



The Pilot Shortage & Small Community Air Service Trends

April 5, 2024



The pilot shortage is not over.

US airlines warn of more Boeing delivery delays due to safety crisis

By Abhijith Ganapavaram, Rajesh Kumar Singh and David Shepardson

March 12, 2024 9:26 PM EDT · Updated 22 days ago



Boeing is falling so behind on plane deliveries that United is asking pilots to volunteer for unpaid leave, potentially for months



New quality glitch to delay some Boeing 737 MAX deliveries

By Tim Hether and Valerie Insinna

February 5, 2024 12:16 PM EST · Updated 2 months ago



**We can't believe we have to say this, but...
An abrupt, temporary hiring disruption—driven entirely
by an abrupt, aircraft delivery disruption—
*is not the same thing as fixing the pilot shortage!***

Fortune

Boeing is falling so behind on plane deliveries that United is asking pilots to volunteer for unpaid leave, potentially for ...

United Airlines will receive less than 40% of the planes it ordered from Boeing this year.

23 hours ago



United Halts Pilot Hiring Due to Boeing Delivery Delays

United isn't the only airline to slow pilot hiring in 2024. Delta Air Lines and American Airlines have both said they plan to hire fewer pilots...

4 weeks ago



The Guardian

Boeing may delay more 737 Max deliveries after incorrectly drilled holes found

Boeing may delay more 737 Max deliveries after incorrectly drilled holes found ...

Boeing could have to delay deliveries of more of its...

Feb 5, 2024



AP News

Southwest plans to reduce capacity, reevaluate 2024 financial outlook on delivery delays from Boeing

Shares of Southwest are plunging as the airline said that it plans to reduce capacity and reevaluate its full-year financial outlook because...

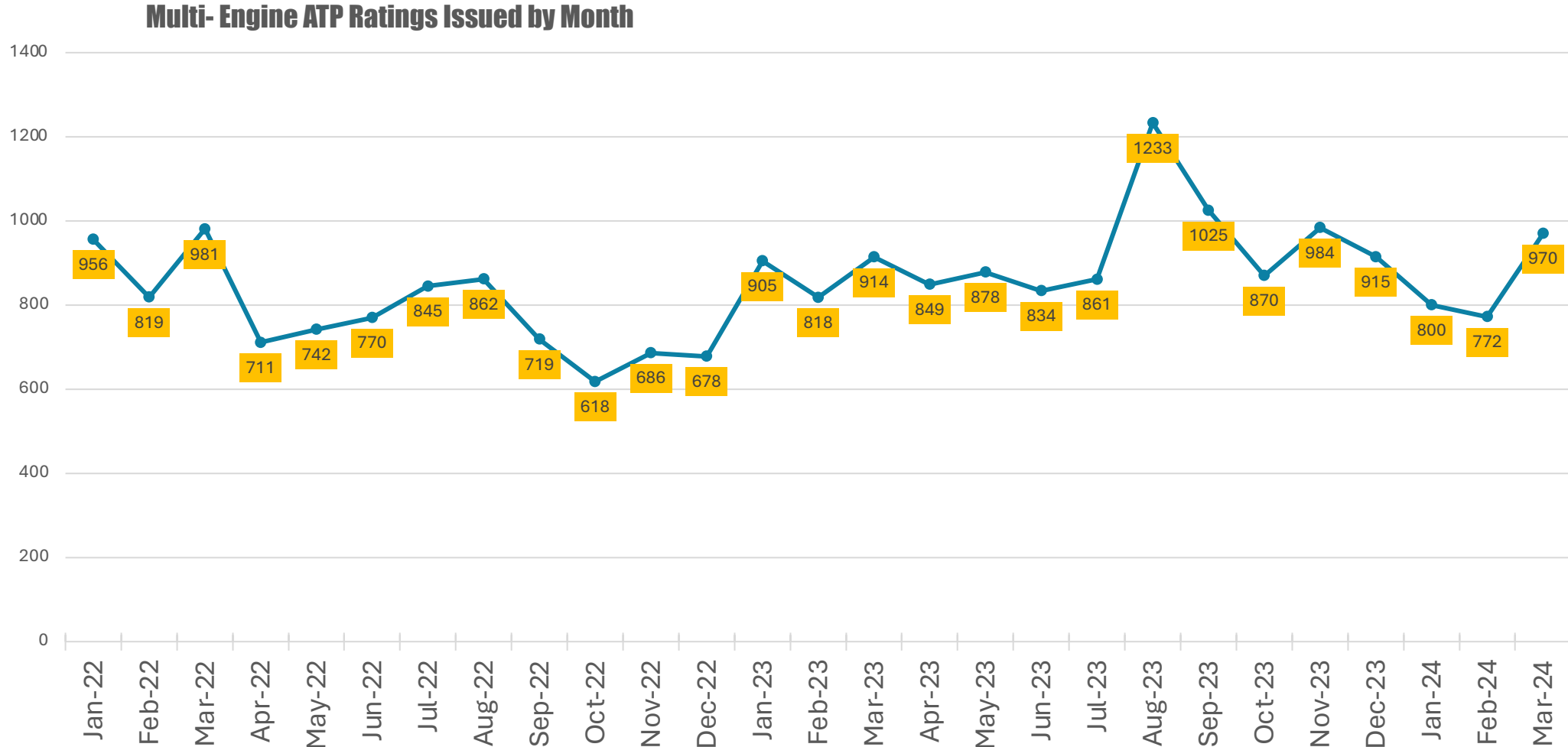


The Pilot Shortage Continues Despite *Temporary* Hiring Disruptions

- Aircraft delivery disruptions have caused major and low-cost airlines to slow or suspend hiring of pilots previously slated to crew aircraft now behind on delivery. This is a *temporary* disruption.
- Despite the hiring slowdown, YTD hiring in 1Q24 outpaced the supply of new pilots.
- Simultaneously, new pilot certifications have moderated from post-pandemic highs, aligning more closely with pre-pandemic norms.
- Retirements are high and growing, with 57% more qualified pilots reaching mandatory retirement age in 2029 compared with 2024. Retirements will stay near this peak for several decades.
- The pilot pool is not just shallow; it lacks diversity. Fewer than 10% of today's pilots are women or people of color.
- The supply/demand balance will rapidly reverse as aircraft deliveries resume; we must address the pilot shortage to be prepared when mainline aircraft deliveries recover amidst even *higher* pilot retirements.
- Using a lull in attrition as an excuse to discontinue recruiting, training, and career access equity/diversity improvements would be shortsighted and harmful. We urge all stakeholders to reject cynical ploys to barricade this transformative career to new entrants.

