



# The Economic impact of Ryanair in the UK

FLIGHT	DESTINATION	STATUS	TIME
OU 366	DUBROVNIK	ON TIME	2100
OU 707	SKOPJE	ON TIME	2100
OU 342	SARAJEVO	ON TIME	2100
OU 8660	SARAJEVO	ON TIME	2100
OU 660	DUBROVNIK	ON TIME	2105
AZ 543	DUBROVNIK	ON TIME	2105
AF 2055	HILAN-HALPENSA	ON TIME	2230
LH 2485	PARIS	ON TIME	0550
OU 410	FRANKFURT	ON TIME	0635
SK 9300	FRANKFURT	ON TIME	0650
OS 7052	VIENNA	ON TIME	0655



**Ryanair**

Final Report

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# The Economic Impact of Ryanair in the UK in 2023



# 1. Introduction

## Background

- 1.1 In late 2023, Ryanair commissioned York Aviation to undertake an economic impact assessment of its operations in the UK. Ryanair is one of the largest airlines operating in the UK market and a significant inward investor into the UK through the basing of its aircraft assets at UK airports. This report examines for the first time the Gross Value Added (GVA) and employment supported by Ryanair through its operations and through the services it provides to users of air services in the wider economy.

## About York Aviation

- 1.2 York Aviation is a specialist aviation strategy consultancy based in the UK. The company was founded in 2002 and has been providing advice to a wide range of clients including airlines, airports, governments, investors and regulators since that time. It is the leading provider of air transport economic impact services in Europe, having undertaken over 100 such studies for clients across the continent. It has extensive experience of working with airlines, such as Ryanair, to understand their impact on the economy.

## Our Approach

- 1.3 This report draws on a wide range of sources. This includes data from Ryanair on its UK operations and employment patterns, and also publicly available data from Companies House, the Office for National Statistics (ONS), the UK Civil Aviation Authority (CAA), and OAG, an online database of airline schedules.
- 1.4 The analysis focuses primarily on the economic impact of Ryanair on the UK economy in 2023. This provides a picture of the airline's impact in a post-COVID world, as its operations have recovered strongly from the unprecedented impacts of the pandemic.
- 1.5 The report also considers the role that Ryanair plays in supporting the UK economy across its nations and regions, recognising that airports, the geographic focal points for Ryanair's operations, are vital drivers for the economies that surround them, directly providing jobs and prosperity through the operation of air services, but also through the provision of connectivity to and from those regions.
- 1.6 The economic impact assessment is based around a commonly recognised and well accepted analytical framework. This splits the channels through which Ryanair impacts on the UK economy into a number of different effects. These can be categorised and summarised as follows:
- **Operational Impacts** – GVA and employment stemming from Ryanair's activities relating to the provision of services to passengers. These include:
    - **Direct** – employment and GVA supported by activities wholly or largely related to the provision of air services by Ryanair. These are mainly based at airports where Ryanair operates in the UK. It includes Ryanair and its related maintenance, repair and overhaul subsidiaries based at Prestwick Airport and Stansted Airport;
    - **Indirect** – employment and GVA supported in the supply chain to the direct activities. These purchases support jobs and GVA in a wide range of sectors, such as utilities, advertising, manufacturing, professional services or construction;
    - **Induced** – employment and GVA supported in the economy by the expenditure of wages and salaries earned in relation to the direct and indirect activities;

- **Wider Economic Impacts** – these accrue to the wider economy and relate to the connectivity provided by Ryanair services and its ability to move passengers to, from and within the UK:
  - **Business Productivity** – connectivity for business travel enables trade, investment, labour and knowledge flows, boosting productivity and GVA in the wider economy;
  - **Inbound Tourism** – by bringing visitors to the UK, Ryanair assists in injecting expenditure into the tourism economy supporting jobs and GVA.

1.7 The report considers the full range of these effects, providing quantitative estimates of their impact on UK GVA and employment.

### The Structure of this Report

1.8 This report is structured as follows:

- in **Section 2** we set out a profile of Ryanair’s operations in the UK;
- in **Section 3** we estimate the operational impacts associated with Ryanair’s UK operations in 2023;
- in **Section 4** we consider the role that Ryanair plays in providing connectivity for business travellers in the UK economy;
- in **Section 5** we analyse Ryanair’s contribution to supporting inbound tourism into the UK;
- in **Section 6** we present our estimates of the total impact of Ryanair in the UK economy and our conclusions.

