

Florida
**Aviation &
Aerospace
Industry**



Florida Aviation Industry

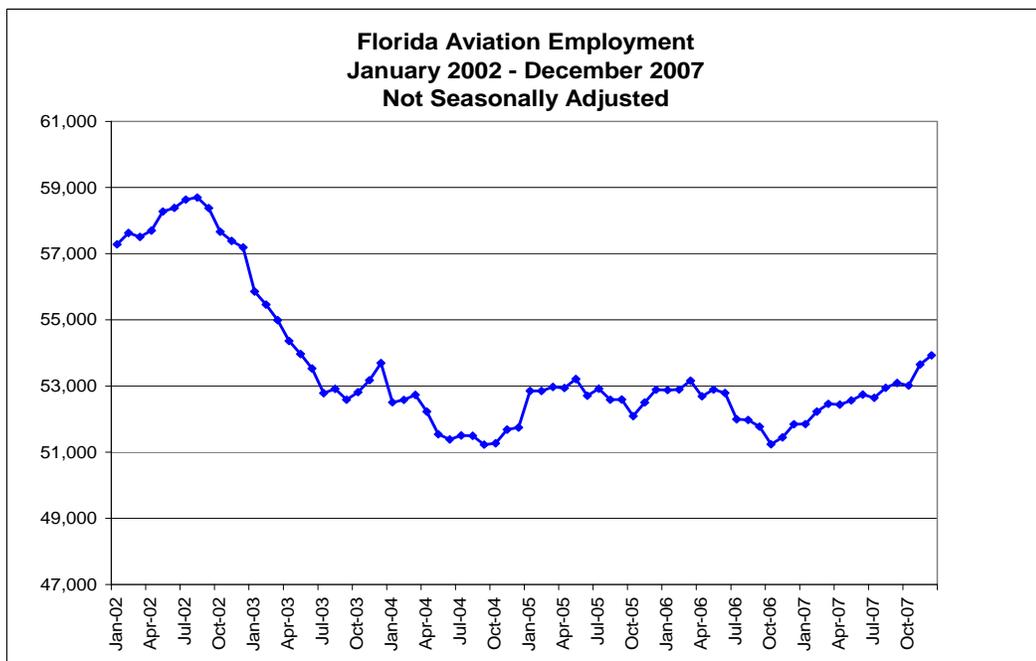
- Aviation includes the following subsectors and industries:
 - air transportation
 - ✓ scheduled passenger and freight air transportation
 - ✓ nonscheduled chartered passenger and freight air transportation
 - ✓ other nonscheduled air transportation
 - support activities for air transportation
 - ✓ air traffic control
 - ✓ other airport operations
 - ✓ other support activities for air transportation
 - flight training.
- The aviation industry had 1,485 establishments in 2007 with average employment of 52,841, up 543 jobs from 2006. This industry has lost 9,118 jobs (almost 15 percent) since 2001.

Florida Aviation Industry

Year	Average Annual Employment	Over-the-Year Change	
		Level	Percent
2001	61,959		
2002	57,895	-4,064	-6.6%
2003	53,845	-4,050	-7.0%
2004	51,811	-2,034	-3.8%
2005	52,759	948	1.8%
2006	52,298	-461	-0.9%
2007	52,841	543	1.0%

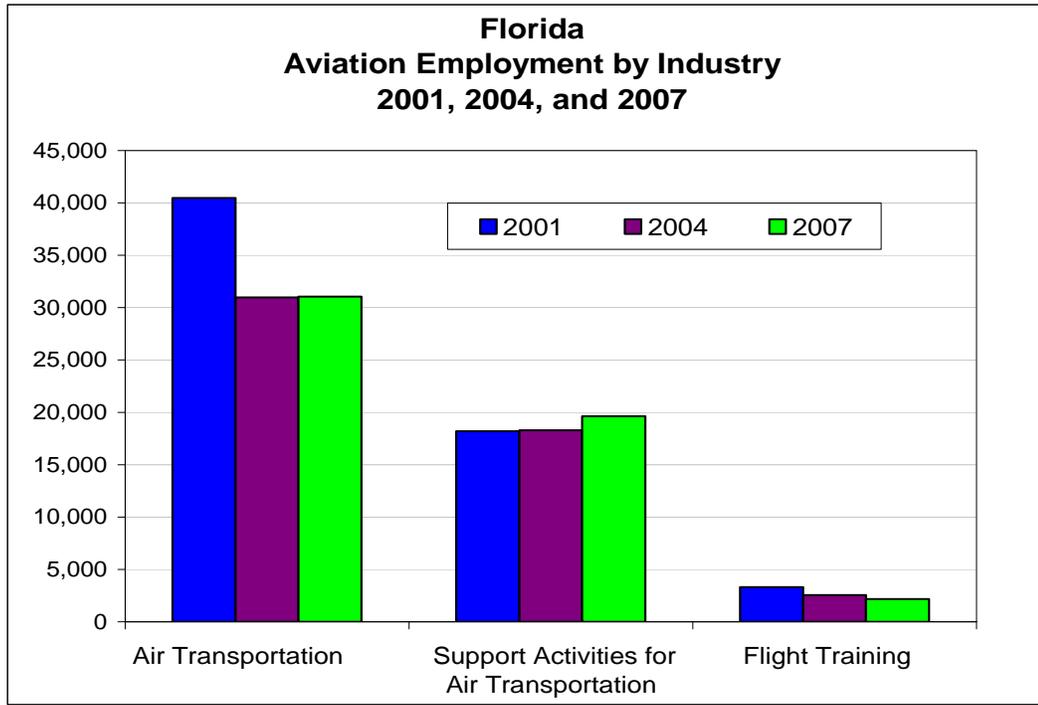
Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- 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.



