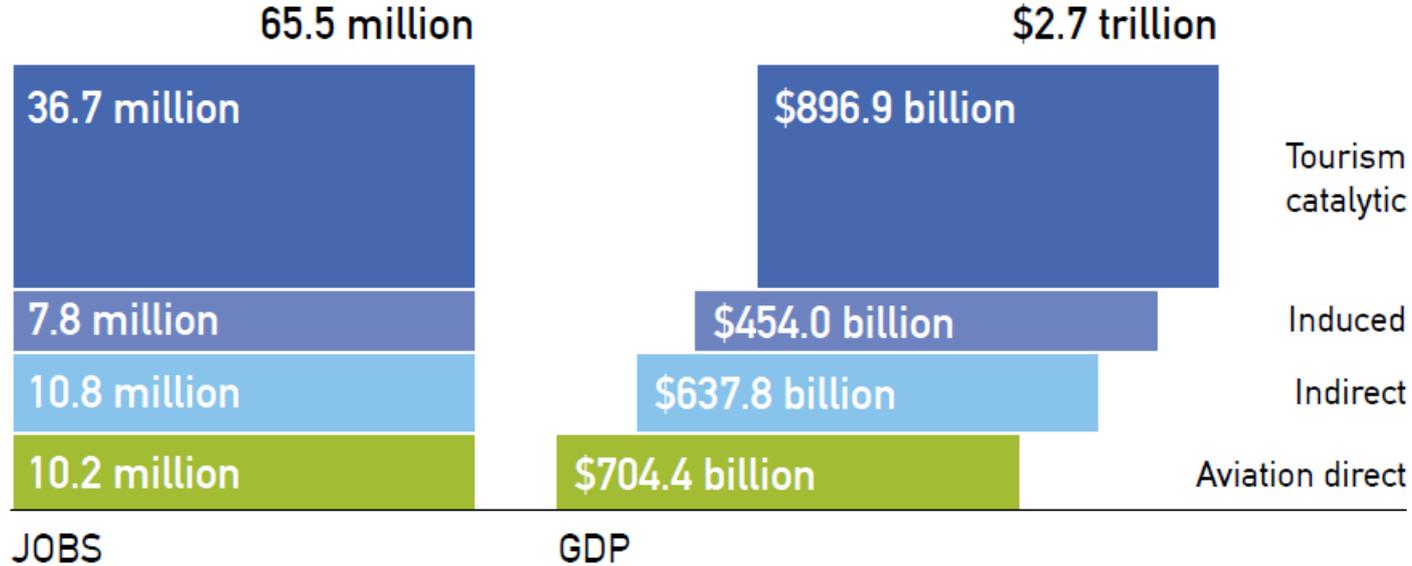


# The global air transport industry:

## Aviation's global employment and GDP impact<sup>2</sup>



**65.5**  
million

Jobs supported by aviation worldwide<sup>1</sup>

**\$2.7**  
trillion

Aviation's global economic impact (including direct, indirect, induced and tourism catalytic)<sup>8</sup>

