




Aviation Jobs in Great Britain



Airlines UK
in conjunction with
Heathrow Airport Limited, Manchester Airports Group and TUI

July 2021

 **York Aviation**

Aviation Jobs in Great Britain: At a Glance

On a conservative basis,
the aviation industry
directly supports

**536,000
jobs**

in Great Britain



Air transport creates **important clusters** of employment around airports across Great Britain



Average salaries in the
aviation industry are



higher than national and
regional averages in the UK

over **60%** of
of constituencies have
more than
500 residents
working in an aviation
job (including in supply
chain jobs)



The UK
**Sustainable
Aviation Fuel**
(SAF) industry



has the potential to
support the UK economy
with up to...



£930m
in GVA
annually, and



6,500
jobs

primarily from seven
regional and coastal
locations across Great
Britain

Aerospace and aircraft maintenance,
repair & overhaul jobs are clustered
in a number of **regional economies**
across Great Britain, including in the
Midlands, the North and the South
West



Only **3** constituencies
in Great Britain have
less than **100**
residents working
in an aviation job



1 in 4 constituencies has
more than **1,000 residents**
employed in the aviation sector
(including its supply chains)



Aviation Jobs in Great Britain

Air transport has long been recognised as a vital part of the UK economy. It provides essential domestic and international connectivity that enables trade, enhances the UK's position as a place to live, to do business and to invest, drives competitiveness and brings millions of visitors to the UK each year. The UK Government recognises the unique role and contribution of aviation to the UK as an island economy:

“Aviation and the UK go hand in hand. We were pioneers of early flight, and the sector has long been at the heart of our economic success. It is vital for trade and the distribution of goods, creates jobs, connects friends and family, and – crucially for an island nation – links us to the rest of the world. Flight is essential for our Global Britain ambitions of openness as a society and an economy.” (Department for Transport, Jet Zero Consultation, July 2021)

Behind the UK's air connectivity is a major industry that supports jobs and prosperity across the UK. The UK's airports act as nodes for activity and are key centres for the jobs it creates but the industry's influence spreads far wider. The air transport sector is intrinsically linked with the UK's world leading aerospace & maintenance, repair and overhaul (MRO) sector and its supply chain spreads around the country. Ultimately, there are few parts of the UK that are not recipients of the prosperity and jobs supported by the aviation industry.

In June 2021, York Aviation was appointed by Airlines UK, working with Heathrow Airport Limited, Manchester Airports Group and TUI, to explore the geographic influence of the aviation industry across Great Britain¹. This short report provides some of the key messages from this research. The analysis used publicly available data from the Office for National Statistics, principally the Business Register and Employment Survey and the Census, to ‘map’ aviation related jobs across the UK at a constituency level.

The report focusses on the position in 2019, before the devastating effects of COVID-19 on the aviation sector. This was a deliberate choice. It shows the scale of the danger facing local economies across Great Britain in terms of their reliance on the aviation industry as a provider of employment. It is also important to note that the report considers the location of jobs in terms of where people live rather than where their jobs are located. This is an important distinction. By concentrating on where people live, the analysis

provides a better understanding of the areas where the benefits associated with aviation jobs are most felt but also where the effects of COVID-19 on the industry may be seen.

The analysis uses a narrow definition of aviation jobs. This reflects the employment that can be readily identified from published data. In terms of air transport, it considers employment in airlines, in airport operating companies and in the support services that are directly related to the operation of air services. It does not include employment in the ancillary services that are such an important part of modern airports, such as retail, food & beverage, hotels, surface transport or car parking. In this regard, the analysis very much represents a conservative view of the number of jobs associated with air transport. The report also provides information on the aerospace & aircraft maintenance repair and overhaul (MRO) sector across Great Britain. For both air transport and aerospace & MRO, the study also considers the jobs supported in supply chains and how these spread across the UK. Collectively, the report refers to these different components as Great Britain's aviation jobs. These estimates do not include induced jobs supported across the economy through the spending of wages and salaries earned in aviation jobs and they do not include jobs supported in the wider economy through air transport's role in supporting tourism, trading sectors and inward investment.

Finally, the report also briefly looks at an area of future potential for the aviation sector in terms of job creation. It looks at the potential for the emerging sustainable aviation fuels clusters to support new jobs across the UK by 2035, as the industry progresses towards its net zero ambitions. This builds on existing analysis undertaken by Sustainable Aviation.

This report provides an overview of the findings from the research. In due course, the constituency level data behind this analysis will be made available as a tool for stakeholders to explore the data for themselves to better understand the role that aviation plays, and the national and local jobs ‘prize’ associated with effective intervention to support the recovery of the sector as the pandemic hopefully begins to recede, in particular, with the rollout of vaccination programmes at home and abroad.

¹ Northern Ireland has not been included in the analysis due to the lack of publicly available micro-level data on sectoral employment.

