

Trends in Aviation Flight Training



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- **Jeppesen Corporate Overview**
- **Boeing Pilot & Technician Outlook**
- **Trends in Aviation Training**
- **Emerging Training Models**

Corporate Overview

Aviation – Integrated Solutions

- **Navigation**
- **Flight Operations**
- **Crew and Fleet Planning**
- **Professional Services**
- **Training and Courseware**
- **Pilot Supplies**



An International Company

~3,100 Employees ● 31 Locations ● 17 Countries ● ~45% of staff outside US



Pilot & Technician Outlook

What's trending in commercial aviation?



- **Strong, resilient, growing market expected to continue**



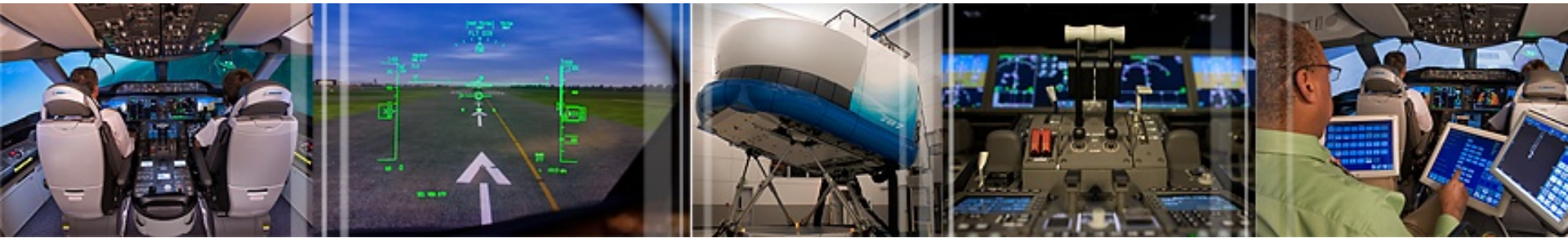
- **Passengers flying where they want when they want**



- **Single-aisle is fastest growing, most dynamic segment**

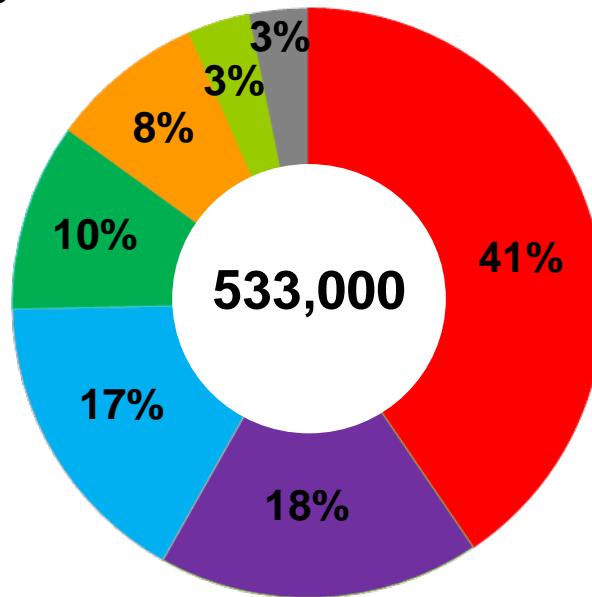
Demand for commercial airline pilots

2014 Pilot & Technician Outlook



New pilots by region

2014–2033



Region

- Asia Pacific
- Europe
- North America
- Middle East
- Latin America
- CIS
- Africa

