# Pilot Survey Report

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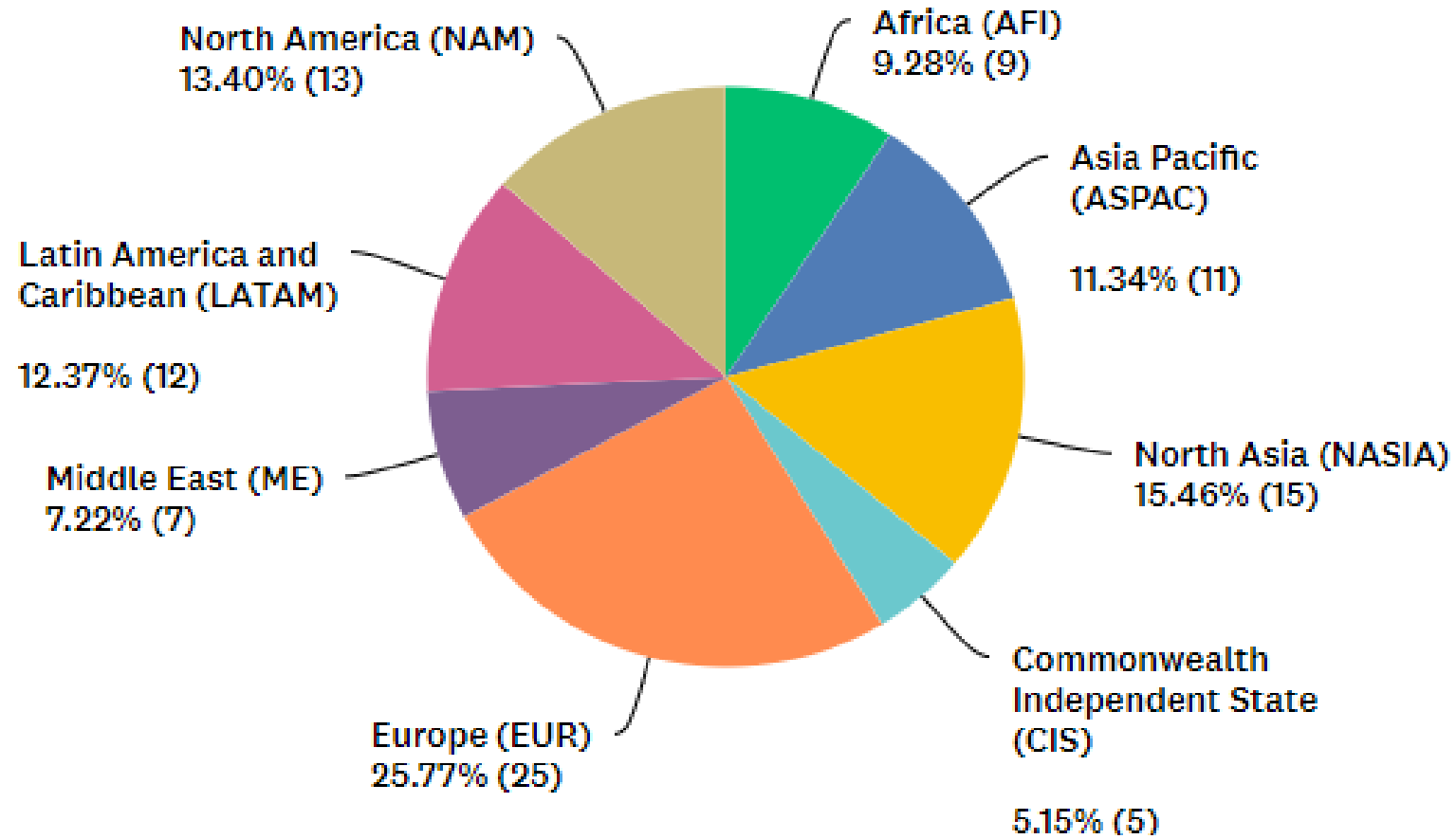
# Survey Content

➢ Background (9 questions)

➢ Attraction and retention (3 questions)

➢ Selection / Pilot Aptitude Testing (7 questions)

➢ Licensing Training (8 questions)

➢ Regulatory (10 questions)