Overview of Aviation Jobs in Great Britain

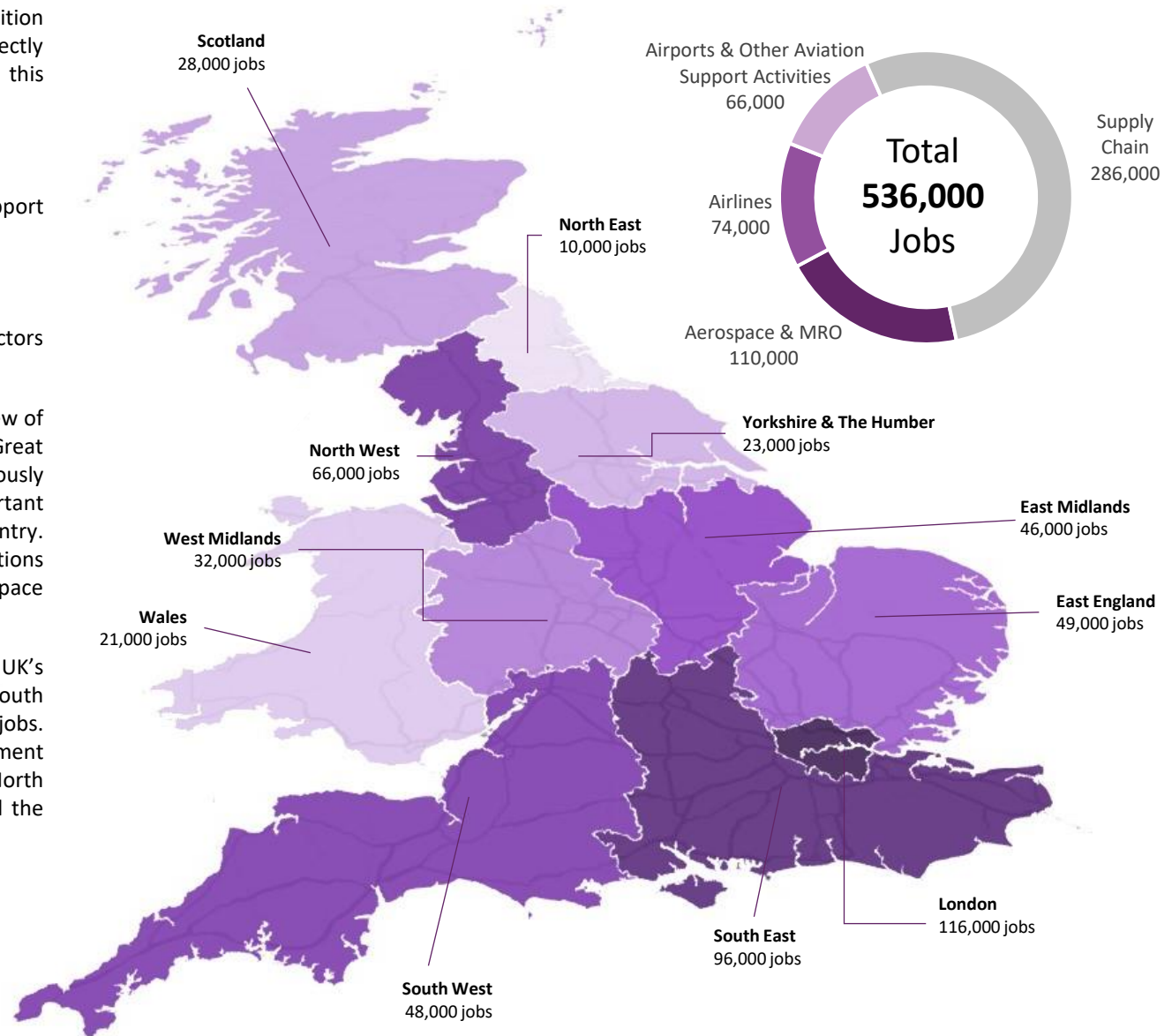
Across Great Britain, on the narrow definition described, the aviation sector directly generates around 536,000 jobs. Within this overall whole, each component supports:

- Airlines – 74,000 jobs;
- Airports & Other Aviation Support Activities – 66,000 jobs;
- Aerospace & MRO – 110,000 jobs.

Together, the supply chains to these sectors account for around 286,000 jobs.

The map opposite provides a high level view of how these jobs are distributed across Great Britain. This immediately and obviously demonstrates the fact aviation is an important provider of employment across the country. This regional distribution reflects the locations of airports and the clusters of large aerospace & MRO firms across Great Britain.

Unsurprisingly, given the location of the UK's two largest airports, London and the South East of England have the most aviation jobs. But there are major centres of employment across Great Britain, notably in the North West, East of England, East Midlands and the South West.



The Importance of Aviation Jobs to Constituencies

The map opposite serves to reinforce the point that aviation is a key provider of jobs across the UK. The map shows constituencies broken down into four categories:

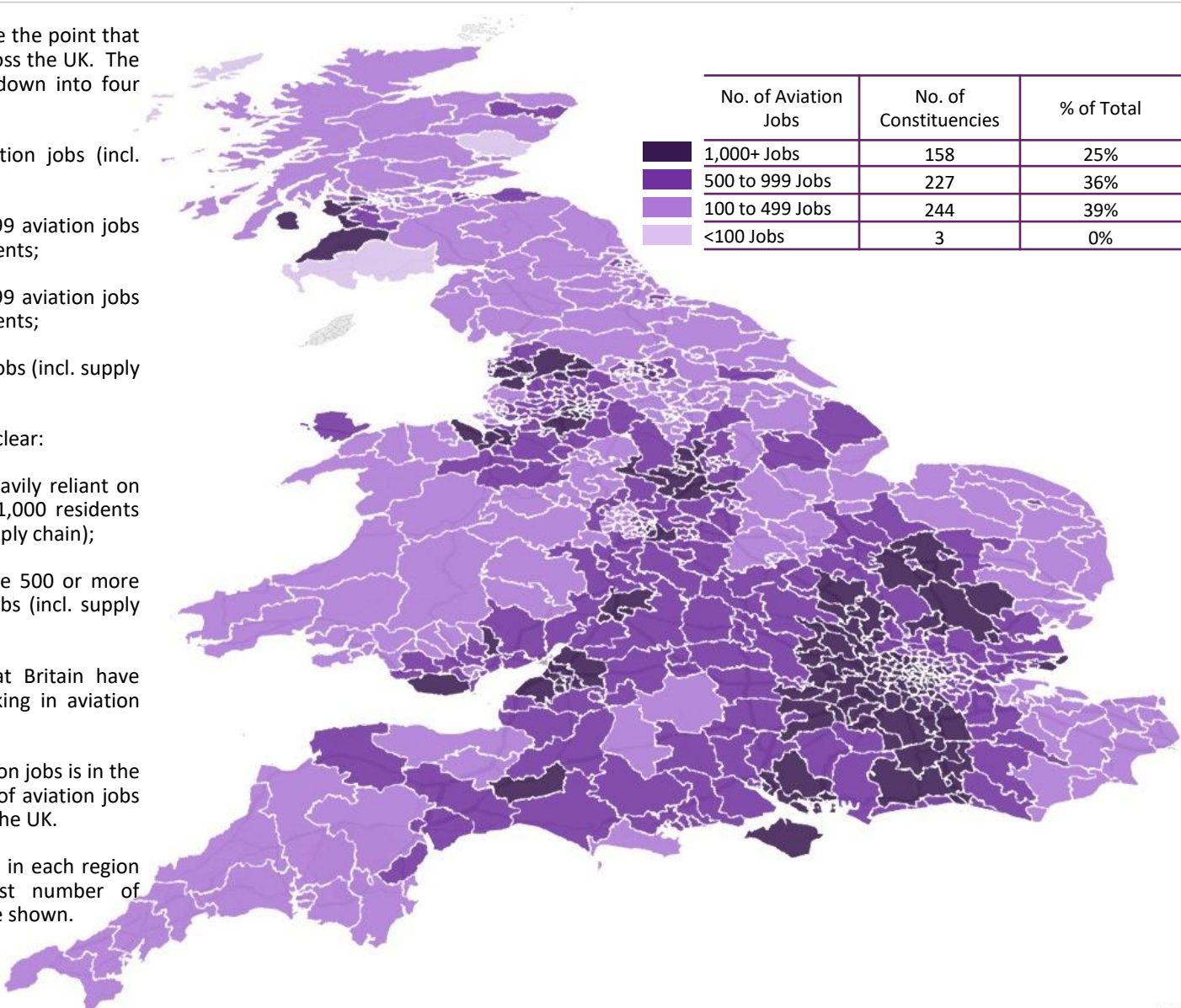
- those with less than 100 aviation jobs (incl. supply chain) held by residents;
- those with between 100 and 499 aviation jobs (incl. supply chain) held by residents;
- those with between 500 and 999 aviation jobs (incl. supply chain) held by residents;
- those with over 1,000 aviation jobs (incl. supply chain) held by residents.





The messages from this analysis are clear:

- one in four constituencies is heavily reliant on aviation jobs, with more than 1,000 residents employed in the sector (incl. supply chain);
- over 60% of constituencies have 500 or more residents working in aviation jobs (incl. supply chain);
- only 3 constituencies in Great Britain have fewer than 100 residents working in aviation jobs (incl. supply chain).

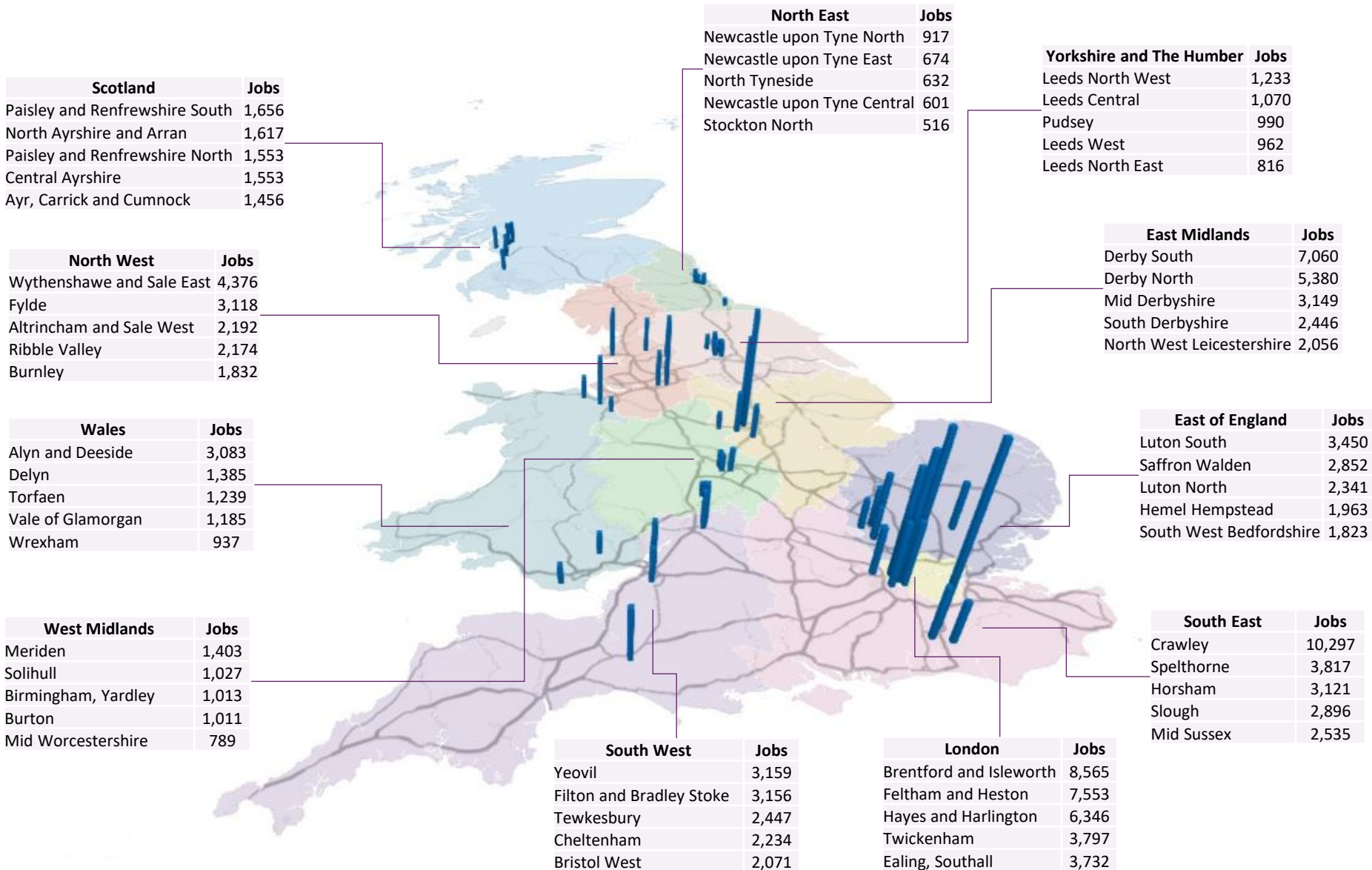
While the greatest intensity of aviation jobs is in the south of the country, the influence of aviation jobs on labour markets is evident across the UK.