Total

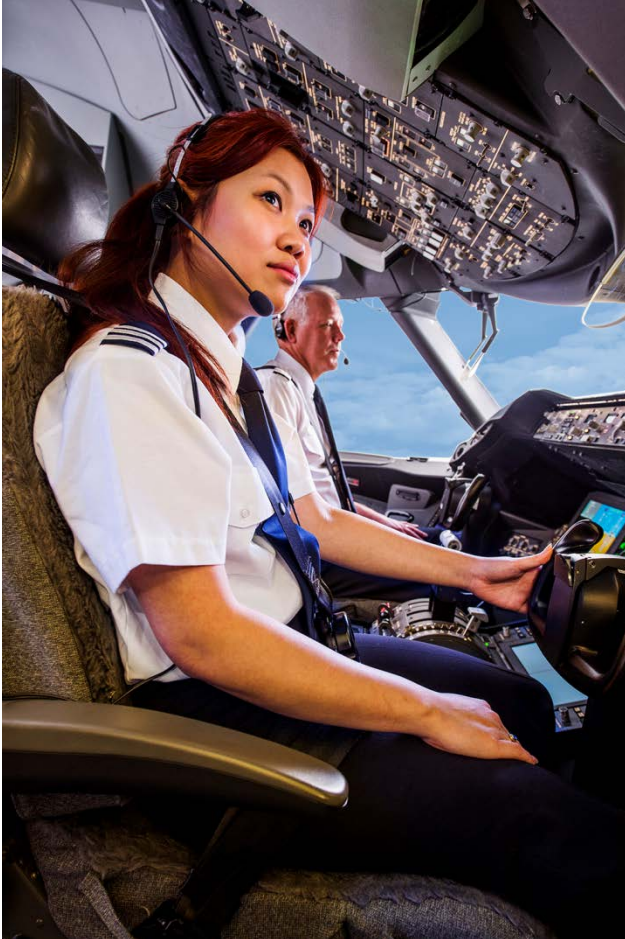
Pilots

- 216,000
- 94,000
- 88,000
- 55,000
- 45,000
- 18,000
- 17,000

533,000

What's happening with pilots?

The industry needs a foundation for developing qualified pilots



"World needs pilots! Record growth leads to record need" (CNN, February 2014)

"A shortage of qualified pilots has hit U.S. airlines sooner and more severely than expected, leading the airlines to accelerate hiring." (The Wall Street Journal, February 2014)

"Republic Airlines grounds 27 aircraft due to the pilot shortage (ATP, February 2014)

"Japan budget carrier cancels flights due to pilot shortage." (Agence France Presse, May 2014)

"2014 Outlook for Aviation Careers Brightens With Looming Pilot and Mechanic Shortages...young people with a dream to fly or fix airplanes can look to a brighter future in an exciting and challenging field" (Forbes, Jan 2014)

Trends In Aviation Training

Evolution of Jeppesen Training Products

A leader for over 50 years



- Traditional Courseware & Films
- Computer Based Training
- Online Training & eBooks
- Virtual Classrooms



Evolving Training Approaches

New approaches with the latest technology

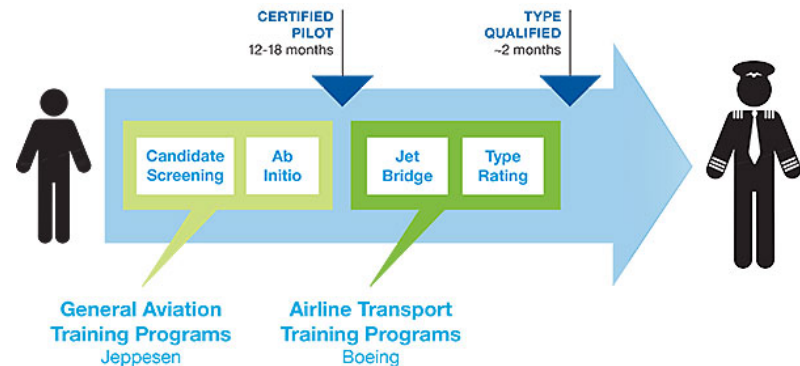
- **Competency Based**



- **Blended Learning**



- **Ab Initio Training**



A Competency Based Approach

Effective, Repeatable, and Current Content

Competency Based Training

- Job tasks by role
- Skills, Knowledge, and Attitudes
- Proficiency objectives
- Regulatory requirements
- User requirements
- Multi-Faceted instruction
 - Presentation
 - Interaction
 - Assessment



Blended Learning

Blending theory and practice

Blended Learning

- Engaging homework = engaging classwork
- Classroom discussions promote critical thinking
- Training focus on competent demonstration
 - Knowledge
 - Skills
 - Attitudes