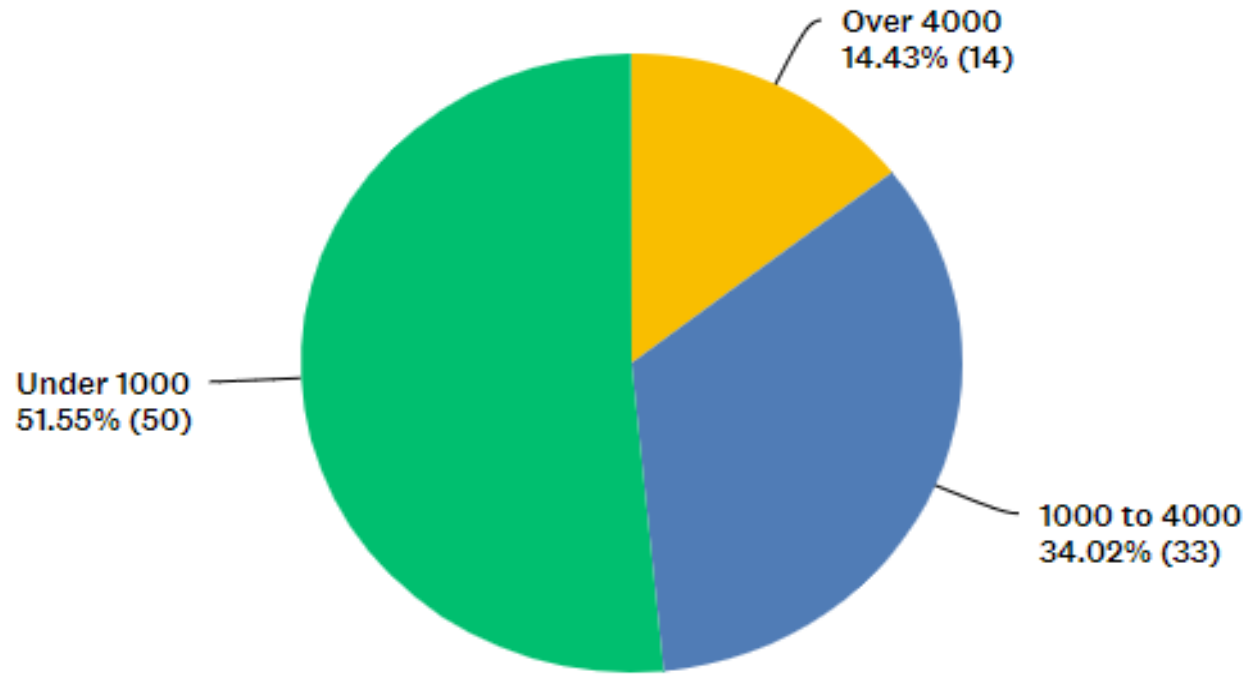➢ What IATA can do? (1 open question)

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# Report presentation

➢ General overview

➢ World shortage top 10 issues

➢ Request from members

➢ Regional issues

➢ Conclusion

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# Respondents



Africa (AFI)
9.28% (9)

Asia Pacific
(ASPAC)

11.34% (11)

North Asia (NASIA)
15.46% (15)

Commonwealth
Independent State
(CIS)

5.15% (5)

Europe (EUR)
25.77% (25)

Middle East (ME)
7.22% (7)

Latin America and
Caribbean (LATAM)

12.37% (12)

North America (NAM)
13.40% (13)