Overleaf, the top five constituencies in each region of Great Britain with the highest number of residents working in aviation jobs are shown.



	No. of Aviation Jobs	No. of Constituencies	% of Total
	1,000+ Jobs	158	25%
	500 to 999 Jobs	227	36%
	100 to 499 Jobs	244	39%
	<100 Jobs	3	0%

The Importance of Aviation Jobs - Top 5 Constituencies by Region for Total Aviation Jobs



Average Salaries in Aviation Jobs

The chart opposite sets out the estimated average salaries for aviation jobs (excl. supply chain) across all countries and regions in Great Britain.

It provides estimates for each of the three direct aviation sectors covered in this study: airlines, airports & other supporting services, and aerospace & MRO. These estimates are based on the ONS Annual Survey of Hours and Earnings. The analysis compares these salary levels to the average salary across the economy as a whole in each country and region.

The analysis suggests that, across countries and regions:

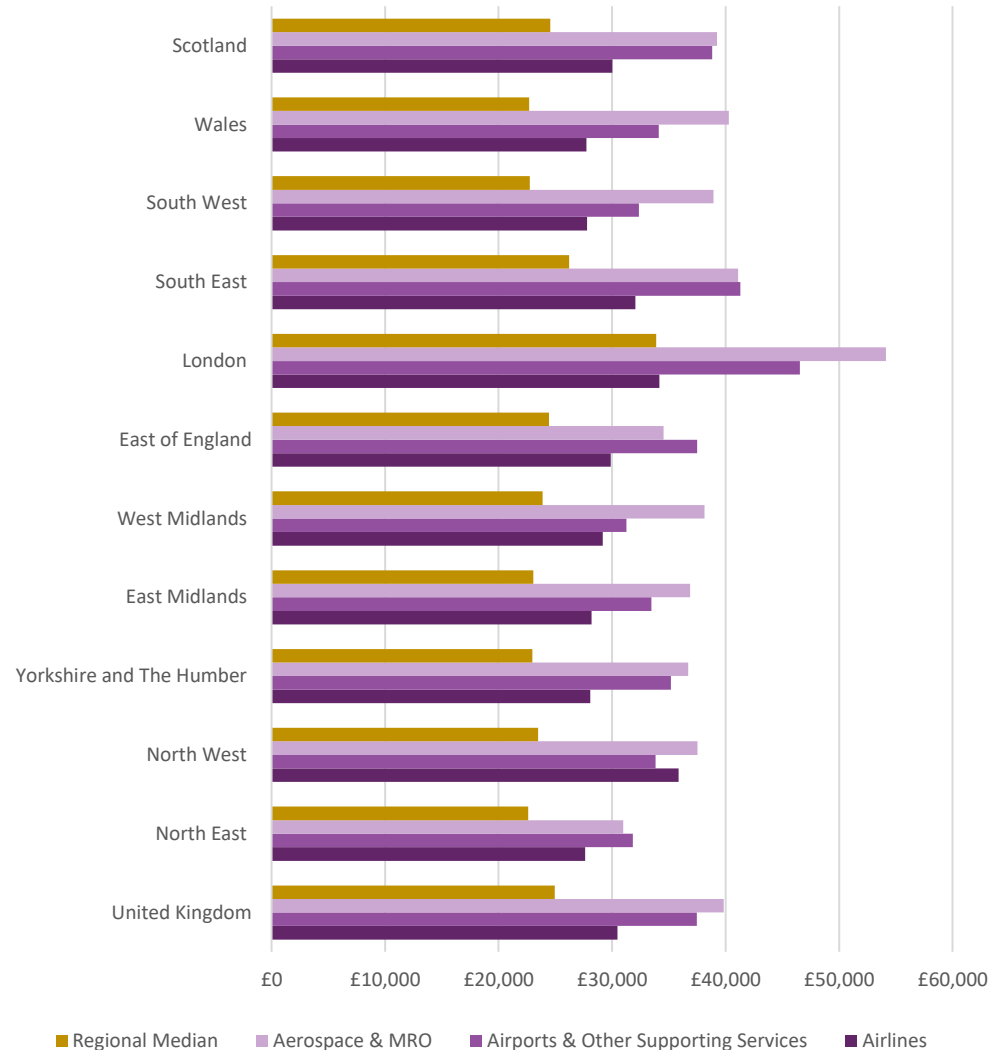
- airline jobs pay on average between around £27,600 and £35,900 per annum;
- airport & other supporting services jobs pay on average between around £31,300 and £46,500 per annum;
- aerospace & MRO jobs pay on average between around £31,000 and £54,100 per annum.