## 2. Profile of Ryanair in the UK

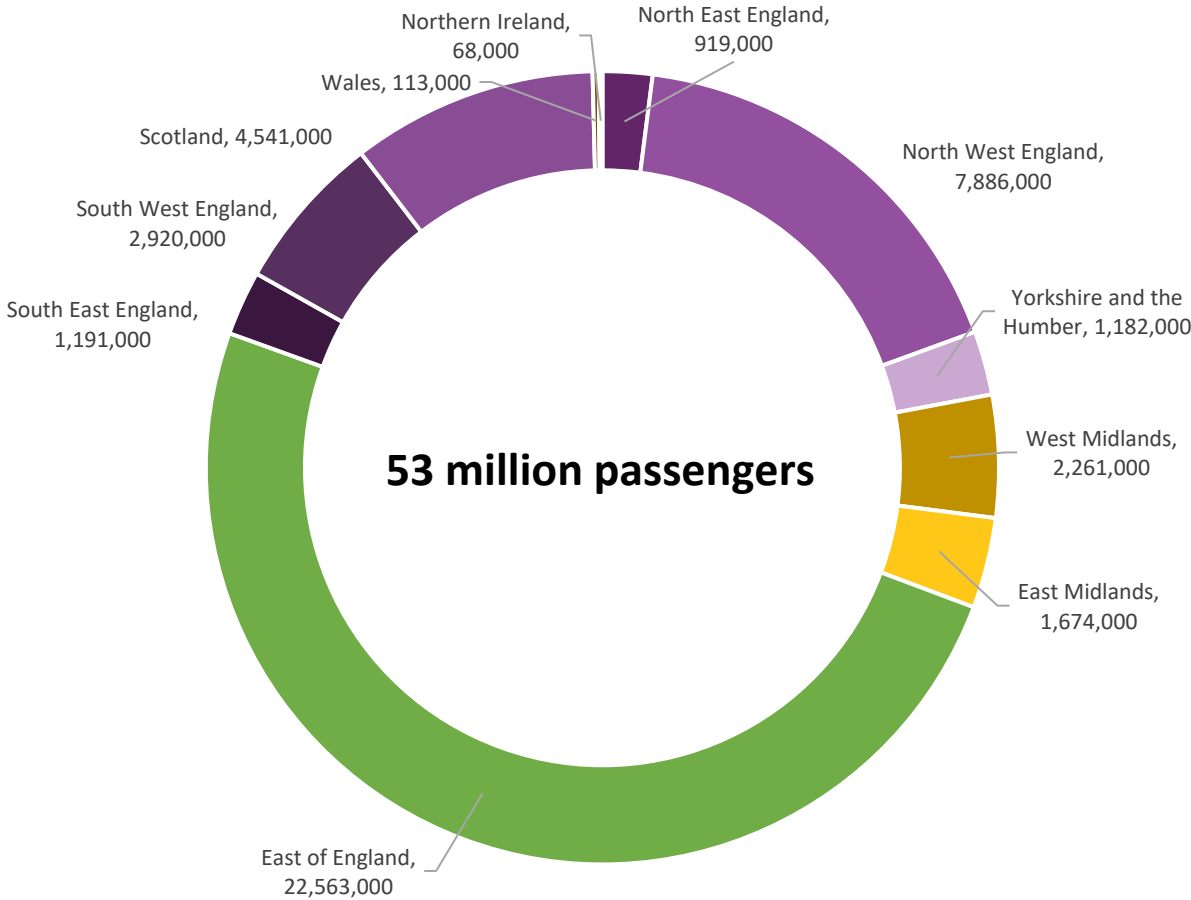
### Introduction

2.1 In this section, we set out some key facts about the size and scale of Ryanair’s operations across the UK. This includes the number of passengers carried in 2023, the number of Ryanair bases, the number of based aircraft in the UK, and the number of routes served. The purpose of the analysis is to provide a feel for the overall size of Ryanair in the UK and it’s nations and regions, and it’s importance in the air transport market.

### Size of Ryanair’s UK Operations

2.2 Figure 2.1 shows the number of passengers carried by Ryanair to and from UK airports by region or nation in the 2022/23 financial year. The airline carried over 53 million booked passengers in that period. This equates to around 20% of all passengers travelling to / from UK airports during that time. It is also important to note the distribution of those passengers across the UK. Ryanair is genuinely an airline that services the entire UK, carrying passengers from airports in every nation and region. Its largest operations are in the East of England, reflecting Stansted Airport’s position as the airline’s largest base, but it also carried nearly 10 million passengers from airports across the North, 4.5 million passengers from Scottish airports, and nearly 3 million passengers from the South West.

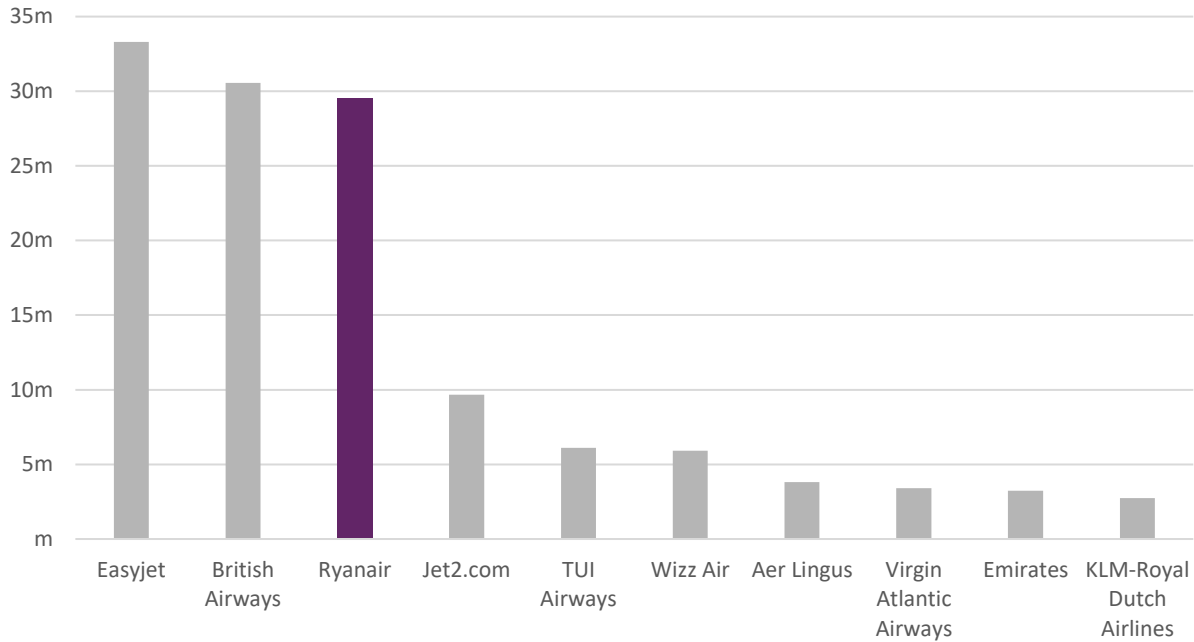
Figure 2.1: Ryanair Passengers at UK Airports in 2023



Source: Ryanair.

2.3 Figure 2.2 shows the top 10 airlines in the UK air transport market in 2023 by seat capacity. This clearly establishes Ryanair as part of a triumvirate that provides a significant proportion of the UK’s air passenger connectivity. It should also be remembered that Ryanair is a short haul airline, unlike its nearest competitor, British Airways, which provides services across the world. With this in mind, it can be said that Ryanair, along with easyJet, is one of two airlines that provide backbone of the UK’s short haul connectivity.