2023 Pilot Production Has Moderated

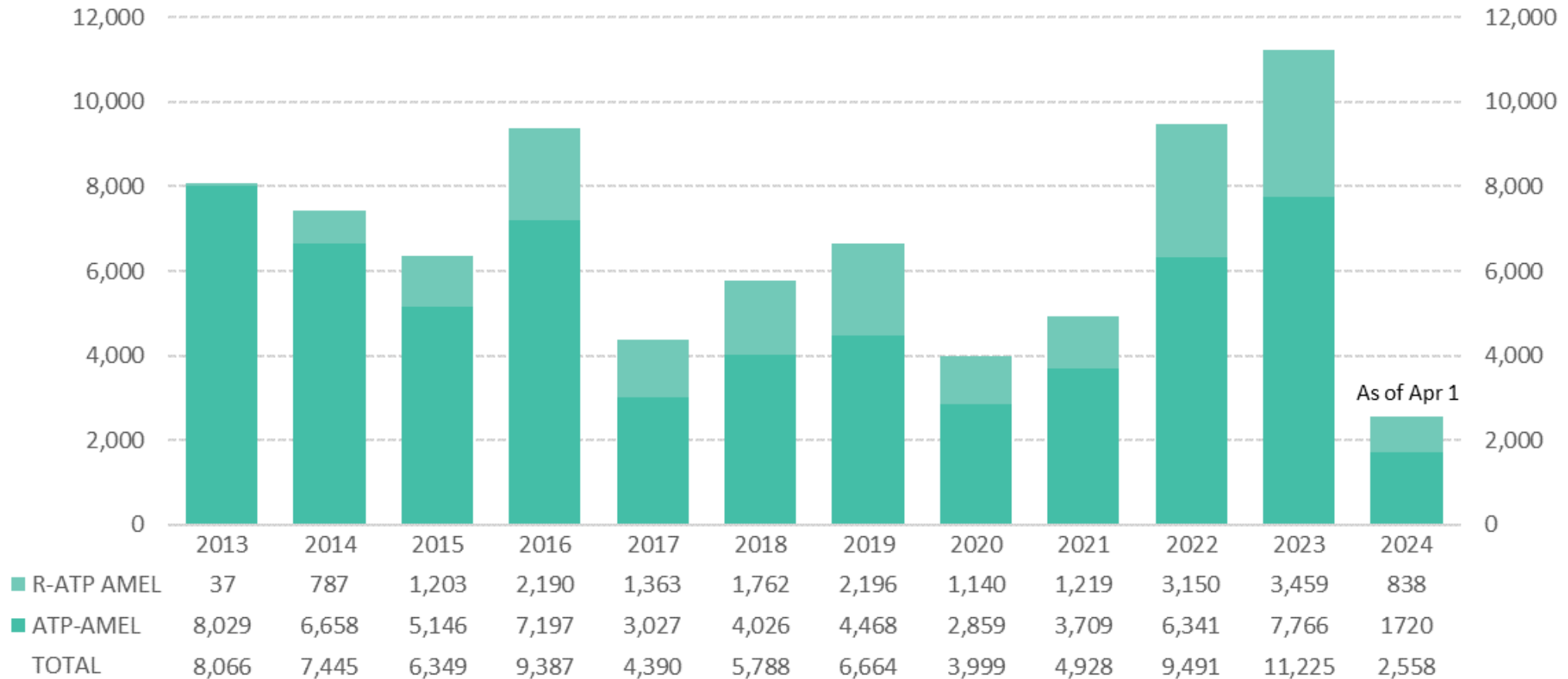
Production is highly variable; March upset a clear downward trend from Nov-23 but remains well under 2023 highs



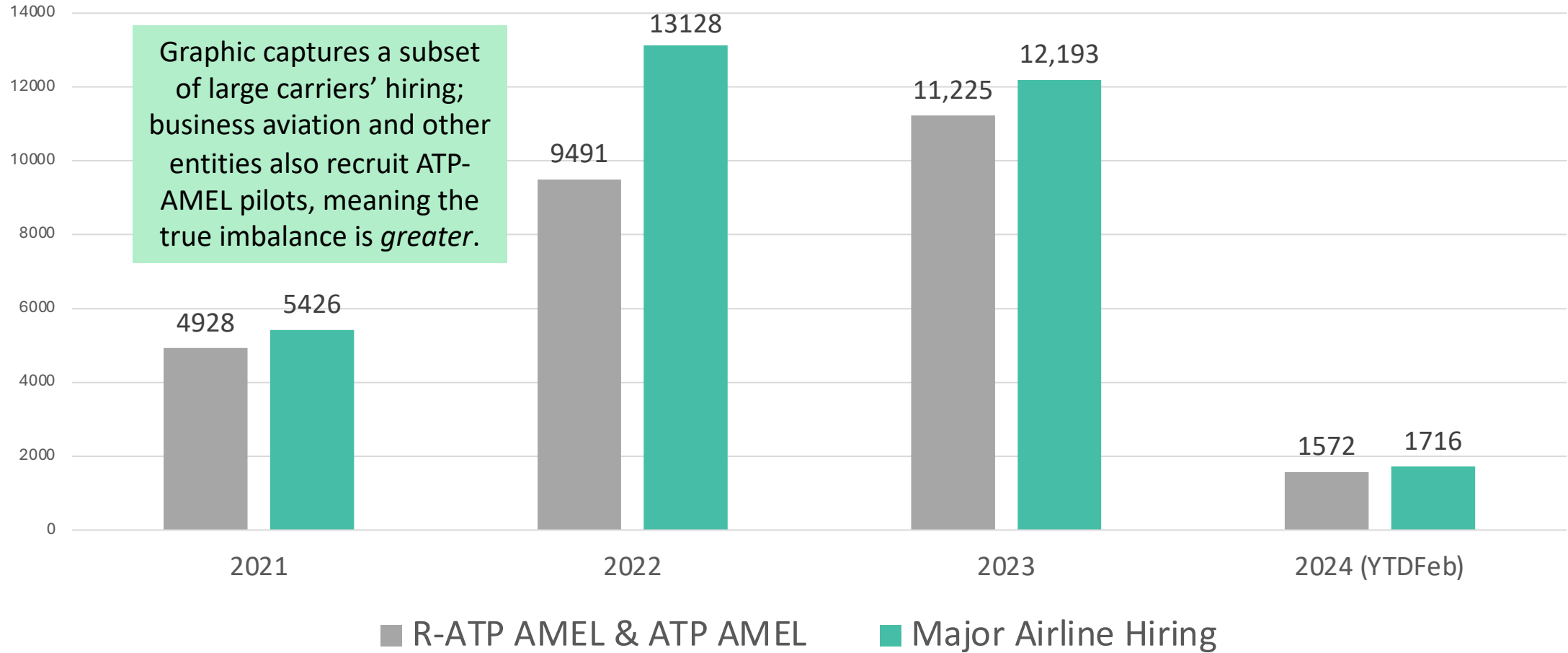
Pilot Pipeline: Pandemic Recovery Surge Shows Signs of Moderating

