,973 establishments in 2008 with 1,918 establishments in 2007.
- The aviation industry cluster increased by 5.0 percent between 2007 and 2008 to a total of 58,844 jobs in 2008. Total jobs in all industries decreased by 2.5 percent during the same time period.



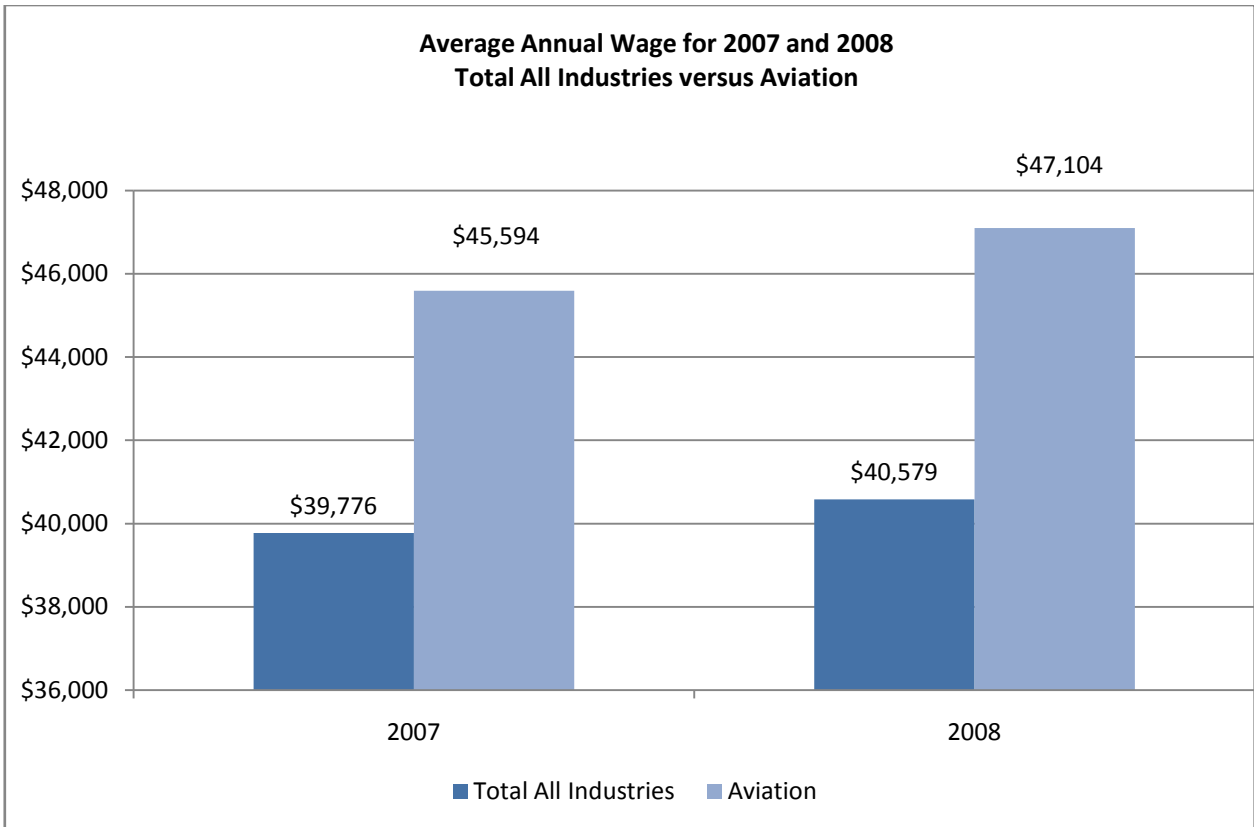
Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, prepared May 2010.

- Aviation employment has been on an upward trend since September 2004. Aviation employment has increased by 11.0 percent since September 2004 (the low point) when jobs measured 53,031. Total industry employment statewide gained 165,651 jobs (2.2%) during the same time period.
- The largest subsector in aviation is air transportation. Air transportation employment in 2008 was 31,387, which is 53.3 percent of total aviation employment.
- The largest industry within air transportation is scheduled passenger air transportation with employment of 27,706 in 2008, down -214 jobs (-0.8 percent) from 2007.
- Scheduled passenger air transportation, support activities for air transportation, and technical and trade schools account for over 93.7 percent of the total aviation employment.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, prepared May 2010.

- The largest industry subsector in the aviation sector in 2008 was scheduled air transportation (27,706 jobs). This subsector accounted for 47.1 percent of aviation employment.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, prepared May 2010.