**3.6%**

Global GDP supported by aviation<sup>9</sup>

# The global industry outlook remains bright...



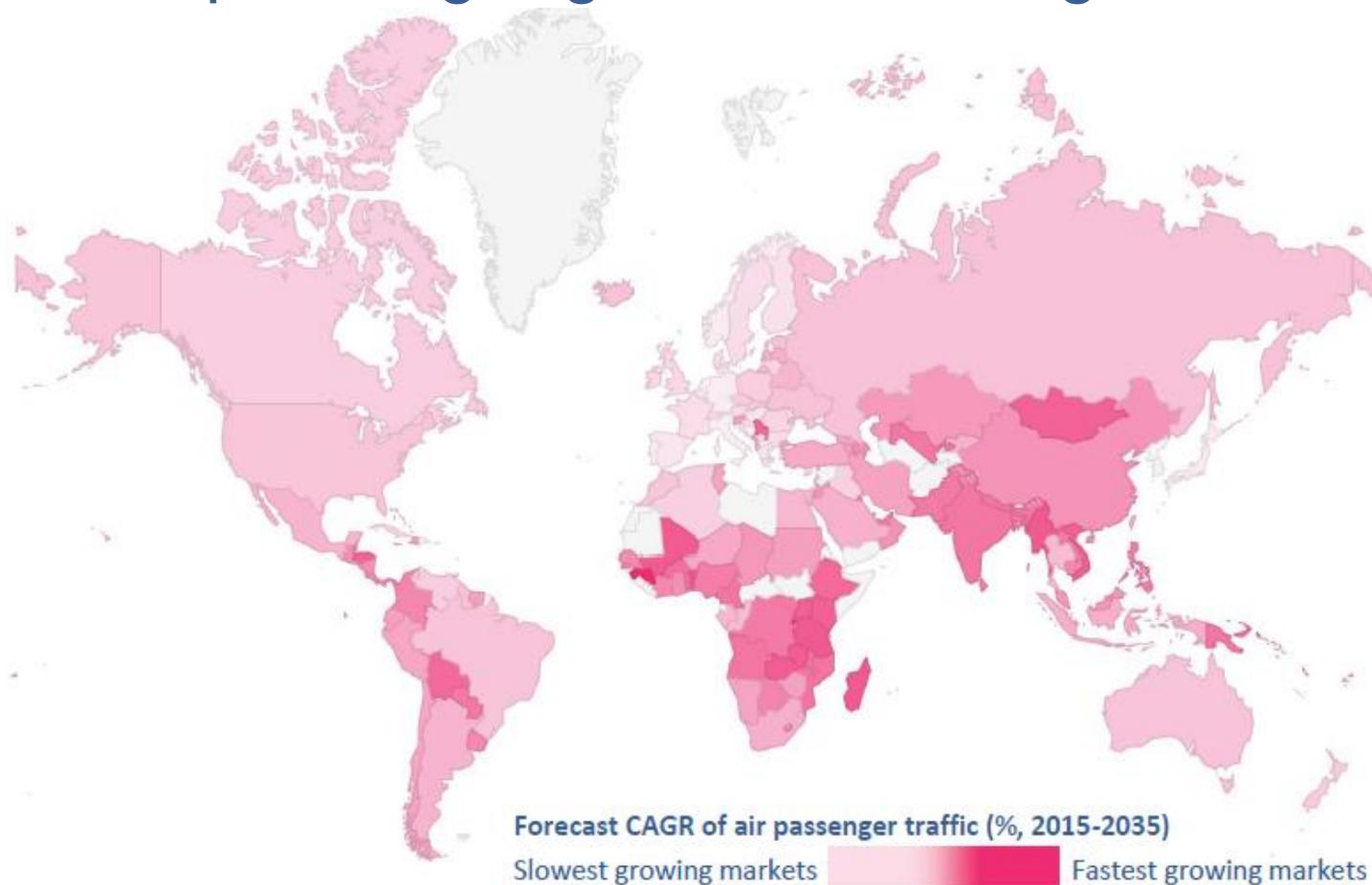
**3.5%**

Average annual growth in global air passenger journeys over the next 20 years

**2.0x**

The number of air passenger journeys in 2037 compared with today

# 20-year air passenger growth is shifting East & South

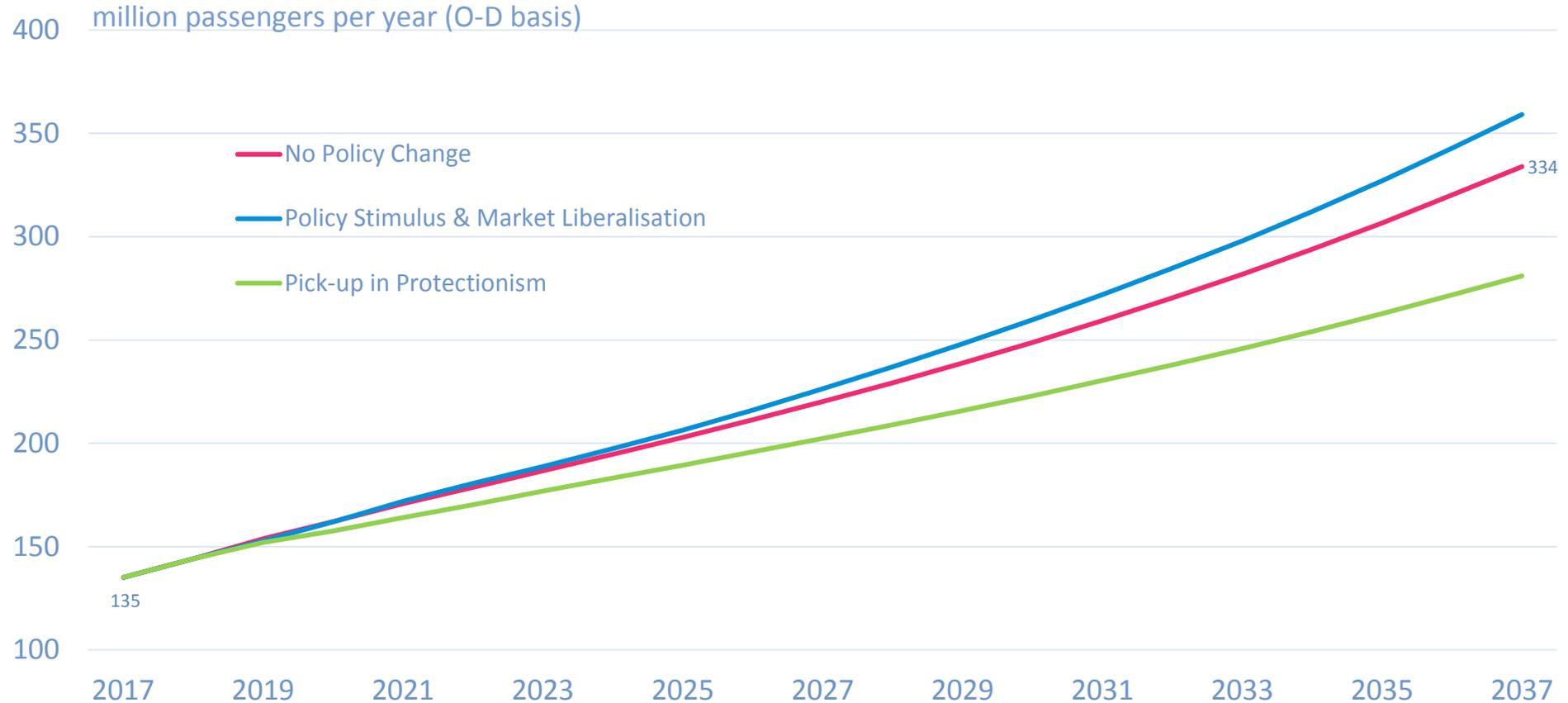


In Africa, air transport supports...

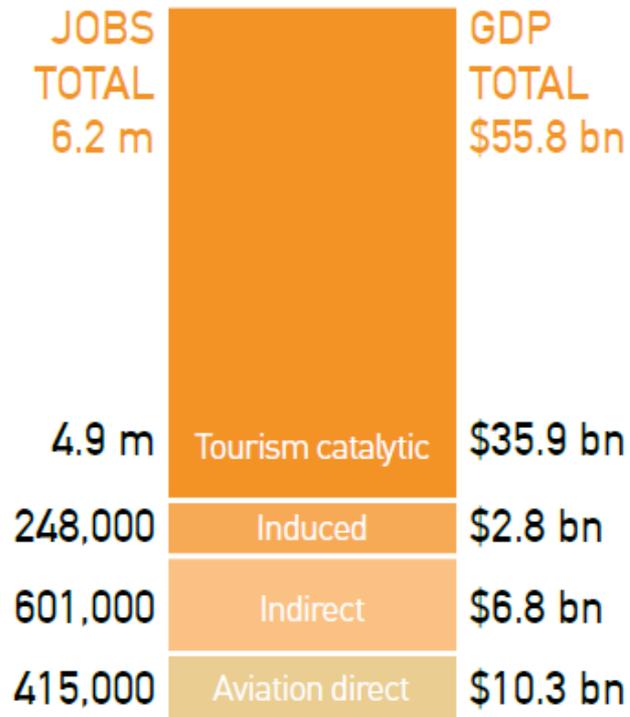
**...6.2 million jobs & \$55.8 billion of GDP**



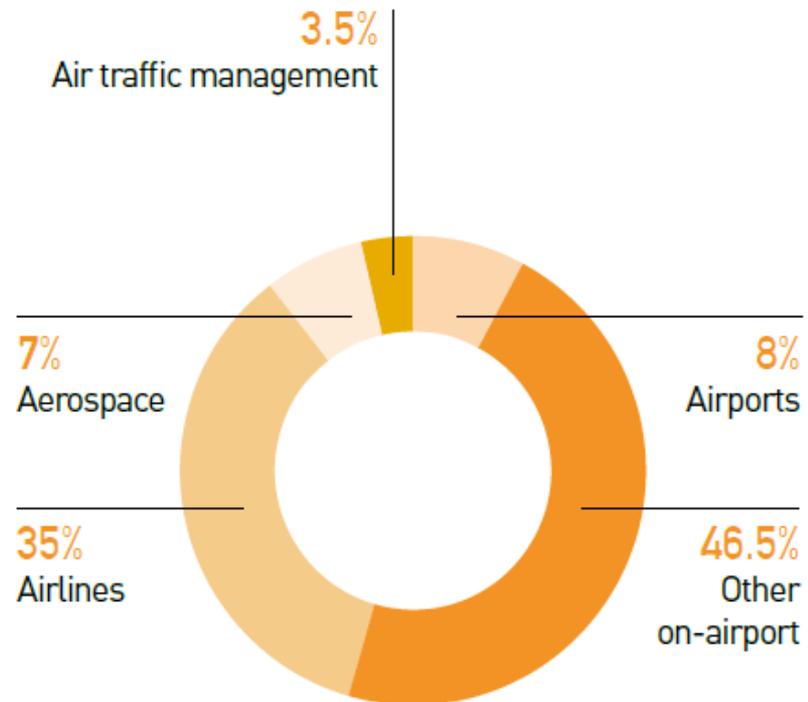
# Demand for air travel in Africa to soar in the middle run



