

/ MIDDLE EAST²⁰⁹

Air transport supported 3.4 million jobs and \$213 billion in Middle East economic activity. That is 4.5% of all employment and 7.6% of all GDP in Middle Eastern countries in 2018.

Every person directly employed in the aviation sector and in tourism made possible by aviation supported another 4.6 jobs elsewhere in the Middle East. Similarly, \$2.10 of economic activity was supported elsewhere in the Middle East for every \$1 of gross value added directly created by the air transport sector.

The aviation sector in the Middle East directly employed an estimated 595,000 people in 2018. A sub-sectoral analysis of these workers suggests that:

- » **262,000 (44% of the total)** were employed by airlines or handling agents as, for example, flight crew, check-in staff, maintenance crew, or head office staff;
- » **26,000 (4%)** had jobs with airport operators in, for example, airport management, maintenance, and security;
- » **297,000 (50%)** worked on-site at airports in, for example, retail outlets, restaurants, and hotels;
- » **4,600 (1%)** were employed in the manufacture of civil aircraft (including systems, components, airframes, and engines); and
- » **5,300 (1%)** 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 the Middle East. In 2018, the operations of these businesses directly generated a \$68 billion contribution to GDP, about equivalent to the entire GDP of Tehran.

The aviation sector's spending with suppliers is estimated to have supported a further 700,000 jobs and a \$40 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 302,000 more jobs and a \$18 billion gross value-added contribution to GDP.

The aviation sector also facilitates a substantial amount of tourism in the Middle East. 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 Middle Eastern countries supported an estimated 1.8 million jobs and a \$87 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 3.4 million jobs and a \$213 billion contribution to GDP in the Middle East in 2018.

Air travel in the Middle East is expected to continue to grow at about 4.1% 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 Middle Eastern countries will have grown to support 6.7 million jobs (101% more than in 2018) and a \$517 billion contribution to GDP (a 143% increase).



1,257,259

flights

192

million passengers

68

airlines

6.7

million tonnes of cargo

114

commercial airports

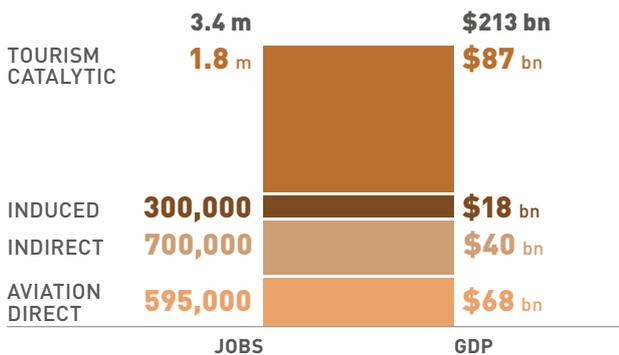
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air navigation service providers

74%

average regional load factor

Total jobs and GDP generated by air transport in the Middle East, 2018.



Direct jobs generated by air transport in the Middle East.