Blended Learning

Content Appropriate for Training Phase

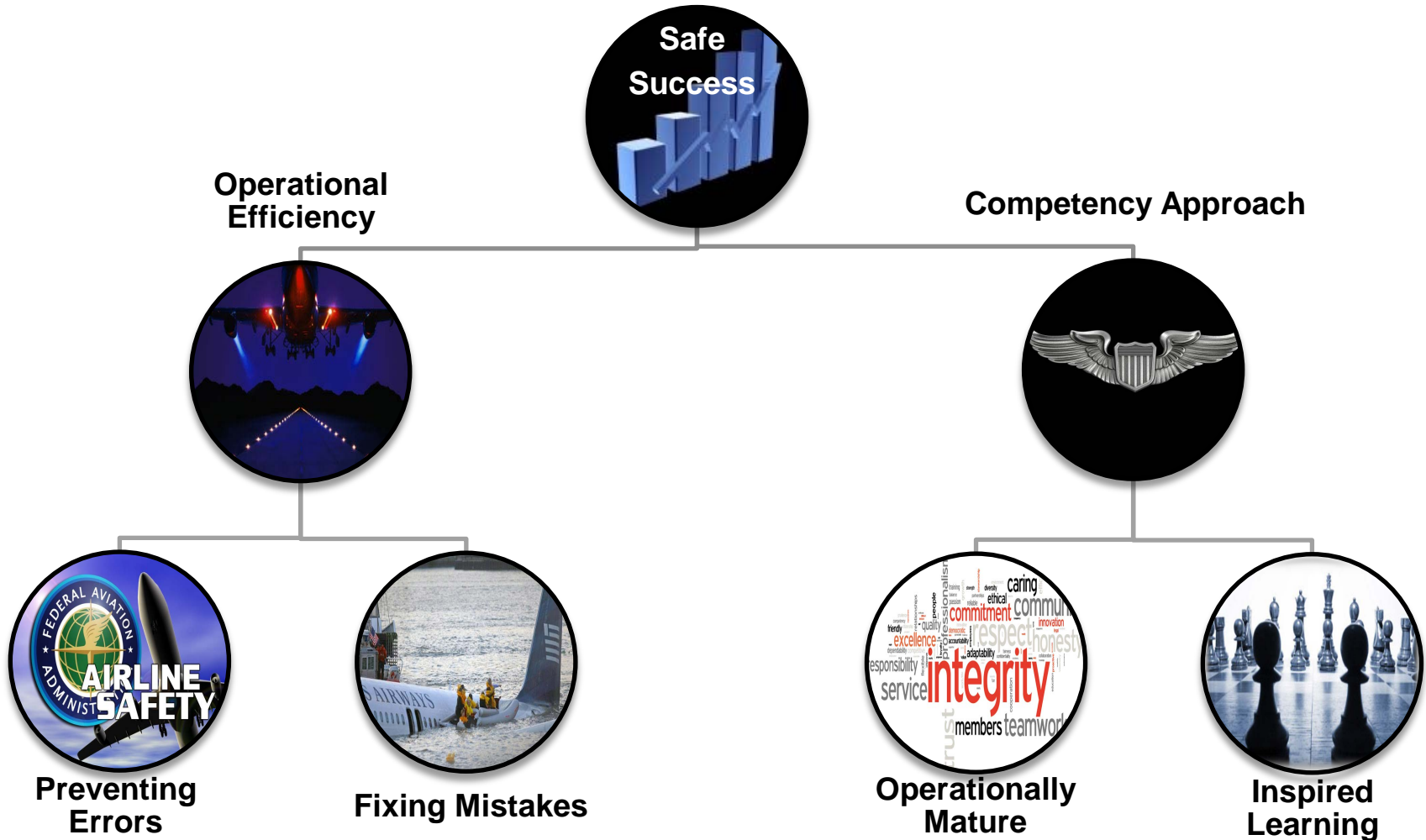
- Aircraft
- Familiarization
- and Systems
- Checklists and
- Procedures
- Manuals and
- Textbooks