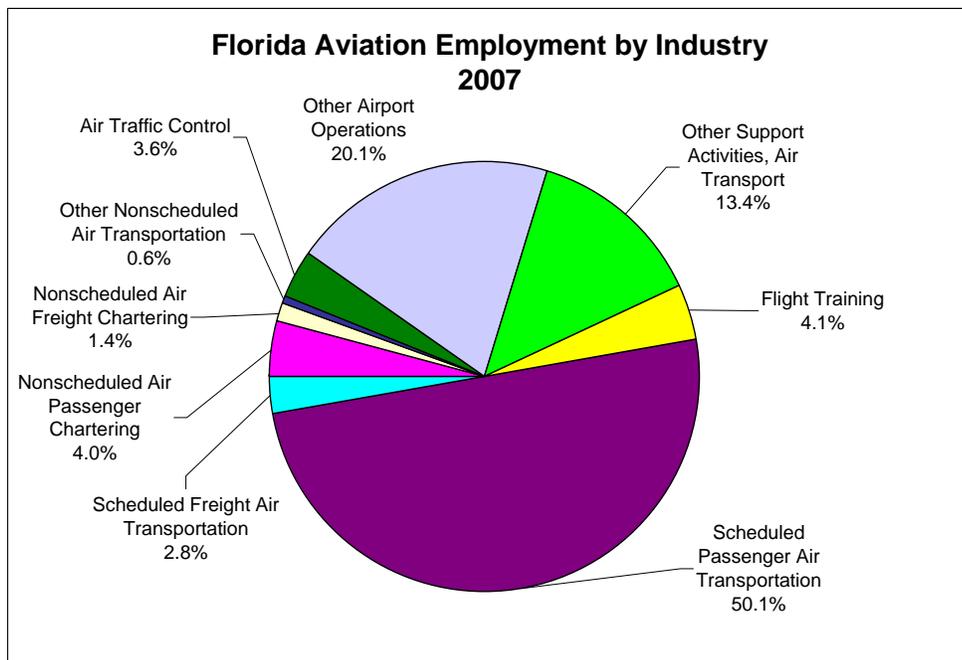
Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- The largest subsector in aviation is air transportation. Air transportation employment in 2007 was 31,049, which is 58.8 percent of the aviation employment. This represents a loss of 9,404 jobs from 2001 (-23.2 percent).



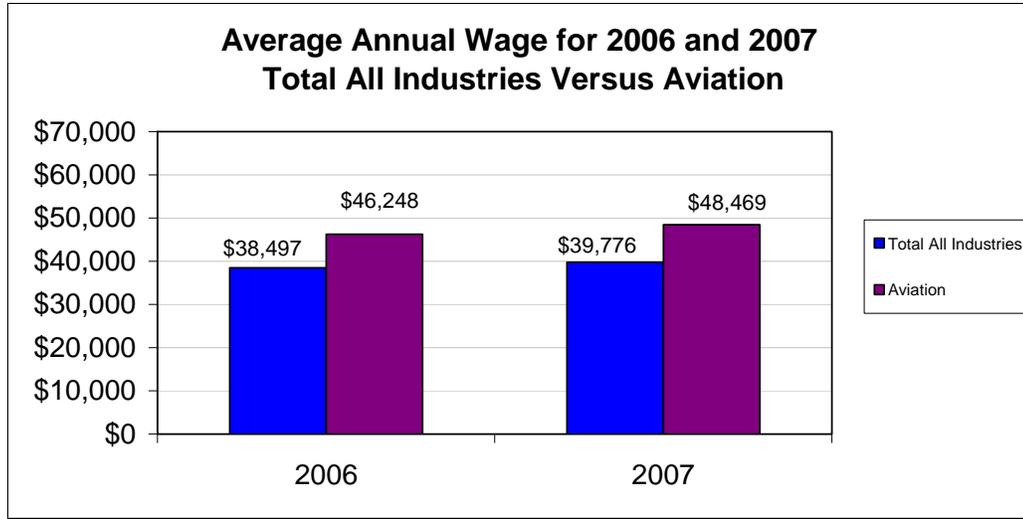
Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- The largest industry within air transportation is scheduled passenger air transportation with employment of 26,449 in 2007, up 1,139 jobs (+4.5 percent) from 2006.
- Scheduled passenger air transportation, other airport operations, and other support activities for air transportation account for over 80 percent of the total aviation employment.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- The 2007 annual average wage for workers in the aviation industry was \$48,469, exceeding the state's total annual average wage of \$39,776 by 22 percent.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- More than three-quarters of the jobs in aviation are concentrated in the 15 largest occupations in this industry.
- Six 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 \$40.18 for commercial pilots to a low of \$9.58 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.

