Crisis Management
Aviation Perspectives

Andrew Herdman
Director General
Association of Asia Pacific Airlines

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Aviation: moving the world

- Air travel delivers global mobility
- 3.2 billion passengers
  - 9 million people flying per day
- Carries 35% by value of global trade
  - Goods worth US$ 7 trillion
- Wider social and economic benefits
- Committed to sustainable growth
- Outstanding safety record

Source: ICAO, ATAG
Aspirational Demand for Air Travel

Growth driven by rising incomes, urbanisation, & social development

Trips per capita

GDP per capita US$
Emerging economies drive growing middle class

Global Middle Class**
(Millions of people)

<table>
<thead>
<tr>
<th>Year</th>
<th>Emerging countries</th>
<th>North America</th>
<th>Europe</th>
<th>World Population</th>
<th>% of world population</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013*</td>
<td>2,356</td>
<td>1,413</td>
<td>679</td>
<td>7,200</td>
<td>33%</td>
</tr>
<tr>
<td>2023</td>
<td>3,740</td>
<td>2,782</td>
<td>697</td>
<td>7,900</td>
<td>48%</td>
</tr>
<tr>
<td>2033</td>
<td>5,375</td>
<td>4,450</td>
<td>673</td>
<td>8,500</td>
<td>63%</td>
</tr>
</tbody>
</table>

** Households with daily expenditures between $10 and $100 per person (at PPP)

Source: Kharas and Gertz, Airbus
* EOY 2013

Source: Airbus
GMF 2014 - 2033
Asia Pacific traffic leading global markets

RPK traffic by airline domicile (billions)

<table>
<thead>
<tr>
<th>Region</th>
<th>2013 traffic</th>
<th>2014-2033 traffic</th>
<th>% of 2013 world RPK</th>
<th>20-year growth</th>
<th>% of 2033 world RPK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia-Pacific</td>
<td></td>
<td></td>
<td>30%</td>
<td>5.7%</td>
<td>36%</td>
</tr>
<tr>
<td>Europe</td>
<td></td>
<td></td>
<td>25%</td>
<td>3.6%</td>
<td>20%</td>
</tr>
<tr>
<td>North America</td>
<td></td>
<td></td>
<td>24%</td>
<td>2.9%</td>
<td>17%</td>
</tr>
<tr>
<td>Middle East</td>
<td></td>
<td></td>
<td>8%</td>
<td>7.1%</td>
<td>13%</td>
</tr>
<tr>
<td>Latin America</td>
<td></td>
<td></td>
<td>5%</td>
<td>5.4%</td>
<td>6%</td>
</tr>
<tr>
<td>CIS</td>
<td></td>
<td></td>
<td>4%</td>
<td>5.4%</td>
<td>5%</td>
</tr>
<tr>
<td>Africa</td>
<td></td>
<td></td>
<td>3%</td>
<td>4.7%</td>
<td>3%</td>
</tr>
</tbody>
</table>

20-year world annual traffic growth 4.7%

Source: Airbus GMF 2014 - 2033
“Aviation in itself is not inherently dangerous. But to an even greater degree than the sea, it is terribly unforgiving of any carelessness, incapacity or neglect.”

Captain A.G. Lamplugh
CBE FRAeS MJAE FRGS
British Aviation Insurance Group (1931)
Unprecedented tragedies

• Every loss brings human suffering
• Even though, flying is extraordinarily safe, and getting safer still
• Industry is delivering further improvements in aviation safety performance
• Despite heightened anxieties, public confidence about air travel remains positive
Safety Performance Trends

Flying is extraordinarily safe ... and getting safer still

Source: AAPA
Wider Risk Management Challenges

Crisis management and emergency response planning must be prepared for a wide range of unpredictable events.
Crisis Management Response

Accidents, earthquakes, typhoons, floods, fires, volcanic ash, health pandemics ...
Aviation & Emergency Response

- Aviation is at the heart of global economic development.
- Society relies on aviation every day, and especially in a crisis.
- Managing large-scale disruptions requires close cooperation between regulators, airlines, airports and other stakeholders.
- Importance of the human and social dimension to managing crises that affect the travelling public.
- Crisis communications expectations are rising.
- AAPA is committed to playing a critical role in promoting the highest standards in emergency response preparedness amongst airlines in the region.
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