2023 produced 11,225 ME ATPs. Using a 12-month rolling average (Apr-23 through Mar-24), 2024 is forecast to produce 10,991 ME ATPs. Using a 3-month average (Jan-24 to Mar-24), 2024 forecast to produce 10,168 ME ATPs.

Original Issuance ATP AMEL and R-ATP AMEL



Mainline Hiring Has Slowed Temporarily, but 2024 YTD Large Carrier Hiring Exceeded Pilot Production



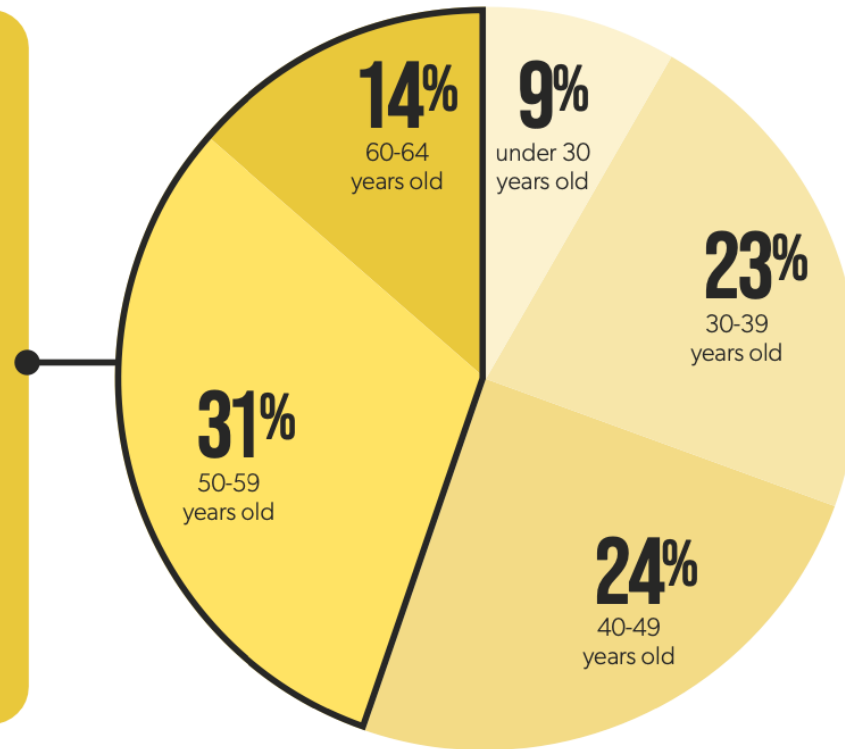
Meanwhile, the Pilot Workforce is Aging



Nearly

HALF

of today's Part 121 qualified pilot workforce face federally-mandated Age 65 retirement within fifteen years.



16,204

Airmen **MUST** retire within 5 years. This equates to

13.5%

of the total eligible pilot workforce.

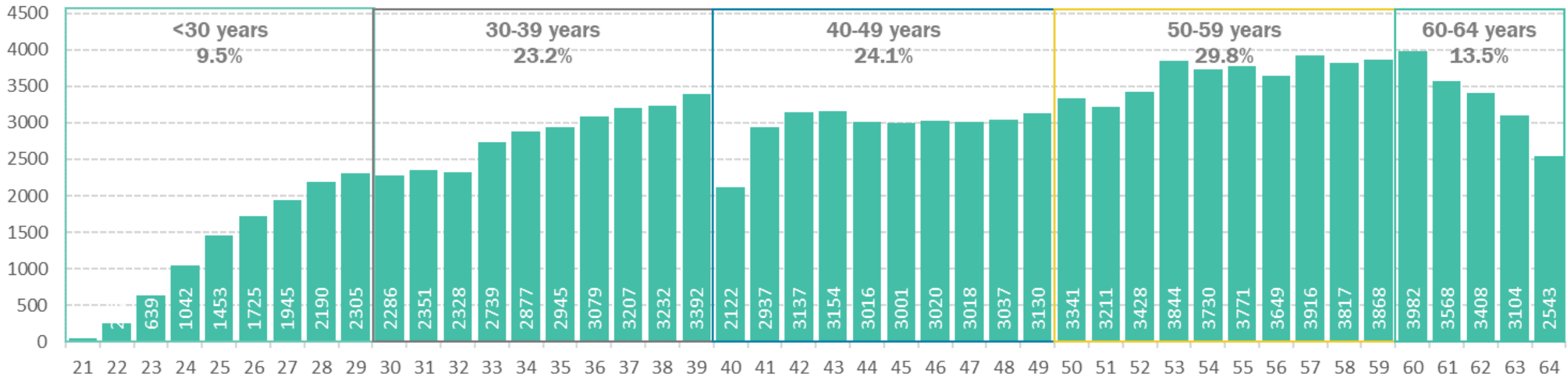
Pilot Age-Outs are Growing, not Slowing

Pilot age-based loss of eligibility peaks in 2028, when 3,982 pilots expected to turn 65.

This is a 57% increase over this year's age-outs.

Thereafter, age-outs to remain at or near peak for the foreseeable future.

ATP AMEL Pilots with Valid 1st Class Medicals by Age



The Pilot Shortage has already hurt American communities. Major airline delivery disruptions may compound these harms.

Deep, Nationwide Air Service Loss Under the Pilot Shortage

January 2024 compared with January 2020:

10% fewer departures across all airports

12 airports (3%) have lost all commercial air service

317 airports (74%) saw a reduction or loss in air service

Among airports with losses, average loss was 25%

131 airports (31%) lost 25% or more of their flights

Carriers have exited more than 121 markets

37 airports (9%) lost more than half of their flights

Large Airline Market Exits by Carrier

United Airlines

Exited 35 markets between January 2020 and January 2024.