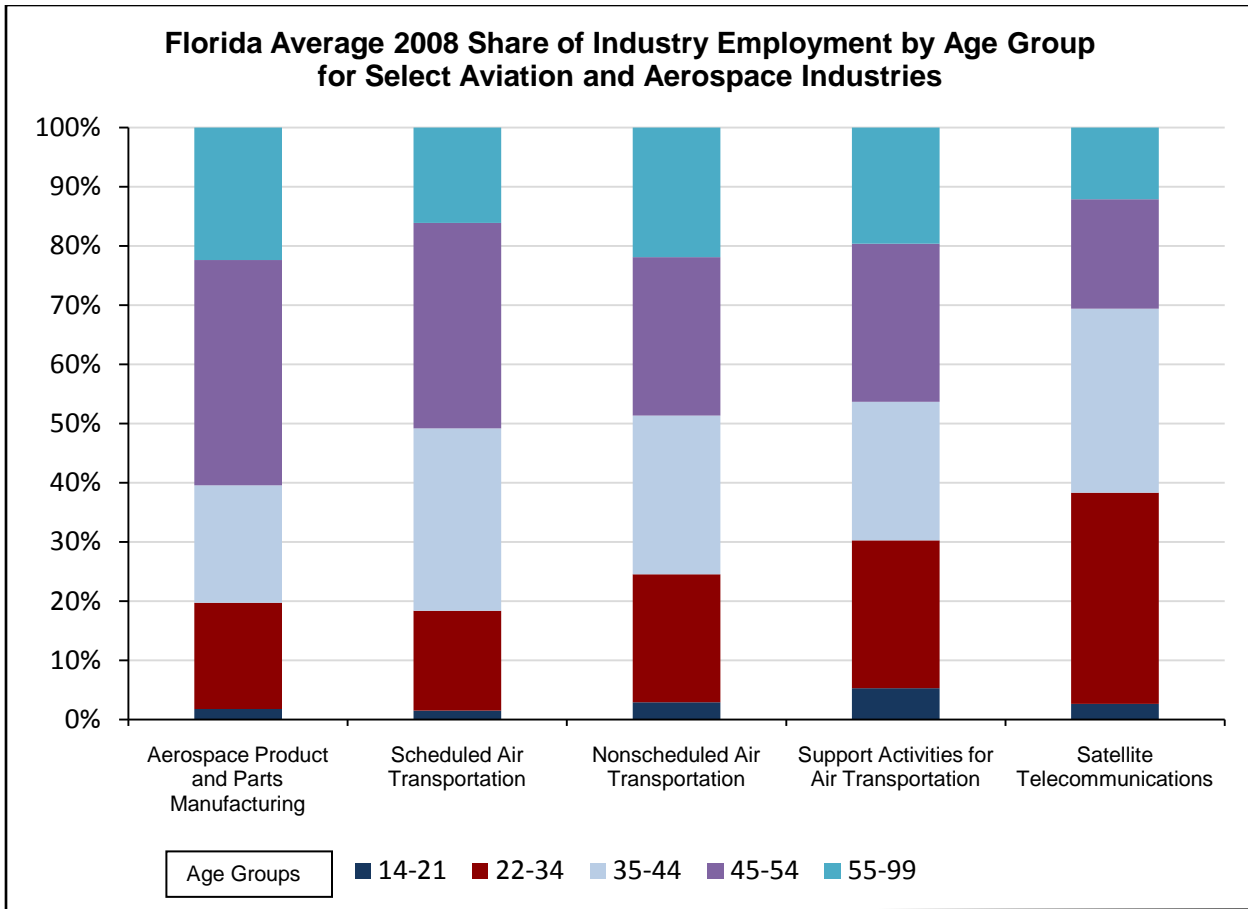
- The 2008 annual average wage for workers in the aviation industry was \$47,104, exceeding the state's total annual average wage of \$40,579 by 16.1 percent.

Top Occupations in Aviation Industry

Occupation Title	Employment		Annual Change		% of Industry	2009 Average Hourly Wage	Training Requirement
	2009	2017	Total	Percent	Total		
Total, All Occupations	47,414	48,200	98	0.21			
Ticket Agents and Travel Clerks	11,166	10,331	-104	-0.94	23.55	15.61	High School
Flight Attendants	4,620	4,612	-1	-0.02	9.74	21.46	High School
Aircraft Mechanics and Service Technicians	4,385	4,780	49	1.12	9.25	23.27	Postsecondary Vocational
Cargo and Freight Agents	2,853	2,933	10	0.35	6.02	15.92	Postsecondary Vocational
Airline Pilots, Copilots, and Flight Engineers	2,634	2,685	6	0.24	5.56	65.91	Associate's Degree
Laborers and Freight, Stock, and Material Movers, Hand	2,527	2,461	-8	-0.33	5.33	11.49	Less Than High School
Baggage Porters and Bellhops	1,796	1,980	23	1.28	3.79	9.37	Less Than High School
Commercial Pilots	1,605	1,619	2	0.11	3.38	40.10	Postsecondary Vocational
Customer Service Representatives	1,026	1,160	17	1.62	2.16	14.36	Postsecondary Vocational
First-Line Supervisor of Office and Admin. Support Workers	992	949	-5	-0.55	2.09	22.64	Associate's Degree
Cleaners of Vehicles and Equipment	766	849	10	1.34	1.62	10.29	Less Than High School
Maintenance and Repair Workers, General	654	705	6	0.97	1.38	15.44	Postsecondary Vocational
Transportation Attendants	572	606	4	0.73	1.21	11.53	Associate's Degree
Avionics Technicians	555	608	7	1.19	1.17	23.88	Postsecondary Vocational
Security Guards	502	549	6	1.15	1.06	11.10	Postsecondary Vocational

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Long Term Projections Program, forecast to 2017. Projections to the year 2017 assume economic recovery.

- More than three-quarters of the jobs in aviation are concentrated in the 15 largest occupations in this industry.
- Four of the top fifteen largest aviation occupations in Florida are expected to lose jobs over the next eight years, with the majority of these job losses being concentrated in occupations employed in the air transportation sector.
- Customer service representatives are expected to grow the fastest, while aircraft mechanics and service technicians will gain the most new jobs among the top fifteen aviation occupations.
- Ticket agents and travels clerks are expected to lose the greatest number of jobs over the next eight years and to have the greatest rate of job decline of these top 15 occupations.
- Average hourly wages for the top 15 aviation occupations range from a high of \$65.91 for airline pilots, copilots, and flight engineers to a low of \$9.37 for baggage porters and bellhops.
- None of the top fifteen occupations require a bachelor's degree; however, 10 of the top 15 aviation occupations require training beyond high school.

