

Factors Affecting Pilot Supply

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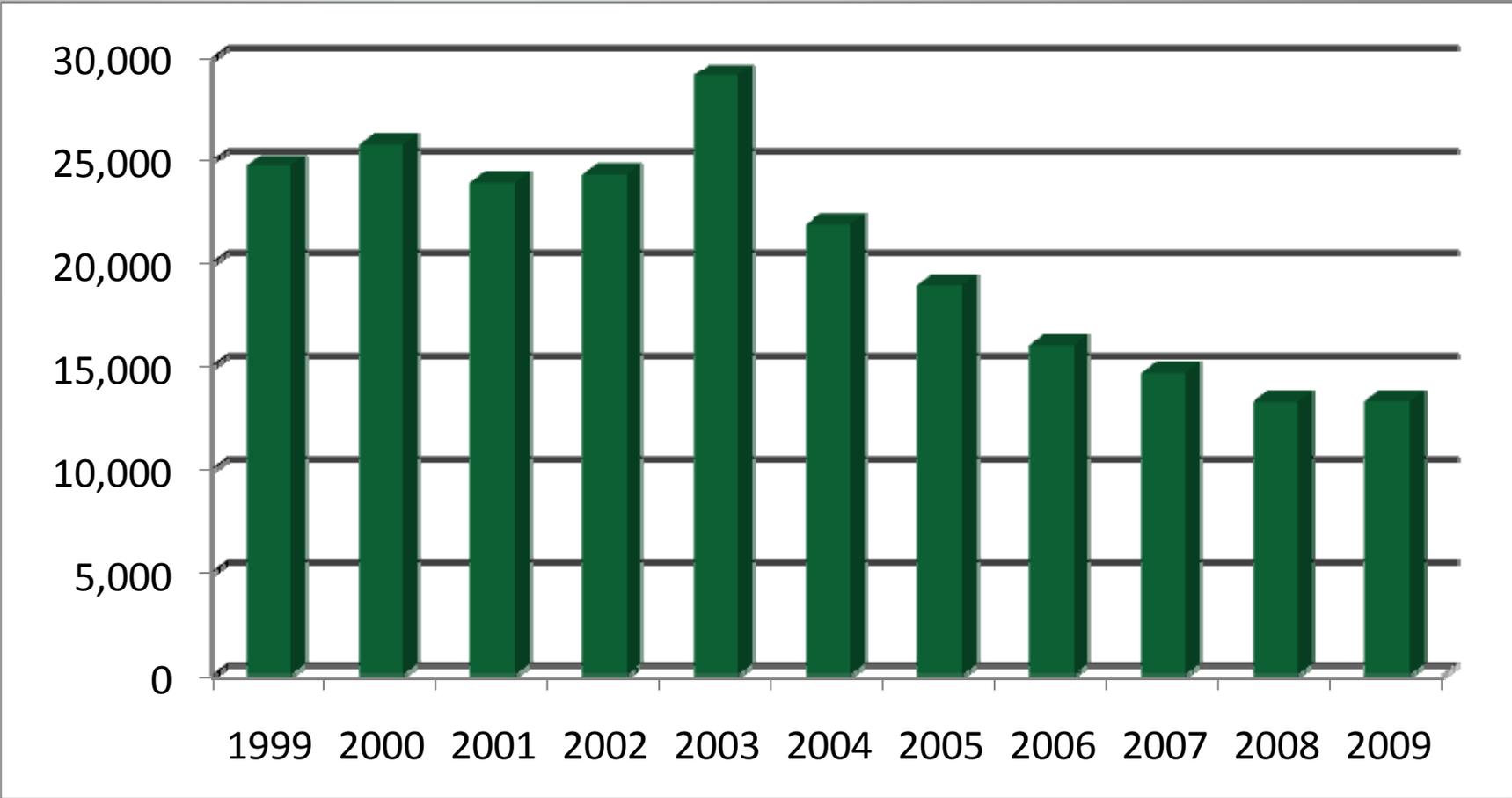