Effective Training Models

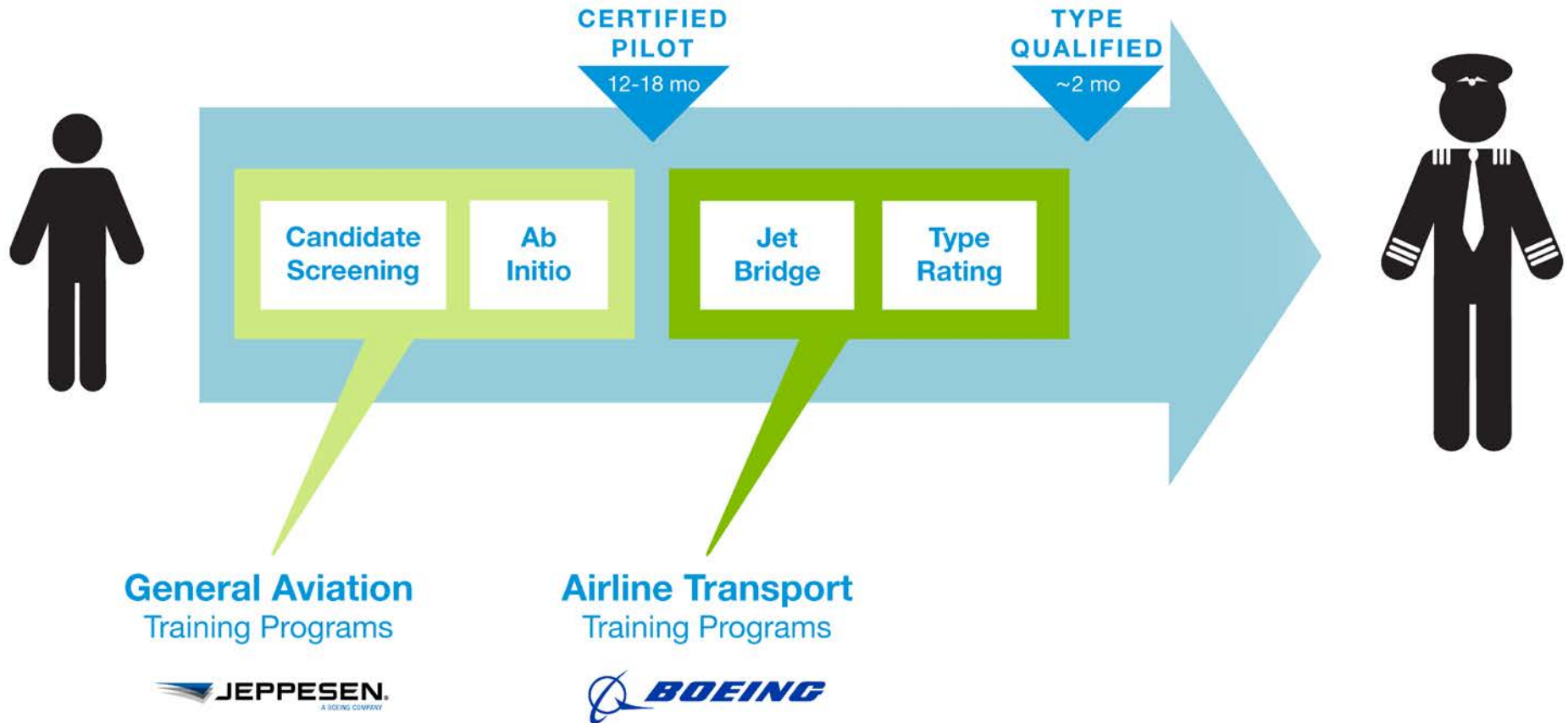
Value Proposition

Safe... Efficient... Competent Pilots



Emerging Training Models

Emerging Training Models



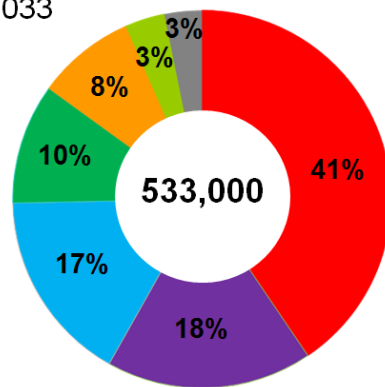
Providing A Solution



Together Jeppesen, Boeing and industry partners will build a future generation of operationally mature professional pilots

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