

THE WORKFORCE CRISIS

High-quality training and education are the way forward - Panel discussion

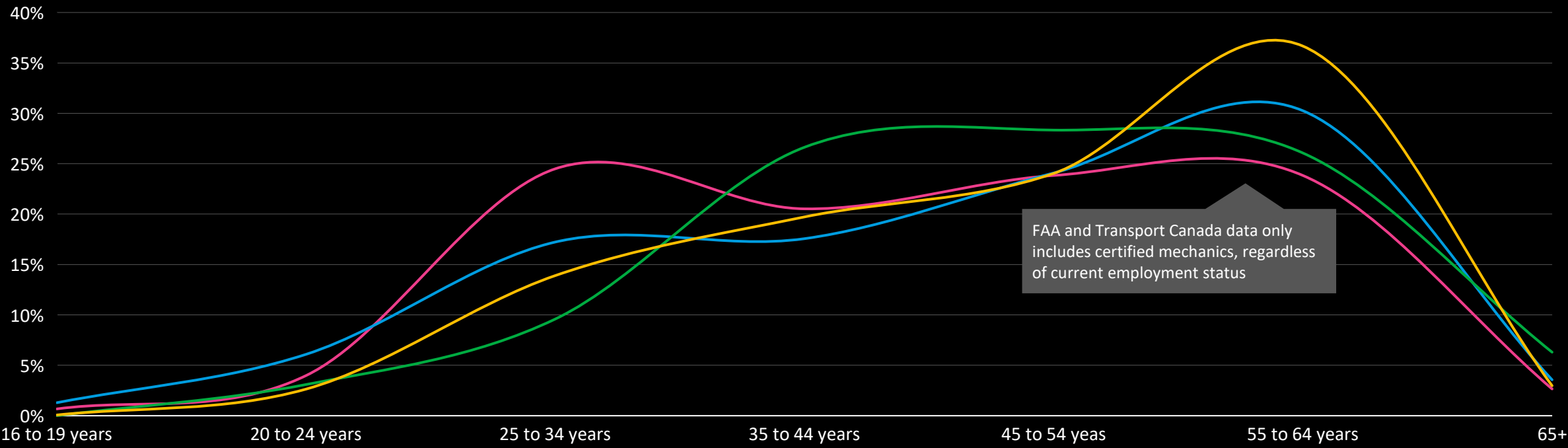
February 23, 2023

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Partner

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FOR MECHANICS, IT'S TOO MANY BABY BOOMERS AND NOT ENOUGH GENERATION Z

Mechanics age curves
By data source



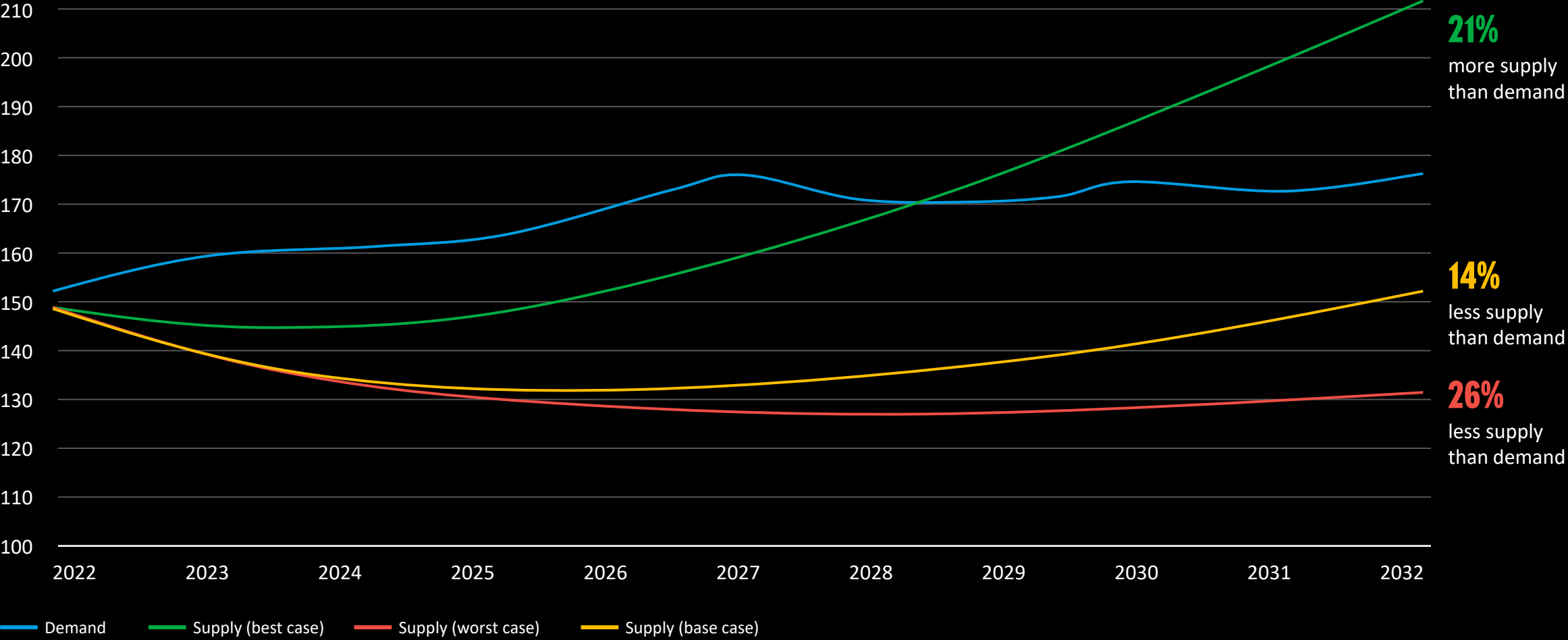
FAA and Transport Canada data only includes certified mechanics, regardless of current employment status

