

NORTH AMERICA²¹⁰

Air transport supported 8.7 million jobs and \$1.1 trillion in North American economic activity. That is 5% of all employment and 5% of all GDP in the United States and Canada in 2018.

Every person directly employed in the aviation sector and in tourism made possible by aviation supported another 2.3 jobs elsewhere in North America. Similarly, \$2.00 of economic activity was supported elsewhere in North America for every \$1 of gross value added directly created by the air transport sector.

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

- » **572,000 (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;
- » **48,000 (2%)** had jobs with airport operators in, for example, airport management, maintenance, and security;
- » **1.4 million (52%)** worked on-site at airports in, for example, retail outlets, restaurants, and hotels;
- » **636,000 (24%)** were employed in the manufacture of civil aircraft (including systems, components, airframes, and engines); and
- » **40,000 (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 North America. In 2018, the operations of these businesses directly generated a \$364 billion contribution to GDP, significantly more than the entire GDP of Toronto.

The aviation sector's spending with suppliers is estimated to have supported a further 2.2 million jobs and a \$289 billion gross value-added contribution to GDP. In addition, wage payments to staff – by the aviation sector

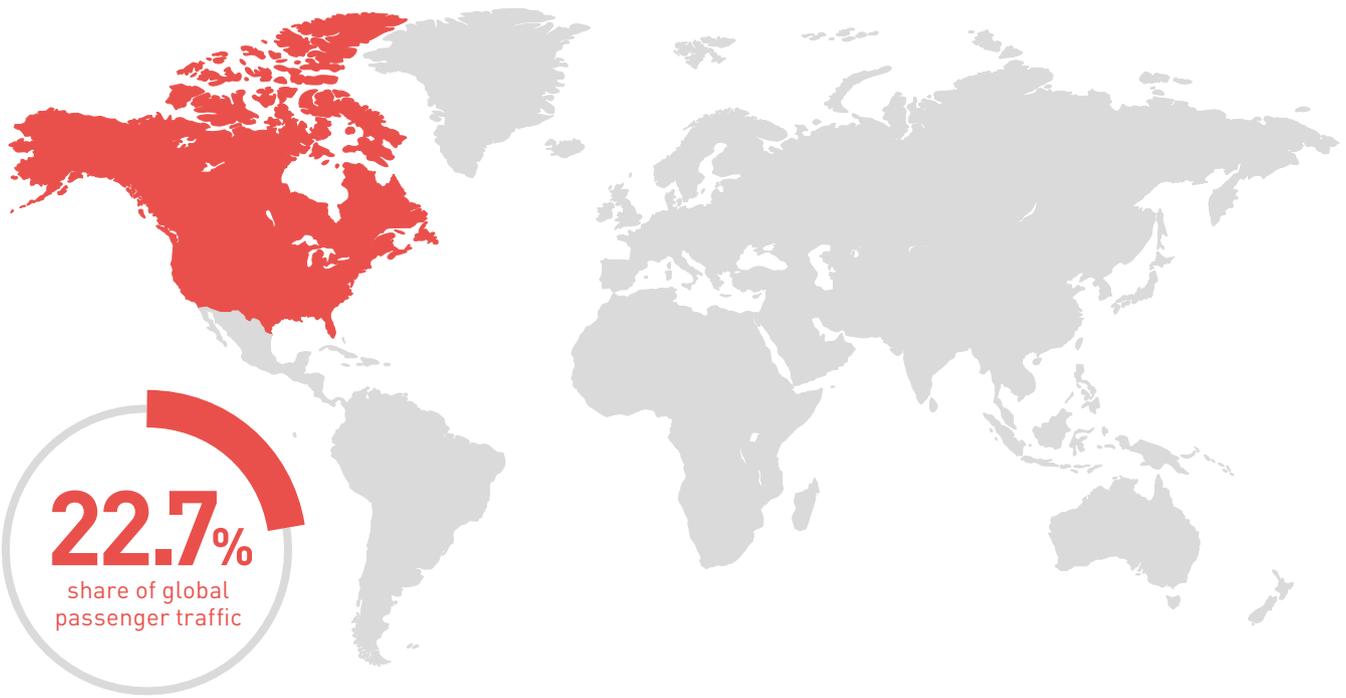
and businesses in the aviation sector's supply chain – supported 2.3 million more jobs and a \$300 billion gross value-added contribution to GDP.

The aviation sector also facilitates a substantial amount of tourism in North America. 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 North American countries supported an estimated 1.5 million jobs and a \$152 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 8.7 million jobs and an \$1.1 trillion contribution to GDP in North America in 2018.

Air travel in North America 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 North America will have grown to support 11.9 million jobs (35% more than in 2018) and a \$1.7 trillion contribution to GDP (an 53% increase).

Note: In the United States, the FAA collects economic impact data with which these numbers are aligned. The FAA assessment further evaluates the much wider economic activity that is supported by air transport, including general aviation and the domestic tourism markets, which this report does not include. Accordingly, with these wider catalytic impacts included, the total number of jobs supported by civil aviation in the US alone is around 10.9 million, with a contribution to GDP of \$1.1 trillion in 2016²¹¹.



10,599,508
flights

1
billion passengers

180
airlines

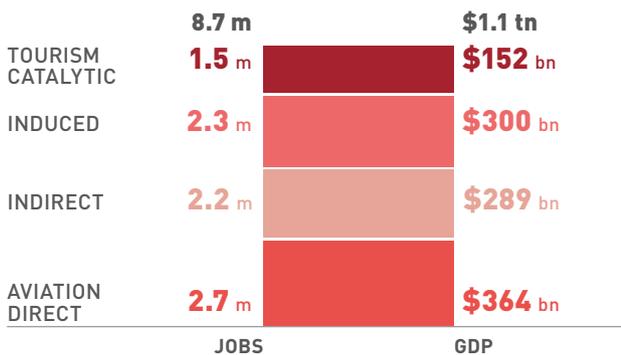
19
million tonnes of cargo

850
commercial airports

2
air navigation service providers

84%
average regional load factor

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



Direct jobs generated by air transport in North America.