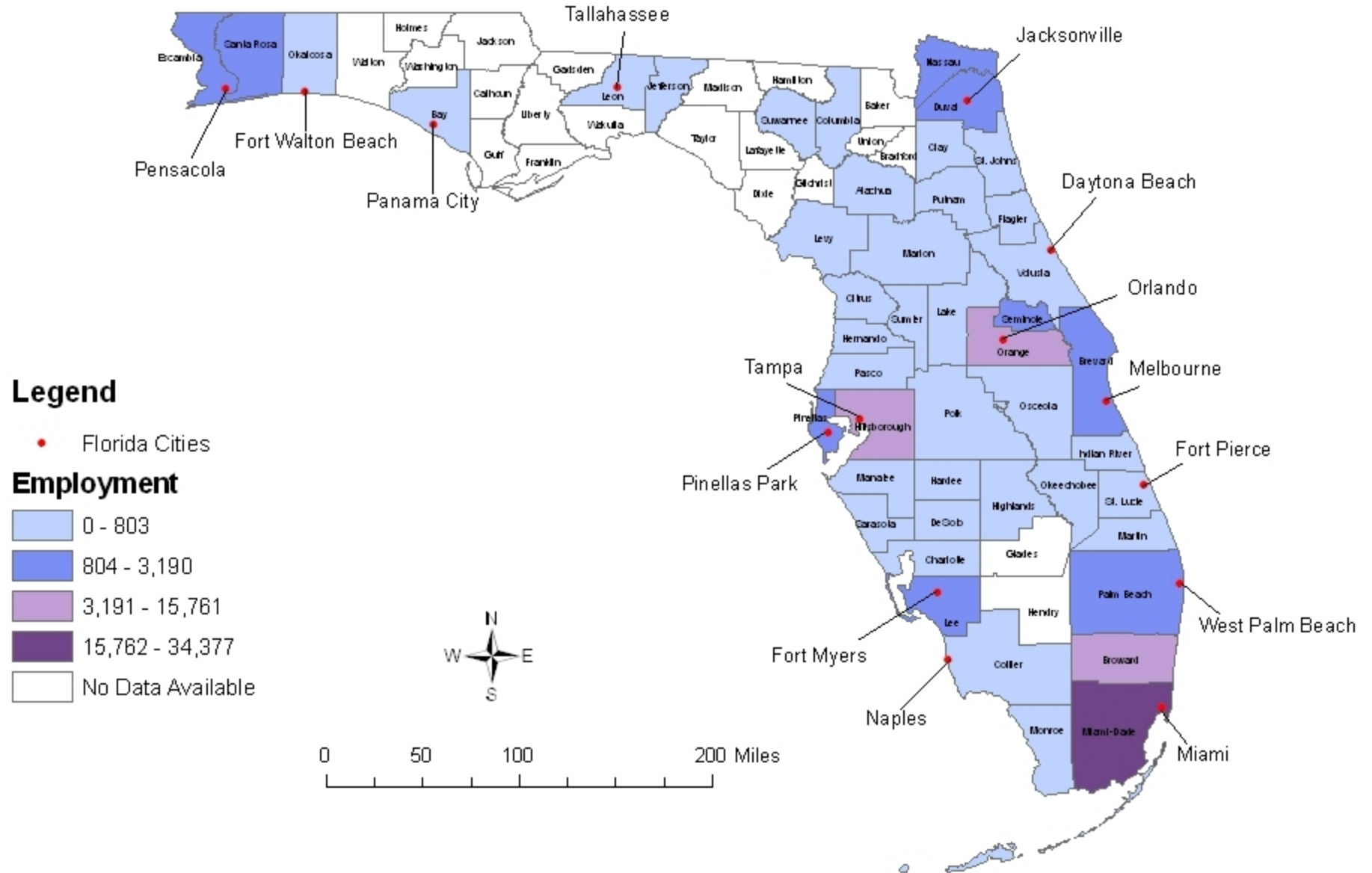


Source: U.S. Census Bureau, Local Employment Dynamics Program (LED).

Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics Center, prepared May 2010.

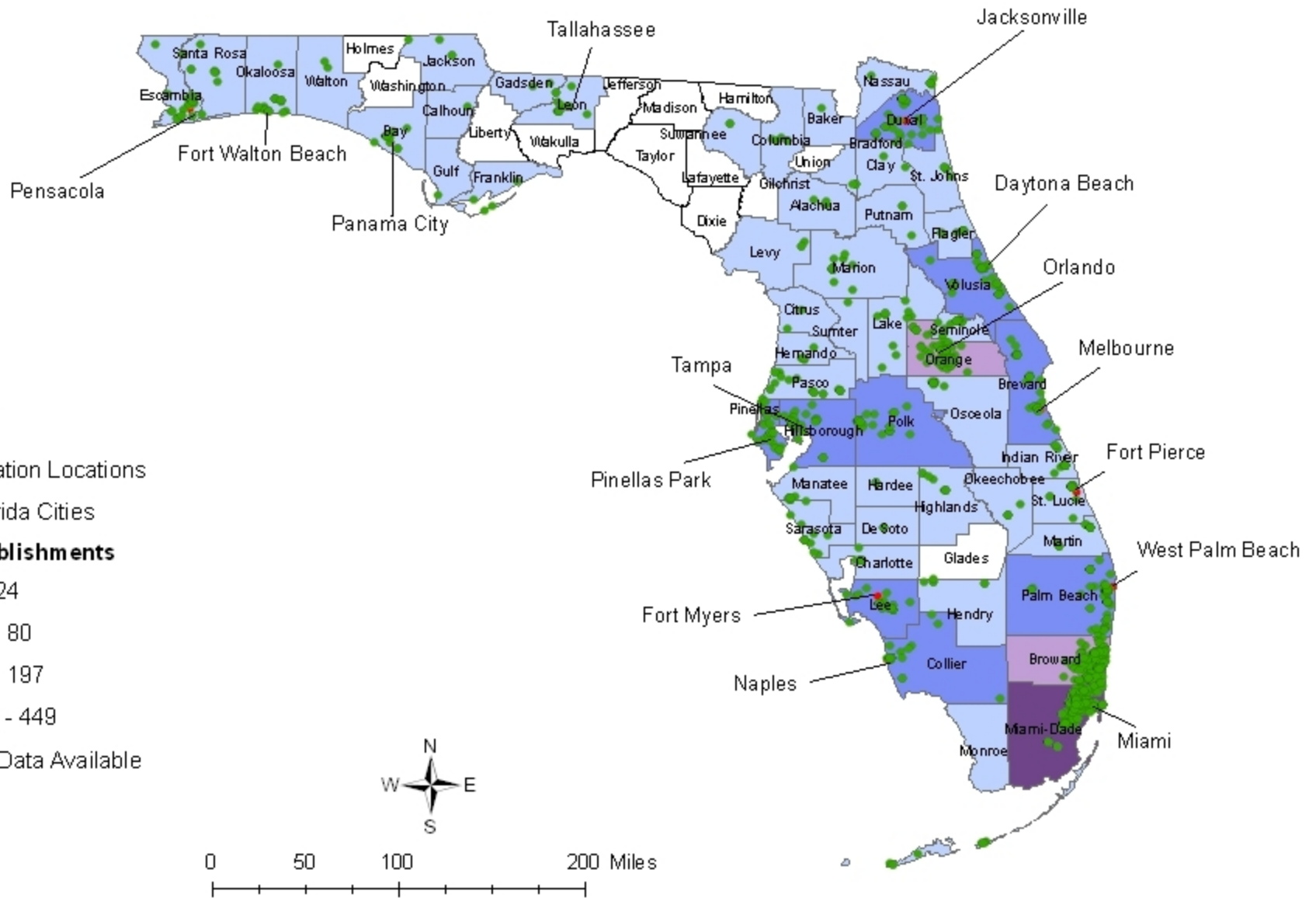
- Florida employment in the aviation and aerospace industry tends to be most heavily concentrated in the age groups 22-34, 35-44, and 45-54.
- All occupations in the aviation and aerospace industry employed more male employees compared to female employees in 2008.
- Of the select aerospace and aviation industries available, support activities for air transportation had the largest percentage of youth employment (age 14 – 21) in 2008, with 5.3 percent.
- Aviation employment is concentrated along the coast in south, south-central, northeastern and northwestern Florida with the largest number of jobs found in Miami-Dade, Broward, Hillsborough, and Orange Counties.
- The aviation industry had 1,973 establishments in 2008 with employment of 58,844. In 2007, aviation establishments numbered 1,918 and employment was 56,061. Over the year, establishments increased by 55 (+2.9%) and employment increased 2,783 (+5.0%).
- Most aviation subsectors gained establishments over the year; nonscheduled air transportation (+9); support activities for air transportation (+37); and technical and trade schools (+10).