Lansing, MI (LAN)

Quincy, IL (UIN)

Destin/Ft Walton, FL (VPS)

Alexandria, LA (AEX)

Hilo, HI (ITO)

Santa Rosa, CA (STS)

Watertown, SD (ATY)

Cape Girardeau, MO (CGI)

Lewisburg, WV (LWB)

College Station, TX (CLL)

Muskegon, MI (MKG)

Wausau, WI (CWA)

Monroe, LA (MLU)

Eau Claire, WI (EAU)

Mammoth Lakes, CA (MMH)

Erie, PA (ERI)

Ogdensburg, NY (OGS)

Grand Canyon, AZ (FLG)

Everett, WA (PAE)

White Plains, NY (HPN)

Paducah, KY (PAH)

Clarksburg, WV (CKB)

Plattsburgh, NY (PBG)

Kearney, NE (EAR)

Pierre, SD (PIR)

Evansville, IN (EVV)

Pueblo, CO (PUB)

Kalamazoo/Battle Creek, MI (AZO)

Rochester, MN (RST)

Elmira/Corning, NY (ELM)

Sacramento, CA (SCK)

Columbia, MO (COU)

Staunton/Waynesborough, VA (SHD)

Killeen/Fort Hood, TX (GRK)

Springfield, IL (SPI)

Delta Air Lines

exited 16 markets between January 2020 and January 2024.

Hilton Head Isl, SC (HHH)

Flint, MI (FNT)

Fort Smith, AR (FSM)

New York, NY (SWF)

Grand Junction, CO (GJT)

Santa Barbara, CA (SBA)

Peoria, IL (PIA)

Newport News/Williamsburg, VA (PHF)

Akron/Canton, OH (CAK)

Erie, PA (ERI)

Wilkes-Barre/Scranton, PA (AVP)

New Bern, NC (EWN)

State College, PA (SCE)

Lincoln, NE (LNK)

Manchester, NH (MHT)

La Crosse, WI (LSE)

American Airlines

Exited 16 Markets Between January 2020 and January 2024.

Islip, NY (ISP)

Ithaca, NY (ITH)

Joplin, MO (JLN)

Long Beach, CA (LGB)

Toledo, OH (TOL)

New Haven, CT (HVN)

Hattiesbur, MS (PIB)

Williamsport, PA (IPT)

Dubuque, IA (DBQ)

Sioux City, IA (SUX)

Del Rio, TX (DRT)

New York, NY (SWF)

Duluth, MN (DLH)

Meridian, MS (MEI)

Cheyenne, WY (CYS)

Oakland, CA (OAK)

LCC/ULCC Market Exits

Select LCC/ULCC's have exited 52 markets between January 2020 and January 2024.

JetBlue

Long Beach, CA (LGB)
Oakland, CA (OAK)
Albuquerque, NM (ABQ)
Portland, OR (PDX)
Hayden, CO (HDN)
New York, NY (SWF)
San Jose, CA (SJC)

Spirit

Greensboro/High Point, NC (GSO)
Niagara Falls, NY (IAG)
Asheville/Hendersonville, NC (AVL)
Plattsburgh, NY (PBG)
Jacksonville, FL (JAX)
Akron/Canton, (CAK)

Allegiant

Tucson, AZ (TUS)
Montrose, CO (MTJ)
Albuquerque, NM (ABQ)
Cleveland, OH (CLE)
Gulfport/Biloxi, MS (GPT)
Raleigh/Durham, NC (RDU)
Ogden, UT (OGD)
San Antonio, TX (SAT)
Ogdensburg, NY (OGS)
State College, PA (SCE)
Redmond/Bend, OR (RDM)
Owensboro, KY (OWB)

Hawaiian

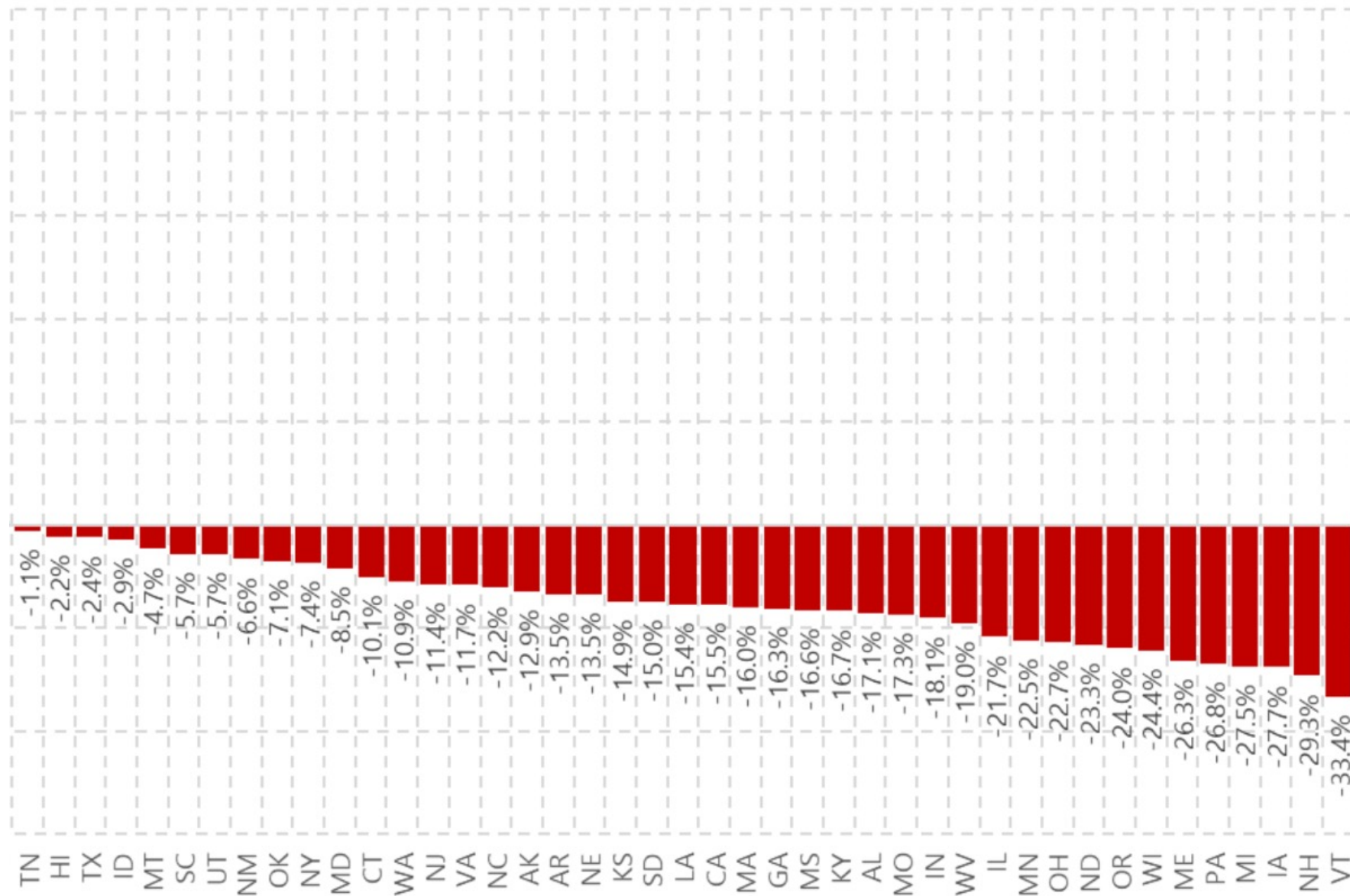
Lanai City, HI (LNY)
Hoolehua, HI (MKK)
Kapalua, HI (JHM)