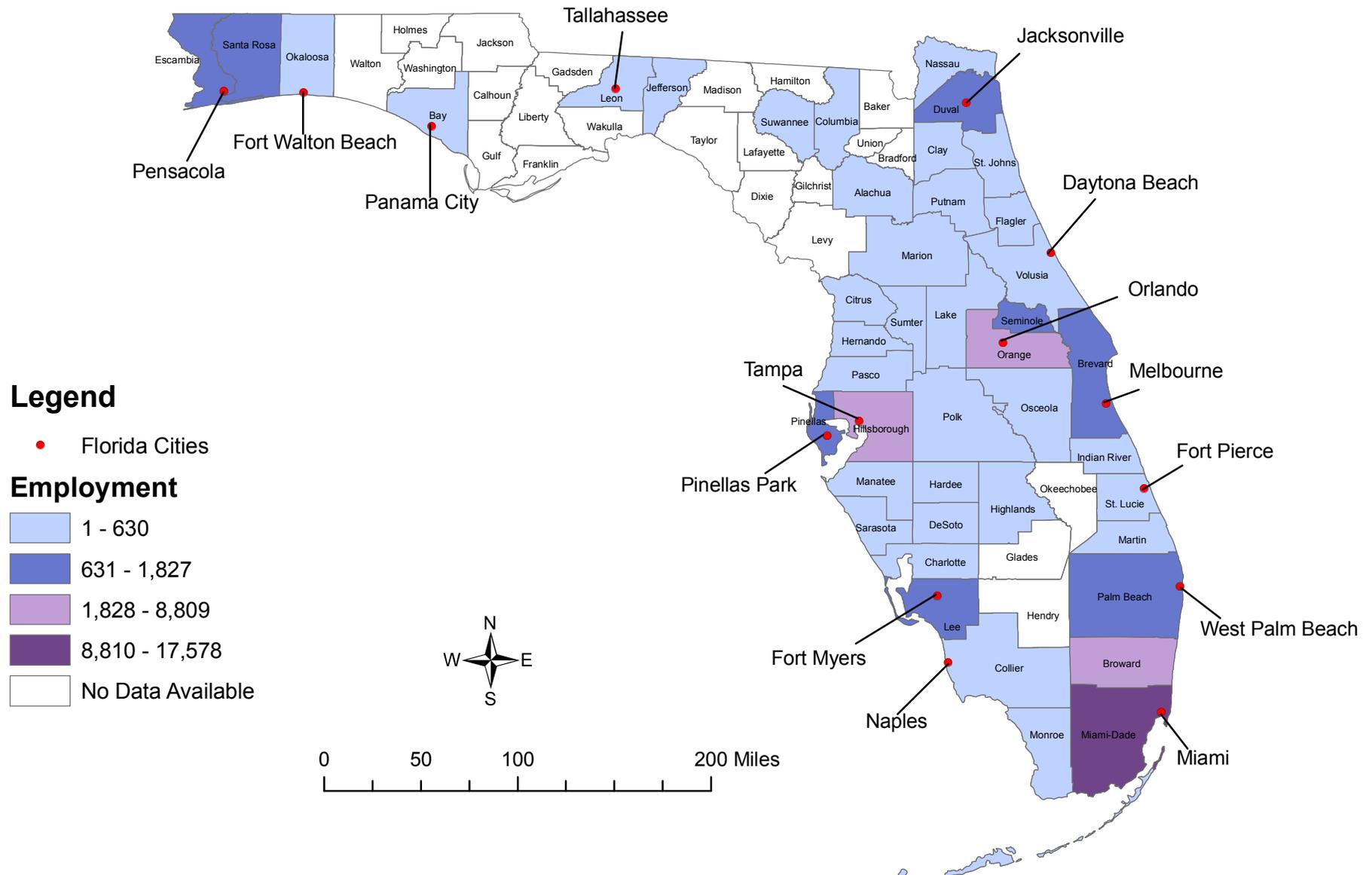
TOP 15 LARGEST AVIATION OCCUPATIONS

Occupation Title	Employment		Annual Change		% of Industry Total	2008 Average Wage	Training Requirement
	2008	2016	Total	Percent			
Ticket Agents and Travel Clerks	10,695	9,656	-130	-1.21	22.89	\$15.32	High School
Aircraft Mechanics and Service Technicians	4,436	4,639	25	0.57	9.49	\$23.32	PSAV Certificate*
Flight Attendants	4,428	4,333	-12	-0.27	9.48	NA	High School
Laborers and Freight, Stock, and Material Movers, Hand	3,255	3,205	-6	-0.19	6.97	\$11.14	Less Than High School
Airline Pilots, Copilots, and Flight Engineers	3,110	3,105	-1	-0.02	6.65	NA	CC Credit/Vocational
Cargo and Freight Agents	1,900	1,889	-1	-0.07	4.07	\$17.34	PSAV Certificate
Baggage Porters and Bellhops	1,555	1,651	12	0.77	3.33	\$ 9.58	Less Than High School
Commercial Pilots	1,440	1,477	5	0.32	3.08	\$40.18	PSAV Certificate
Transportation Attendants	1,057	1,155	12	1.16	2.26	\$10.67	CC Credit/Vocational
Customer Service Representatives	1,043	1,190	18	1.76	2.23	\$14.05	PSAV Certificate
First-Line Superv. of Office and Admin. Support Workers	933	876	-7	-0.76	2.00	\$22.42	CC Credit/Vocational
Janitors and Cleaners, Except Maids and Housekeeping	527	598	9	1.68	1.13	\$10.23	Less Than High School
First-Line Superv. of Mechanics, Installers, and Repairers	495	524	4	0.73	1.06	\$27.45	PSAV Certificate
Maintenance and Repair Workers, General	490	515	3	0.64	1.05	\$14.93	PSAV Certificate
Security Guards	470	509	5	1.04	1.01	\$10.81	PSAV Certificate