Source: US Bureau of Labor Statistics, Transport Canada, Federal Aviation Administration, OW Survey, OW analysis
 Note: Oliver Wyman survey includes certified and non-certified personnel with working at independent MROs, regional, mainline, and cargo carriers

— US Bureau of Labor Statistics
 — Oliver Wyman Survey
 — Transport Canada
 — FAA

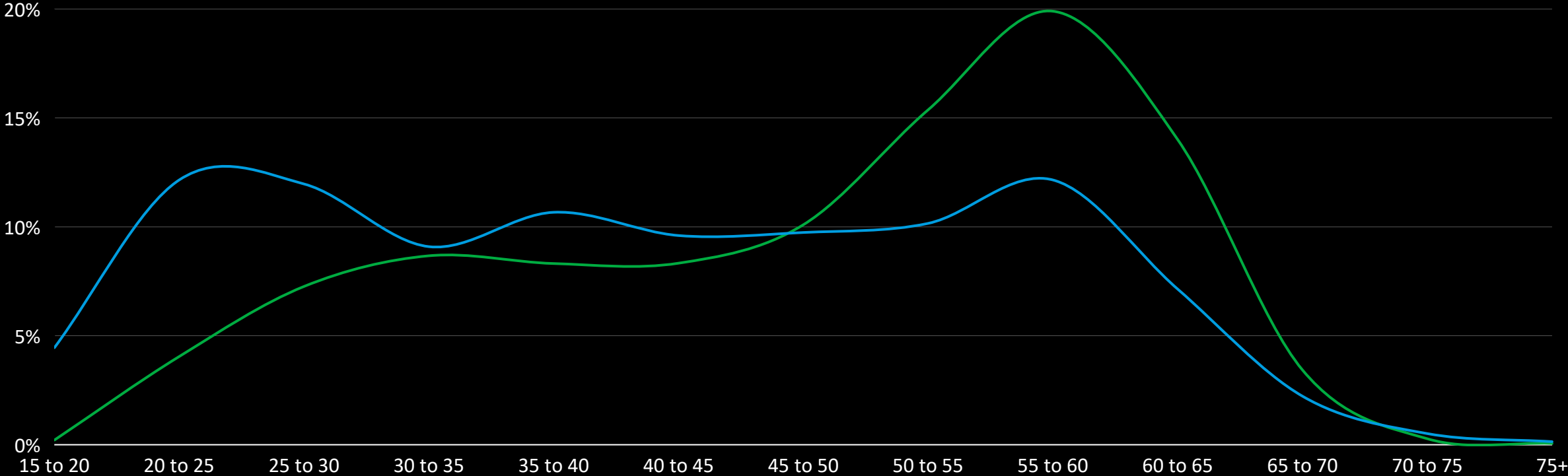
IMBALANCE BETWEEN SUPPLY AND DEMAND WILL PERSIST AND EVEN WORSEN OVER THE NEXT 10 YEARS

North American aviation mechanic supply and demand



THE MAINTENANCE WORKFORCE AT AIRLINES IS OLDER THAN AT INDEPENDENT MROS

Mechanics age curves
By employer type, Oliver Wyman Survey



Source: OW survey
Note: Oliver Wyman survey includes certified and non-certified personnel with working at independent MROs, regional, mainline, and cargo carriers

Airlines MROs



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