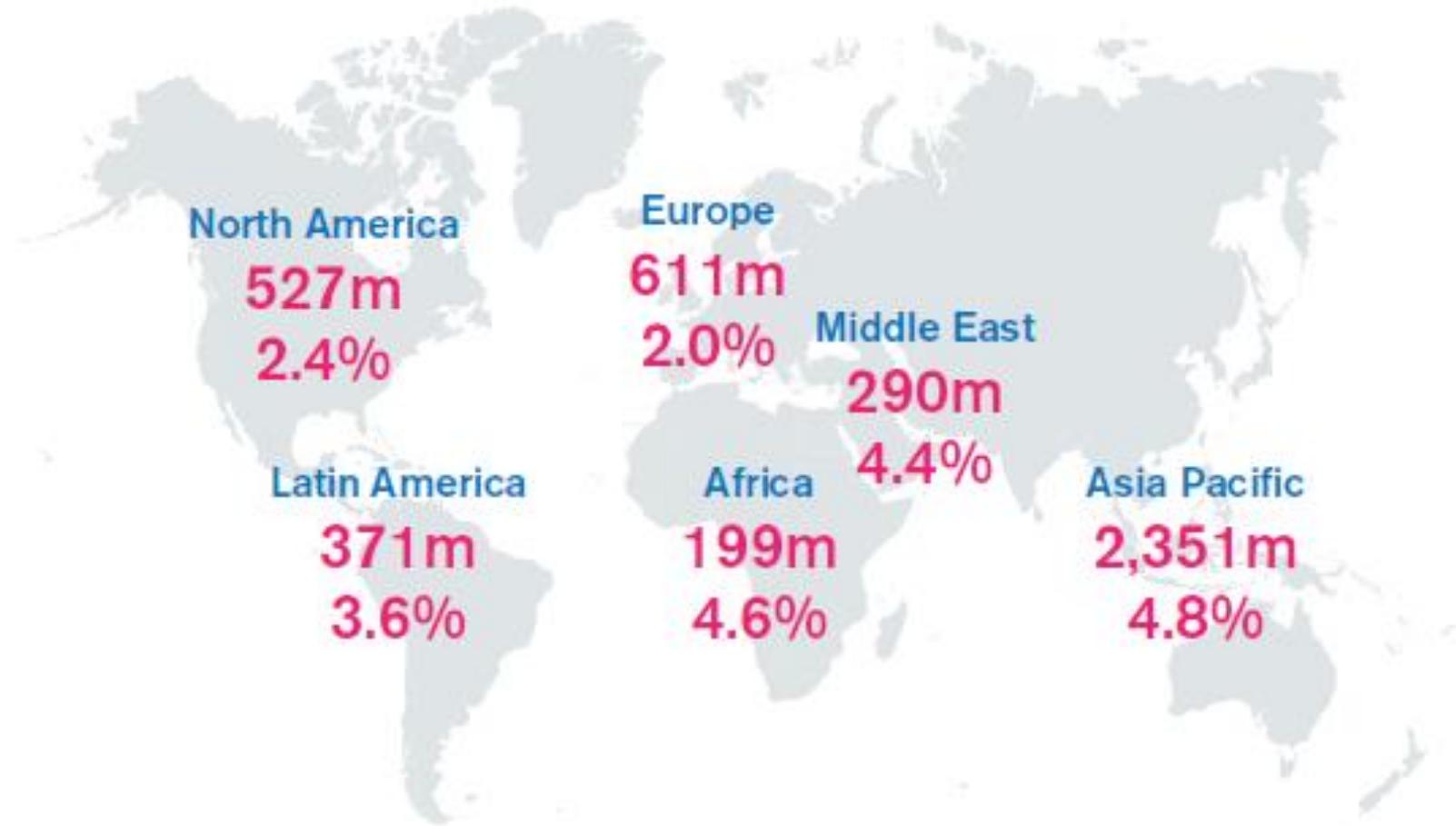
## Total jobs and GDP supported by air transport in Africa



## Direct jobs generated by air transport in Africa

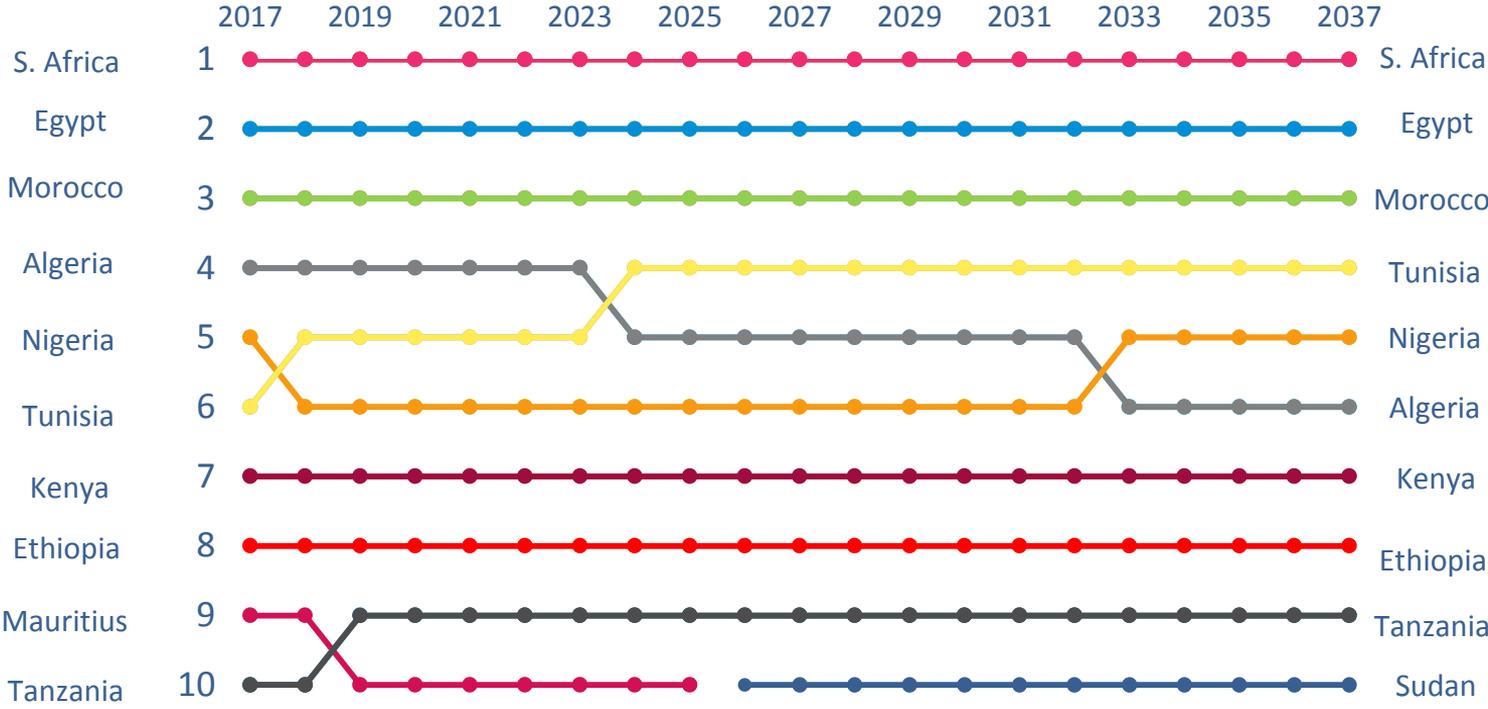


# 20-year passenger growth outlook (2017-37)





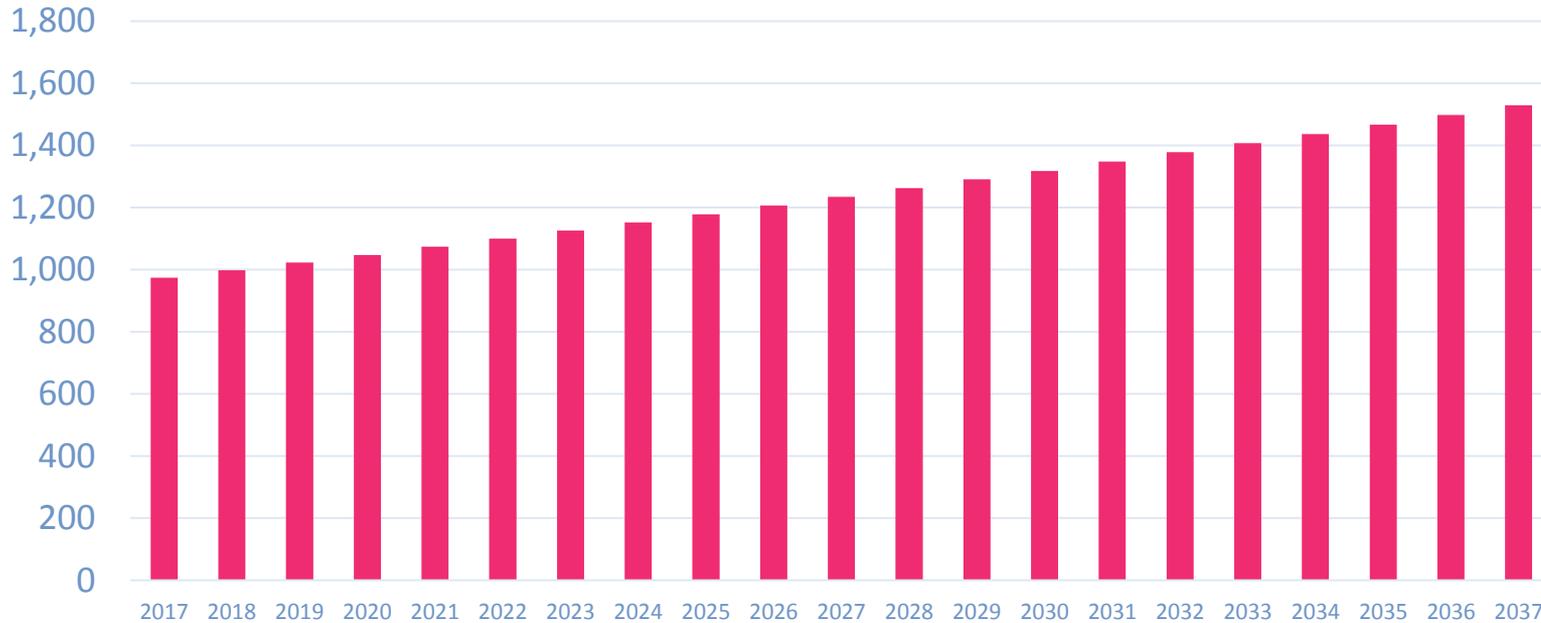
# Top 10 air markets in Africa shows few changes