* PSAV - Post Secondary Adult Vocational Certificate

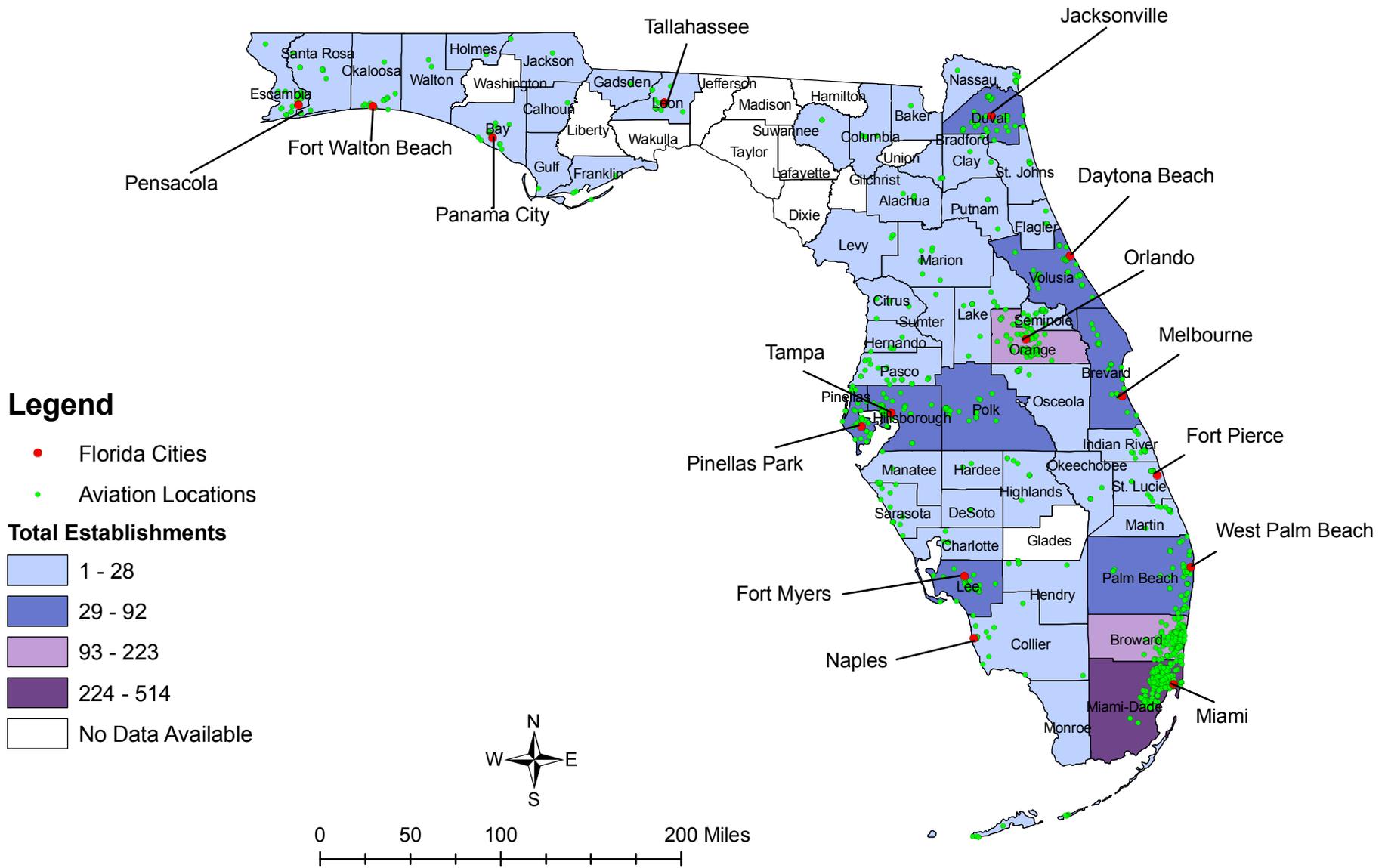
Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Long Term Projections Program, Forecast to 2016.

Concentration of Aviation Employment



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages, 2008, Q1, December 2008

Concentration of Aviation Establishments by Location



Source: InfoUSA Inc., Employer Database 2009-1st Edition
 Prepared by: Florida Agency for Workforce Innovation, Labor Market Statistics Center, December 2008

Florida Aerospace Industry

- Aerospace includes the following groups and industries:
 - search, detection, and navigation instrument manufacturing
 - aerospace product and parts manufacturing
 - ✓ aircraft manufacturing
 - ✓ aircraft engine and engine parts manufacturing
 - ✓ other aircraft parts and auxiliary equipment manufacturing
 - ✓ guided missile and space vehicle manufacturing
 - ✓ guided missile and space vehicle propulsion unit and other parts manufacturing
 - satellite communications
 - space research and technology.

