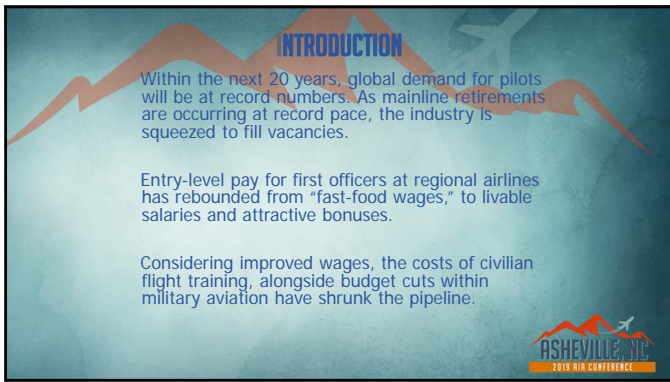
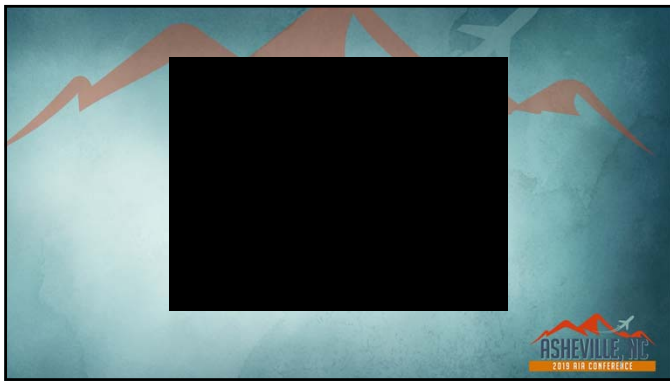




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What is being done to solve the problem across the industry?

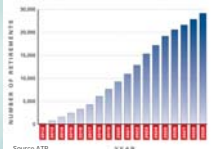
Is aviation safety at risk?




4

WHAT IS CAUSING THE PILOT SHORTAGE?

Accelerating Age 65 mandatory retirements. On average, 3000 airline pilots are retiring each year from the Mainlines.




Source ATP



5

HIGHER BARRIERS TO ENTRY

- Flight Training Costs exceed \$200,000 at many university level and civilian flight schools. Bachelor's Degree. From zero to 1500 hours with ATP.
- 9/11 had a significant impact on the aviation community to include loss of pilot appeal, TSA, grounding of aircraft and a financial recession.
- In 2009, Congress changed mandatory retirement age for airline pilots from 60-65.
- Colgan Airline Crash spearheaded the Congressional & FAA Action (Public Law 111-216) August 1, 2013. Regional Airline First Officer requirements increased (x6) from 250 hours and Commercial Certificate to 1500 hours and ATP. Regional Airline Captains must have logged minimum of 1000 hours as Co-Pilot.



6

WHERE IS THE WORLD PILOT SHORTAGE?

- Within past 20 years, air travel grew by 4.8% each year. Projected 2037, air travel will grow by 5.0% each year
- Boeing has 7,900 aircraft greater than 100 passenger seats on firm order
- Estimates 19,000 pilots are needed each year through 2026. US Flight Schools train approximately 12,000 annually
- Despite two major world recessions, major terrorist acts, war and global pandemics, the industry is responding to find qualified candidates




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20 YEAR PILOT OUTLOOK

Pilot Outlook by Region Map

New Pilot Demand 2019-2037



Source Boeing





8

Training the Next Generation

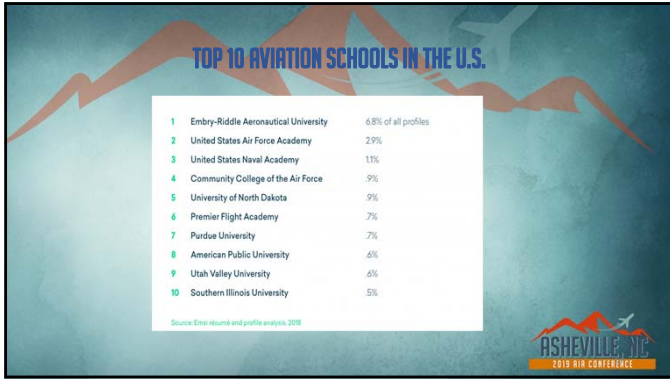
Where are the major training pipelines?

What are student pilots studying in college? The airlines do not require an aviation major but require a 4-year degree.