Concentration of Aviation Employment



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, 2009, Q4, Prepared July 2010.

Concentration of Aviation Establishments by Location



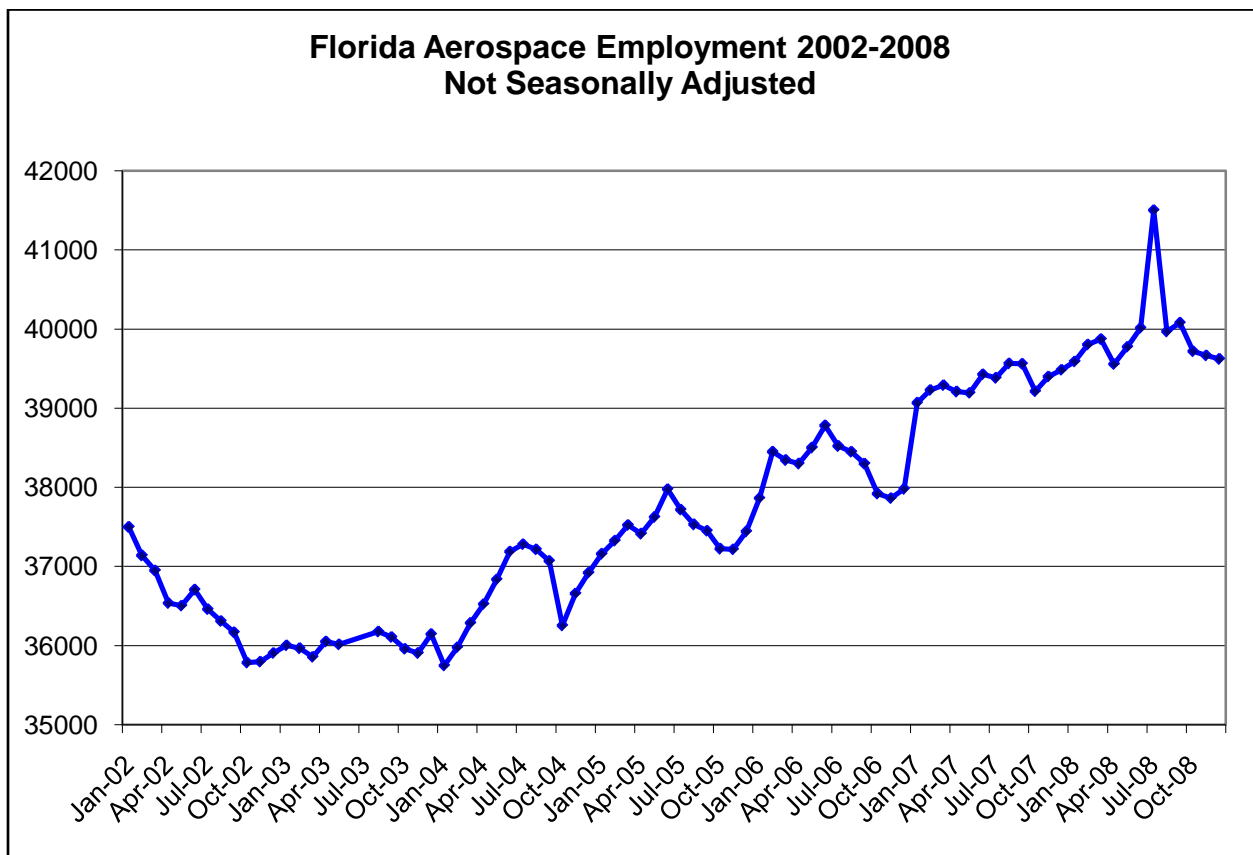
Source: Infogroup Inc., Employer Database 2010-2nd Edition.

Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Prepared May 2010.