**Figure 2.2: Top 10 UK Airlines by Seat Capacity in 2023**



Source: OAG.

**Ryanair as an Investor in the UK Regions**

- 2.4 Ryanair’s primary physical assets are its aircraft. Their location reflects its role as an inward investor in particular geographic markets. Figure 2.3 shows the location of Ryanair’s based aircraft in the UK currently.
- 2.5 The airline currently has 115 aircraft based in the UK out of a current fleet of 565 aircraft across the Ryanair Group. The airlines largest investments are at Stansted Airport (48 aircraft), Manchester Airport (16 aircraft), and Edinburgh Airport (11 aircraft). However, again, it is worth noting that Ryanair’s investment in the UK is spread across the country.
- 2.6 In addition to its placement of aircraft assets, Ryanair has also invested in two major MRO bases in the UK at Prestwick Airport in Scotland and Stansted Airport in the East of England. These MRO bases provide services to Ryanair aircraft from across Europe, providing significant numbers of highly skilled jobs to residents in and around each location.



Figure 2.3: Ryanair Aircraft Based in the UK



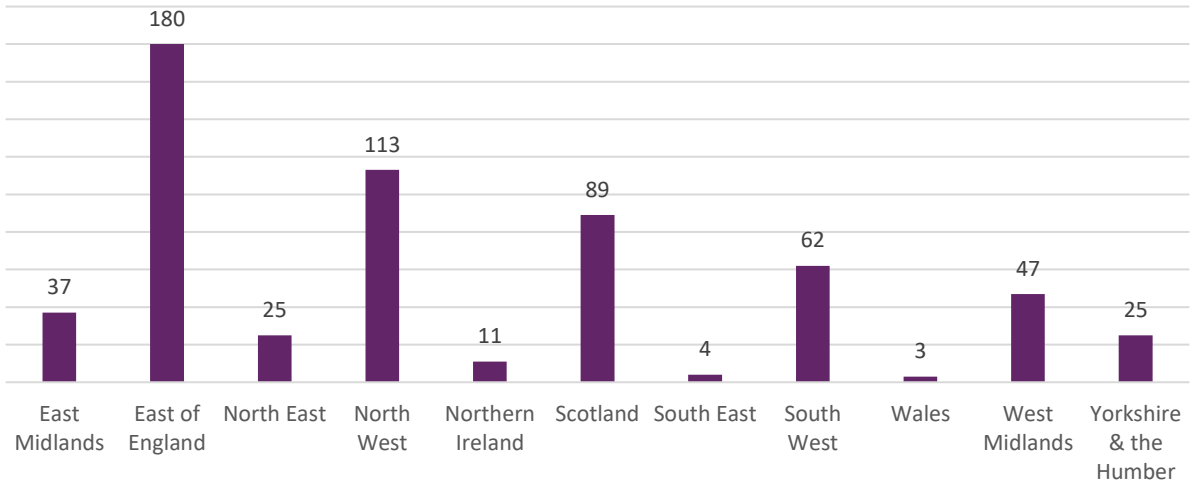
Source: Ryanair.

2.7 Ryanair is continuing to invest new aircraft. With over 500 new, environmentally efficient aircraft on order, the airline will continue to grow its presence and investment in the UK.

**Ryanair is a Key Connector for the UK**

2.8 In addition to understanding Ryanair’s scale in terms of the passengers it carries and its investment in assets in the UK, it is also helpful understand its size as a connector for the UK. Figure 2.4 shows the number of routes served by Ryanair from each of the nations and regions of the UK.

Figure 2.4: Routes Served by Ryanair from the UK’s Nations and Regions



Source: OAG.

- 2.9 This pattern ultimately reflects Ryanair’s aircraft basing, with 180 destinations served from its bases in the East of England, 113 from the North West and 89 from Scotland. However, again, it is important to note the significant numbers of destinations served across the UK’s nations and regions. Even where Ryanair does not currently have a base, notably in Wales and South East, the airline is still providing connectivity through the use of aircraft based elsewhere.
- 2.10 Ryanair is particularly important as a connector for the UK given that it provides access to a wide range of destinations that are not served by other airlines. Table 2.1 shows the number of unique airport pair destinations that will be served by Ryanair in 2023 by UK region and compares this to the total number of routes served from UK regions.

**Table 2.1: Unique Airport Pairs Served by Ryanair in 2023**

Region	Unique Ryanair Routes	Other Short Haul Routes	Total	% Unique Ryanair
North East	12	80	92	13%
North West	68	169	237	29%
Yorkshire and the Humber	10	76	86	12%
West Midlands	20	101	121	17%
East Midlands	21	53	74	28%
East of England	137	228	365	38%
South East	2	347	349	1%
South West	37	126	163	23%
Scotland	58	228	286	20%
Wales	2	34	36	6%
Northern Ireland	11	80	91	12%
<b>Total</b>	<b>378</b>	<b>1,522</b>	<b>1,900</b>	<b>20%</b>

Source: York Aviation analysis of OAG.

- 2.11 Across the UK, Ryanair serves 378 routes that are unique to the UK airport. This is around 20% of the short haul routes served from the UK. The effect is strongest in the East of England, reflecting the location of Ryanair’s largest base at Stansted, with 137 unique routes out of a total of 365 (38%).