Frontier

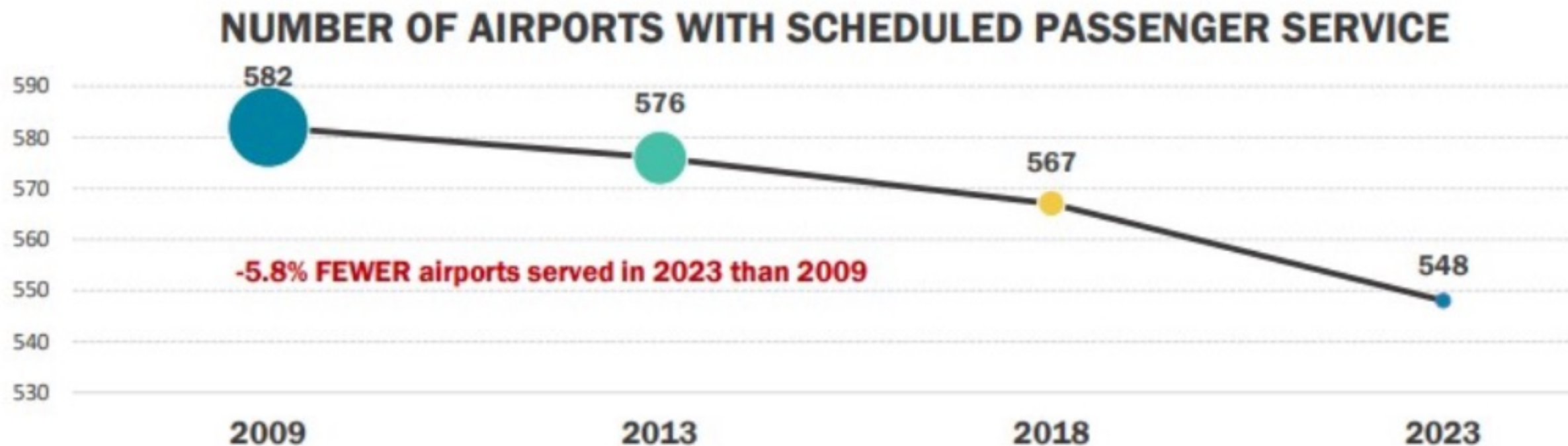
Los Angeles, CA (LAX)
Harlingen, TX (HRL)
Huntsville, AL (HSV)
Albany, NY (ALB)
Washington, DC (IAD)
Mobile, AL (BFM)
Wichita, KS (ICT)
Bloomington/Normal, IL (BMI)
Albuquerque, NM (ABQ)
Billings, MT (BIL)
Tucson, AZ (TUS)
San Jose, CA (SJC)
Tyler, TX (TYR)
Colorado Springs, CO (COS)
Bozeman, MT (BZN)
Fresno, CA (FAT)
Burlington, VT (BTV)
Greenville/Spartanburg, SC (GSP)
Palm Springs, CA (PSP)
NY/Newark, NJ (EWR)
Providence, RI (PVD)
Spokane, WA (GEG)
Louisville, KY (SDF)
Reno, NV (RNO)

Total Departures: % Change January 2020 vs. January 2024

State by State Air Service Loss:



Airports Disconnected as Pilot Shortage Grew Over Time



Airlines Using Larger Aircraft to Compensate for Pilot Shortage; Communities Losing Destination Options and Frequency

2023
vs.
2009



Departures

Large	-9.3%
Medium	-12.7%
Small	-21.5%
Nonhub	-31.0%
Nonprimary	-30.0%



Seats

Large	34.5%
Medium	25.6%
Small	25.6%
Nonhub	16.3%
Nonprimary	6.2%



Routes

Large	4.3%
Medium	-3.0%
Small	-9.0%
Nonhub	-14.1%
Nonprimary	-31.8%

Source: OAG Schedule Analyser



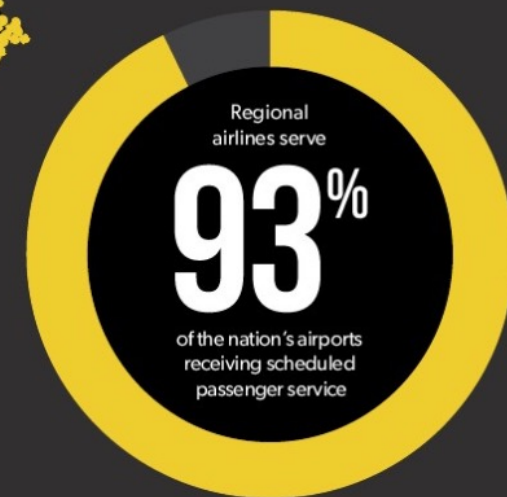
Policy Solutions

- Immediate: Raise the Pilot Mandatory Retirement Age
- Medium term: Strengthen Pilot Training Pathways
- Long term: Align Federal Student Loan Caps with Cost of Pilot Higher Education

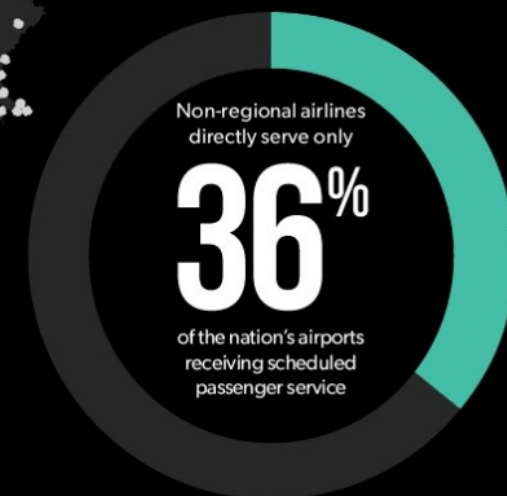
Without regional airlines, most U.S. airports would lose all of their air service.