Trends in Student Interest in Aviation Careers

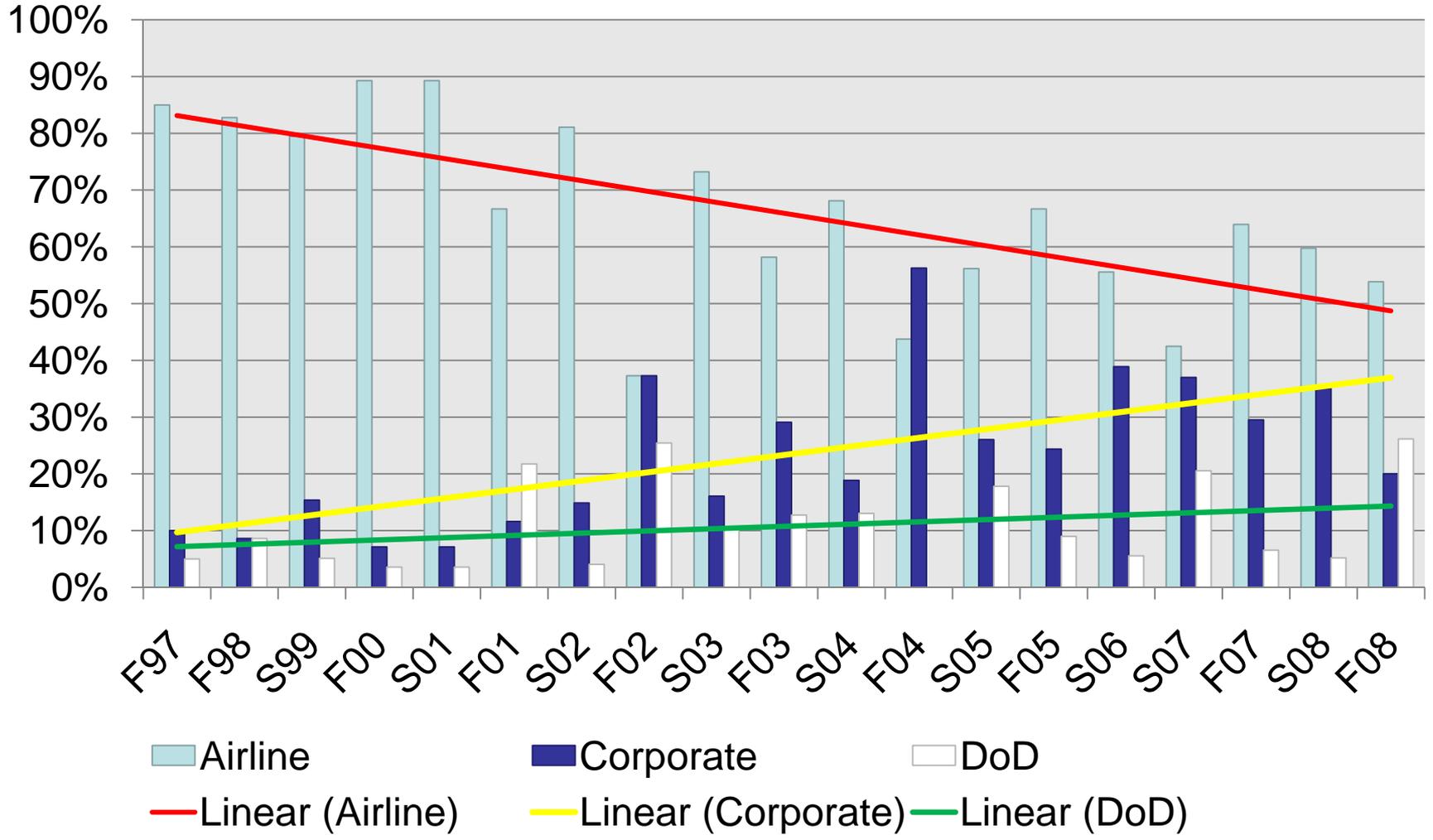
- Fewer students interested in aviation careers
 - Airline distress and media coverage
 - Low pay entry level careers
 - Pilot image at a low point
- More students looking away from airline/piloting careers within aviation
 - Increasing costs
 - Increasing debt
 - Tightening of student loan market
 - Parents less able or willing to help



Aviation Interested High School Juniors NRCCUA



Student Trends in Aviation Careers



Recent Survey of UND CFI's

- N = 173
- 56% said they wanted to be airline pilots initially
- Only 24% are considering an airline career
- 76% indicated considering business or general aviation, law enforcement, military, UAS or non-flight careers

