IATA

APATS 2018 - Singapore

Blair Cowles
Regional Director – Safety and Flight Operations
Asia Pacific
Today

- Blair Cowles – Regional Director, Safety & Flight Operations Asia Pacific
- What is IATA
- Economic overview
- IATA initiatives in the training domain
IATA in Brief
IATA Overview

- Global trade association for the world’s airlines
- 287 passenger and cargo carriers in 120 countries
- 84% of global air traffic
- 54 offices in 53 countries with 1,500 employees
- Founded in Havana, Cuba in April 1945
- Head Office: Montreal, Canada
  Executive Office: Geneva, Switzerland
IATA Overview

 aç Mission: To represent, lead and serve the airline industry
 aç Leadership:
 aç Chair of IATA Board of Governors – QR CEO Akbar Al Baker
 aç IATA Director General and CEO – Alexandre de Juniac
## IATA Overview

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IATA Overview

Regions
- North Asia (Beijing)
- ASPAC (Singapore)
- AME (Amman)
- Europe (Madrid)
- Americas (Miami)

Organizational Divisions
- Member & External Relations (MER)
- Financial & Distribution Services (FDS)
- Airport, Passenger, Cargo & Security (APCS)
- Safety & Flight Operations (SFO)
- Marketing & Commercial Services (MACS)
IATA Asia Pacific

42 member airlines
13 country offices
26 countries
8 time zones
IATA Asia Pacific
Economic Overview
Every day in 2017...

11.2 MILLION PASSENGERS

114,500 FLIGHTS

$16.6 BILLION WORTH OF GOODS CARRIED
Industry profitability still high and now stabilizing

Worldwide average airline operating margin

Data adjusted to remove seasonal influences

Unadjusted data
But the industry now faces late-cycle cost pressures
Regional profitability remains very uneven.
Driven largely by N.America (again) plus Europe & Asia
Regional (net) profitability – Asia Pacific
Per passenger (net) profit shows wide regional variation
Record # of city-pairs = more choice + economic benefit
Increasing accessibility of air travel

Passenger numbers and months before next trip for world population

- **Airline passengers**
- Number of months before average member of world population takes a flight
Average price of air travel (real terms)
Boosting trade and tourism

Value of trade carried by air and the spending of tourists

Value of traded goods carried by air

Spending by tourists carried by air
2.9 million airline jobs in 2018
Demand for air travel to double over the next 20 years

Global passengers (billion, O-D basis)

- Constant policies scenario
- A Pick-up in Protectionism
- Policy stimulus and market liberalization

2017 2019 2021 2023 2025 2027 2029 2031 2033 2035 2037

3.5bn 6.9bn
The value of aviation in Asia-Pacific

Asia Pacific: aviation’s economic impact set to double by 2035
20-year passenger growth outlook (2017-37)
Top 10 air passenger markets 2017-37

- US
- China
- UK
- Spain
- Japan
- Germany
- India
- Italy
- France
- Indonesia

- China
- US
- India
- Indonesia
- UK
- Spain
- Japan
- Germany
- Thailand
- France
Rise of Asian domestic markets

Top domestic passenger markets, ranked by passenger numbers

- **US**: 1
- **China**: 2
- **Japan**: 3
- **Indonesia**: 4
- **Brazil**: 5
- **India**: 6
- **Australia**: 7
- **Russia**: 8
- **Turkey**: 9
- **Canada**: 10

Countries: China, US, India, Indonesia, Brazil, Japan, Australia, Turkey, Philippines, Mexico
Changes in market share over time

Share of global passenger revenue...

...and freight tonne kilometres*

*Region of registration basis
IATA in the Training Domain
IATA Governance Structure
2007-2013 ITQI Total System Approach

- From the selection criteria to training process:
  - Selection Criteria (Pilot Aptitude Testing)
  - Multi-Crew Pilot License (MPL)
  - Evidence-Based Training (EBT)
  - Instructor Qualification (IQ)
  - Flight Simulation Training Devices (FSTD)
- Engineering & Maintenance (competency-based training and qualification requirements)
PTTF 2014-2017

- UPRT Guidance material
- Flight Crew Monitoring Guidance material
- TEM/CRM/Competencies model
- Instructor Evaluator Competency-Based Guidance Material

http://www.iata.org/whatwedo/ops-infra/training-licensing/Pages/index.aspx
Pilot Shortage Forecast

2017-2027 airline pilot demand forecast

- 290K Active Pilots (2017)
- 105K Replacements
- 150K Additional Pilots for Growth
- 440K Active Pilots (2027)

10-year demand for airline captains

- 180K New captains

Source: CAE forecast

APATS - August 2018
Source: CAE forecast

- **AMERICAS**: +85K New pilots
- **EUROPE**: +50K New pilots
- **MIDDLE EAST & AFRICA**: +30K New pilots
- **ASIA-PACIFIC**: +90K New pilots

**255k** New pilots required for growth and replacement

**50%** Of pilots flying by 2027 have not started to train yet

**70** New pilots/day

**180k** New captains

Source: APATS - August 2018
IATA Action Plan
Phase 1: collect information

- Training Capacity Data
- Regulatory Requirements
- Career Path
- Pilot Aptitude Testing
- Approved Training Organization and Operator Partnership
IATA Action Plan
Phase 2: to mitigate

- Advocate
- Attract
- Harmonized Pilot Aptitude Testing
- CBTA implementation
- Improve ATO/Operator Partnership
From this situation

Licensing Training  Selection  Operations (& Operator Training)
To this situation
Training and Licensing Dept. 2018 priorities

- Pilot Aptitude Testing (REV 3)
- Command Course
- Competency-Based Training and Assessment (CBTA) implementation guidance
- Evidence-Based Training Data Report update
- UPRT (REV 2)
Other initiatives

- Support EBT implementation
- Prepare CBTA implementation
- Link ATO-AOC (ATO Training Performance Audit)
- New training media / methods credits
Thank You

To represent, lead and serve the airline industry