Regional airlines provide the **only** source of air service to 64% of U.S. airports and provide **more than half** of the air service in 21 U.S. states and **more than 70%** of the air service to nine U.S. states

2022 U.S. AIR SERVICE NETWORK



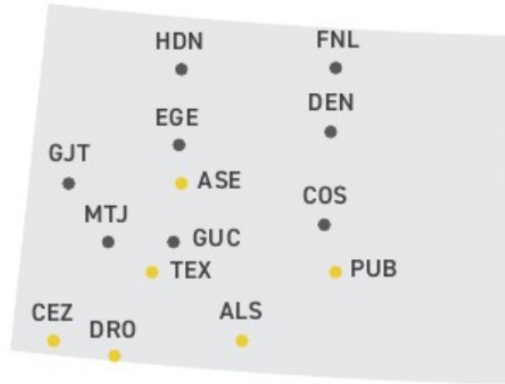
U.S. AIR SERVICE NETWORK WITHOUT REGIONAL AIRLINES



Select State Air Service Loss

Air Service Loss Example (w/ Essential Air Service)

Statewide, Colorado's departures have ticked up by 8%. But numerous small communities are experiencing deep air service loss; Alamosa has lost more than half of its air service.



COLORADO

Code	Airport Name	% Pax.	% Depts.
ALS	Alamosa	100%	100%
ASE	Aspen	100%	100%
CEZ	Cortez	100%	100%
COS	Colorado Springs Municipal	24%	42%
DEN	Denver Intl Apt	10%	25%
DRO	Durango La Plata County Apt	97%	98%
EGE	Vail/Eagle County Rgnl Apt	30%	50%

Code	Airport Name	% Pax.	% Depts.
FNL	Fort Collins/Loveland Municipal Apt	1%	0%
GJT	Grand Junction	79%	90%
GUC	Gunnison	81%	89%
HDN	Hayden	29%	42%
MTJ	Montrose	38%	52%
PUB	Pueblo	100%	100%
TEX	Telluride	100%	100%

- Durango (DRO) - 9%
- Pueblo (PUB) - 12%
- Cortez (CEZ) - 15%
- Grand Junction (GJT) - 27%
- Alamosa (ALS) - 62%

EAS Community	Annual Contract Subsidy Rates 6/1/22	EAS Carrier	Start	Expiration	Order	Hub(s) Served
Alamosa	\$5,242,836	KeyLime Air	06/08/22	06/30/24	2022-5-9	DEN
Cortez	\$6,410,791	KeyLime Air	10/01/22	09/30/24	2022-5-8	DEN/PHX
Pueblo	\$2,992,087	Southern	01/15/23	01/31/25	2022-10-14	DEN

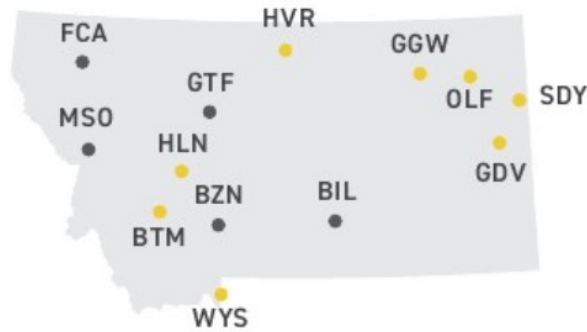
2022 Enplanements	Regional	Industry
Regional Share — 12.8%	4,629,177	36,056,337

2022 Scheduled Departures	Regional	Industry
Regional Share — 30.5%	100,708	330,271

Air Service Loss by State (w/ Essential Air Service)

Montana has lost 5% of its departures statewide; three communities have lost one in five flights.

MONTANA



- Butte (BTM) - 4%
- Billings (BIL) -10%
- Kalispell (FCA) -19%
- Helena (HLN) -19%
- Missoula (MSO) -19%

Code	Airport Name	% Pax.	% Depts.
BIL	Billings	45%	80%
BTM	Butte	100%	100%
BZN	Bozeman	16%	28%
FCA	Kalispell	38%	57%
GDV	Glendive	100%	100%
GGW	Glasgow	100%	100%
GTF	Great Falls	83%	93%

Code	Airport Name	% Pax.	% Depts.
HLN	Helena	100%	100%
HVR	Havre	100%	100%
MSO	Missoula	42%	60%
OLF	Wolf Point	100%	100%
SDY	Sidney	100%	100%
WYS	West Yellowstone	100%	100%

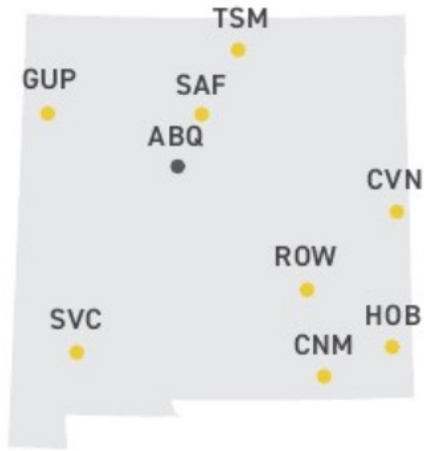
EAS Community	Annual Contract Subsidy Rates 6/1/22	EAS Carrier	Start	Expiration	Order	Hub(s) Served
Butte	\$997,186	SkyWest	01/01/22	12/31/24	2021-7-15	DEN/SLC
Glasgow	\$2,335,300	CapeAir	01/01/20	12/31/23	2019-10-11	BIL
Glendive	\$2,522,648	CapeAir	01/01/20	12/31/23	2019-10-11	BIL
Havre	\$2,484,878	CapeAir	01/01/20	12/31/23	2019-10-11	BIL
Sidney	\$4,611,469	CapeAir	01/01/20	12/31/23	2019-10-11	BIL
West Yellowstone	\$1,491,893	SkyWest	05/06/21	10/15/23	2021-3-20	DEN/SLC
Wolf Point	\$2,511,712	CapeAir	01/01/20	12/31/23	2019-10-11	BIL

2022 Enplanements	Regional	Industry
Regional Share — 35.2%	927,826	2,638,241

2022 Scheduled Departures	Regional	Industry
Regional Share — 65.1%	24,446	37,553

Air Service Loss by State (w/ Essential Air Service)

New Mexico has lost 7% of its departures statewide; two communities have lost one of three flights; two communities have lost nearly half of their air service.