# Airlines



Over 4000
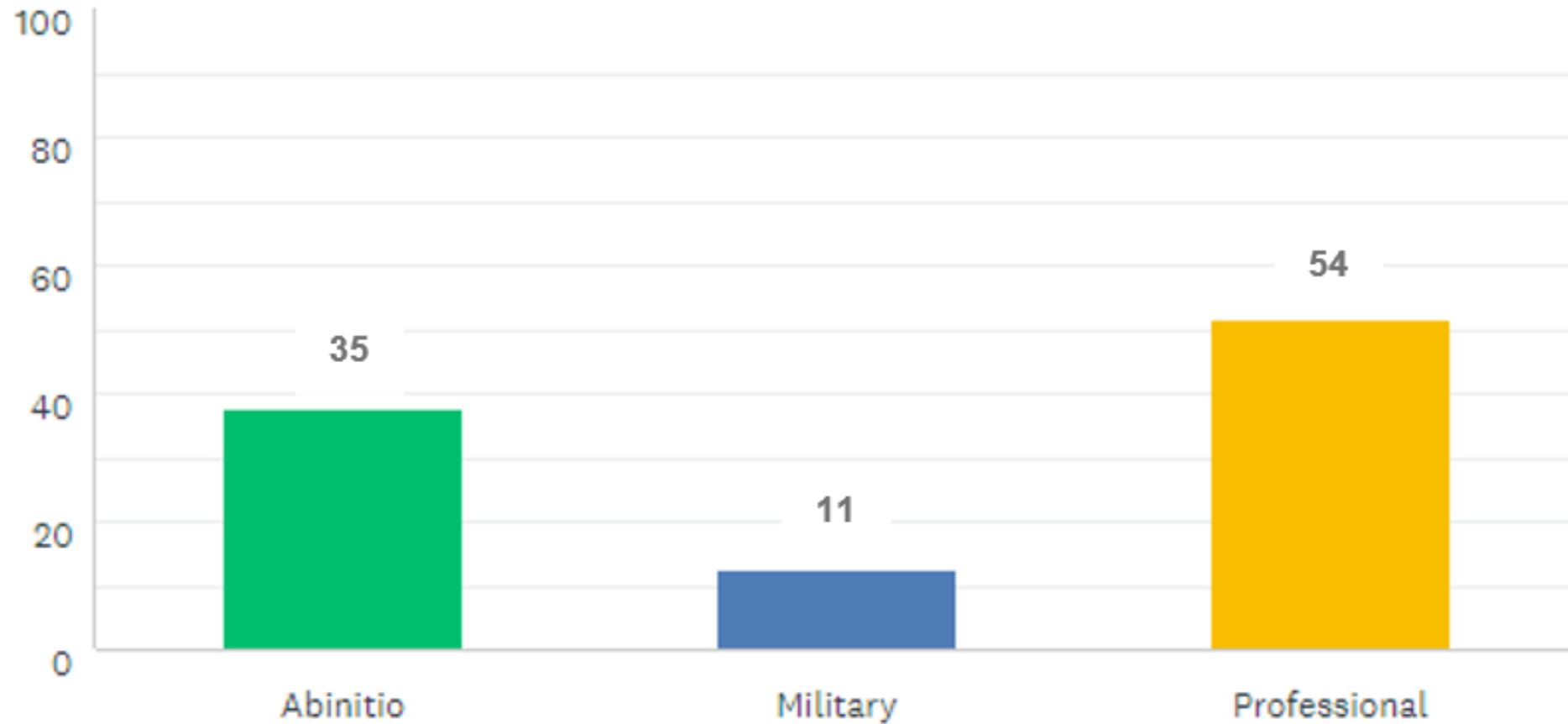14.43% (14)

Under 1000
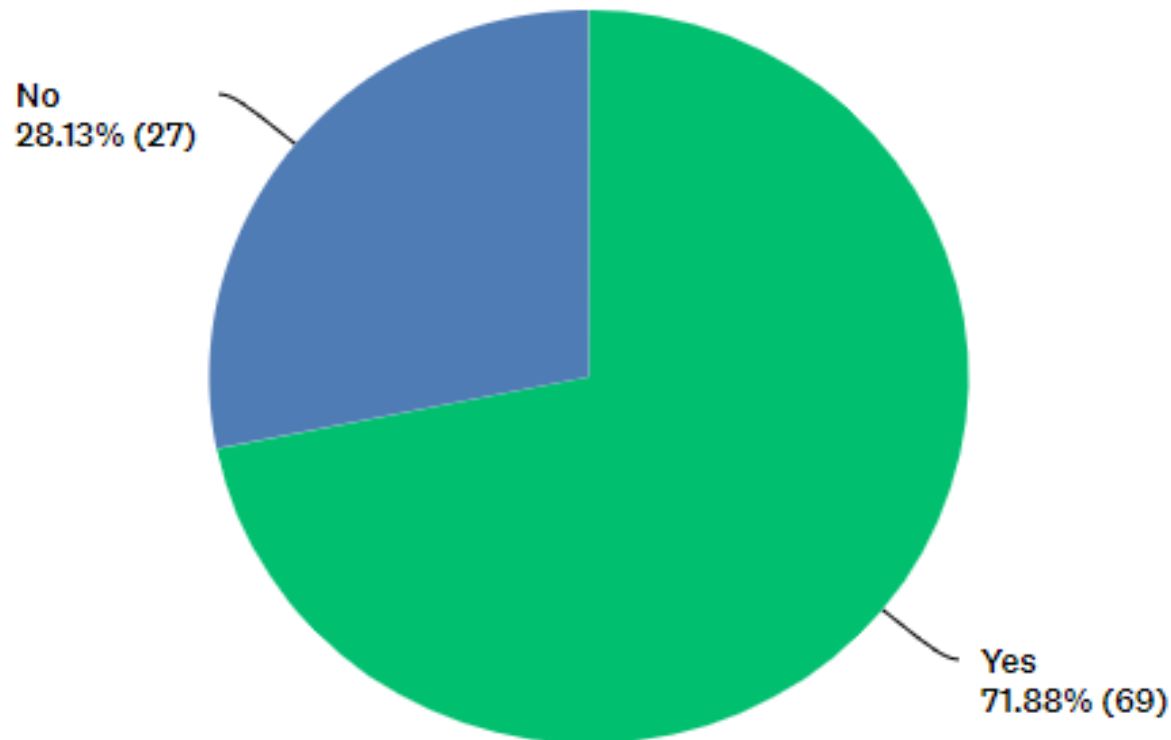51.55% (50)