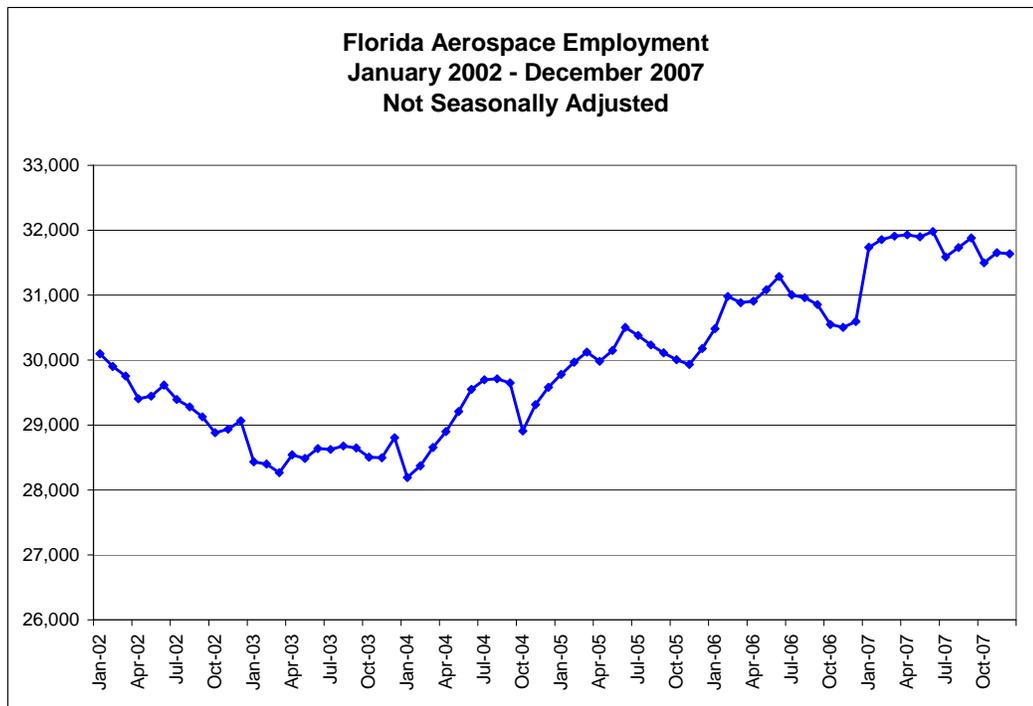
- The aerospace industry had 407 establishments in 2007 with employment of 31,706, up 865 jobs from 2006 (+2.8 percent). This industry has lost 416 jobs (-1.3 percent) since 2001.

Florida Aerospace Industry

Year	Employment	Over-the-Year Change	
		Level	Percent
2001	32,122		
2002	29,409	-2,713	-8.4%
2003	28,545	-864	-2.9%
2004	29,137	592	2.1%
2005	30,112	975	3.3%
2006	30,841	729	2.4%
2007	31,706	865	2.8%

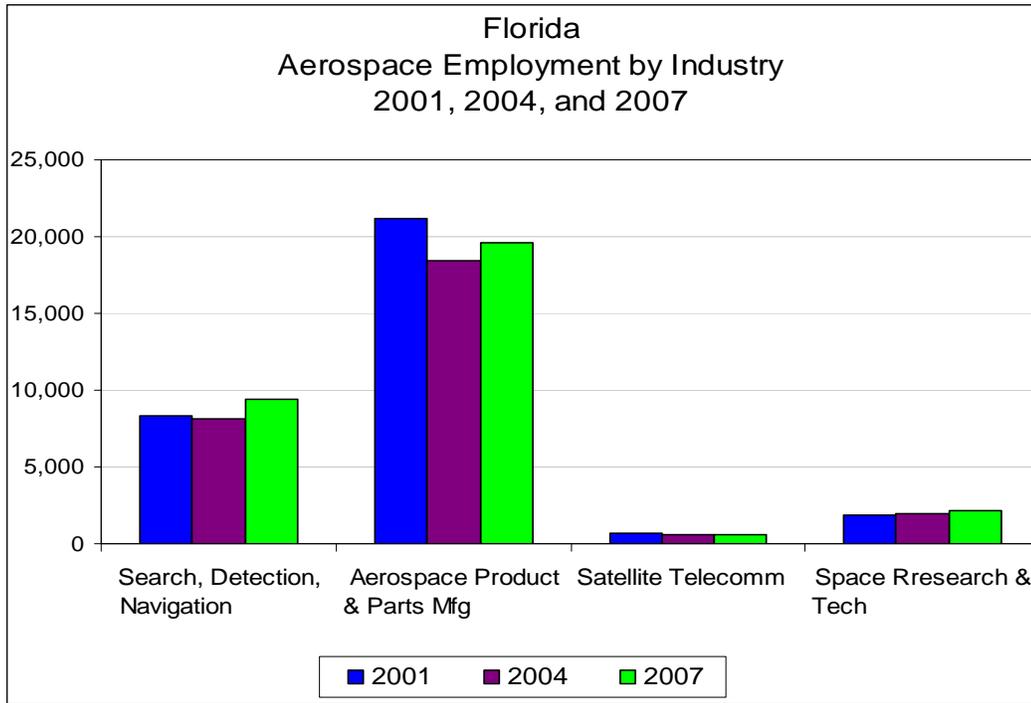
Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- 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.