Florida Aerospace Industry

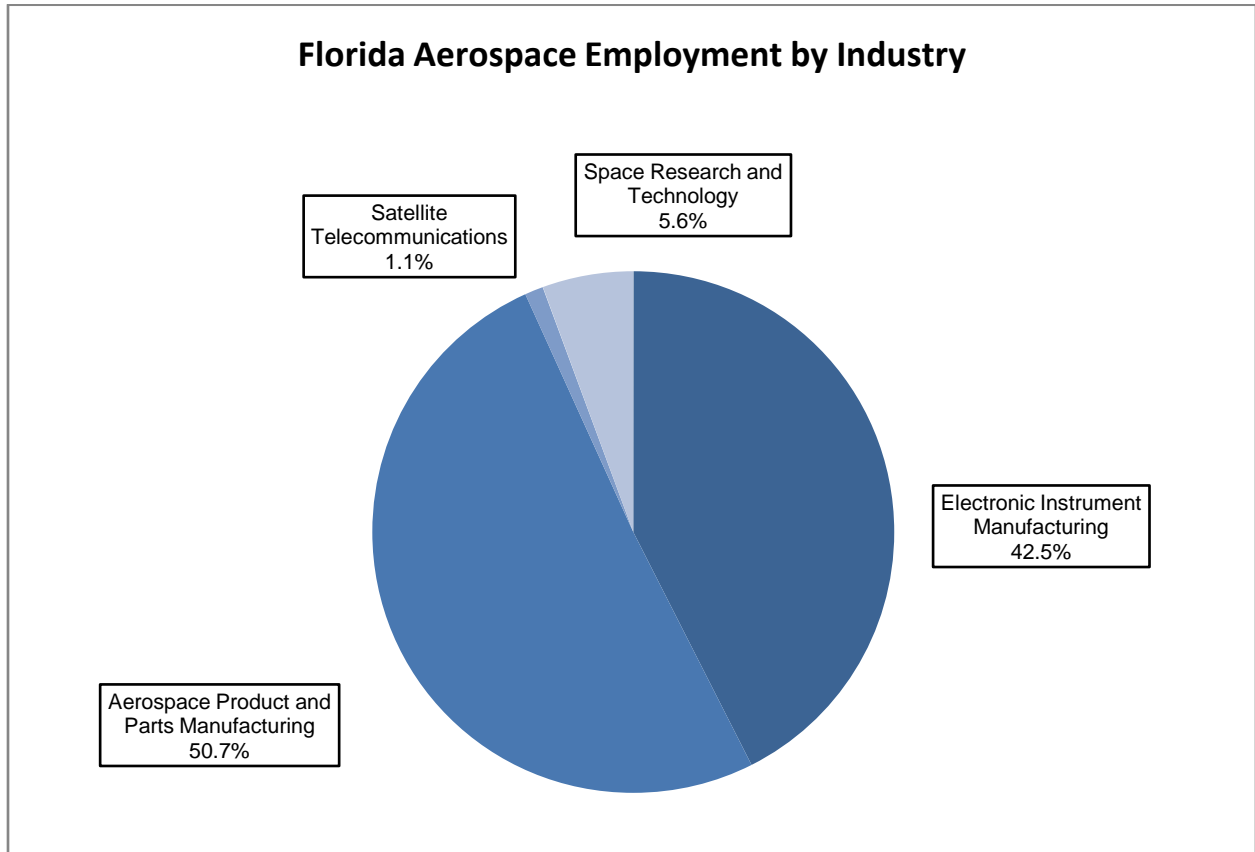
Florida is known as the premier location in the world for space technologies. Virtually every major aerospace company and defense contractor from the U.S. and abroad has operations in Florida. The state has been a center for aerospace research and testing since 1946. Florida's aerospace industry includes search, detection, and navigation instrument manufacturing, aerospace product and parts manufacturing, satellite communications, and space research and technology.

- The aerospace industry includes the following detailed subsectors: aircraft manufacturing, aircraft engine and engine parts manufacturing, other aircraft parts and auxiliary equipment manufacturing, guided missile and space vehicle manufacturing, and guided missile and space vehicle propulsion unit and other parts manufacturing.
- The aerospace industry sector had 694 establishments in 2008 with employment of 39,933, up 594 jobs (1.5 percent) from 2007.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, prepared May 2010.

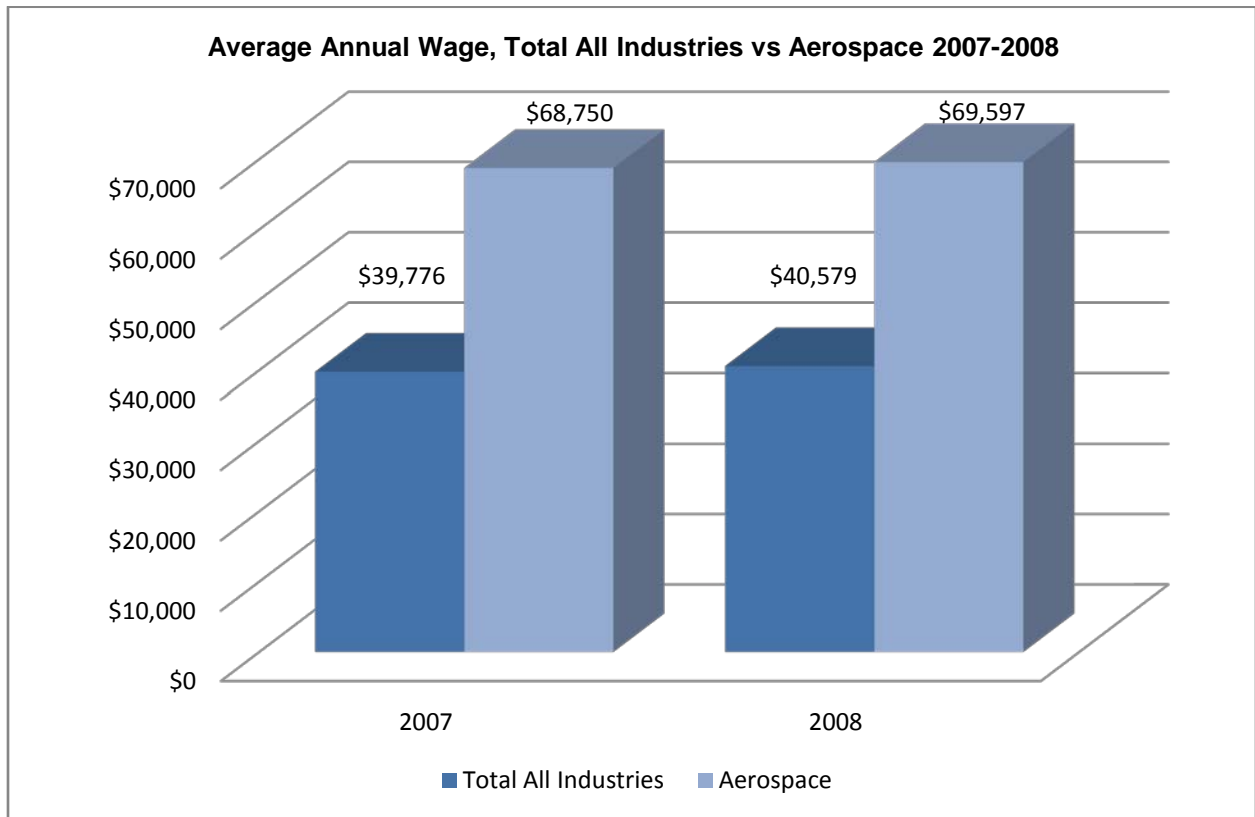
- Aerospace employment has been on an upward trend since January 2004, when the industry reached a low point. Employment has increased by 11.7 percent since January 2004 when employment was 35,750.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, prepared May 2010.