NEW MEXICO

- Silver City (SVC) - 2%
- Albuquerque (ABQ) - 5%
- Santa Fe (SAF) - 8%
- Carlsbad (CNM) - 10%
- Hobbs (HOB) - 30%
- Clovis (CVN) - 44%
- Roswell (ROW) - 47%

Code	Airport Name	% Pax.	% Depts.
ABQ	Albuquerque	15%	33%
CNM	Carlsbad	100%	100%
CVN	Clovis Municipal Apt	100%	100%
GUP	Gallup	100%	100%
HOB	Hobbs Lea County Reg Apt	100%	100%

Code	Airport Name	% Pax.	% Depts.
ROW	Roswell	100%	100%
SAF	Santa Fe	100%	100%
SVC	Silver City	100%	100%
TSM	Taos	100%	100%

EAS Community	Annual Contract Subsidy Rates 6/1/22	EAS Carrier	Start	Expiration	Order	Hub(s) Served
Carlsbad	\$3,493,893	Boutique Air	06/01/21	05/31/25	2021-3-11	ABQ/DFW
Clovis	\$4,804,921	Key Lime Air	05/01/22	04/30/26	2022-2-18	DFW/DEN
Silver City	\$4,830,725	Advanced Air	02/01/23	01/31/25	2022-12-10	ABQ/PHX

2022 Enplanements	Regional	Industry
Regional Share — 22.7%	589,448	2,594,483

2022 Scheduled Departures	Regional	Industry
Regional Share — 49.9%	14,988	30,055

Air Service Loss by State

Two Nevada airports have lost nearly or more than half of their flights.



NEVADA

Code	Airport Name	% Pax.	% Depts.
BLD	Las Vegas Boulder City Airport	100%	100%
EKO	Elko	100%	100%

Code	Airport Name	% Pax.	% Depts.
LAS	Las Vegas McCarran International Apt	1%	3%
RNO	Reno	17%	33%

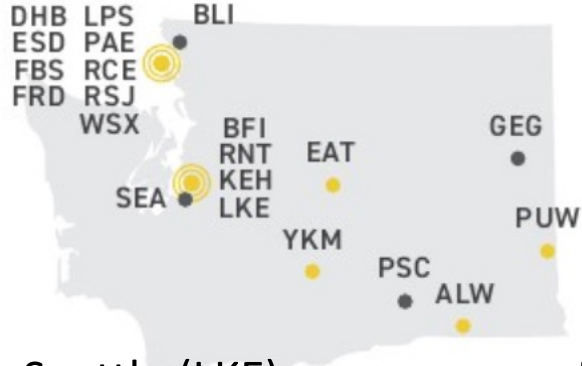
2022 Enplanements	Regional	Industry
Regional Share — 2.0%	534,772	26,372,709

2022 Scheduled Departures	Regional	Industry
Regional Share — 6.7%	13,546	202,570

- Reno (RNO) - 13%
- Elko (EKO) - 47%
- Las Vegas (BLD) - 63%

Air Service Loss by State

Washington state has lost 11% of its flights overall and numerous airports have seen severe air service reductions. One community has lost all air service (Kenmore Air exit at LKE).



- Seattle (LKE) - **LOST**
- Walla Walla (ALW) - 6%
- Seattle (SEA) - 15%
- Pasco (PSC) - 17%
- Spokane (GEG) - 18%
- Pullman/Msw (PUW) - 32%
- Wenatchee (EAT) - 35%
- Yakima (YKM) - 49%
- Everett (PAE) - 58%
- Seattle (BFI) - 67%

WASHINGTON

Code	Airport Name	% Pax.	% Depts.
ALW	Walla Walla	100%	100%
BFI	Seattle Boeing Fld-King CoInt	100%	100%
BLI	Bellingham	27%	55%
DHB	Deer Harbor SeaPlane Base	100%	100%
EAT	Wenatchee	100%	100%
ESD	Eastsound	100%	100%
FBS	Friday Harbor Seaplane Base	100%	100%
FRD	Friday Harbor Airport	100%	100%
GEG	Spokane International Apt	30%	48%
KEH	Kenmore	100%	100%
LKE	Seattle Lake Union SPB	100%	100%
LKE	Seattle Lake Union Spb	100%	100%

Code	Airport Name	% Pax.	% Depts.
LPS	Lopez Island Airport	100%	100%
PAE	Everett	76%	89%
PSC	Pasco	82%	92%
PUW	Pullman/Moscow	100%	100%
RCE	Roche Harbor	100%	100%
RNT	Renton	100%	100%
RSJ	Rosario	100%	100%
SEA	Seattle-Tacoma International Apt	15%	30%
WSX	Westsound	100%	100%
YKM	Yakima	100%	100%
YKM	Yakima	100%	100%

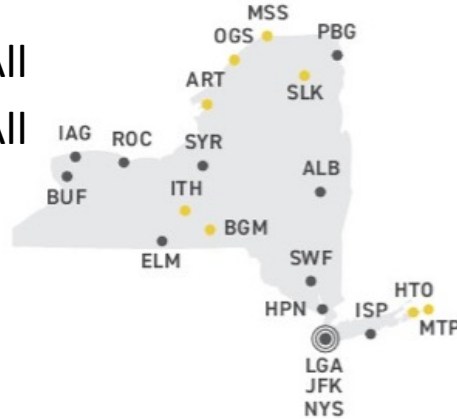
2022 Enplanements	Regional	Industry
Regional Share — 19.0%	4,612,140	24,219,409

2022 Scheduled Departures	Regional	Industry
Regional Share — 37.4%	85,170	228,005

Air Service Loss by State (w/ Essential Air Service)

New York has lost 7% of its flights statewide. Two airports have lost all service and seven airports have lost more than 25% of their flights.

