

INTRODUCING ATAG

COMMERCIAL AVIATION, SPEAKING WITH ONE VOICE



ONLY GLOBAL REPRESENTATIVE OF WHOLE AVIATION SECTOR PLAYS INDUSTRY COORDINATION ROLE

> FUNDING AND BOARD MEMBERS:

FOCUS ON SUSTAINABLE DEVELOPMENT OF AVIATION: ECONOMIC, SOCIAL AND ENVIRONMENTAL ASPECTS



HOSTS THE
GLOBAL
SUSTAINABLE
AVIATION SUMMIT

FOUNDED IN 1990























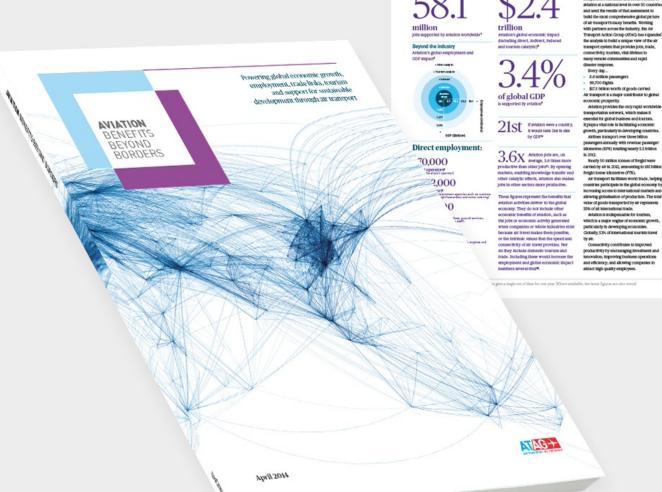






Executive summary

Key facts and figures from the world of air transport



This report provides a global view of one of the most global industries. Ordord Economics analysed the economic and social benefits of

carried by air in 2002, amounting to sit5 billion.

Air transport thcilitates world trade, betome

Aviation provides the only rapid workly ide

allowing globalisation of production. The total

million

routes

served globally*

billion passengers carried by airlines 4 (In 2012, it was

Aviation's global economic impact (direct,

Indirect, induced and tournim catalytics is

of world gross domestic product (GDP).

These figures do not include other

economic benefits of aviation, such as the

jobs or economic activity that occur when

companies or industries exist because air

travel makes them possible, or the intrins

value that the speed and connectivity of

air travel provides. Nor do they include

economic impact numbers several-fold.

domestic tourism and trade. Including thes-

Nearly 1,400 airlines operate a total fleet

of over 25,000 africraft. They serve almost

4,000 airports through a route network of

several million kilometres managed by (7)

air navigation service providers.

estimated at \$2.4 trillion, equivalent to 3.4%

trillion kilometres flows by passengers (to 2012, it was 5.7 trillion)**

> Going places Global passenger split, into domestic, billions®



Air transport is a major global employer

of S8.1 million jobs globally. It provides 8.7 million direct jobs: airlines, air navigation service providers million people and the civil aerospace sector (manufacture of aircraft systems, frames and enginess employs 1.2 million people. A further 4.6 million work in other on-airport positions.

There are 9.8 million indirect jobs generated through purchases of goods and services from companies in its supply chalt Industry employees support 4.6 million induced jobs through spending. Aviation-enabled tourism generates around 25 million jobs globally.

building new int development sp Industry are esti eventually gener benefits of \$70 x

Asia-Pacific
 Europe

Air transport

Unlike other tru

transport Indius

airport terminal

than being finan public investme

In 2012, atrpo

EXECUTIVE SUMM

million h

flown by IATA at

Asia-Pacific in





1,397 commercial airlines

3,864 airports

25,332 aircraft in service

173 ANSPs



In one year of commercial aviation...

3.1 billion passengers

36.4 million

5.7 trillion passenger kilometres

49,871 routes served





Aviation: employment 58.1 million jobs supported **Economy** worldwide 8.7 million 3.6 xdirectly employed more productive in the industry than average jobs

Aviation: an economic engine



\$2.4 trillion global GDP supported

3.4% of global GDP

21st largest economy, if industry were a country

Aviation: world trade





Aviation: social benefits





modern geographically-dispersed lifestyles

Aviation skills

diverse range of jobs and skillsets

230 million

people live outside the country of their birth

Lifeline

communities in remote regions and islands

Aviation: climate responsibility



705 million tonnes of CO₂ from aviation in 2013

~2% of global CO₂ emissions of 36 billion tonnes 70% +
improvement in fuel
efficiency since first jets

Ambition

First sector to develop global emissions-reduction targets



Aviation: climate action



2010

1.5% p/a fuel efficiency

Working towards carbon-neutral growth

2020

Carbon-neutral growth

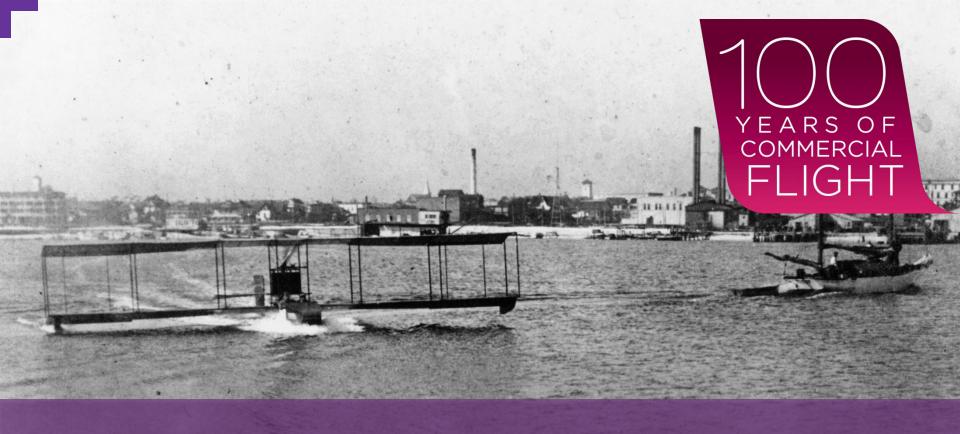
Implementation of global sectoral approach