1000 to 4000
34.02% (33)

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# Airline population break down (global average)

# Airline population break down per region

| Regions \ Pilot Profile | Ab initio | Military | Professional |
|---|---|---|---|
| AFI | 20 % | 12 % | 68 % |
| ASPAC | 60 % | 11 % | 29 % |
| CIS | 26 % | 9 % | 65 % |
| EUR | 36.5 % | 10 % | 53.5 % |
| LATAM | 25 % | 6 % | 69 % |
| ME | 26 % | 3 % | 71 % |
| NAM | 11 % | 29 % | 60 % |
| NASIA | 73 % | 9 % | 18 % |

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# Pilot shortage forecast



No
28.13% (27)

Yes
71.88% (69)

**71.88%** of the operators answered that they forecast a pilot shortage.

**But 78%** have formulated a strategy:

➤ Recruitment campaigns (61%)

➤Awareness campaigns at universities (35%)

➤Financial incentives and support (33%)

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# Attraction and retention

### 1. Difficulty in Attracting Professional Pilots

Operators declare having the greatest level of difficulty attracting professional pilots (3.22/5 difficulty), compared to attracting Ab initio pilots (2.33/5 difficulty) and military pilots (2.68/5 difficulty).

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| Ease of attracting professional pilots (1=very easy, 5=very difficult) | 3.88 | 3.40 | 3.80 | 3.24 | 2.91 | 2.86 | 1.77 | 4.21 | 3.22 |

### 2. Lack of Candidates

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| Operators experience a lack of professional pilots candidates. | 44% | 27% | 60% | 40% | 33% | 29% | 0% | 53% | 35% |

# Attraction and retention

➢ High cost of training (mainly Ab initio)

➢ Undesirable lifestyle

➢ Tied to previous contract (professional)

➢ Overestimated training difficulties (military)

➢ Lack or loss of interest for the profession (Ab initio)

➢ Potential change of location to find a job (professional)

➢ Lack of knowledge on the profession (Ab initio)

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# Licensing Training

Approved Training Organization (ATO) / Flight Training Organization (FTO) **Capacity Limitations**

**42.27%** of the respondents declare experiencing licensing training capacity limitations at the ATO/FTO level

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| Training capacity limitations at the ATO/FTO level | 33% | 64% | 0% | 68% | 8% | 57% | 23% | 40% | 42% |

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# Licensing Training – Training capacity limitations