### Investing in a Sustainable Future

- 2.12 As Europe's largest airline group, Ryanair has an important role in shaping the future of sustainable aviation. It is committed to ensuring that its operations align with global efforts to mitigate the impacts of climate change.
- 2.13 Ryanair’s 2023 Sustainability Report highlights a number of key actions, including:
- In May 2023 Ryanair announced a 300 Boeing 737- MAX-10 aircraft order (150 firm and 150 options) for delivery between 2027 to 2033. The new Boeing 737-MAX-10 aircraft have 228 seats (21% more than the Boeing 737-800NG). This order supports Ryanair’s environmental agenda with the Boeing 737-MAX-10 being 20% more fuel efficient and 50% quieter than the Boeing 737-800NGs;
  - In 2023, Ryanair’s carbon intensity improved to 66g CO<sub>2</sub> pax/km (76g CO<sub>2</sub> pax/km in 2022). A key driver in the improvement in carbon intensity, relates to the addition of 37 new Boeing 737-8200s into the fleet, bringing the total Boeing 737-8200s to 98 at year end. The Boeing 737-8200 aircraft

has 4% more seats and uses the latest engine technology (CFM Leap-1B engines) which are 16% more fuel efficient than the previous generation;

- Ryanair believes that the use of sustainable aviation fuels (SAFs) is the most realistic and effective method for aviation to reduce emissions in the coming decades. Ryanair expects c.34% of its 2050 net zero target to be achieved through the use of SAF. In order for this to become a reality, barriers to the production of significant quantities of SAF need to be overcome. Ryanair is leading the drive to increase the usage of SAF across Europe. Since its 2022 Sustainability Report, Ryanair has signed MOU's for the supply of up to 675,000 mt of SAF (equivalent to approximately 70% of our 2030 target) to be delivered across its key European locations;
- Ryanair has been a long-time advocate of the "Single European Sky" project. The much needed and overdue reform of ATM in Europe can dramatically reduce CO2 and non-CO2 emissions from aviation. A more efficient ATM network would result in a 10% reduction in carbon emissions and bring us closer to our goal of net-zero carbon emissions by 2050.

## Conclusions

- 2.14 Ryanair is one of the largest and most significant airlines operating in the UK market. It has invested broadly across the UK's nations and regions, with 115 aircraft based in the UK and 53 million passengers handled in the last financial year. It is a major provider of connectivity to all parts of the UK.

### 3. Ryanair as a Provider of Prosperity

#### Introduction

- 3.1 In this section, we analyse Ryanair's role as a provider of jobs and prosperity in the UK economy through its operations. In the analytical framework described above, this reflects the operational impacts of the airline, referred to as direct, indirect and induced employment and GVA impacts. This is the core of Ryanair's economic impact in the UK.

#### Direct Employment and GVA

- 3.2 Table 3.1 shows the employment and GVA directly supported by Ryanair and its MRO subsidiaries in the UK. In total, the airline supports around 6,400 jobs and £808 million in GVA across the country. Reflecting the geographic spread of its operations, the largest impacts are in the East of England, the North West and Scotland. It is, however, also possible to see the effect of its training facility in the East Midlands. Even where its operations are, relatively, smaller, the direct impacts remain significant, with, for instance, 140 jobs supported in the North East and 90 in Northern Ireland.

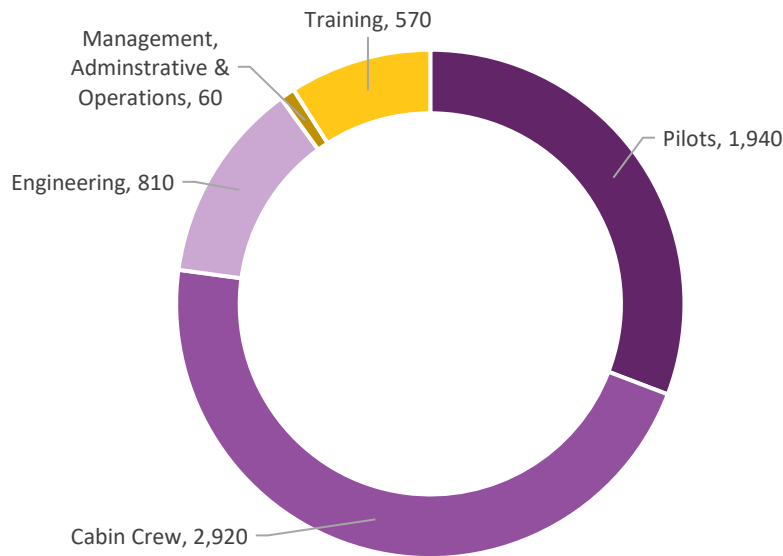
**Table 3.1: Direct Employment and GVA Impacts by Region in 2023**

Nation / Region	Employment	GVA (£m)
North East	140	£19
North West	860	£117
Yorkshire and The Humber	160	£21
West Midlands	230	£32
East Midlands	780	£106
East of England	2,850	£360
London	0	£0
South East	0	£0
South West	330	£44
Scotland	970	£96
Northern Ireland	90	£12
Wales	0	£0
<b>Total</b>	<b>6,400</b>	<b>£808</b>

Source: York Aviation.

- 3.3 It is also interesting to note the productivity levels associated with Ryanair's operations in the UK. Based on these estimates, direct GVA per job is around £126,000 per annum. This is significantly higher than the UK average of around £59,000. This reflects the high skill, high quality jobs offered by the airline through its UK operations.
- 3.4 Figure 3.1 explores this point further, providing a broad breakdown of employment by role for Ryanair's UK operations. This shows in particular the focus on high value pilot roles and also a significant number of engineering roles.

**Figure 3.1: Direct Employment by Activity**



Source: York Aviation.

**Indirect & Induced Employment and GVA**

3.5 Table 3.2 shows the employment and GVA supported by Ryanair in the UK economy through its supply chain expenditure (indirect) and from the expenditure of wages and salaries earned through the direct and indirect impacts (induced). These effects have been established via the use of an input-output model for the UK economy based on the ONS UK input-output tables.

**Table 3.2: Indirect & Induced Employment and GVA by Region**

Nation / Region	Employment			GVA (£m)		
	Indirect	Induced	Total	Indirect	Induced	Total
North East	560	350	910	£29	£18	£47
North West	3,300	1,850	5,150	£187	£105	£291
Yorkshire and The Humber	1,190	500	1,690	£63	£27	£90
West Midlands	1,730	1,130	2,860	£93	£61	£155
East Midlands	1,920	1,060	2,980	£105	£58	£162
East of England	3,500	2,350	5,850	£205	£138	£343
South East	1,410	590	2,000	£97	£40	£137
London	3,040	1,400	4,440	£273	£125	£398
South West	970	590	1,560	£54	£33	£86
Scotland	1,890	1,280	3,170	£113	£77	£190
Wales	370	140	510	£20	£8	£27
Northern Ireland	290	180	470	£16	£10	£26
<b>Total</b>	<b>20,160</b>	<b>11,420</b>	<b>31,580</b>	<b>£1,255</b>	<b>£699</b>	<b>£1,954</b>

Source: York Aviation.

