



EUROPE²⁰⁷

Air transport supported 13.5 million jobs and \$991 billion in European economic activity. That is 3.6% of all employment and 4.4% of all GDP in European countries in 2018.

Every person directly employed in the aviation sector and in tourism made possible by aviation supported another 4.1 jobs elsewhere in Europe. Similarly, \$3.00 of economic activity was supported elsewhere in Europe for every \$1 of gross value added directly created by the air transport sector.

The aviation sector in Europe directly employed an estimated 2.7 million people in 2018. A sub-sectoral analysis of these workers suggests that:

- » **553,000 of them (21% of the total)** were employed by airlines or handling agents as, for example, flight crew, check-in staff, maintenance crew, or head office staff;
- » **230,000 (9%)** had jobs with airport operators in, for example, airport management, maintenance, and security;
- » **1.4 million (53%)** worked on-site at airports in, for example, retail outlets, restaurants, and hotels;
- » **395,000 (15%)** were employed in the manufacture of civil aircraft (including systems, components, airframes, and engines); and
- » **69,000 (3%)** worked for air navigation service providers in, for example, air traffic control and engineering.

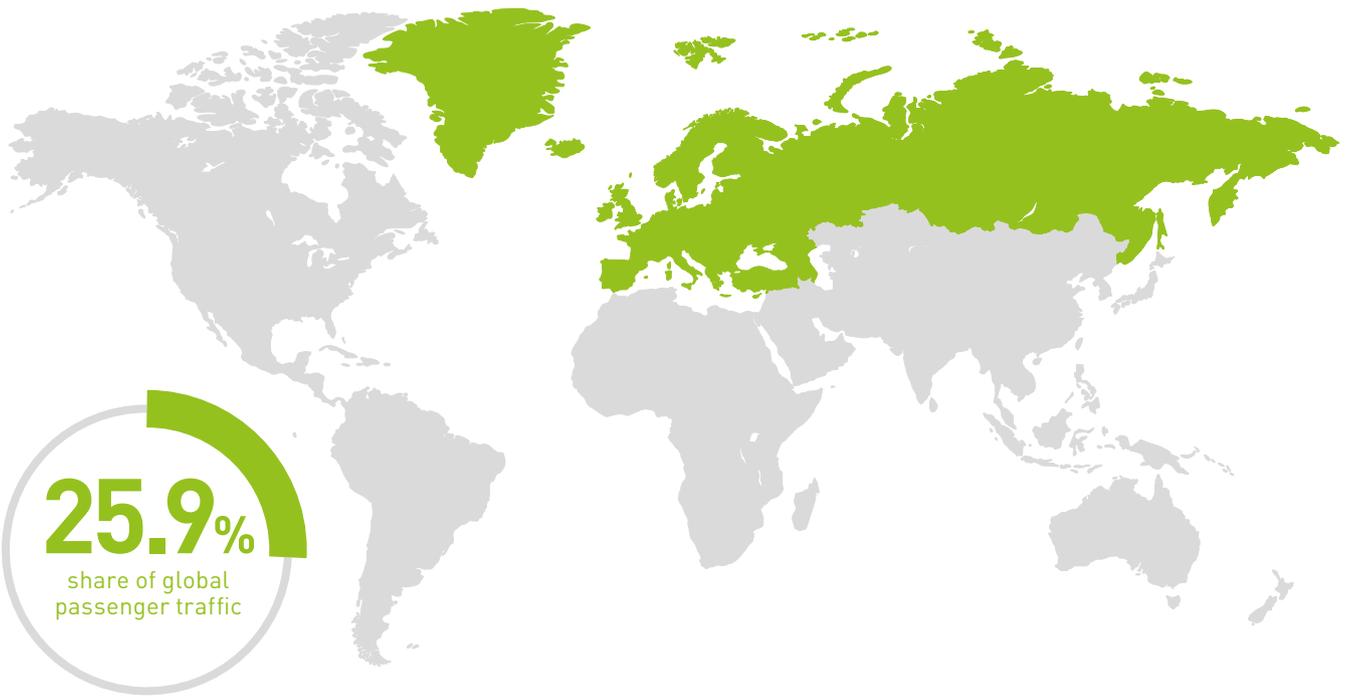
Airlines, airport operators, retailers and other on-site businesses at airports and air navigation service providers and civil aircraft manufacturers also contribute to GDP in Europe. In 2018, the operations of these businesses directly generated a \$245 billion contribution to GDP equivalent to the entire GDP of Czechia.

The aviation sector's spending with suppliers is estimated to have supported a further 3.0 million jobs and a \$242 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 2.2 million jobs and a \$180 billion gross value-added contribution to GDP.

The aviation sector also facilitates a substantial amount of tourism in Europe. This stimulates still more economic activity, as tourists spend their money with restaurants, hotels, retailers, tour operators, and other providers of consumer goods and services. In 2018, spending by foreign visitors who flew to European countries supported an estimated 5.6 million jobs and a \$324 billion 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 13.5 million jobs and a \$991 billion contribution to GDP in Europe in 2018.

Air travel in Europe is expected to continue to grow at about 2.1% 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 Europe will have grown to support 18.6 million jobs (37% more than in 2018) and a \$1.5 trillion contribution to GDP (a 54% increase).



9,112,303
flights

1.2
billion passengers

375
airlines

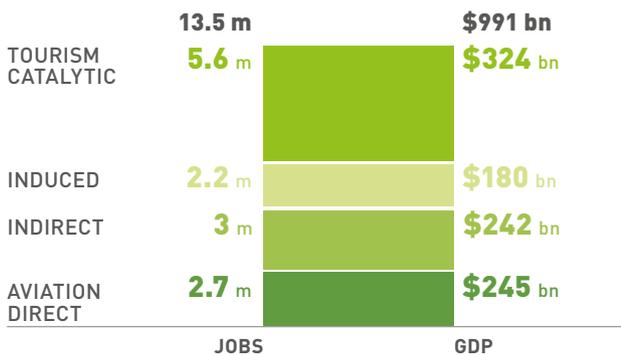
10
million tonnes of cargo

756
commercial airports

44
air navigation service providers

84%
average regional load factor

Total jobs and GDP generated by air transport in Europe, 2018.



Direct jobs generated by air transport in Europe.