- The largest industry group in aerospace is aerospace product and parts manufacturing, with employment of 20,250 in 2008, which is 50.7 percent of the aerospace employment. The second largest industry in the aerospace industry is electronic instrument manufacturing, with 16,975 jobs in 2008 or 42.5 percent of total aerospace employment.
- Satellite telecommunications lost 118 jobs between 2007 and 2008, declining from 576 jobs in 2007 to 458 jobs in 2008 (20.5 percent).
- Aerospace is divided into the following subsectors: satellite telecommunications, space research and technology, electronic instrument manufacturing, and aerospace product and parts manufacturing.

- The largest industry subsector in the aerospace sector in 2008 was aerospace product and parts manufacturing (20,250 jobs). This subsector accounted for 50.7 percent of aerospace employment.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, prepared May 2010.

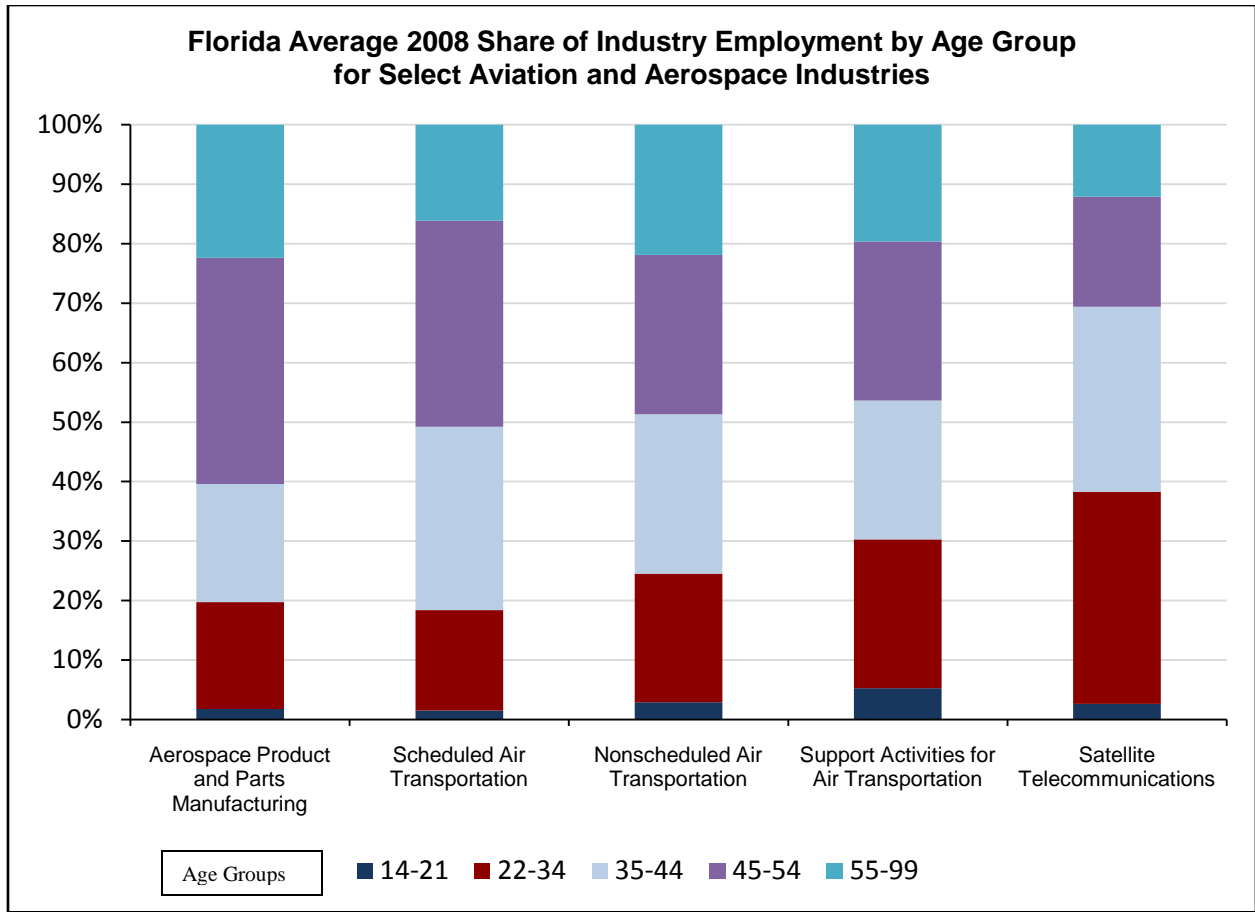
- The 2008 annual average wage for workers in the aerospace industry was \$69,597, exceeding the state's total annual average wage of \$40,579 by 71.5 percent.