3.6 These broader effects of Ryanair’s operations are substantial. Indirect effects total around £1.3 billion currently, which equates to around 20,160 jobs. The geographic patterns reflect a mixture of Ryanair’s base locations across the UK, but also the geographic distribution of the aviation supply chain across the UK. The largest GVA impact is in London (£273 million), reflecting the city’s role as the economic hub

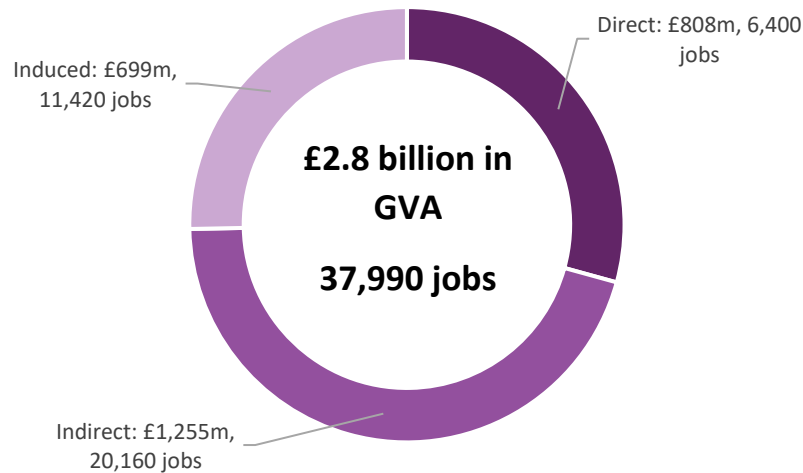
for the UK and location of significant aviation supply chain activities around Heathrow. There are also significant impacts in the East of England, the North West and Scotland, reflecting the location of major Ryanair bases. Again, impacts are ultimately spread across all nations and regions of the UK.

- 3.7 The total induced impact in the UK is around £699 million in GVA and 11,420 jobs. Again, this effect is distributed across the country. Again, impacts are particularly strong around Ryanair’s largest bases and in London.
- 3.8 In total, indirect and induced impacts equate to around £2.0 billion across the UK and around 31,580 jobs.

**Total Operational Employment and GVA**

- 3.9 Figure 3.2 shows the total operational economic impact (direct, indirect and induced) of Ryanair in the UK in 2023 of around £2.8 billion in GVA and 37,990 jobs.

**Figure 3.2: Total Operational Impact of Ryanair in the UK**



Source: York Aviation.

- 3.10 Table 3.3 shows the total impacts of Ryanair operations in 2023 across each of the UK’s nations and regions. These range from £27 million in GVA and 520 jobs in Wales to £703 million and 8,710 jobs in the East of England.

**Table 3.3: Total Impact of Ryanair in the UK by Nation / Region**

<b>Nation / Region</b>	<b>Employment</b>	<b>GVA (£m)</b>
North East	1,040	£66
North West	6,000	£408
Yorkshire and The Humber	1,840	£111
West Midlands	3,640	£261
East Midlands	3,210	£194
East of England	8,710	£703
South East	2,000	£137
London	4,440	£398
South West	1,890	£131
Scotland	4,140	£286
Wales	520	£27
Northern Ireland	560	£39
<b>Total</b>	<b>37,990</b>	<b>£2,762</b>