Across all countries and regions, the average salaries in the three aviation sectors exceed the regional average. In the great majority of cases, aviation jobs salaries are substantially higher than the average. This suggests that aviation jobs are, relatively speaking, more valuable across the UK, reflecting the high productivity and high skill levels within the sectors.

Across the United Kingdom, average salaries for aviation jobs are between 22% and 60% higher than those in the economy as a whole. This means that aviation is providing good quality jobs that support prosperity and economic value throughout the UK economy.

The highest aviation jobs salaries are generally found in London and the South East. Elsewhere, differences across the country largely reflect local labour market conditions.

Comparison of Median Average Salaries for Aviation Jobs with All Sectors of the Economy



Air Transport Jobs

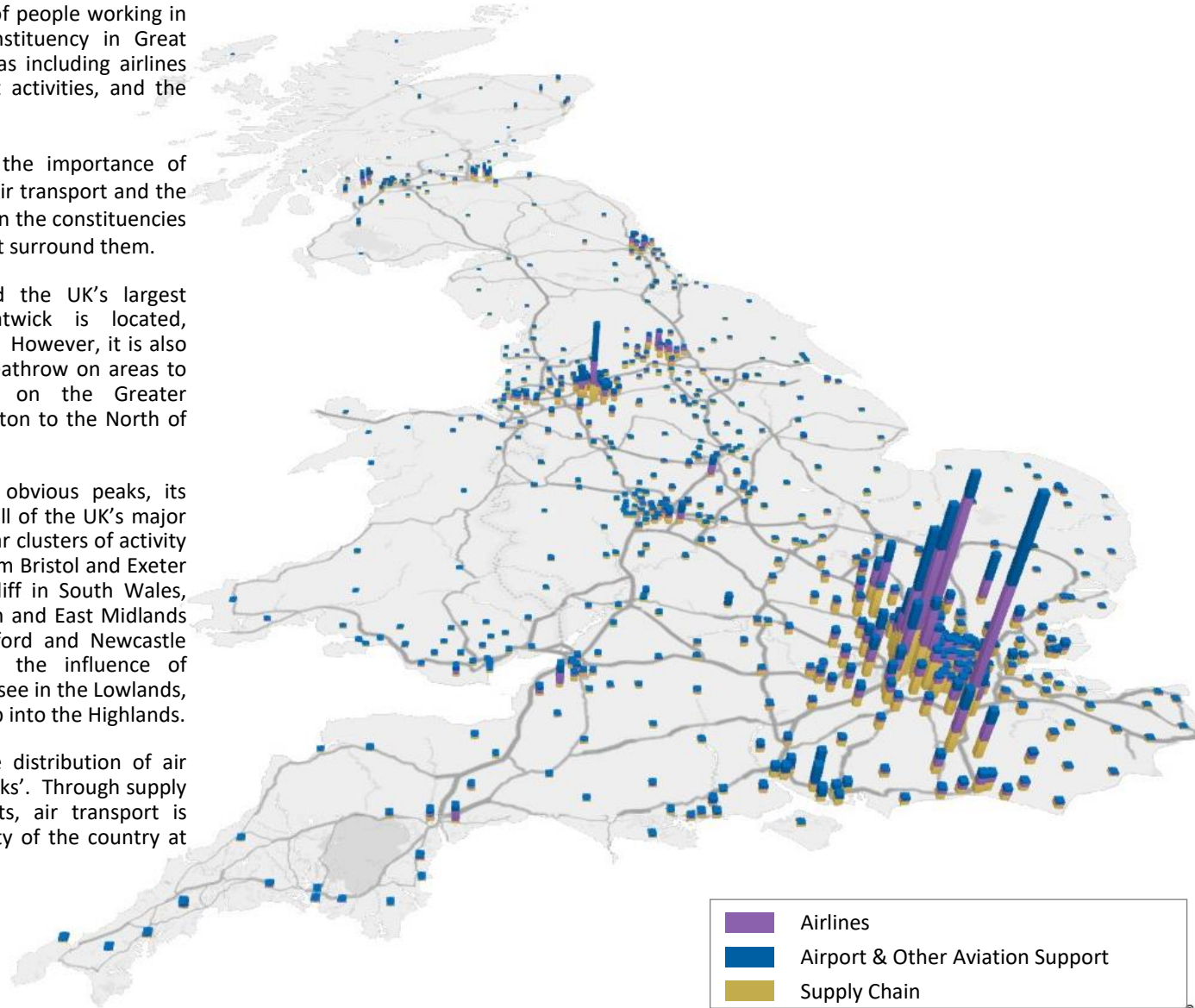
The map opposite shows the number of people working in air transport jobs living in each constituency in Great Britain. Air transport jobs is defined as including airlines and airports & other aviation support activities, and the supply chains to these sectors.

This analysis illustrates quite clearly the importance of airports as the geographic centres for air transport and the role that they play as providers of jobs in the constituencies they are located in but also in those that surround them.

The map shows clear peaks around the UK's largest airports, with Crawley, where Gatwick is located, supporting the largest number of jobs. However, it is also possible to easily see the effects of Heathrow on areas to the west of London, Manchester on the Greater Manchester area, and Stansted and Luton to the North of London.