Top Occupations in Aerospace Industry

Occupation Title	Employment		Annual Change		% of Industry	2009 Average	Training Requirement
	2009	2017	Total	Percent	Total	Hourly Wage	
Total, All Occupations	36,498	38,510	252	0.69			
Aircraft Structure, Surfaces, and Systems Assemblers	2,308	2,603	37	1.60	6.32	19.70	Postsecondary Vocational
Inspectors, Testers, Sorters, Samplers, and Weighers	1,704	1,688	-2	-0.12	4.67	15.46	High School
Industrial Engineers	1,647	1,974	41	2.48	4.51	32.76	Bachelor's Degree
Aerospace Engineers	1,538	1,644	13	0.85	4.21	42.57	Bachelor's Degree
Electrical and Electronic Equipment Assemblers	1,507	1,278	-29	-1.90	4.13	13.49	Postsecondary Vocational
Aircraft Mechanics and Service Technicians	1,228	1,482	32	2.58	3.36	23.27	Postsecondary Vocational
Machinists	840	907	8	1.00	2.30	17.19	Postsecondary Vocational
Mechanical Engineers	817	845	3	0.42	2.24	35.84	Bachelor's Degree
Team Assemblers	801	819	2	0.28	2.19	12.05	High School
Electrical and Electronic Engineering Technicians	768	781	2	0.20	2.11	24.60	Associate's Degree
First-Line Superv. of Production and Operating Workers	712	733	3	0.38	1.95	26.26	Postsecondary Vocational
Electromechanical Equipment Assemblers	612	620	1	0.16	1.68	12.86	Postsecondary Vocational
Purchasing Agents, Except Farm Products & Trade	586	605	2	0.39	1.61	25.38	Associate's Degree
Sales Representatives, Wholesale & Mfg, Tech. & Sci. Products	578	590	1	0.24	1.58	34.59	Postsecondary Vocational
Helpers - Production Workers	565	590	3	0.54	1.55	11.50	Less Than High School

Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Long Term Projections Program, forecast to 2017. Projections to the year 2017 assume economic recovery.

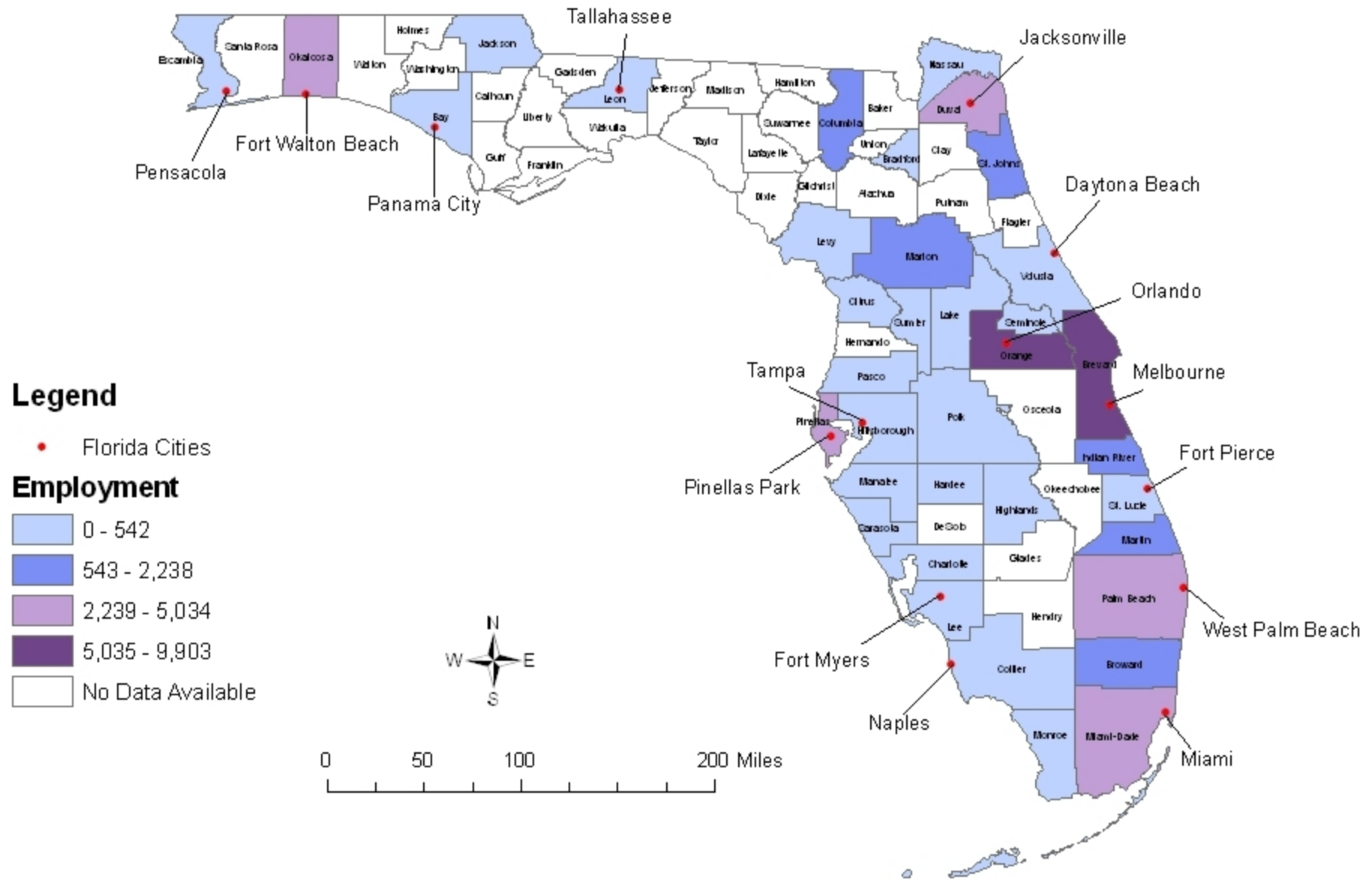
- More than 44.4 percent of the jobs in aerospace are concentrated in the 15 largest occupations in this industry.
- Aircraft mechanics and service technicians employment is expected to grow the fastest (+2.58 percent), while industrial engineers will gain the most new jobs (+41) among the top fifteen aviation occupations.
- Inspectors, testers, sorters; sales representatives, wholesale and manufacturing, technical and scientific products; and electromechanical equipment assemblers are expected to gain the fewest number of jobs over the next eight years. Inspectors, testers, sorters will have the lowest rate of job growth of these top 15 occupations.
- Average hourly wages for the top 15 aviation occupations range from a high of \$42.57 for aerospace engineers to a low of \$11.50 for helpers – production workers.
- Three of the top 15 occupations require a bachelor's degree and 12 of the top 15 aviation occupations require training beyond high school.