The 2 top limitations are: availability of qualified instructors (75%) and training tools (65%).
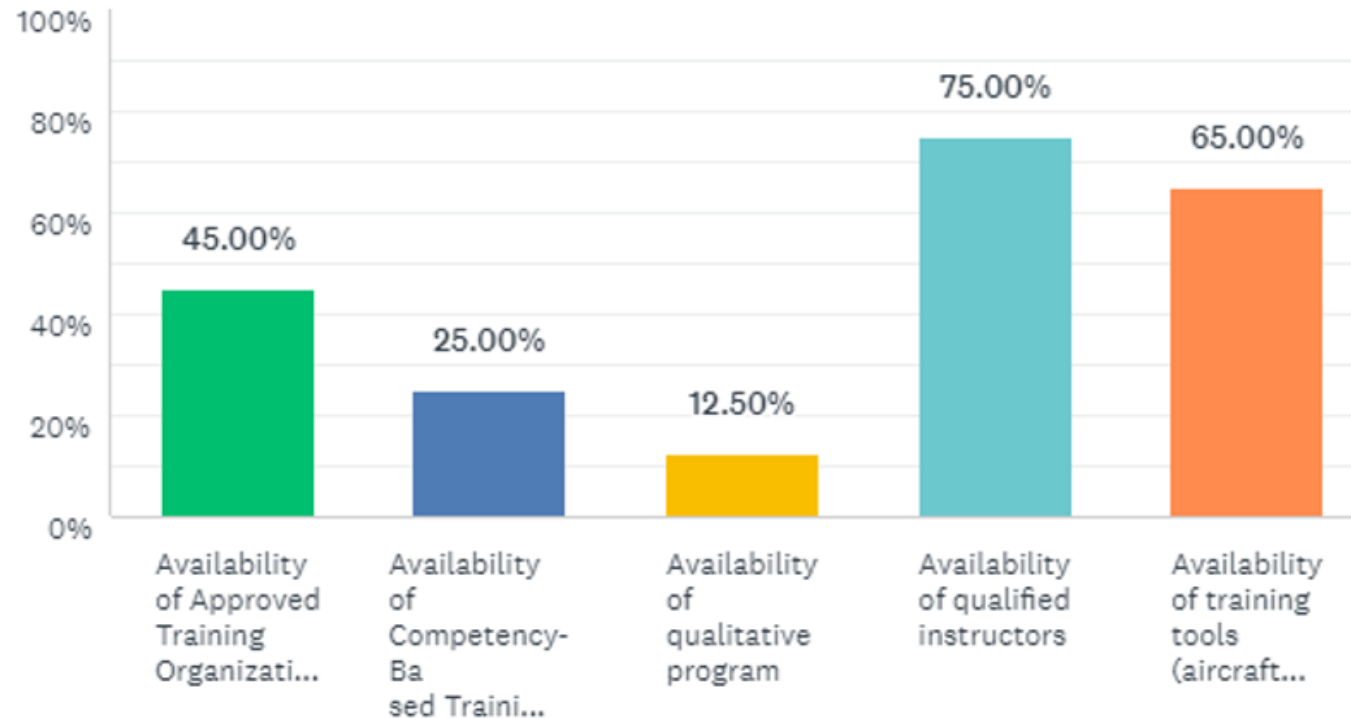
# Licensing Training

**Only 41.24%** of the operators are engaged in providing or sponsoring Ab initio programs.

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| Provide or sponsor Ab initio programs | 44% | 36% | 20% | 44% | 25% | 71% | 15% | 67% | 41% |

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# Licensing Training

**39.18%** of the respondents consider that there is a gap between the licensing requirements and their airline's performance standards.

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| Operators declared that there is a gap between licensing requirements and airline performance standards | 22% | 45% | 40% | 48% | 42% | 29% | 15% | 53% | 39% |

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# Licensing Training

**Only 61%** of operators declared that their State recognizes MPL

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| States recognize MPL | 56% | 73% | 20% | 76% | 33% | 86% | 17% | 93% | 61% |

# Regulatory

**30%** of the respondent consider that their National regulation contain unnecessary requirements contributing to pilot shortage

| ISSUE | AFI | ASPAC | CIS | EUR | LATAM | ME | NAM | NASIA | Average Grand Total |
|---|---|---|---|---|---|---|---|---|---|
| Operators stated that their National Regulations contain requirements that contribute to pilot shortage. | 11% | 55% | 20% | 20% | 42% | 29% | 46% | 20% | 30% |

# Member requests 1/2

➢ Advocate governments to invest in Science, Technology, Engineering and Mathematics (STEM) for high school students

➢ Advocate governments to sponsor pilot initial training, schools

➢ Support with outreach programs

➢ Increase awareness and advertise aviation career opportunities

➢ Find solution for the initial training funding

➢ Promote strategies to attract younger generations

➢ Providing a guidance on selection and pilot training

➢ Mandating Ab initio screening

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# Member requests 2/2

➢ Increase the quality of the initial training

➢ Promote airline sponsorship of ATOs/FTOs

➢ Support enhancement of ATOs/FTOs and Airlines partnership

➢ Reduce the flight hour's requirements at a regulatory level

➢ Promote Competency Based training program (MPL included)

➢ Support extension of retirement age

➢ Support licensing regulatory harmonization to enable seamless cross boarder movement of pilots

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# Regional issues

1. Overview

2. Regional Pilot Shortage Magnitude

3. Region-specific top issues

4. Existing strategies

5. Possible alternative strategies

6. Recommendations from operators

7. Summary

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# Conclusion



Attract → Select → Initial Training ↔ Operations