## 4. Ryanair as a Connector for Business

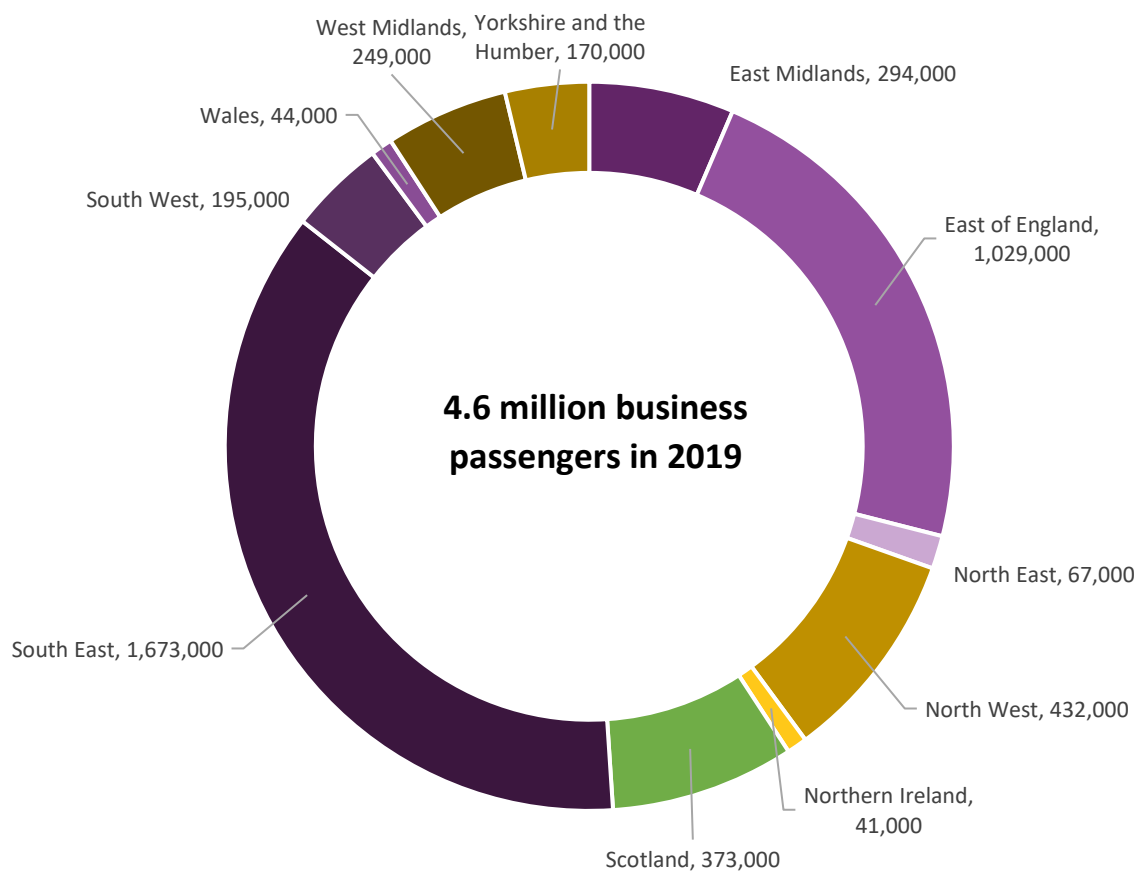
### Introduction

4.1 In this section, we look at Ryanair’s role in providing short haul connectivity for the UK economy. It focuses on analysing connectivity to economically important destinations, particularly where Ryanair is the sole provider. It also considers the GVA effects associated with business travel on Ryanair, using existing secondary research. Business travel is an essential part of the UK’s position as a global economy. It ultimately facilitates trade, helps attract inward investment, enhances competition and opens up new markets. This is then reflected in higher productivity for UK based businesses as they are able to grow and become more efficient and competitive.

### Passengers Travelling for Business on Ryanair

4.2 In 2019, the latest non-COVID affected available data, we estimate Ryanair handled around 4.6 million business passengers at UK airports. This was around 13% of the short-haul business market in the UK. Figure 4.1 shows the distribution of these passengers by nation / region.

**Figure 4.1: Business Passengers Using Ryanair in 2019**



Source: York Aviation analysis of CAA Passenger Survey.

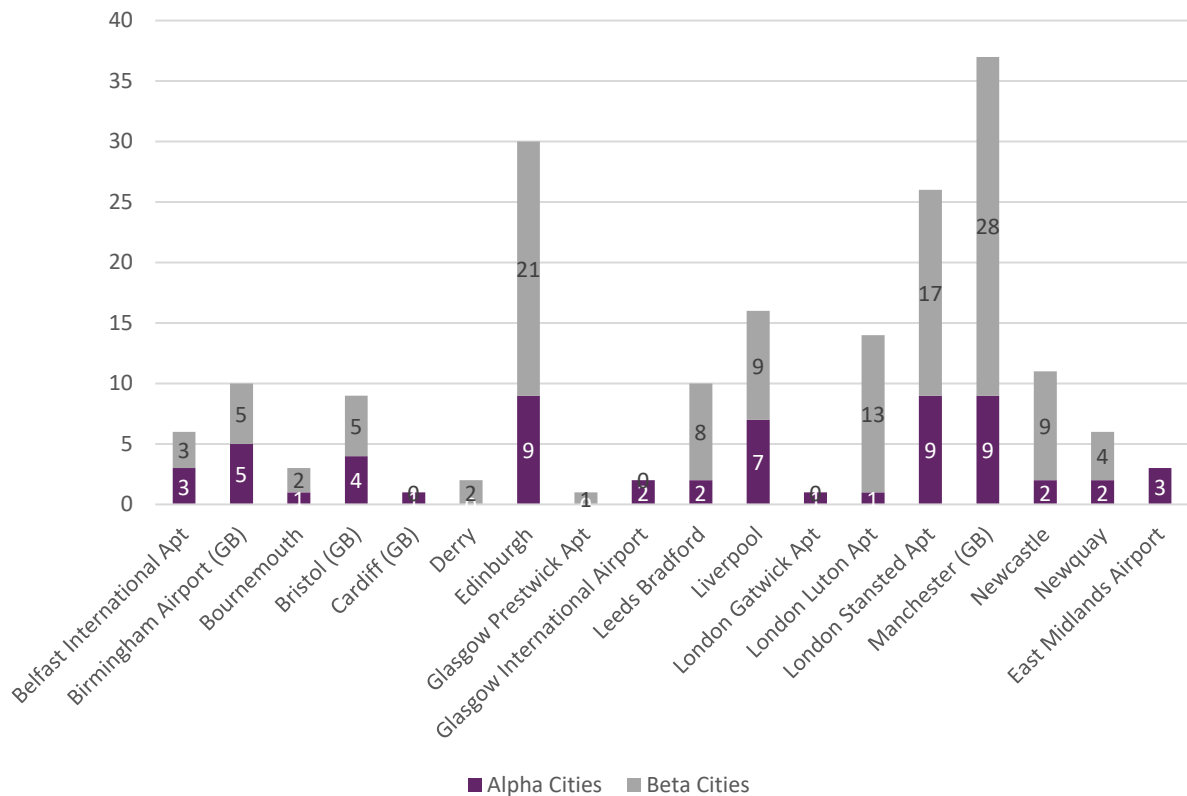
4.3 This analysis again shows the important role Ryanair plays in serving markets across the nations and regions of the UK. The results demonstrate that it facilitated business travel to/from every region and nation. Ryanair’s passenger numbers have now exceeded the number carried in 2019 and consequently, it is reasonable to assume that this pattern and scale of business travel on Ryanair remains similar.



### Supporting the UK’s Connectivity to the World Economy

4.4 In Figure 4.2, we explore further Ryanair’s role in providing connectivity to important centres in the world economy. The chart examines the connections that Ryanair offers to cities in the Globalisation and World Cities Network’s hierarchy of world cities. This long running research series categorises cities from around the world based on the location decisions of a large basket of advanced service firms. It provides a good proxy for a city’s importance in the world economy. The highest broad rank is an Alpha city, which includes places such London, New York, Paris, Amsterdam, Madrid, Dubai and others. The rank just below are Beta world cities. These include places such as Rome, Berlin, Copenhagen, Athens, Manchester and Geneva. The latest ranking reflects city status in 2020<sup>1</sup>.

