

**\*MARCH 2019, ADDENDUM:**

*More Recently York Aviation updated the worth of GA to the UK Economy and the following paragraph is taken from their March 2015 'General Aviation Economic Research' for the DfT:*

The total economic impact of GA on the UK economy is around £3.0 billion of Gross Value Added (GVA) and supports in excess of 38,000 jobs.

For the purposes of this research, we took a broad definition of 'general aviation' (GA) to refer to all flying activity other than that undertaken by commercial air transport operating to a schedule and military flying.

GA therefore includes business aviation. While there are some difficulties in combining the quantitative outputs from the different pieces of analysis undertaken in this study, primarily relating to uncertainty around the extent to which benefit is retained within the UK and to which different strands of analysis interlink, a reasonable estimate can be made of the total impact on the UK from activities associated with GA. In Gross Value Added terms, this total includes:

- An economic footprint from GA flying operation of £1.1 billion;
- The export component of GA manufacturing of around £1.1 billion;
- The additional wider benefits deriving from the use of business aviation of at least £0.8 billion.

Combining these figures would suggest a total economic impact on the UK economy of around £3.0 billion of GVA. While this figure should be regarded with some caution, we believe it provides a reasonable representation of the magnitude of the total impact of GA activities on the UK economy.

We also estimate that there are around 9,700 jobs supported by GA flying activity in the UK, measured at the aerodrome level, and around 28,400 jobs supported by GA manufacturing, making a total in excess of 38,000 jobs supported.



## Fact Sheet 4 - General Aviation (GA) – its value to the UK economy

### 1. **What is General Aviation (GA)?**

- General Aviation (GA), together with Aerial Work (AW) comprises all civil aviation activity other than Commercial Air Transport (CAT).
- The CAT sector operates about 900 UK registered aircraft and uses some 25 airports.
- In comparison, the active UK based GA fleet exceeds 15,500 aircraft. This includes conventional aircraft, helicopters, gliders, microlights and balloons.
- GA uses virtually all the 140 aerodromes licensed by the Civil Aviation Authority (CAA) and more than 1,000 other active flying sites.
- Although some three quarters of GA movements are related to a top tier of 90 aerodromes, the remainder of 1,000 plus active flying sites are as essential to the GA industry as rural amenities are to urban economic activity.

### 2. **What does GA do?**

Together with Aerial Work, GA embraces a wide variety of activities including:

- **Business:** GA serves local businesses by facilitating rapid links with other parts of the UK and with other countries, which is of ever increasing importance given the single market economy that is the EU. The availability of a local aerodrome can also boost a region's attractiveness to firms wishing to locate there.
- **Pilot Training:** providing the pilots to fly the airliners which carry people on holidays and other personal journeys, and those on professional or other business;
- **Agriculture:** protecting crops and forests;
- **Delivery:** of mail, newspapers and essential items;
- **Life Saving:** transport of dangerously ill people and of urgently needed human organs, medical equipment and medicines;
- **Traffic Control:** monitoring traffic movements from the air;
- **Civil Search & Rescue:** often in conjunction with local police;
- **Law Enforcement:** fighting crime, including drug smuggling;
- **Aerial Survey:** patrols of pipelines and electricity transmission lines, photography for map-making and oil exploration;
- **Protecting the Environment:** pollution control, fire fighting and fishery protection;
- **Recreation:** including flying as a chosen leisure pursuit and flying model aircraft;
- **Helping the Disabled:** to experience the pleasures of flying;
- **Flying for Youth:** giving air experience to young people;
- **Flying Displays:** entertaining hundreds of thousands of spectators each year.

### 3. **What are GA's needs?**

- GA needs suitable flying sites, with the supporting infrastructure, from which to operate safely and which can be safeguarded from future adjacent development that could prejudice safe operation.
- More particularly sites are needed for GA operations that can no longer be accommodated at some of the larger airports as CAT movements increase.

These may involve new sites or the development of existing smaller aerodromes.

- The services that GA provides depend on there being a nationwide network of aerodromes from which the GA fleet can operate.
- This network of aerodromes is part of the national transport infrastructure. Thus the future of one location cannot be considered purely in the context of its localised impact. It has to be viewed in the context of the whole network.
- In order to provide the wide range of services that are expected of GA operators, permitted hours of operation should pay full regard to the activities envisaged for the particular location.

#### **4 What is the value of GA to the national economy?**

- The 2006 CAA General Aviation Strategic Review (GASR) incorporated a study regarding the value of GA<sup>1</sup>. It made some important findings – listed below. Data relate to 2005.
  - The economic contribution of GA is valued at £1.4bn.
  - This is equivalent to 8% of the CAT sector.
  - 11,600 people are directly employed in GA.
  - There are some 15,500 active GA aircraft based in the UK, flown by more than 32,000 pilots.
  - Some 4.6 million movements took place between approximately 1,140 formal flying sites.
- The GASR endorsed the above data and concluded that GA ***“makes a significant economic contribution – even before one considers the role played by some parts of the GA sector as a facilitator of other business activity.”***
- Due to the difficulty in calculating accurately, no figure could be placed upon the added value of GA to the CAT industry through pilots training through the GA route (often at their own expense) and then providing partly trained personnel for use by the commercial airlines. However, this is known to be a significant national resource.
- As part of separate research undertaken by the General Aviation Awareness Council (GAAC) it has been estimated that some 70% of GA activity has some safety or business purpose.
- This contrasts with a figure of just 15% for the CAT sector as about 85% of all seats sold by airlines are for the purpose of holiday travel or pleasure purposes.\*

#### **5. What are the local economic benefits of GA?**

- Benefits to local economies that are attributable to the presence of an aerodrome will depend upon both its size and the nature of activities.
- In addition to providing employment on the aerodrome itself, it may attract associated services on the site. Furthermore, the multiplier effect means that an aerodrome can also generate additional business from local traders and service providers.

[An evaluation model was produced to assess the possible value to the local economy of either establishing a GA aerodrome or changing its operating restrictions (e.g., number of movements)]

### **Conclusions**

GA is unique, its activity impinging on issues relating to transport, recreation, the economy, services, public utilities and the environment. As has been endorsed by the Civil Aviation Authority and the Department for Transport in accepting the recommendations of the

Strategic Review of General Aviation, the multiplicity of activities embraced by GA and its contribution to both the national and local economies should be recognised in national, regional and local planning.

***General Aviation Awareness Council***

*This is one of a series of Fact Sheets available from the GAAC.*

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1. T Lober, 2008 – ‘The effectiveness of national strategic guidelines at a local level: a case study of the UK general aviation industry.’ PhD Thesis, Bartlett School of Planning, University College London, London University. [A draft of this thesis was used as input to the GASR]