



EUROPE¹⁵⁵

Air transport supports 11.9 million jobs and \$860 (€707.5) billion in GDP in Europe



873.4
million passengers

7,560,360
flights

1,682
billion RPKs

667
commercial airports

387
airlines

6,586
aircraft in service

46
air navigation service providers

81%
Average regional load factor

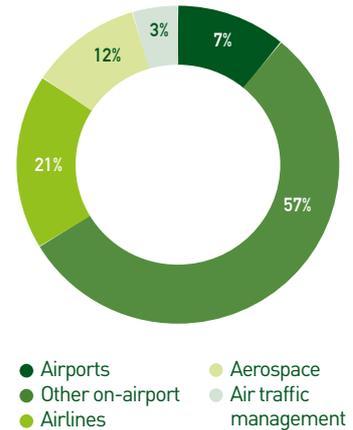
The air transport industry in Europe directly generated an estimated 2.5 million jobs in 2014.

- » 533,000 of those people (21% of the total) were in jobs for airlines or handling agents (for example, flight crew, check-in staff, maintenance crew, reservations and head office staff).
- » Another 174,000 people (7% of the total) worked for airport operators (for example, in airport management, maintenance, security and operations).
- » 1.4 million jobs (57%) were on-site in airports, at retail outlets, restaurants, hotels, etc.
- » A further 311,000 people (12%) were employed in the manufacture of civil aircraft (including systems, components, airframes and engines).
- » Air navigation service providers employed an additional 84,000 people (3%).

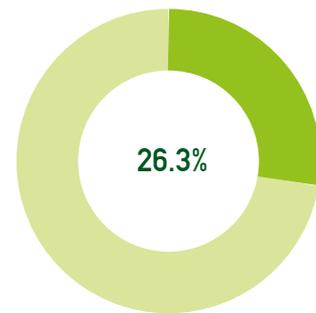
As well as this direct employment in the operations of the air transport sector itself, the sector's impact reaches further through European economies. Including direct impacts, as well as the effect of the sector's procurement of goods and services through its supply chain, and the benefits that arise when employees in the industry and its supply chain spend their wages in the local consumer economy, in total the air transport sector supported 6.9 million jobs and contributed \$531 billion to GDP in Europe in 2014.

In addition, the spending of foreign tourists – many of whom arrive by air – supported an estimated five million jobs and contributed \$328 billion to GDP in Europe's economies in 2014.

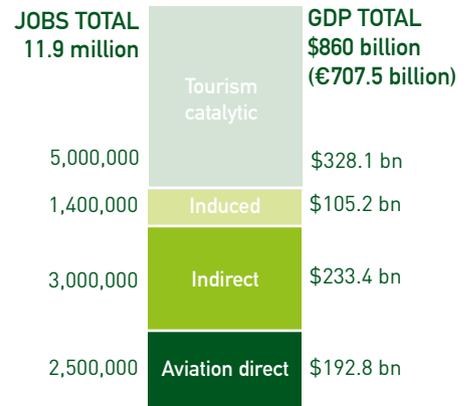
Direct jobs generated by air transport in Europe, 2014



Europe's share of global passenger traffic, 2014



Total jobs and GDP generated by air transport in Europe, 2014



Projected annual growth rate for international traffic by region, 2014 - 2034⁴⁸

AFRICA	5.4%
ASIA-PACIFIC	5.1%
EUROPE	3.6%
LATIN AMERICA & CARIBBEAN	4.7%
MIDDLE EAST	6.0%
NORTH AMERICA	2.7%
APEC	3.9%
EUROPEAN UNION	3.6%
SMALL ISLANDS STATES	4.9%
DEVELOPING COUNTRIES	5.0%
OECD	3.5%
WORLD	4.3%

In total, the industry supported 11.9 million jobs and made an \$860 billion (€707 billion) contribution to GDP in Europe. This accounted for 19% of the jobs and 32% of the GDP supported by the air transport industry worldwide.

The past five years have seen marked growth in passenger traffic in Europe. The number of revenue passenger kilometres flown has increased by 30% between 2010 and 2014, or an average of 6% per year¹⁵⁶. The continent's air travel expansion is expected to continue, albeit more modestly, at a rate of 3.6% per annum on average over the next two decades¹⁵⁷.

This increase will, in turn, drive growth in the economic output and jobs that are supported by the air transport industry on the continent in the next 20 years. By 2034, Oxford Economics forecasts that the impact of air transport and the tourism it facilitates in Europe will have grown to support 17 million jobs (41% more than in 2014) and a \$1.6 trillion (€1.2 trillion) contribution to GDP (an 86% increase).

Europe is one of the most established regions of the world in terms of air transport activity, particularly Western Europe.

However, emerging economies in the east are contributing to the overall growth in the region, with employment in the European aviation industry expected to grow by 2% per annum up to 2034. This growth, and the restrictions of development across much of Europe, are leading to capacity shortfalls.

As part of its *Challenges of Growth* series, in 2013 Eurocontrol released a report forecasting air traffic in Europe in 2035 and the difficulty for the sector to meet that projected demand¹⁵⁸. The foregone economic impact associated with this unmet demand is estimated to be two million jobs and \$132 billion (€96.7 billion) in GDP, including direct activity at the airport, indirect and induced impacts, and the lost tourism, trade and investment due to low connectivity growth. Furthermore, the majority of this loss is in the general economy, not the airports or aviation sector.

The European industry is one of the most heavily regulated in the world in terms of social rights, consumer protection and the environment.



Air ambulances in Norway



Living in a remote area can be challenging in any number of ways, be it shopping for food or simply finding ways of socialising. However, one of the main obstacles that many living in these regions need to overcome is accessing healthcare, which can, of course, be a matter of life and death.

For residents of rural Norway this is a particular problem, not only due to their distance from hospitals, but also because of the harsh climatic conditions that can make travelling by road difficult. To address this important issue and serve its citizens living in the High North (among other places), the Norwegian government has, since 1988, been running the National Air Ambulance Service. This service provides an essential lifeline for citizens who need urgent access to healthcare.

The annual budget of the service is almost 800 million Norwegian kroner (\$91 million) and each year around 20,000 patients are helped by the service. Roughly half of these patients are transported by ambulance aircraft, while others are flown by helicopter. In total, the service flies around 18,000 flight hours every year.

The aircraft are usually dispatched for more serious cases and are equipped with state-of-the-art medical equipment, with two pilots and a specially trained nurse. If necessary, a doctor will also travel on board.

Without air links, people living in remote areas of Norway simply would not be able to access healthcare in an emergency, making some regions almost uninhabitable.