**Figure 4.2: Ryanair’s Connections to Major World Cities from UK Airports**



Source: York Aviation analysis of OAG and GaWC.

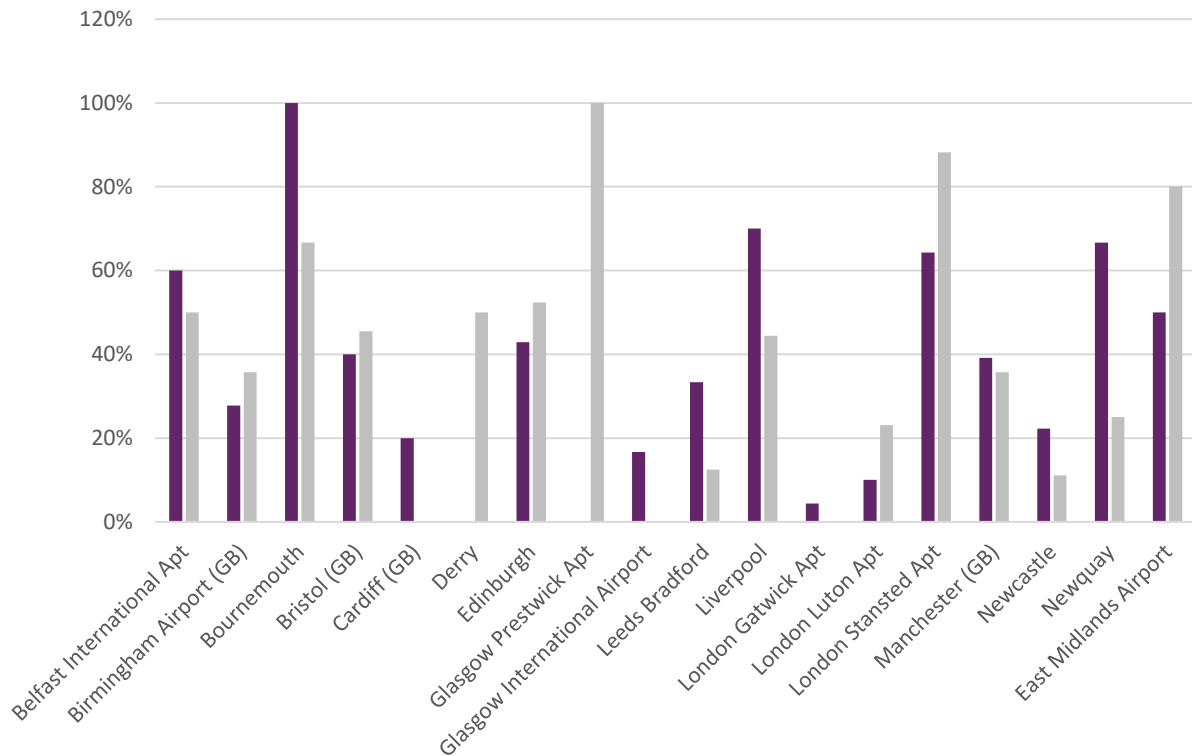
4.5 The chart shows that Ryanair provides access to a wide range of Alpha and Beta cities across its UK operations. In other words, it is providing direct access to key economic centres at all of the airports listed. There are 16 Alpha cities in Europe. Ryanair serves between 1 and 9 of these cities from its airports. At its larger bases, it is often serving 9 Alpha cities, more than half of this rank of city in Europe. This connectivity to major economic centres in Europe, is often backed up by significant connectivity to the second ranked Beta cities.

4.6 Figure 4.3 examines the extent to which Ryanair is contributing to the overall connectivity at its airports to these economically important cities. It shows the percentage of these destinations served at an airport that are served by Ryanair. It demonstrates that often Ryanair is the majority provider of

<sup>1</sup> The World According to GaWC in 2020 – Globalisation and World Cities Network (2020).

connectivity economically important connectivity at an airport, serving more than 50% of the total Alpha or Beta destinations on offer.

**Figure 4.3: Ryanair’s Role in Connectivity to Major World Cities from UK Airports**



Source: York Aviation analysis of OAG and GaWC.

### Ryanair’s Contribution to Productivity in the Wider Economy

- 4.7 In Table 4.1, we set out our estimates of the effects on GVA in the wider economy stemming from business travel on Ryanair services in 2023. This analysis is based on the flows of passengers described above and research undertaken by Oxford Economics<sup>2</sup> that identified a statistical link between a combined measure of business air travel and air freight in the UK and the level of productivity in the economy. This research identified that, if the combined measure of business passengers and air freight were to increase by 10%, then UK productivity would increase by 0.5%. Similar research undertaken PwC for the Airports Commission identified that a 10% increase in overall UK seat capacity would increase UK GDP by around 1%<sup>3</sup>. We have used the Oxford Economics research here as it is specific to business travel and more conservative.
- 4.8 The analysis identifies a substantial impact on the UK economy from Ryanair’s role in providing business connectivity. In 2023, we estimate the impact on productivity in the wider economy to result in a £7.2 billion boost to UK GVA. The largest effects are seen the South East (which includes London) and the East of England, but there are again substantial impacts in the North West, Scotland and the Midlands. The smallest impact is in Northern Ireland, but this is still around £65 million in 2023.

<sup>2</sup> Oxford Economics (2013). Impacts on the UK Economy through the Provision of International Connectivity.

<sup>3</sup> PwC for Airports Commission (2013). Econometric Analysis to Develop Evidence on the Links Between Aviation and the Economy.

**Table 4.1: Productivity Impacts from Business Travel on Ryanair Services**

<b>Region</b>	<b>GVA (£m)</b>
North East	£106
North West	£681
Yorkshire and The Humber	£268
East Midlands	£464
West Midlands	£393
East of England	£1,623
South East	£2,638
South West	£307
Scotland	£588
Wales	£69
Northern Ireland	£65
<b>Total</b>	<b>£7,202</b>

Source: York Aviation.