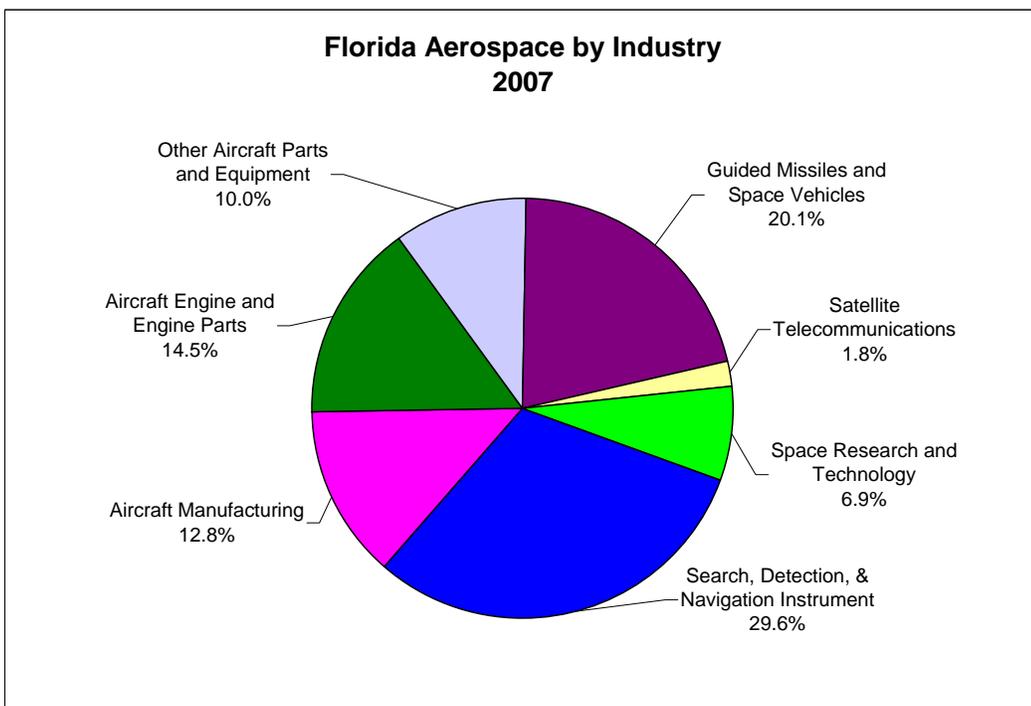


Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- The largest industry group in aerospace is aerospace product and parts manufacturing, with employment of 19,565 in 2007, which is 61.7 percent of the aerospace employment. The second largest industry in the aerospace industry is search, detection, and navigation instrument manufacturing, with 9,379 jobs in 2007.
- Within aerospace product and parts manufacturing, the largest industry is guided missiles and space vehicles, with 6,388 jobs in 2007.

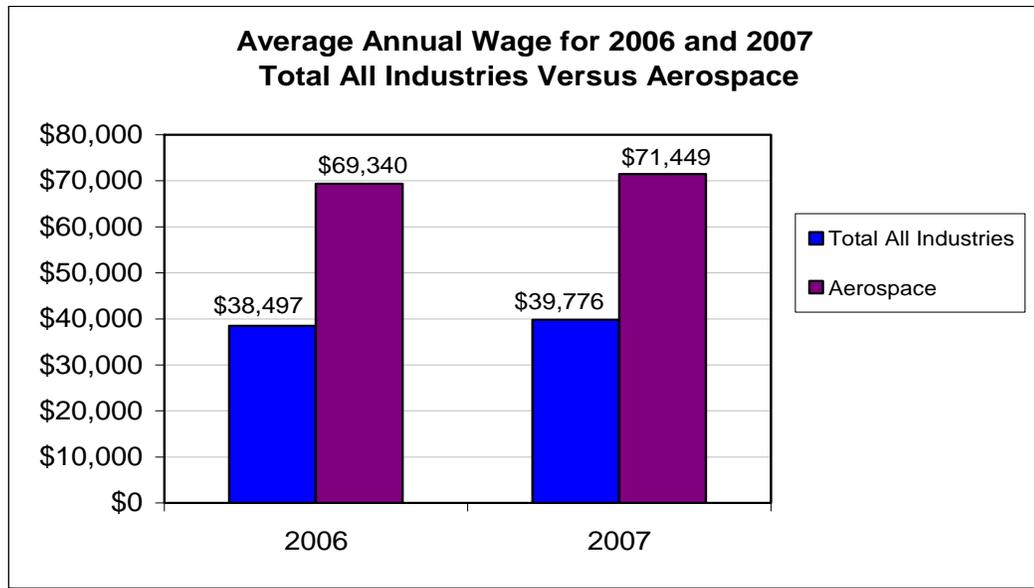


Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.