However, while these are the most obvious peaks, it's clearly possible to see effects around all of the UK's major regional airports as well. There are clear clusters of activity spread across Great Britain, moving from Bristol and Exeter airports in the South West, past Cardiff in South Wales, through the Midlands with Birmingham and East Midlands airports, up to Liverpool, Leeds Bradford and Newcastle further North. While in Scotland, the influence of Edinburgh and Glasgow airports can be seen in the Lowlands, with Aberdeen and Inverness moving up into the Highlands.

It should also be recognised that the distribution of air transport jobs is not just about the 'peaks'. Through supply chains and through commuting habits, air transport is providing jobs across the great majority of the country at some level.



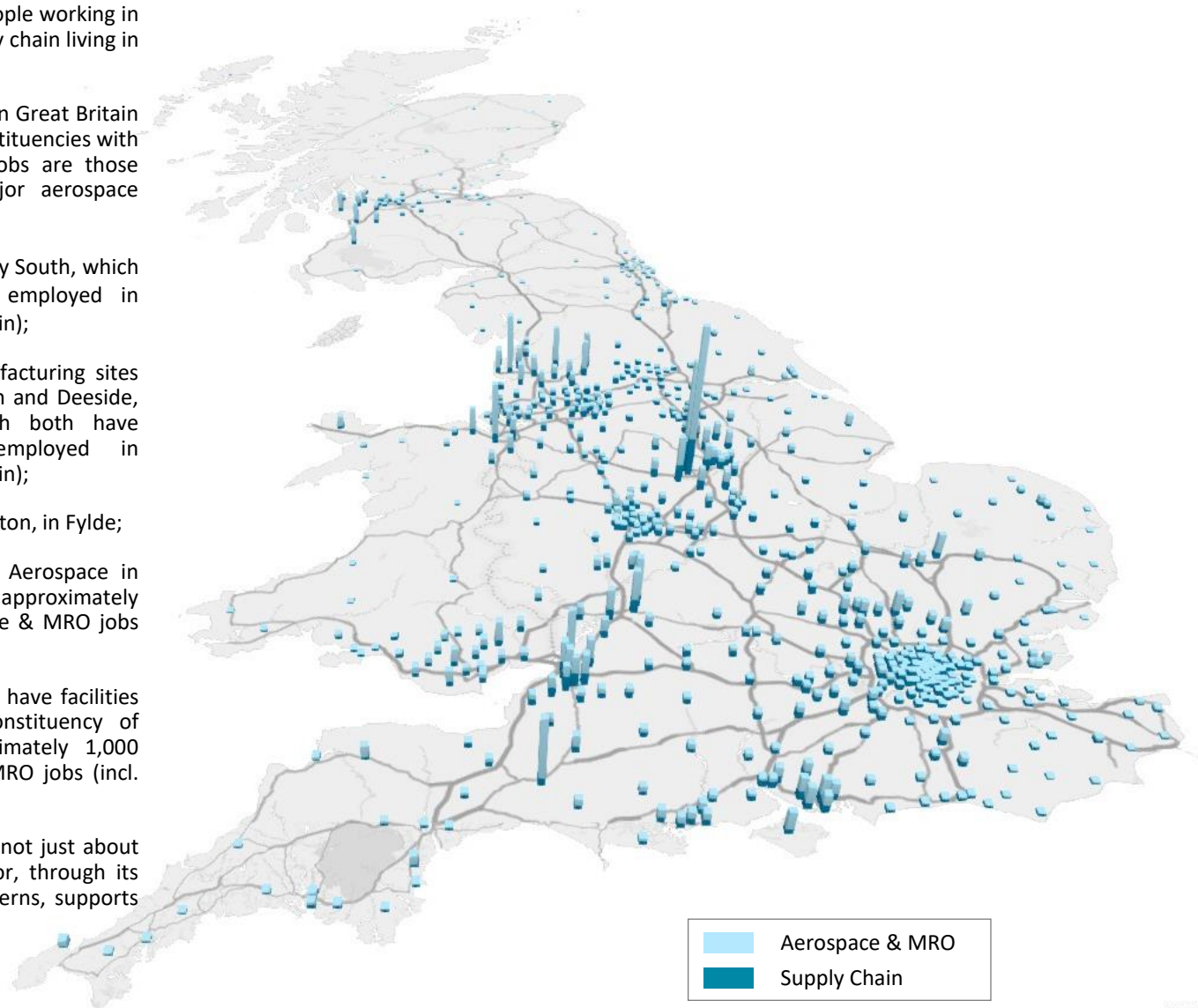
Aerospace & MRO Jobs

The map opposite shows the number of people working in aerospace & MRO jobs or the sectors supply chain living in each constituency in Great Britain.

The distribution of aerospace & MRO jobs in Great Britain is quite different to air transport jobs. Constituencies with greater numbers of aerospace & MRO jobs are those within close proximity to the UK's major aerospace clusters, notably:

- Rolls-Royce in the constituency of Derby South, which has approximately 7,000 residents employed in aerospace & MRO jobs (incl. supply chain);
- major research and design and manufacturing sites for Airbus in the constituencies of Alyn and Deeside, and Filton & Bradley Stoke, which both have approximately 3,000 residents employed in aerospace & MRO jobs (incl. supply chain);
- BAe Systems has a major facility at Warton, in Fylde;
- Leonardo Helicopters and Honeywell Aerospace in the constituency of Yeovil, which has approximately 3,000 residents employed in aerospace & MRO jobs (incl. supply chain);
- General Electric and Collins Aerospace have facilities around Prestwick Airport in the constituency of Central Ayrshire, which has approximately 1,000 residents employed in aerospace & MRO jobs (incl. supply chain).

However, again, as with air transport, it is not just about the 'peaks'. The aerospace & MRO sector, through its supply chain and through commuting patterns, supports employment all around the UK.