# Drivers of demand for air travel in Africa: Population

## Total population evolution: Africa

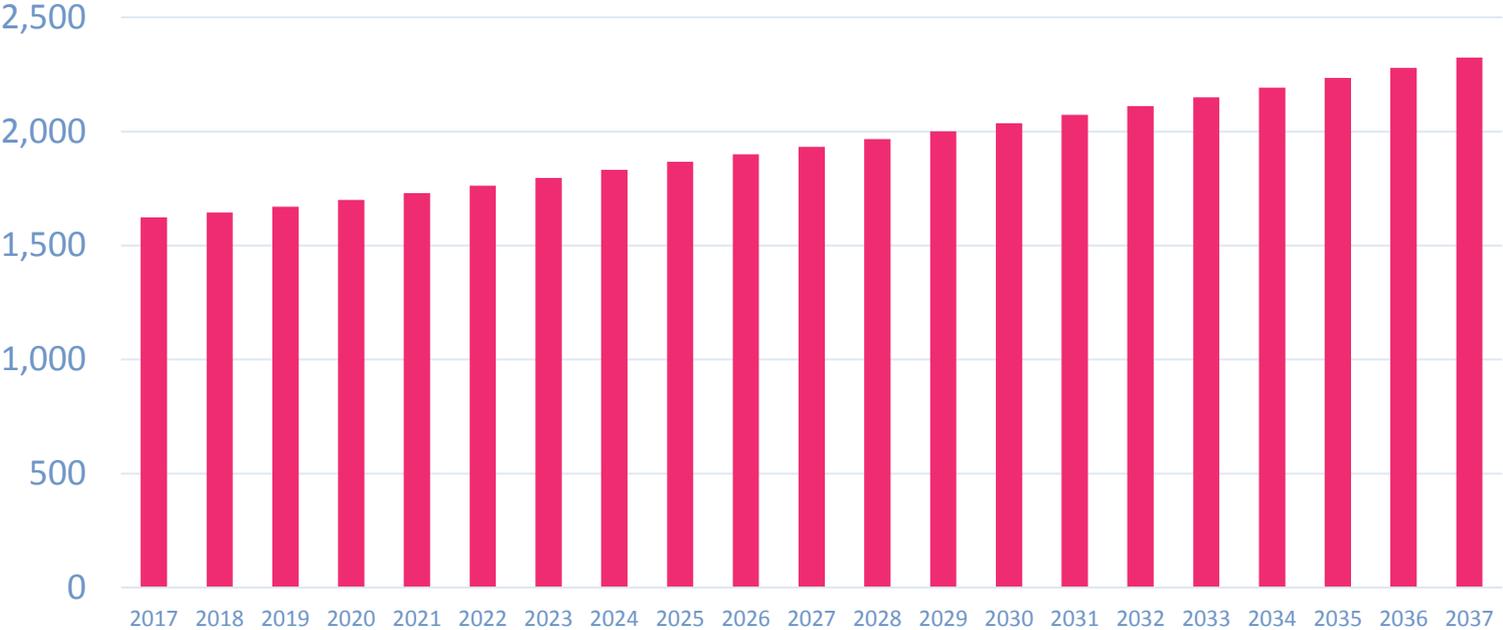
African Population in Million



# Drivers of demand for air travel in Africa: Income

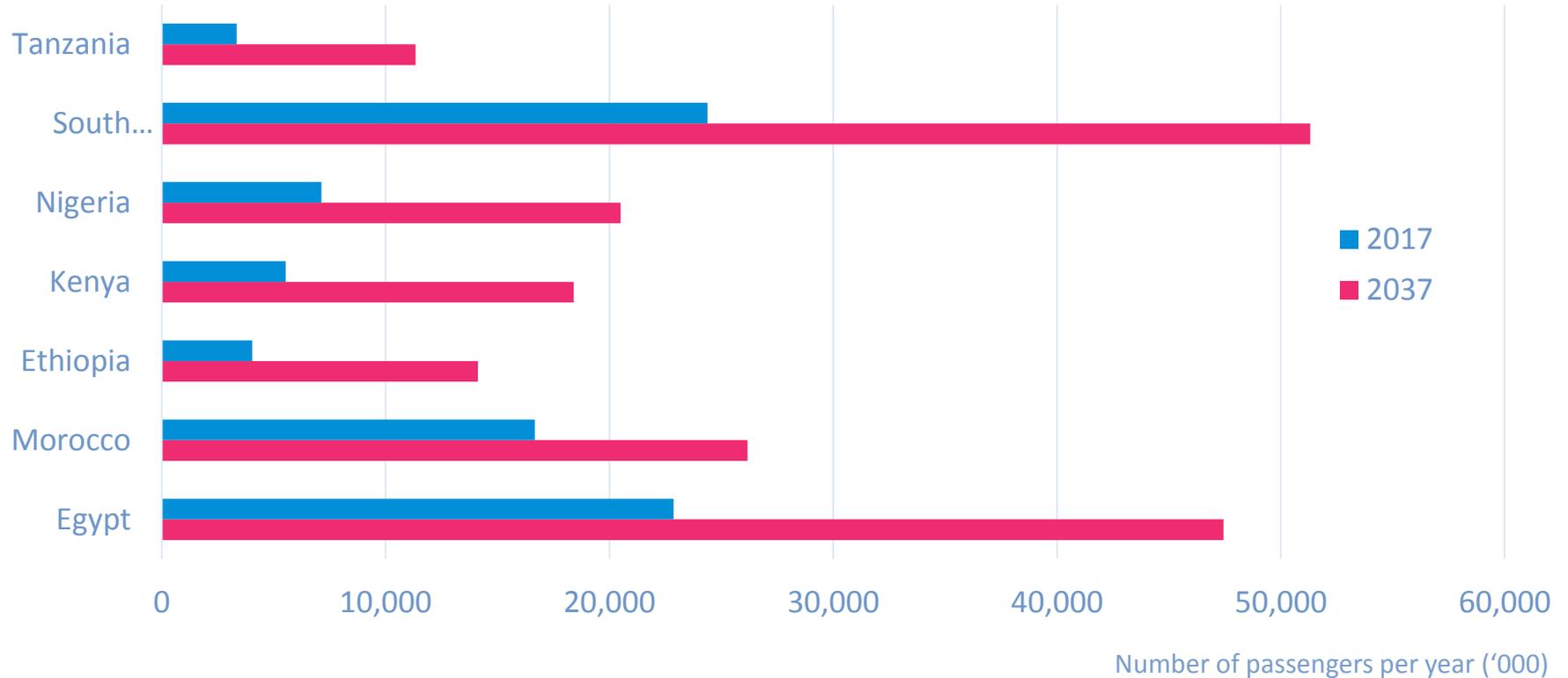
## Per capita GDP evolution: Africa

African per Capita GDP in Real USD