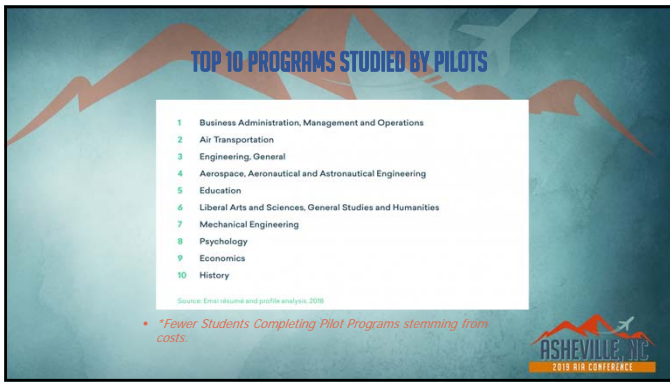
Who is the largest employers of pilots?

9



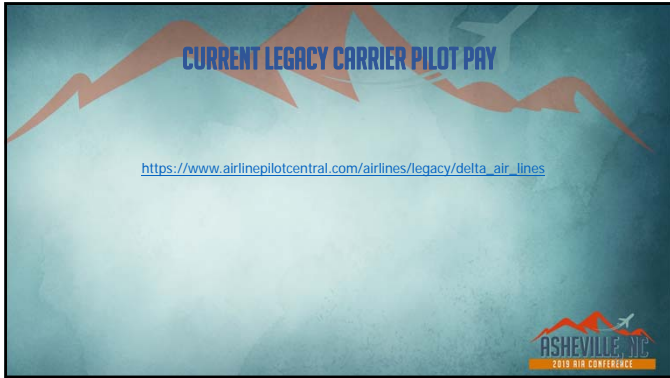
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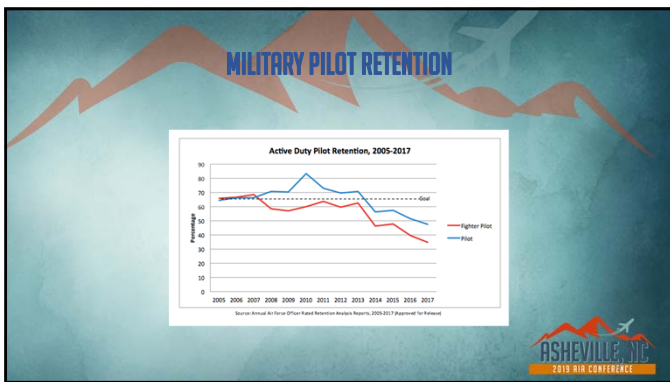
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HOW DOES THE PILOT SHORTAGE IMPACT AVIATION SAFETY?

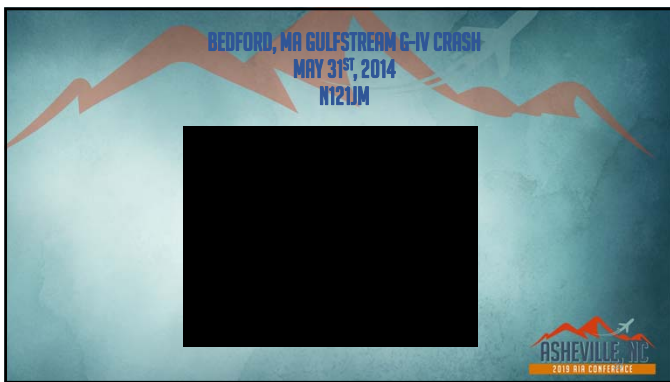
- How is airline hiring effecting business aviation pilot pools (Pt. 91 & 135)? Are hiring requirements being reduced? Higher "wash-out" rates in training?
- How are flight schools adapting with rapid turnover of CFI's?
- How is the aviation insurance industry reacting to these challenges?
- Contract Pilots "Rolling the Dice". Issues facing CRM, Workers Compensation Liability and Benefits. Approving less qualified Pilots?

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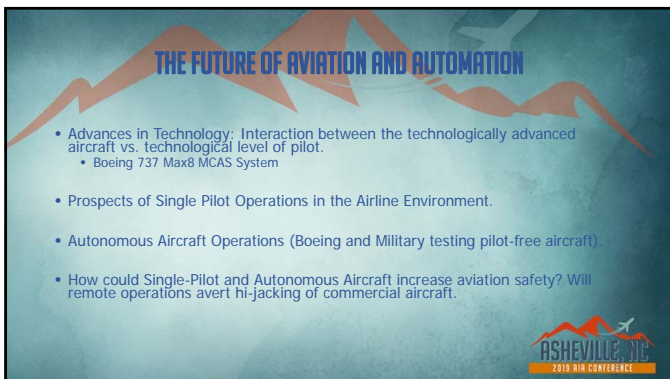
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CLOSING COMMENTS

- **Innovation**
 - Flight Training (pilot experience similar to 1000 hour pilot)
 - Pilot Pool (hiring, salary, benefits, ect)
 - Technology in aircraft
 - Advancements in safety programs (C-FOQA)
 - Mentor programs (college partnership, mentoring, internship)

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