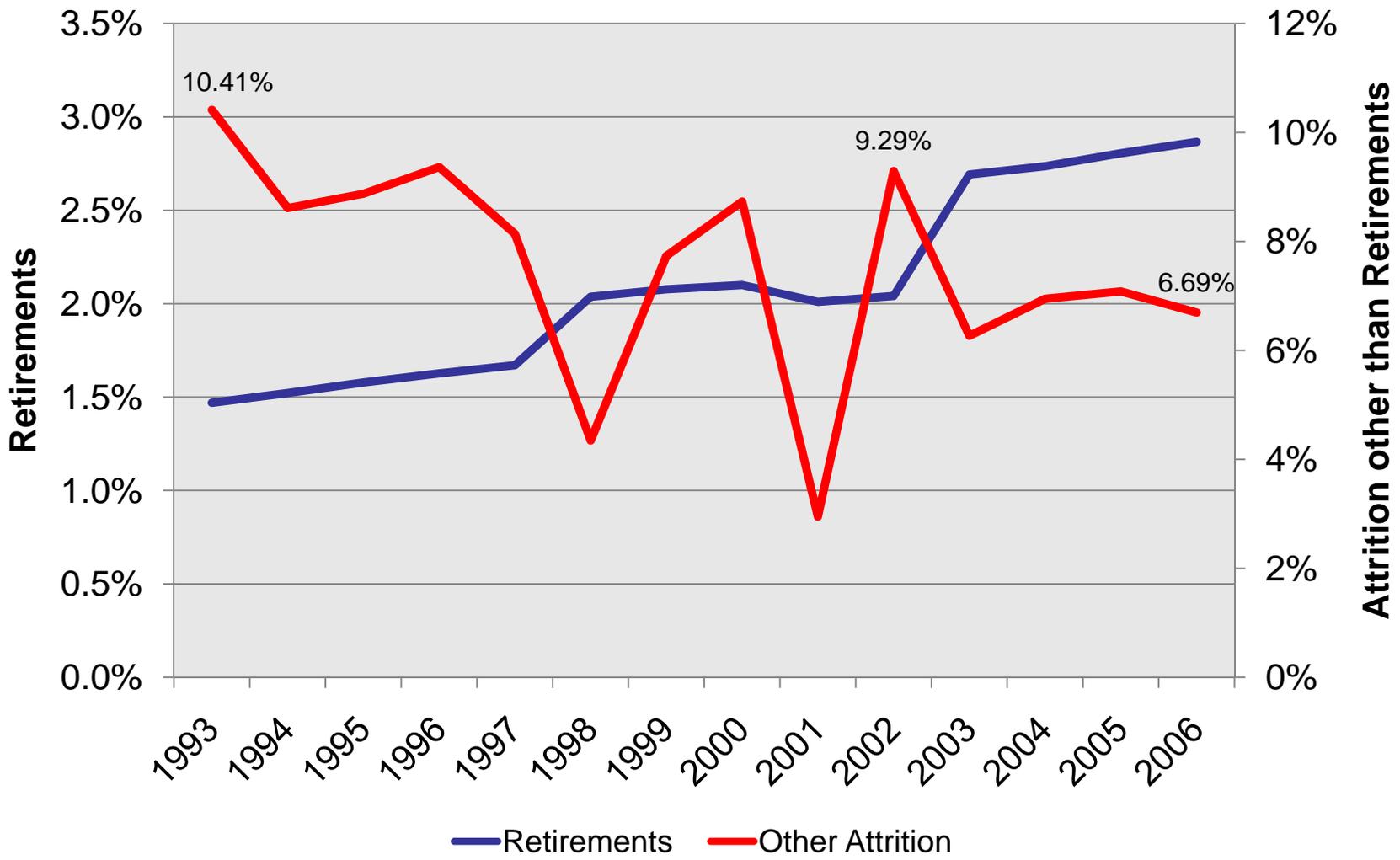


Pilot Supply Forecasts

- Factors affecting current active pilot supply
 - Attrition (8.94% annually)
 - Retirements (2.12% annually)
 - Other Attrition (6.82% annually, lowest rate 2.94%)
 - Loss of medical
 - Loss of certificate
 - Career transfer