# Strong increase in # of passengers over next 20 years

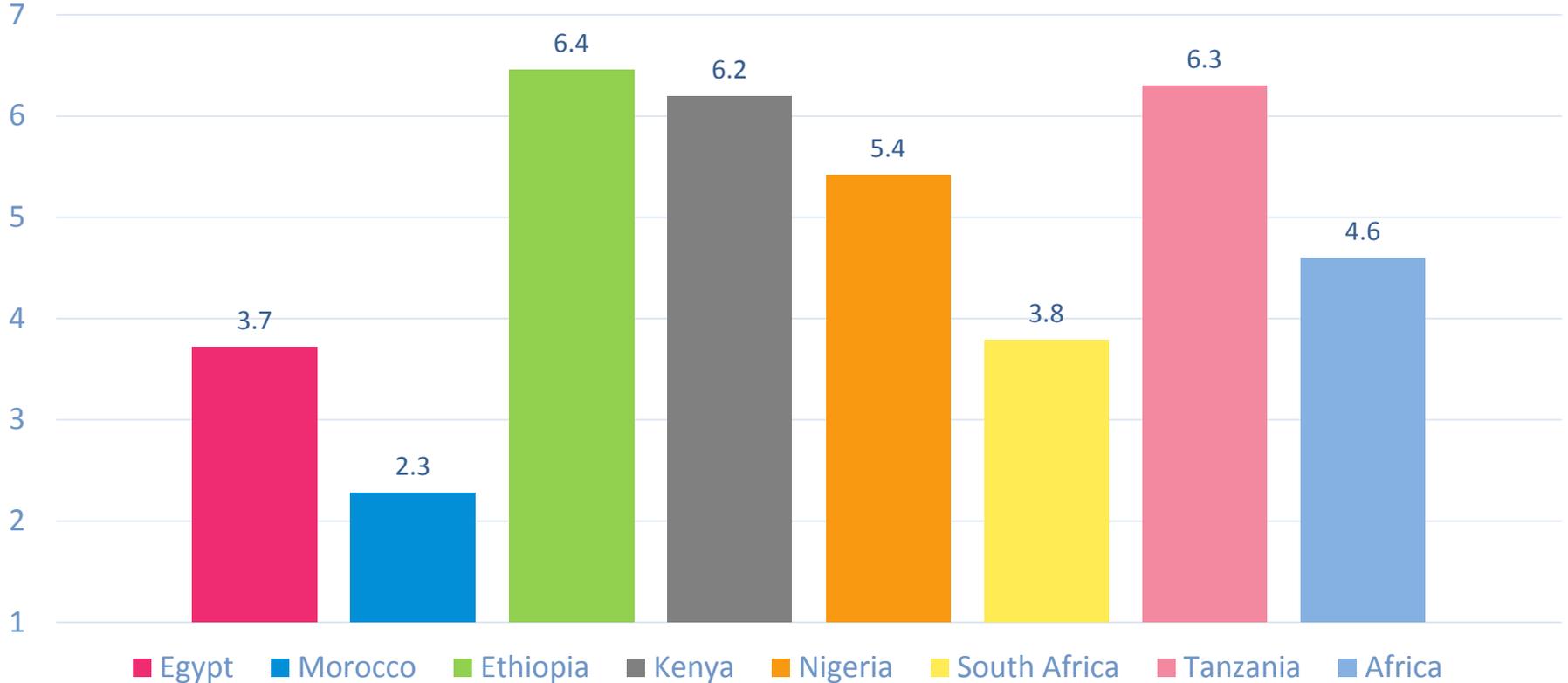
Number of passengers in African countries with strong airline industry



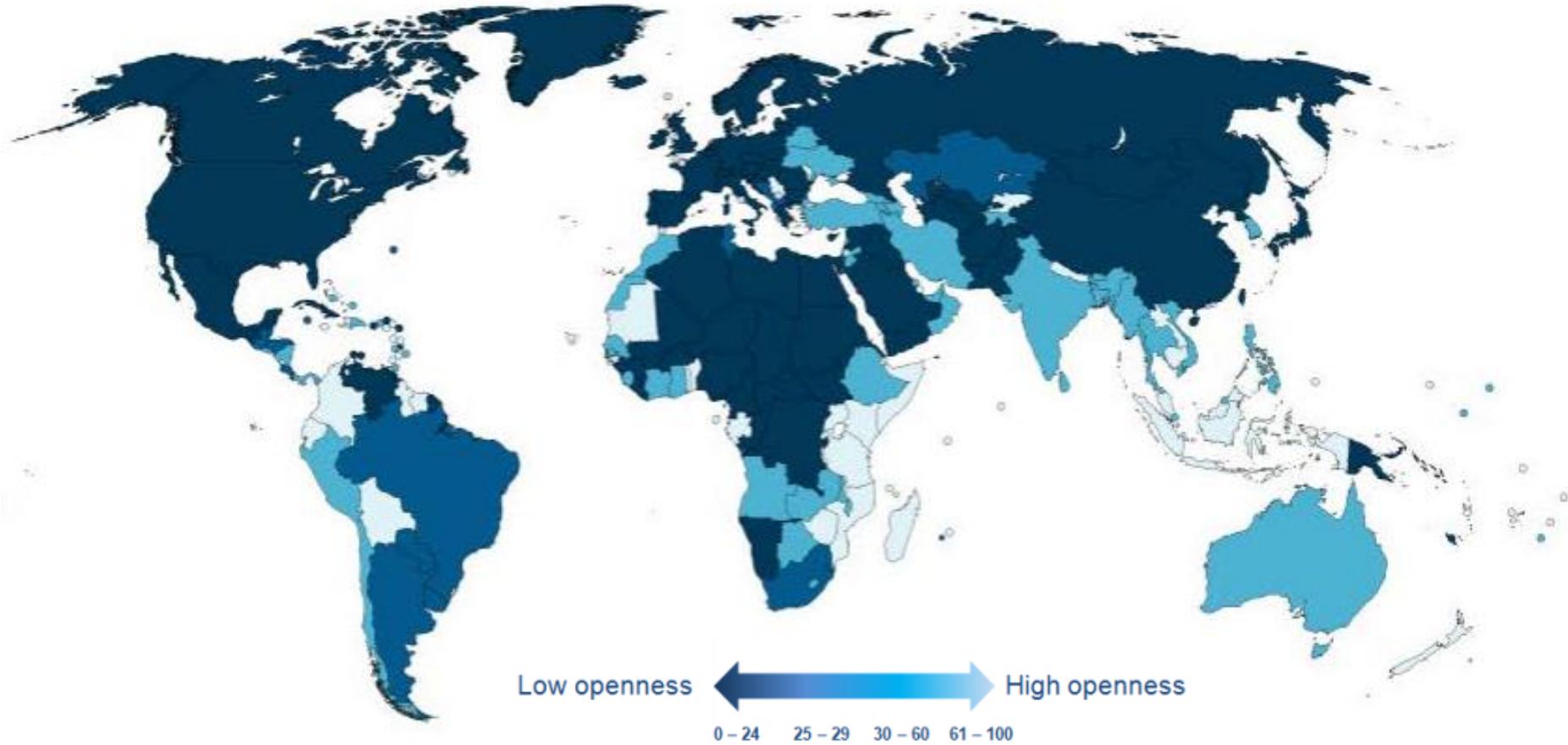
# ... translating into high annual passenger growth rate