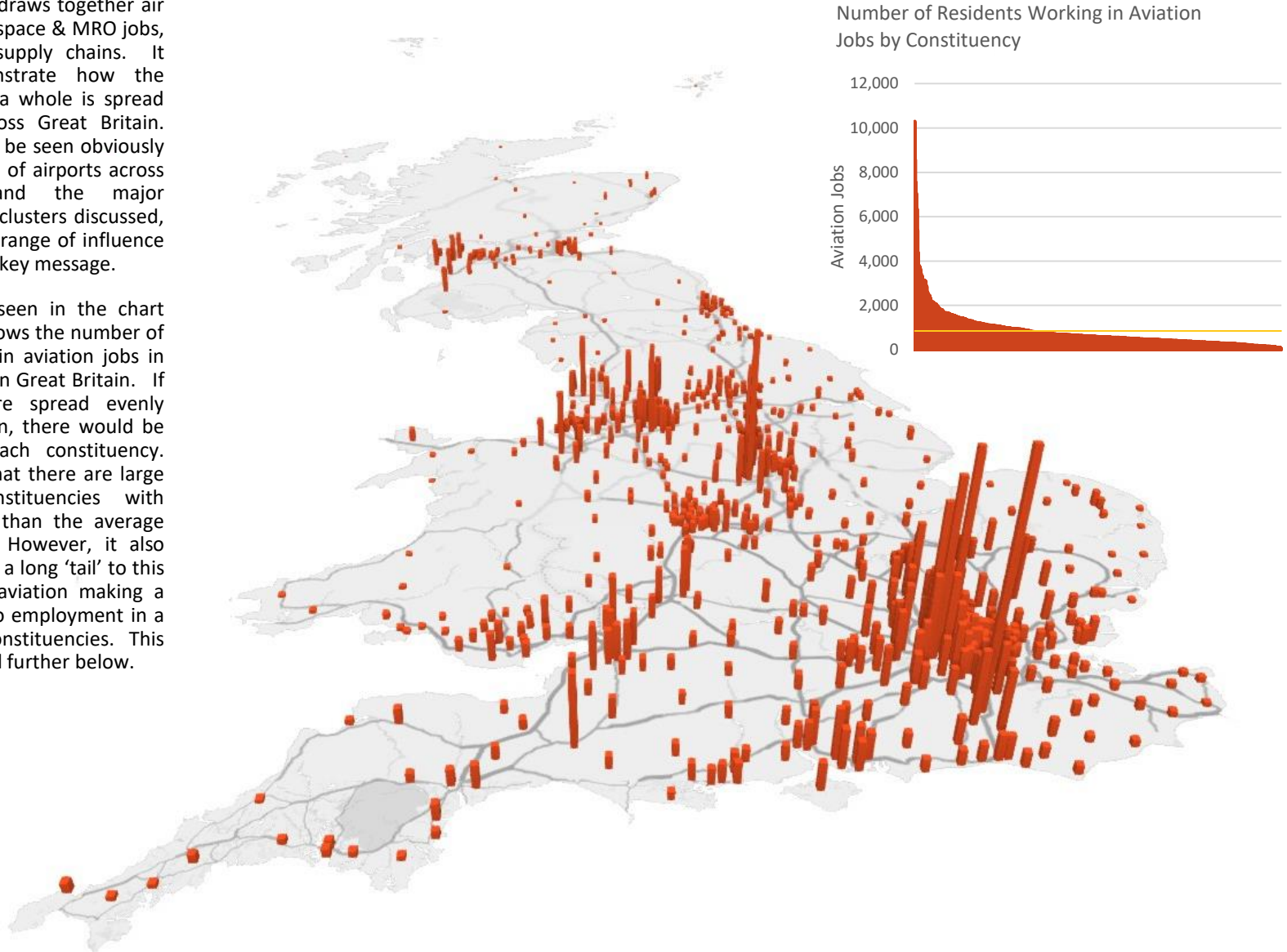


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Total Aviation Jobs

The map opposite draws together air transport and aerospace & MRO jobs, along with their supply chains. It serves to demonstrate how the aviation sector as a whole is spread geographically across Great Britain. The peaks that can be seen obviously reflect the location of airports across Great Britain and the major aerospace & MRO clusters discussed, but it is the broad range of influence that is perhaps the key message.

This can also be seen in the chart opposite, which shows the number of residents working in aviation jobs in each constituency in Great Britain. If aviation jobs were spread evenly across Great Britain, there would be around 830 in each constituency. The chart shows that there are large numbers of constituencies with significantly more than the average number of jobs. However, it also shows that there is a long 'tail' to this distribution, with aviation making a real contribution to employment in a large number of constituencies. This is a theme analysed further below.