- East Hampton (HTO) Lost All
- NY Skyports (NYS) Lost All
- New York (SWF) -85%
- Elmira/Crng (ELM) -59%
- Ithaca (ITH) -42%
- Niagara Falls (IAG) -31%
- Binghamton (BGM) -33%
- Rochester (ROC) -25%
- Watertown (ART) -22%
- Buffalo (BUF) -19%
- Albany (ALB) -17%
- Ogdensburg (OGS) -15%
- Islip (ISP) -9%
- Syracuse (SYR) -8%
- Plattsburgh (PBG) -2%



NEW YORK

Code	Airport Name	% Pax.	% Depts.
ALB	Albany International Airport	30%	53%
ART	Watertown	100%	100%
BGM	Binghamton	87%	96%
BUF	Buffalo	21%	38%
ELM	Elmira/Corning	46%	71%
HPN	White Plains	38%	60%
HTO	East Hampton	100%	100%
IAG	Niagara Falls	0%	0%
ISP	Islip	3%	8%
ITH	Ithaca	100%	100%
JFK	New York JF Kennedy International Apt	10%	24%

Code	Airport Name	% Pax.	% Depts.
LGA	New York LaGuardia Apt	30%	50%
MSS	Massena	100%	100%
MTP	Montauk	100%	100%
NYS	New York Skyports SPB	100%	100%
OGS	Ogdensburg	100%	100%
PBG	Plattsburgh	15%	56%
ROC	Rochester	44%	64%
SLK	Saranac Lake	100%	100%
SWF	New York Stewart International	0%	0%
SYR	Syracuse	36%	56%

EAS Community	Annual Contract Subsidy Rates 6/1/22	EAS Carrier	Start	Expiration	Order	Hub(s) Served
Massena	\$5,322,161	Boutique Air	04/01/23	03/31/25	2023-2-3	BOS
Ogdensburg	\$4,931,190	AEAS/Contour	07/01/22	09/30/24	2022-5-4	PHL
Plattsburgh	\$4,187,568	AEAS/Contour	07/01/22	09/30/24	2022-5-3	PHL
Saranac Lake	\$2,634,351	Cape Air	03/01/22	02/28/26	2022-1-9	BOS/JFK
Watertown (NY)	\$4,701,099	American	02/01/22	01/31/24	2021-12-4	PHL

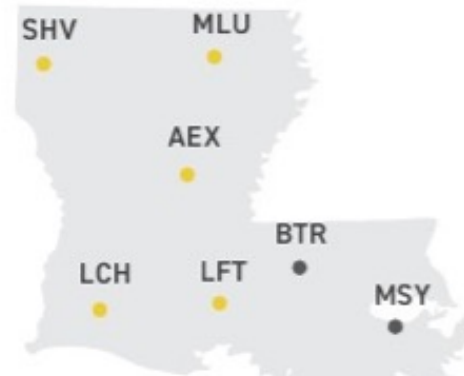
2022 Enplanements	Regional	Industry
Regional Share — 20.2%	8,483,477	42,025,964

2022 Scheduled Departures	Regional	Industry
Regional Share — 40.9%	185,271	452,948

Air Service Loss by State

Louisiana has lost 15% of its flights statewide. Four airports have lost more than 25% of their flights.

- Monroe (MLU) -42%
- Alexandria (AEX) -40%
- Shreveport (SHV) -23%
- Baton Rouge (BTR) -22%
- Lafayette (LFT) -16%
- New Orleans (MSY) -11%
- Lake Charles (LCH) -8%



LOUISIANA

Code	Airport Name	% Pax.	% Depts.
AEX	Alexandria International Apt	100%	100%
BTR	Baton Rouge	70%	81%
LCH	Lake Charles	100%	100%
LFT	Lafayette Regional Apt	100%	100%

Code	Airport Name	% Pax.	% Depts.
MLU	Monroe	100%	100%
MSY	New Orleans Louis Armstrong Intl Apt	4%	8%
SHV	Shreveport Regional Apt	89%	96%

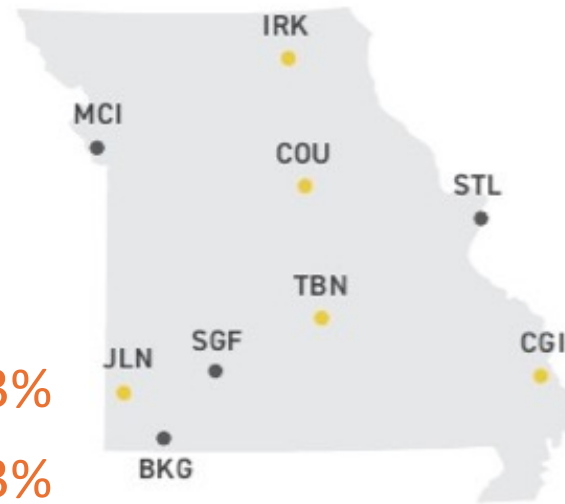
2022 Enplanements	Regional	Industry
Regional Share — 16.6%	1,168,079	7,049,405

2022 Scheduled Departures	Regional	Industry
Regional Share — 34.2%	24,419	71,406

Air Service Loss by State (w/ Essential Air Service)

Missouri has lost 17% of its flights statewide. Four communities have lost more than 25% of their flights.

- Joplin (JLN) -53%
- Kirksville (IRK) -43%
- Columbia (COU) -38%
- St Louis (STL) -22%
- Springfield (SGF) -14%
- Kansas City (MCI) -8%
- Ft Leonard Wood (TBN) -4%



MISSOURI

Code	Airport Name	% Pax.	% Depts.
BKG	Branson	0%	0%
CGI	Cape Girardeau	100%	100%
COU	Columbia	100%	100%
IRK	Kirksville	100%	100%
JLN	Joplin	100%	100%

Code	Airport Name	% Pax.	% Depts.
MCI	Kansas City International Apt	11%	22%
SGF	Springfield	69%	84%
STL	StLouis Lambert Intl Apt	10%	27%
TBN	Fort Leonard Wood	100%	100%

EAS Community	Annual Contract Subsidy Rates 6/1/22	EAS Carrier	Start	Expiration	Order	Hub(s) Served
Cape Girardeau	\$5,485,833	Contour	10/01/22	09/30/25	2022-9-2	BNA
Fort Leonard Wood	\$4,449,693	Contour	10/01/22	09/30/25	2022-10-12	BNA/DFW
Joplin	\$1,222,934	SkyWest	06/01/21	UFN	2021-3-2	DEN/ORD
Kirksville	\$3,132,522	Cape Air	01/24/23	UFN	2023-2-11	STL

2022 Enplanements	Regional	Industry
Regional Share — 14.2%	1,765,441	12,395,106

2022 Scheduled Departures	Regional	Industry
Regional Share — 31.5%	39,879	126,570



Thank you.

RAA
Regional Airline Association