Annual Pilot Attrition – Historical



Long Term Pilot Demand Forecast

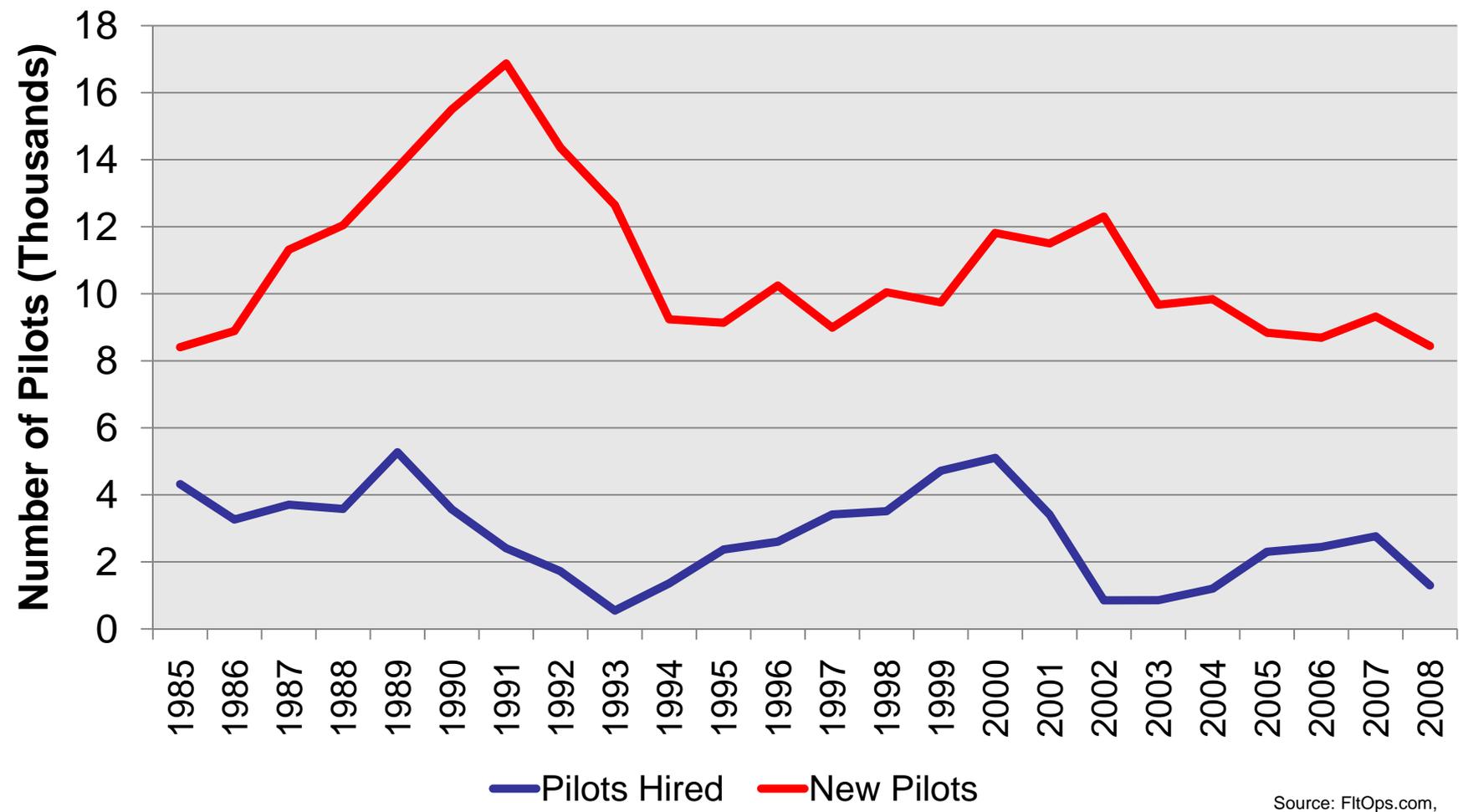
Reason	New Pilots Required 2010-2025
Retirement	107,485
Aircraft Additions*	54,358
Other Attritions**	139,197
Total	301,040

* 2009 FAA Forecast

**Using the historic low rate of 2.94%



Historical Pilots Hired at Major Airlines vs. New Commercial Pilots Created



Source: FltOps.com,



- The Forecast Surplus/Shortfall
 - Supply derived from model
 - Predictors:
 - Risk (Cost of Flight Training)
 - Reward (Number of Pilots Hired at a Major Airline)
 - Demand derived from 2009 FAA forecast aircraft, retirements and other attrition
 - Forecast in a nutshell:
 - Between 2010 and 2025, there will be a potential pilot shortfall of 85,777



Mitigation Strategies

- Securing Supply – attracting the best and the brightest
 - Industry must realize young people’s interest in flying careers is declining
 - Industry needs communicate that there future opportunities in aviation flight careers
 - Active industry involvement in student recruitment
 - Airline sponsored career path (JetBlue/CapeAir)
 - Industry sponsored scholarships/student debt retirement
 - Sponsored Ab Initio flight training



Thank you!

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