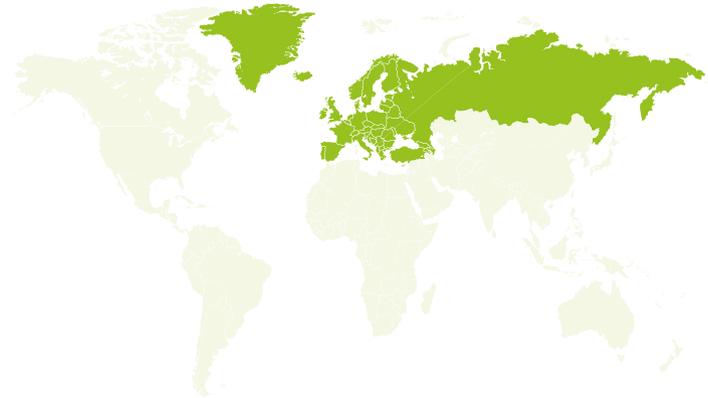


Europe¹²⁹

Air transport supports 11.7 million jobs and \$860 billion in GDP in Europe



780.6 million

passengers

9,401,000

flights¹³⁰

1.2 trillion

RPKs

959

commercial airports

387

airlines

6,306

aircraft in service

46

air navigation service providers

The air transport industry in Europe directly generated an estimated 2.6 million jobs in 2012.

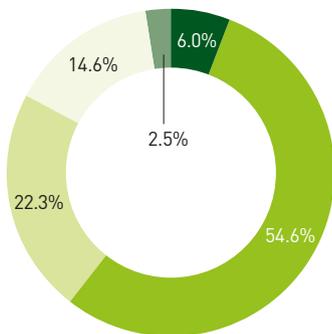
- » 576,000 of those people (22% of the total) were in jobs for airlines or handling agents (for example, flight crew, check-in staff, maintenance crew, reservations and head office staff).
- » Another 156,000 people (6% of the total) worked for airport operators (for example, in airport management, maintenance, security and operations).
- » 1.4 million jobs (55%) were on-site in airports, at retail outlets, restaurants, hotels, etc.
- » A further 378,000 people (15%) were employed in the manufacture

of civil aircraft (including systems, components, airframes and engines).

- » Air navigation service providers employed an additional 64,000 people (2%).

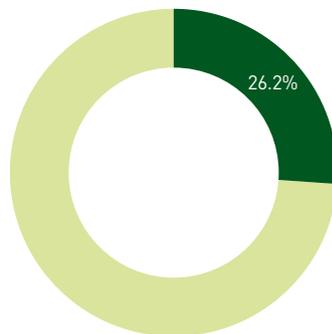
The total impacts – including those from the operations of the air transport sector itself, the impact of the air transport sector’s procurement of inputs of goods and services from its supply chain, and the impact of employees of the air transport sector and its supply chain spending their wages – mean the air transport sector supported seven million jobs (1.9% of economy-wide employment) and contributed \$581 billion to GDP in Europe (2.8% of economy-wide GDP).

Direct jobs generated by air transport in Europe, 2012



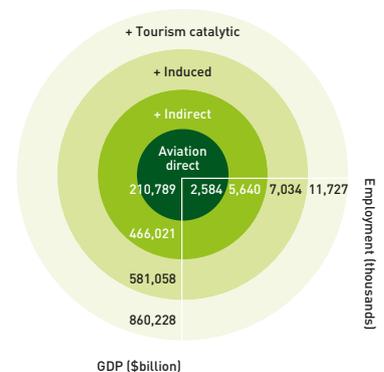
■ Airports
■ Other on-airport
■ Airlines
■ Aerospace
■ Air traffic Management

Europe’s share of global passenger traffic, 2012



■ Europe
■ Rest of the World

Total jobs and GDP generated by air transport in Europe, 2012



GDP (\$billion)

Employment (thousands)



Moreover, substantial benefits derive to regional economies via the catalytic impacts of tourist spending, much of which is generated by tourists travelling by air. In 2012, the spending of tourists arriving at their destination by air is estimated to have added 4.7 million to employment (1.3% of economy-wide employment) and \$279 billion in GDP (1.3% of economy-wide GDP).

Worldwide, including the tourism impacts, Europe accounts for 20% of the jobs and 35% of the GDP supported by the air transport industry.

Air travel forecasts suggest that these benefits will grow significantly in future. Over the next 20 years, revenue passenger kilometres are expected to grow at an average annual rate of 3.8% in Europe. This expansion in air travel is likely to generate significant economic impacts. Oxford Economics forecasts that the number of jobs supported by aviation and tourism impacts will grow to 19.1 million by 2032, a 63% increase from

2012. Meanwhile, the contribution to GDP is forecast to grow to \$1.8 trillion by 2032, a 108% increase on 2012 figures.

Characterised by a mixture of mature and typically slower-growing markets in the west and more dynamic emerging economies in the east, forecasts still point to a significant overall increase in demand for aviation services, which current levels of capacity are ill-equipped to deal with. Therefore, it is crucial that investment in infrastructure be sufficient to ease congestion and increase connectivity.

Despite a substantially deregulated marketplace which has stimulated competition and fostered the development of new airline business models, air transport in Europe is constrained by regulatory burdens heavier than in other parts of the world. These arise in many fields, including social affairs, consumer protection and environment. The sector is also a prime target for taxation.

Meanwhile, escalating security-related costs need to be addressed, as they are impeding the ability of airports to function profitably. The inefficiency of the current system is starkly illustrated by ACI's estimate that 35% of airport operating costs are accounted for by security. Further investment in relevant technologies is a pre-requisite here, but increased harmonisation at the global level on security processes could also generate significant efficiency savings.

JOBS



Soaring interest in airport career opportunities

London's Heathrow Airport saw 5,800 young people attend the airport's Jobs and Careers fair in 2014, the largest number of attendees since the fair was launched seven years ago.

The fair, which is held every February, brings together 16-24 year olds from communities surrounding the airport and links them with the companies working there. In 2014, 47 companies attended to explain what career opportunities were on offer. Parents and teachers also came to the fair to gain an understanding of what prospective employers expected in candidates, and were given information on CV advice, interviews and career guidance.

As one of the largest single-site employers in the country, with 76,500 people directly employed on the Heathrow site, the airport offers a wide range of jobs, training and career opportunities. A total of 114,000 jobs are supported in the local area by the operation of Heathrow Airport — representing one in five jobs (or 22% of the total) in the local area.

The business community surrounding the airport includes firms involved in construction, engineering, retail, logistics, communication, planning, security and technology. There are 323 separate businesses working within the perimeter fence at Heathrow.

The airport also plays an active role in supporting small and medium-sized enterprises (SMEs) in surrounding areas. At its annual Business Summit, the airport provides an opportunity for 'speed dating' between procurement executives of the airport and large on-airport businesses and local SMEs that could provide services.