Sustainable Aviation Fuels and Jobs in the Future

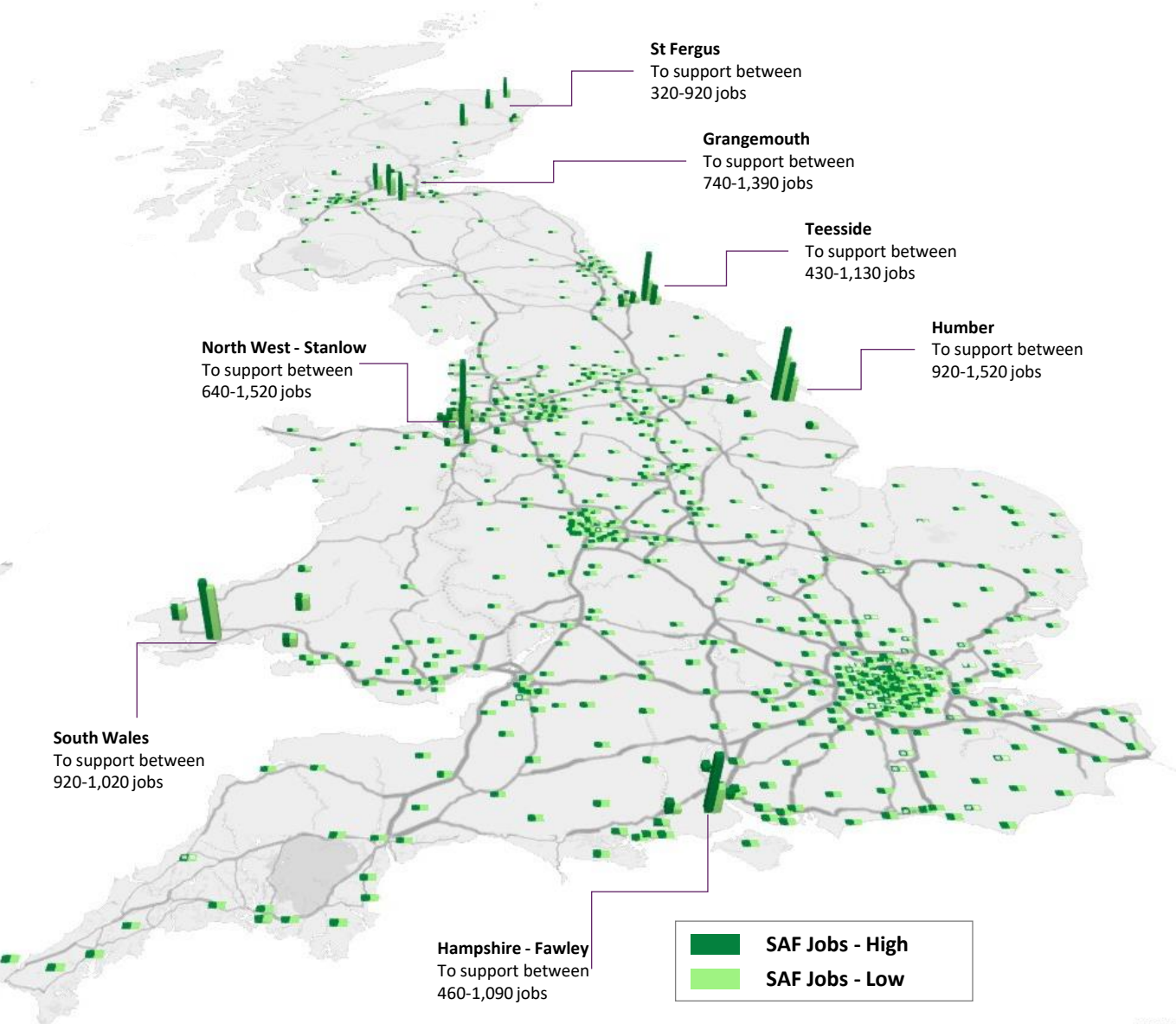
Looking to the future and particularly the opportunities presented by sustainable aviation, the analysis has examined the potential for job creation around the developing Sustainable Aviation Fuels (SAF) sector.

Using research data made available by Sustainable Aviation on the UK's potential for employment generated by SAF processing in Great Britain, the estimated spread of jobs by residency has been set out on the map opposite.

Sustainable Aviation's research found that there could be seven key processing locations around Great Britain, which have the potential to act as the main infrastructure for the early development of this industry up to 2035. These locations form the 'peaks' that can be seen on the map, with employment spreading around the locations, in line with commuting patterns.

The map shows a lower estimate of employment contribution and an upper estimate. These estimates reflect the extent to which the sites are able to achieve their full potential.

The seven key locations have the potential to support 14 processing plants in total by 2035. The industry as a whole has the potential to support the UK economy with £930 million in GVA annually and over 6,500 jobs by 2035.



Key Conclusions

Aviation is a key part of the UK economy, supporting trade, inward investment, tourism and international competitiveness. However, it is also a key provider of jobs and prosperity to communities across the UK's nations and regions. This research has used a range of published data sources to consider this role as a provider of employment, using a narrow definition of aviation employment, at a constituency level across Great Britain. It has focussed not on where jobs are located but where people live, providing a more granular picture of how aviation impacts on local areas and their prosperity.

This report highlights a number of key conclusions:

- on a conservative basis, the aviation industry directly supports over half a million jobs in Great Britain;
- air transport jobs creates important cluster of employment around airports across Great Britain, particularly in London, the South East, East of England and the North West. These clusters can mean thousands of residents in individual constituencies working in aviation jobs. However, it is important to note that supply chains and commuting mean that employment is ultimately widely spread, supporting prosperity across large areas;
- aerospace & MRO jobs are clustered in a number of regional economies across Great Britain, including in the Midlands, the North West and the South West. As with air transport jobs, it is important to note that supply chains and commuting mean that employment is again widely spread;
- one in four constituencies are estimated to have more than 1,000 residents employed in the aviation sector (incl. supply chain). Over 60% of constituencies are estimated to have more than 500 residents working in an aviation job (incl. supply chain);
- only three constituencies in Great Britain are estimated to have fewer than 100 residents working in an aviation job (incl. supply chain);
- average salaries in the aviation industry are significantly higher than national and regional averages (22%-60% higher in the UK), indicating the quality, importance and value of aviation jobs;
- the Sustainable Aviation Fuel industry is a significant opportunity for the future. By 2035, it has has the potential to support the UK economy with £930 million in GVA annually and 6,500 jobs, primarily in seven regional and coastal locations across the country.

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