

DEVELOPING COUNTRIES²¹⁶

Air transport supported nearly 56 million jobs and \$760 billion in economic activity in developing countries. That is 2.2% of all employment and 2.6% of all GDP in developing countries in 2018.

Every person directly employed in the aviation sector and in tourism made possible by aviation supported another 11.2 jobs elsewhere in developing countries. Similarly, \$3.60 of economic activity was supported elsewhere in developing countries for every \$1 of gross value added directly created by the air transport sector.

The aviation sector in developing countries directly employed an estimated 4.6 million people in 2018 in the following sub-sectors:

- » **Airlines: 2 million** (44% of the total)
- » **Airport operators: 342,000** (7%)
- » **Other on-airport: 1.95 million** (43%)
- » **Civil aerospace: 166,000** (4%)
- » **Air navigation service providers: 116,000** (3%)

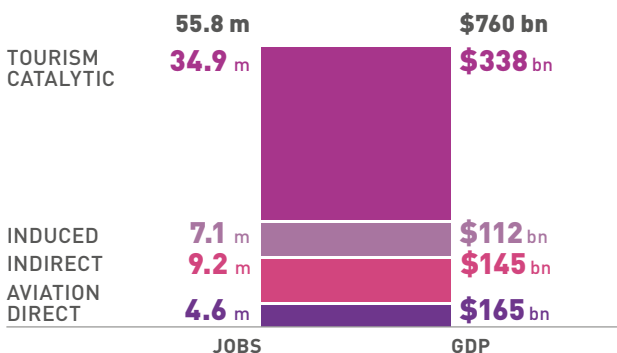
Airlines, airport operators, retailers and other on-site businesses at airports and air navigation service providers and civil aircraft manufacturers also contribute to GDP in developing countries. In 2018, the operations of these businesses directly generated a \$112 billion contribution to GDP, equivalent to the entire GDP of Kazakhstan.

The aviation sector's spending with suppliers is estimated to have supported a further 9.2 million jobs and a nearly \$145 billion gross value-added contribution to GDP. In addition, wage payments to staff – by the aviation sector and businesses in the aviation sector's supply chain – supported another 7.1 million jobs and a further \$112 billion gross value-added contribution to GDP.

In total, accounting for the sector's direct impact, its supply chain impact, its wage expenditure impact, and the impact of tourism made possible by air transport, the aviation sector supported an estimated 56 million jobs and a \$760 billion contribution to GDP in developing countries in 2018.

Air travel in developing countries is expected to continue to grow at about 3.8% per year over the next two decades. This increase will, in turn, drive growth in the economic output and jobs that are supported by the air transport industry over the next 20 years. Oxford Economics forecasts that by 2038 the impact of air transport and the tourism it facilitates in developing countries will have grown to support 93 million jobs (67% more than in 2018) and a \$1.7 trillion contribution to GDP (a 123% increase).

Total jobs and GDP generated by air transport in developing economies.



2 billion passengers

43.4% share of global passenger traffic

763 airlines

1,969 airports

12,741 aircraft in service