## Conclusions

- 4.9 Ryanair facilitates a large volume of business travel from UK airports, around 4.6 million passengers in 2019. These passengers are making use of the connectivity the airline provides to a wide of economically important destinations in Europe. This business travel is estimated to support around £7.2 billion in GVA in 2023.

## 5. Supporting the UK Tourism Industry

### Introduction

- 5.1 This section analyses Ryanair's role in bringing international visitors to the UK. By providing access to a wide range of international source markets, Ryanair helps to bring visitors to the UK and with them additional expenditure in the UK tourism economy.

### Ryanair's Role in Bringing Visitors to the UK

- 5.2 Table 5.1 sets out the estimated number of international visitors brought to the UK on Ryanair services and the expenditure injection into the UK's nations and regions from these visits. These effects have been estimated based CAA Passenger Survey responses and VisitBritain data taken from the International Passenger Survey.

**Table 5.1: International Inbound Trips and Spend by Ryanair Passengers**

Region / Nation	Trips	Spend (£m)
North East	119,900	£80
North West	760,300	£410
Yorkshire and the Humber	358,600	£176
West Midlands	392,600	£185
East Midlands	237,100	£107
East of England	953,400	£451
South East	3,355,900	£2,487
South West	223,900	£124
Scotland	772,400	£656
Wales	69,000	£37
Northern Ireland	53,100	£31
<b>Total</b>	<b>7,296,200</b>	<b>£4,743</b>

Source: York Aviation analysis of CAA Passenger Survey and Visit Britain data.

- 5.3 For 2023, Ryanair will bring around 7.3 million international visitors to the UK. By far the largest destination is the South East of England, which includes London. However, Ryanair's services will support the tourism economy throughout the UK, with notable numbers visiting Scotland, the North and the Midlands. In total, these visits are expected to inject around £4.7 billion into the UK economy. Around half of that expenditure will come into the South East.

### The Impact of Inbound Tourists on the UK Economy

- 5.4 In Table 5.2, we estimate the impact of this expenditure injection on the UK economy in terms of GVA and employment supported. In total, international visits on Ryanair are estimated to support around £3.8 billion in GVA, which equates to around 60,840 jobs.
- 5.5 Again, the majority of this impact is felt in the South East, with a boost to GVA of around £2.0 billion and 31,900 jobs supported. However, the impacts are felt across the UK, particularly in the Scottish tourist economy, which receives £524 million in GVA and 8,420 jobs.

**Table 5.2: GVA and Employment Supported by Inbound Visitors**

Region / Nation	GVA (£m)	Jobs
North East	£64	1,030
North West	£327	5,260
Yorkshire and the Humber	£141	2,260
West Midlands	£147	2,370
East Midlands	£86	1,380
East of England	£360	5,780
South East	£1,984	31,900
South West	£99	1,590
Scotland	£524	8,420
Wales	£29	470
Northern Ireland	£24	390
<b>Total</b>	<b>£3,785</b>	<b>60,840</b>

Source: York Aviation.

## Conclusions

- 5.6 Ryanair is a major contributor to the UK tourism industry, bringing 7.3 million visitors to the UK. The expenditure from these visits is estimated to contribute around £3.8 billion to GVA and support 60,840 jobs spread across the nations and regions of the UK.

## 6. Total Impact and Conclusions

6.1 Table 6.1 summarises the total economic impact of Ryanair in the UK in 2023. This includes estimates of the effects in each of the UK's nations and regions. This analysis has established Ryanair as a significant contributor to the UK economy. In 2023, we estimate it supports around £13.7 billion in GVA and 98,820 jobs.

**Table 6.1: Total Economic Impact of Ryanair in the UK in 2023**

GVA (£m)					
Nation / Region	Direct	Indirect & Induced	Business Productivity	Tourism	Total
North East	£19	£47	£106	£64	£236
North West	£117	£291	£681	£327	£1,417
Yorkshire and The Humber	£21	£90	£268	£141	£520
West Midlands	£32	£155	£393	£147	£727
East Midlands	£106	£162	£464	£86	£818
East of England	£360	£343	£1,623	£360	£2,686
South East	£0	£535	£2,638	£1,984	£5,158
South West	£44	£86	£307	£99	£537
Scotland	£96	£190	£588	£524	£1,398
Wales	£0	£27	£69	£29	£126
Northern Ireland	£12	£26	£65	£24	£128
<b>Total</b>	<b>£808</b>	<b>£1,954</b>	<b>£7,202</b>	<b>£3,785</b>	<b>£13,749</b>
Jobs					
Nation / Region	Direct	Indirect & Induced	Business Productivity	Tourism	Total
North East	140	910	-	1,030	2,080
North West	860	5,150	-	5,260	11,270
Yorkshire and The Humber	160	1,690	-	2,260	4,110
West Midlands	230	2,860	-	2,370	5,460
East Midlands	780	2,980	-	1,380	5,140
East of England	2,850	5,850	-	5,780	14,480
South East	0	6,440	-	31,900	38,340
South West	330	1,560	-	1,590	3,480
Scotland	970	3,170	-	8,420	12,560
Wales	0	510	-	470	980
Northern Ireland	90	470	-	390	950
<b>Total</b>	<b>6,400</b>	<b>31,580</b>	<b>-</b>	<b>60,840</b>	<b>98,820</b>

Source: York Aviation.

6.2 As has been highlighted throughout this report, this contribution to the UK economy is spread widely across the different nations and regions, reflecting both the geography of Ryanair's operations in the UK and also the economic structure of the UK. The largest impact is in the South East of England, with a contribution of around £5.2 billion in GVA and 38,340 jobs. However, even where its activities are smaller, Ryanair contributes significantly, for instance supporting over £125 million in GVA in Wales and Northern Ireland and nearly 1,000 jobs in each.

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