Note: Percentages may not add up to total due to rounding and omission of confidential industries.
 Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- The 2007 annual average wage for workers in the aerospace industry was \$71,449, exceeding the state's total annual average wage of \$39,776 by 79.6 percent.



Source: Florida Agency for Workforce Innovation, Labor Market Statistics Center, Quarterly Census of Employment and Wages Program, released November 2008.

- More than half the jobs in aerospace are concentrated in the 15 largest occupations in this industry.
- Industrial engineers are expected to grow the fastest, while aircraft mechanics and service technicians will gain the most new jobs among the top fifteen aviation occupations.
- Inspectors, testers, sorters; office clerks; purchasing agents; and team 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 \$54.98 for engineering managers to a low of \$11.78 for team assemblers.
- Five of the top 15 occupations require a bachelor's degree and 12 of the top 15 aviation occupations require training beyond high school.

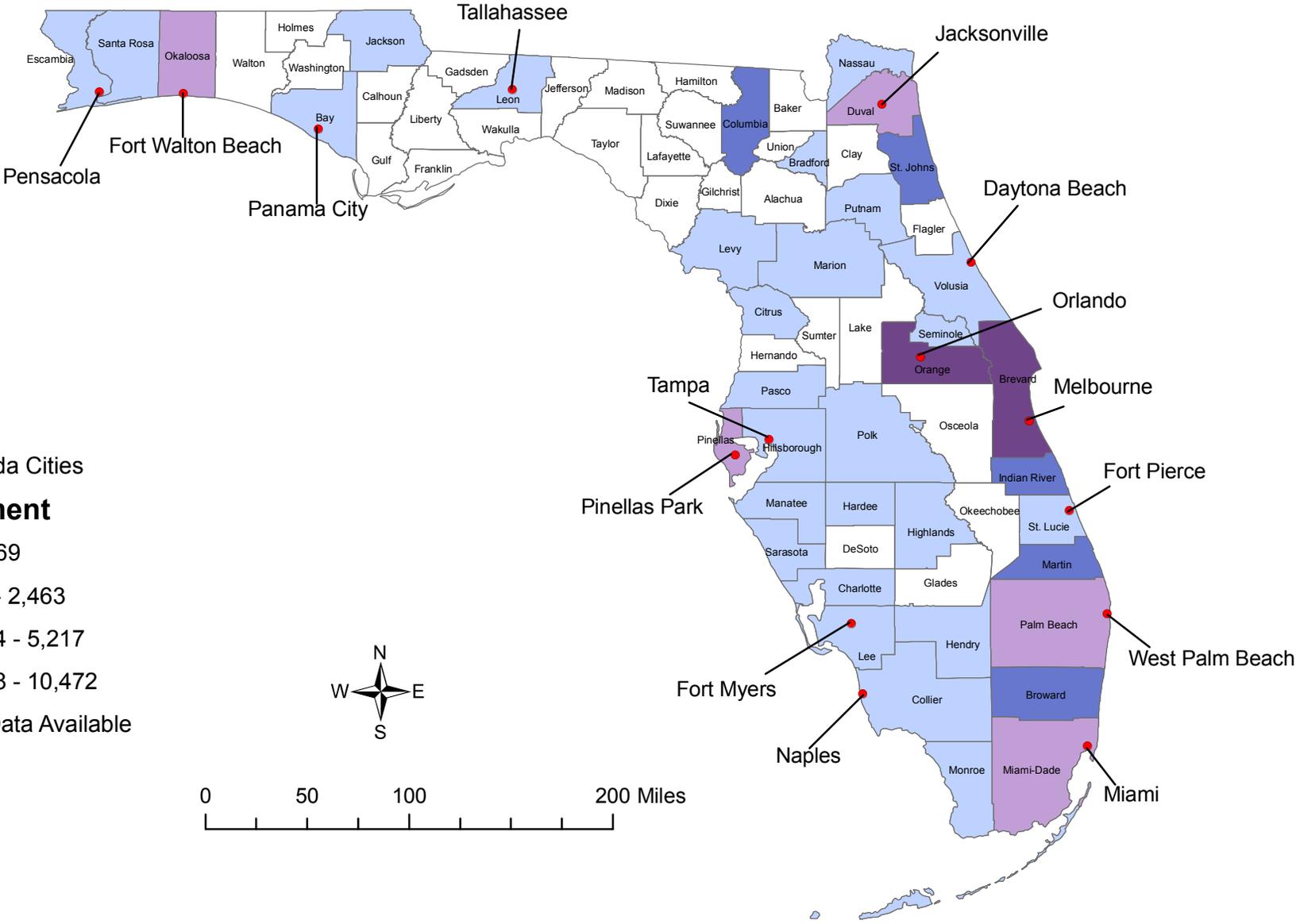
TOP FIFTEEN LARGEST AEROSPACE OCCUPATIONS