2050

-50% CO₂

Half the net aviation CO2 of 2005





100 years serving economies





A growth industry



65,327,000,000

Passengers in the first century of civil aviation



A growth industry



Early reach

Map of the world's air routes in 1937

A growth industry



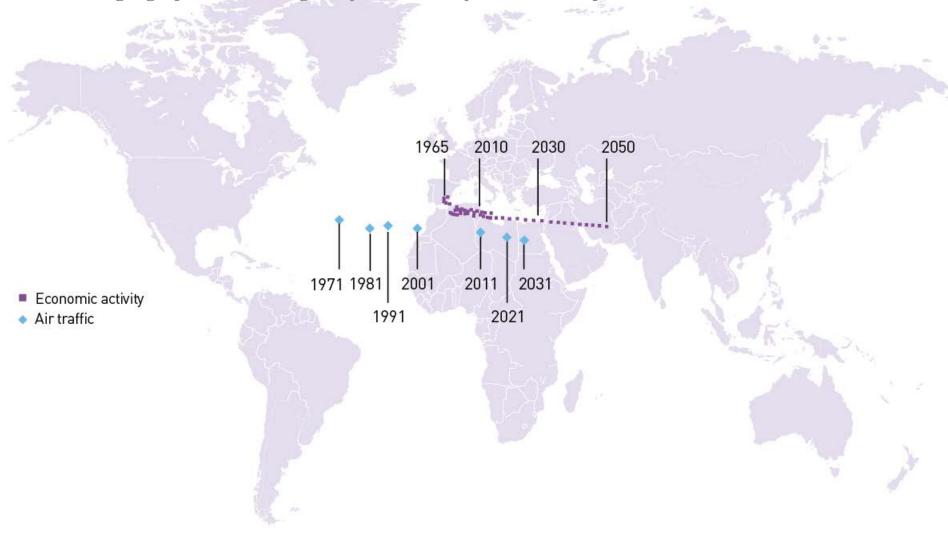
We fly everywhere

Map of the world's air routes today



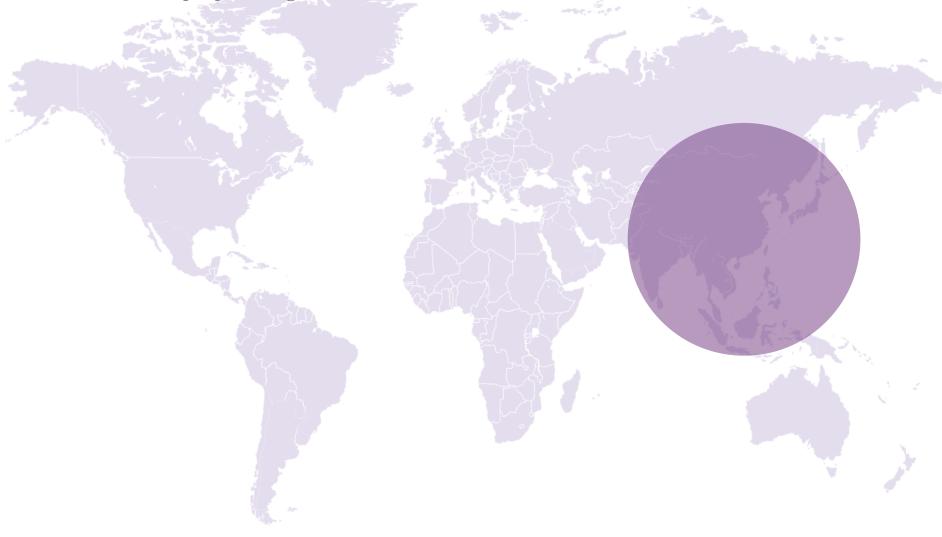
Re-balance

Shift in geographic centre of gravity for economy and air transport



Re-balance

There are more people living inside this circle than outside of it.



Aviation in 2032

Oxford Economics analysis



6.63 bn

41,240 jet aircraft

103.1 m jobs supported

\$5.8 trn
GDP supported



But... lower growth means lower benefits

With just 1% per annum lower growth worldwide...



12.4 m fewer jobs overall \$1 bn
loss in economic activity

1.4 m fewer jobs in aviation





Proactive governments will...

- 1 Recognise the importance of aviation, tourism and travel to national economic growth
- 2 Support the development of airports
 Responding to forecast demand, but maintaining proper land-use planning
- **Encourage freedom of transport** for people and trade with open skies and easier border processing
- Foster the use of next-generation technologies and alternative fuels through research partnerships, prioritisation of aviation as a user of alternative fuels
- Recognise environmental, capacity improvements possible with ATM by reforming ATM provision and the ICAO ASBU process
- Provide encouragement, positive support to ICAO MBM development
 To ensure we have a meaningful market-based measure to sign off in 2016