Source: US Census Bureau, Local Employment Dynamic Program (LED)
 Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics Center, May 2010.

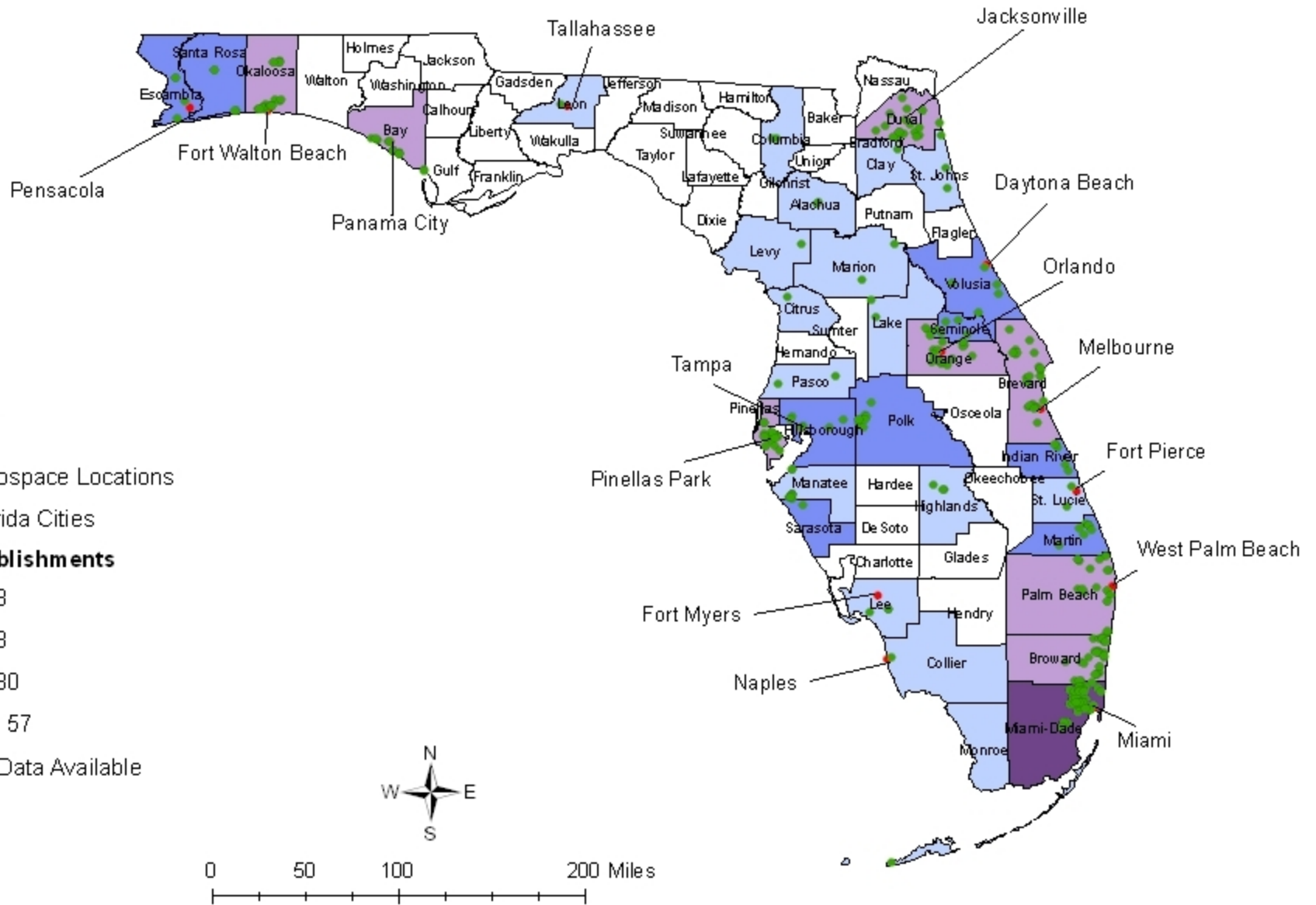
- Florida employment in the aviation and aerospace industry tends to be most heavily concentrated among age groups 22-34, 35-44, and 45-54.
- Of the select aerospace and aviation industries available, support activities for air transportation had the largest percentage of youth employment (age 14 – 21) in 2008, with 5.3 percent.
- All occupations in the aviation and aerospace industry employed more male employees (70.3 percent) compared to female employees (29.7 percent) in 2008.
- Aerospace employment is concentrated along the coast in southeast, central, northeast and northwest Florida with the highest number of jobs found in Brevard and Orange Counties.
- The aerospace industry had 694 establishments in 2008 with employment of 39,933. In 2007, aerospace establishments numbered 650 and employment was 39,339. Over the year, establishments increased by 44 (+6.8%) and employment increased 594 (+1.5%).
- Half of aerospace subsectors gained establishments over the year: electronic instrument manufacturing (+27); and aerospace product and parts manufacturing (+21).

Concentration of Aerospace Employment



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, 2009, Q4, Prepared July 2010.

Concentration of Aerospace Establishments by Location



Source: Infogroup Inc., Employer Database 2010-2nd Edition.

Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Prepared May 2010.