Passenger average yearly growth rate for period 2017-2037

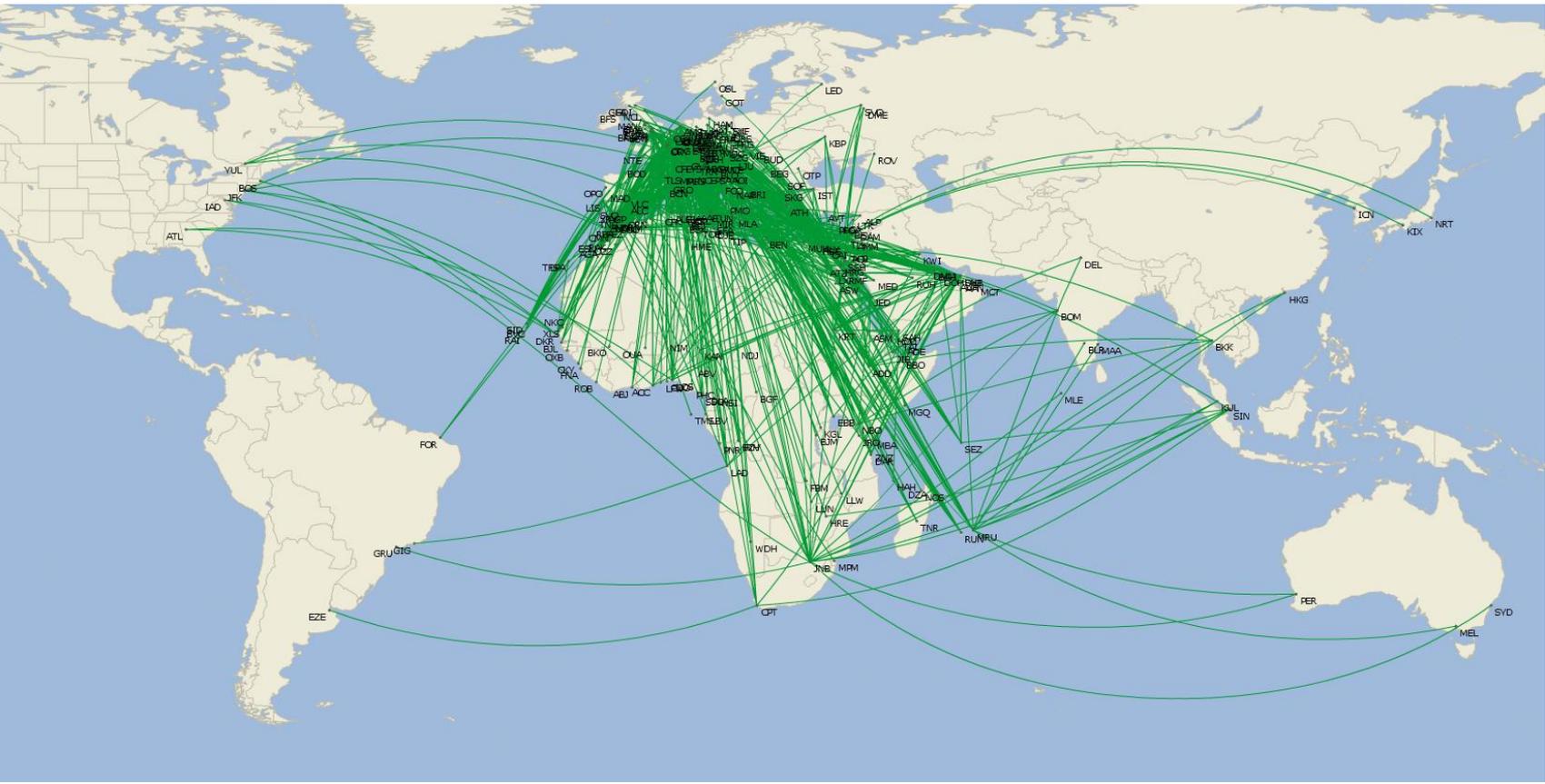
Compound annual growth rate (CAGR) for passengers