Occupation Title	Employment		Annual Change		% of Industry Total	2008 Average Wage	Training Requirement
	2008	2016	Total	Percent			
Aerospace Engineers	2,077	2,325	31	1.49	10.01	\$39.24	Bachelor's
Aircraft Structure, Surfaces, and Systems Assemblers	1,843	2,138	37	2.00	8.88	\$20.34	PSAV Certificate*
Aircraft Mechanics and Service Technicians	1,386	1,718	42	2.99	6.68	\$23.32	PSAV Certificate
Inspectors, Testers, Sorters, Samplers, and Weighers	776	798	3	0.35	3.74	\$14.82	High School
Industrial Engineers	712	891	22	3.14	3.43	\$33.19	Bachelor's
Aerospace Engineering and Operations Technicians	704	758	7	0.96	3.39	\$29.36	CC Credit/Vocational
Management Analysts	667	718	6	0.96	3.22	\$37.87	Bachelor's
Machinists	459	513	7	1.47	2.21	\$16.42	PSAV Certificate
Engineering Managers	448	521	9	2.04	2.16	\$54.98	Bachelor's
Mechanical Engineers	371	400	4	0.98	1.79	\$35.88	Bachelor's
Executive Secretaries and Administrative Assistants	369	407	5	1.29	1.78	\$18.44	PSAV Certificate
Office Clerks, General	335	357	3	0.82	1.61	\$11.92	High School
Purchasing Agents, Except Farm Products & Trade	314	340	3	1.04	1.51	\$25.39	CC Credit/Vocational
Team Assemblers	304	327	3	0.95	1.47	\$11.78	High School
Industrial Engineering Technicians	278	322	6	1.98	1.34	\$22.15	PSAV Certificate

* PSAV - Post Secondary Adult Vocational Certificate

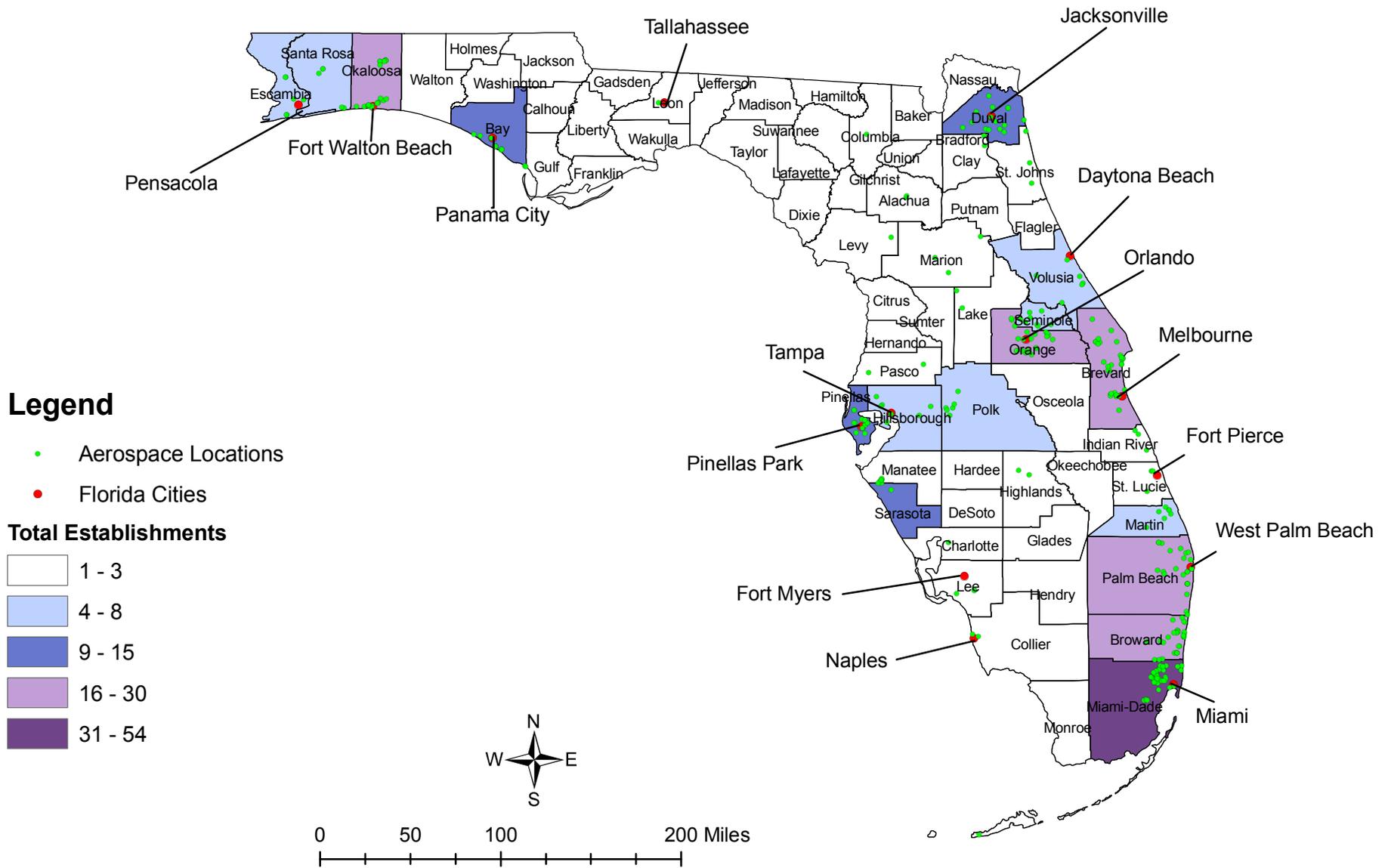
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