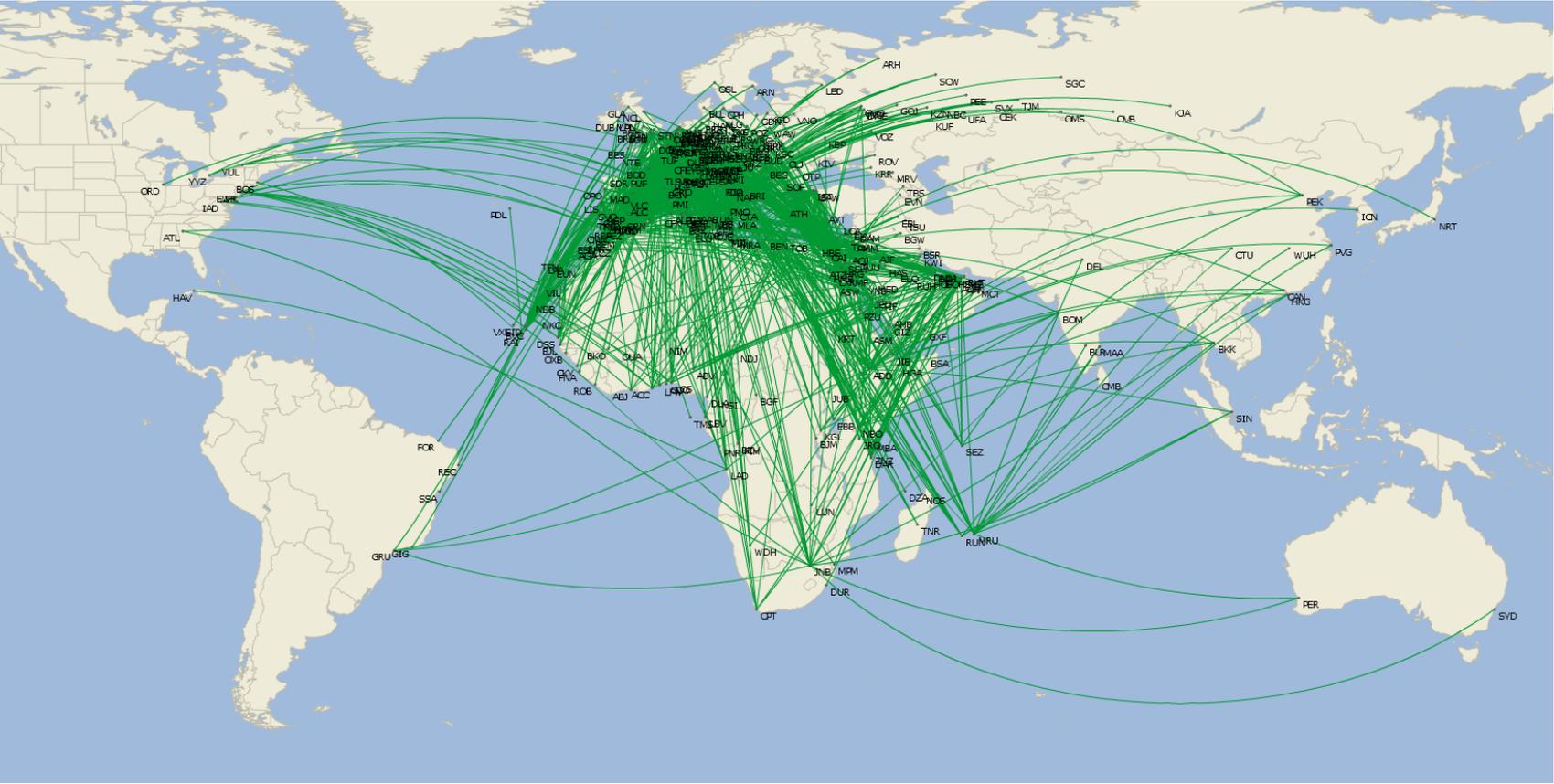
# Visa openness index 2018



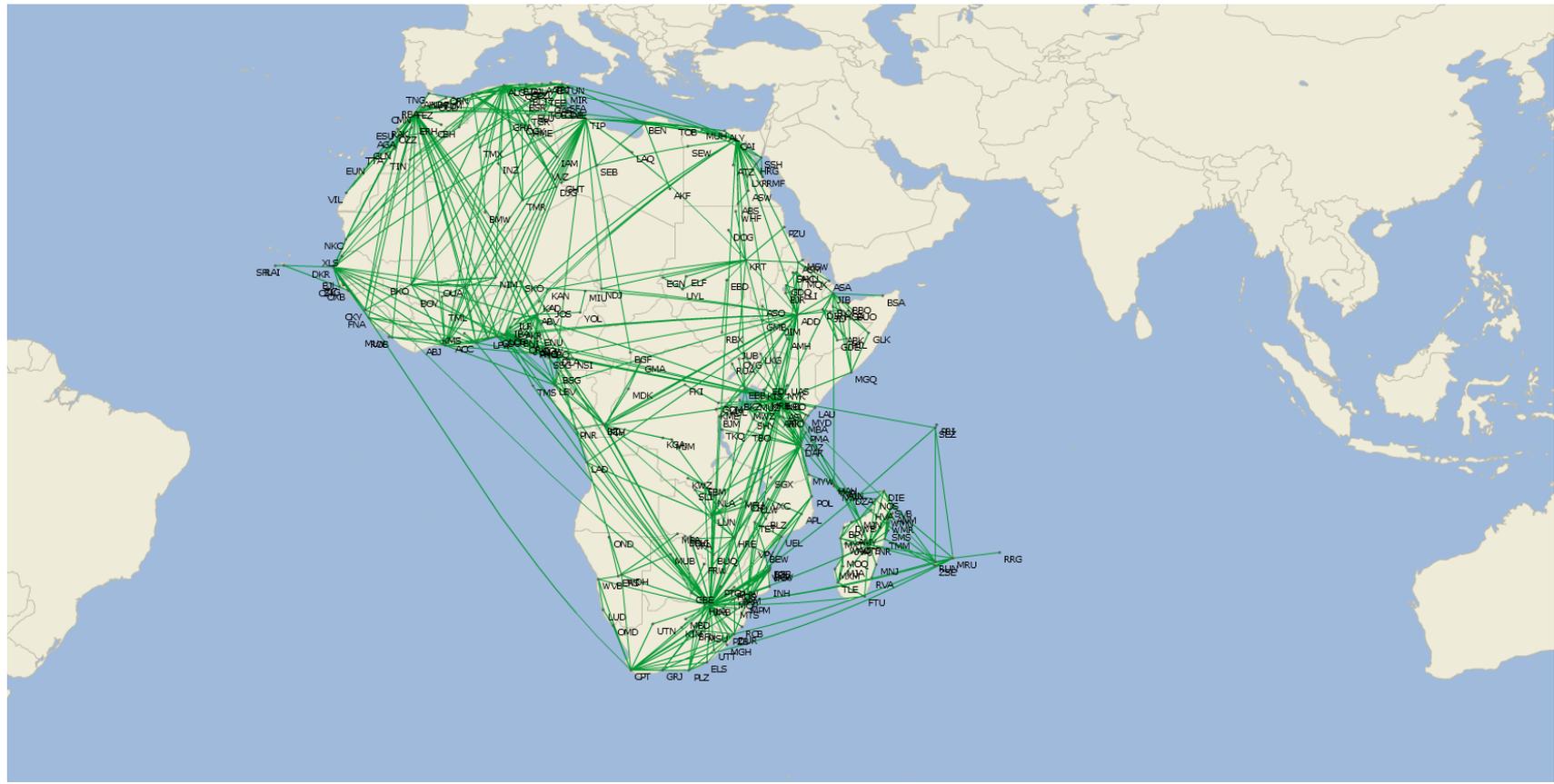
# Air travel connectivity from Africa to the World: 2008



# Air travel connectivity from Africa to the World: 2018



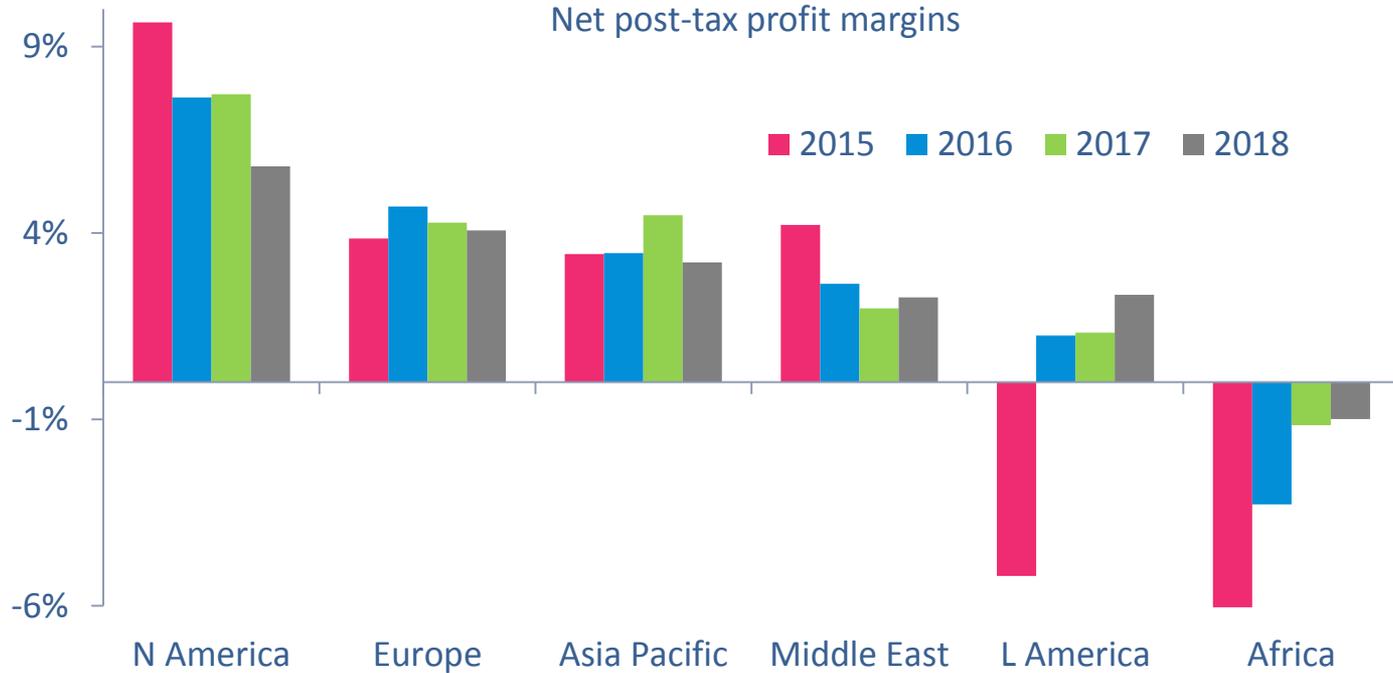
# Air travel connectivity within Africa: 2008



# Air travel connectivity within Africa: 2018



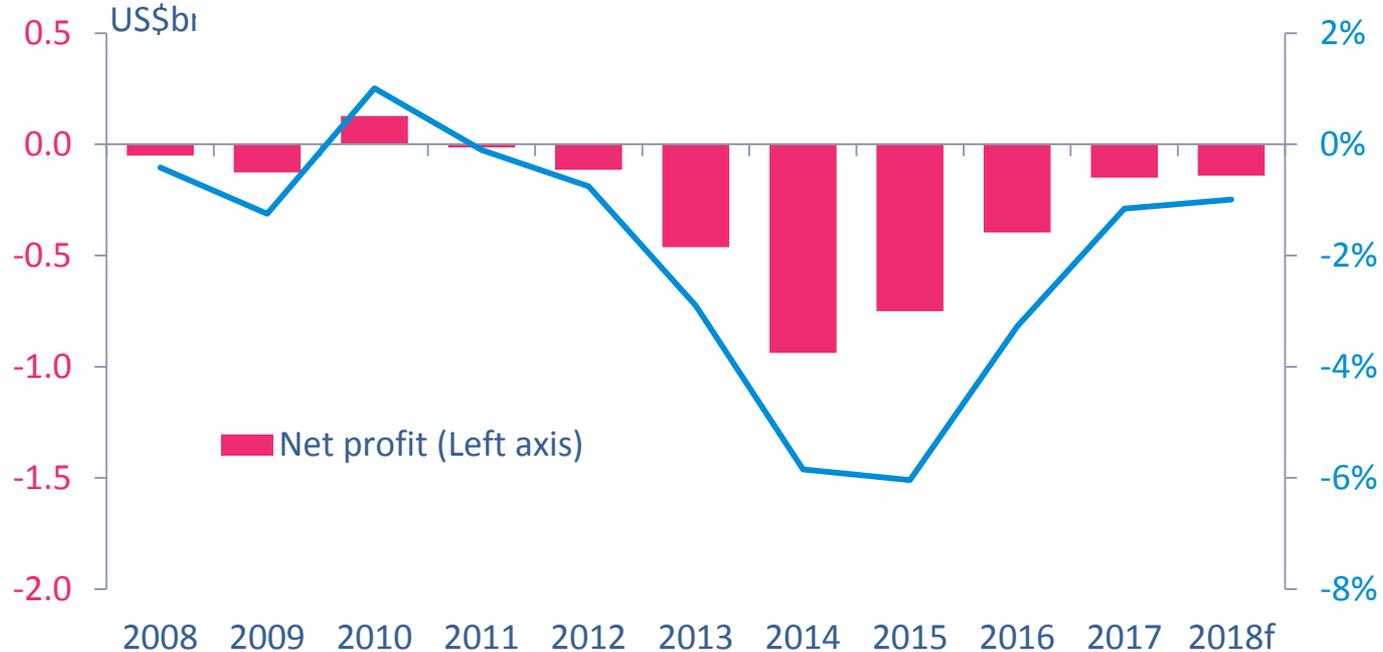
# Regional profitability remains very uneven



Source: IATA Economics using data from ICAO, The Airline Analyst, IATA forecasts



# Regional (net) profitability – Africa



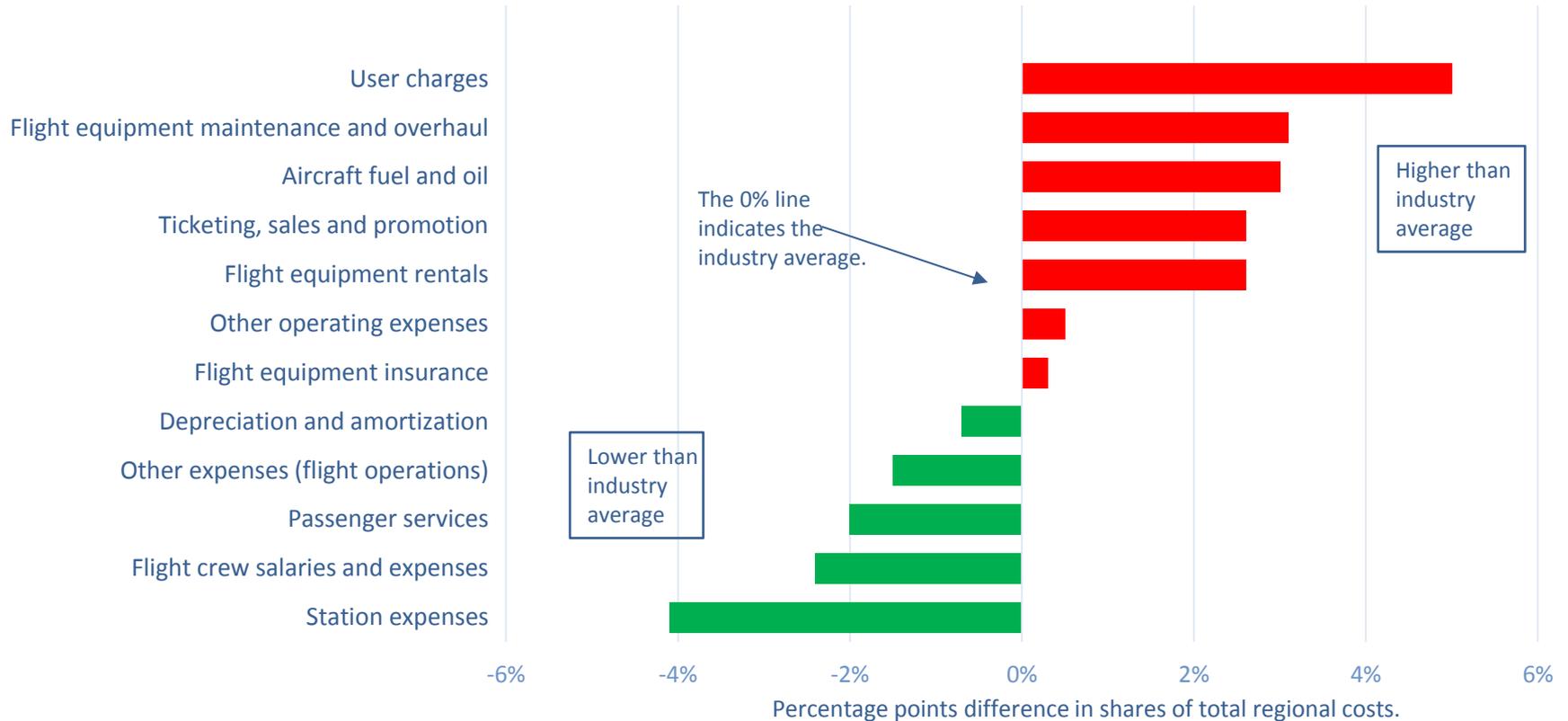
Source: IATA

[www.iata.org/economics](http://www.iata.org/economics) 20



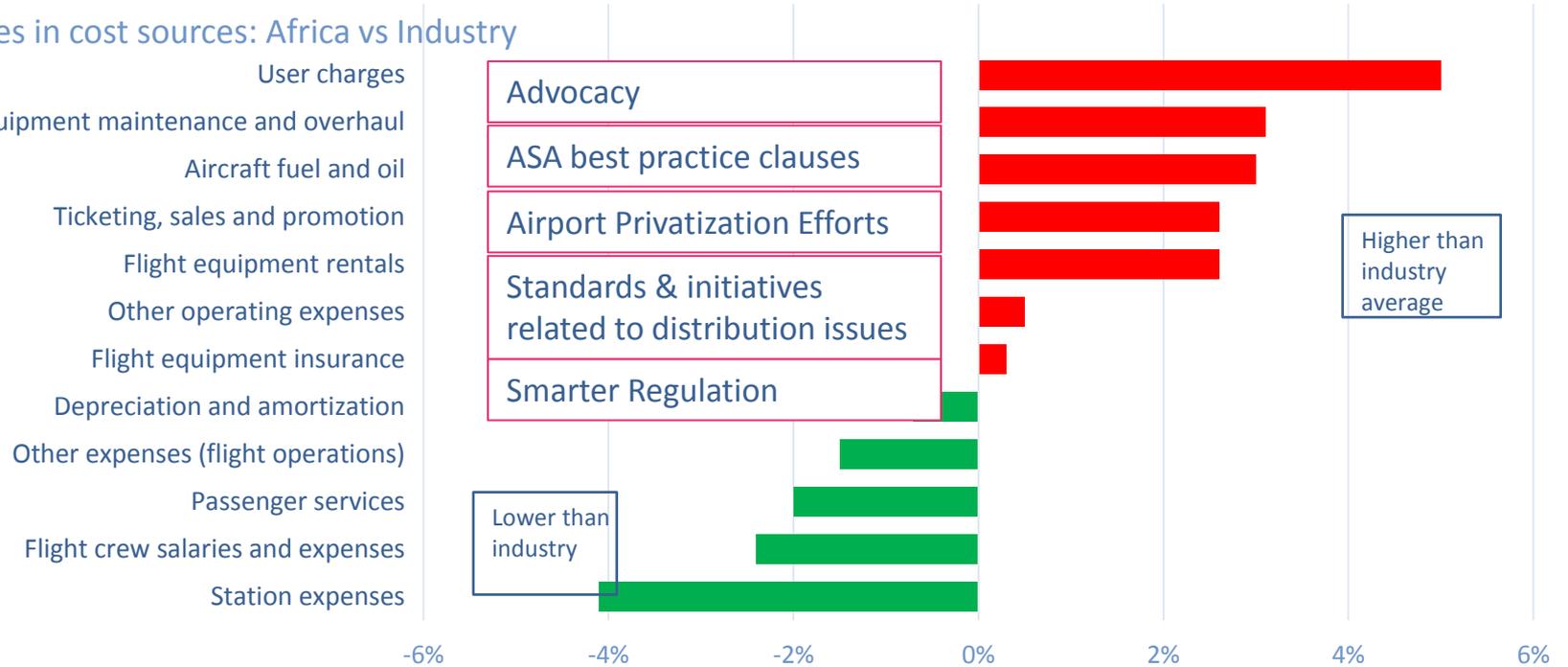
# Airline Cost Drivers in Africa

Differences in cost sources: Africa vs Industry



# How IATA initiatives impact cost-drivers in Africa

## Differences in cost sources: Africa vs Industry



Percentage points difference in shares of total regional costs.