

The Pilot Survey 2022



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RECRUITMENT

 **FlightGlobal**

#thepilotsurvey2022

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Welcome



GOOSE Recruitment is a specialist in aviation recruitment. GOOSE is part of the Faststream Recruitment Group, employing over 100 people and with a history spanning from 1999. GOOSE operates across global hubs in the EMEA and Asia-Pacific regions, servicing their customers, including pilots, aviation professionals and airlines, across the world.

The goose is synonymous with long-distance flying and incredible teamwork. This aptly represents the foundations of GOOSE Recruitment – an incredible team of recruiters striving to be the very best in the industry, here for the long-term and spanning the globe.

Our parent company, Faststream Recruitment Group is a global people specialist in shipping and maritime recruitment. We know what it is to be a true specialist in a generalist recruitment marketplace.

www.goose-recruitment.com



FlightGlobal, part of DVV Media, is the world's leading aerospace publisher and content provider delivering professional publications, special reports and online news and analysis. Alongside its media products, *FlightGlobal* offers an aviation jobs board and a series of conferences and events staged around the world.

FlightGlobal publishes leading monthly *Flight International*, which marked its 110th anniversary in 2019, and established boardroom title *Airline Business* which is entering its 37th year in 2022. *Flightglobal.com* is the industry's most visited and trusted website featuring breaking news, analysis and opinion across industry sectors, as well as a variety of long-form and multimedia content.

FlightGlobal's well-established recruitment portfolio Flight Jobs is the home of the best aviation & aerospace jobs and careers advice that helps recruiters match with aviation professionals across the globe through an online jobs service, providing tailored solutions and recruitment plans to achieve greater business success.

www.flightglobal.com
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Welcome *continued*



Mark Charman

CEO & Founder of GOOSE Recruitment

Mark is the CEO and Founder of GOOSE Recruitment and founded the parent company, Faststream Recruitment Group, in 1999. He has a wealth of knowledge and experience in recruiting in high-demand, skill short sectors globally, and he is bringing these new ideas to the pilot and aviation recruitment market. As a Fellow of the Recruitment and Employment Confederation, he is a renowned thought-leader in specialist recruitment. Mark's involvement as a speaker, panellist and writer provides a head hunters perspective into human factors in the workplace.



Sophie Wild

Divisional Director - FlightGlobal

Sophie is Divisional Director of FlightGlobal with responsibility for its content, sales and marketing strategy, as well as its financial performance within DVV Media International. She has been with FlightGlobal 10 years, seven of those heading its recruitment advertising activities, where she helped develop Flight Jobs, the industry-leading platform that connects recruiters with job seekers. She is passionate about investing in future talent and helping the aviation industry become more diverse and accessible to all. Her career – and love of aviation – began with a spell as cabin crew for Virgin Atlantic.

Foreword

Aviation has been one of the most significantly impacted sectors during the pandemic. Many aviation businesses are still having to work in survival mode. A stressful and pressurised situation has been heightened with many pilots living in fear of redundancy and furlough as well as many who have already had to confront this.

The pandemic has quickly made pilots face adaption to new ways of working, including reduced flying time, quarantine periods, face coverings and social distancing as well as being given more time to think and re-evaluate what is important to them in their careers.

It has not been the crisis alone that has made its impact on pilots. The pressure to stay current, to keep or return to flying, secure medicals and keep healthy both mentally and physically have all been significant.

Many pilots have lost jobs, taken large pay cuts, reduced their flying time and even been demoted in rank, all in order to keep flying.

It was essential that we speak with pilots again this year

to delve deeper into the factors that have impacted them over the last 12 months and their plans on whether they will continue their career as a pilot or simply leave the sector.

In our third year of collaborating, GOOSE Recruitment and FlightGlobal have created The Pilot Survey 2022. We have compiled this unique report once again to establish and highlight trends from a pilot's perspective. We will uncover trends in careers, reward, confidence, stress, and the attractiveness of the profession.

It covers areas such as: What impact has the last 12 months had on unemployment? Are unemployed pilots in holding pools? How long does it take to secure a new pilot job? How confident do pilots feel about returning to the cockpit? How many pilots have been double vaccinated and do they believe it should be compulsory to fly? Would they recommend their career to young people? When do they think the sector will return to pre-COVID levels? These are just a few of the questions that are so unique to the aviation sector and ones that only the pilots themselves will answer.



Methodology

The Pilot Survey 2022 was open for four weeks and closed on the 21st of November 2021. A total of 1,743 pilots took part in the survey.

THE SURVEY

The survey was designed for pilots of all ranks to take part including captains, first officers, second officers and cadets.

All respondents answered the survey questions anonymously online using Survey Monkey, an industry-leading survey platform. Pilots were asked 30 questions each and all answers were held as strictly confidential and the answers were not linked to any personal data.

DATA GATHERING

We promoted the survey using the following activities:

- ◆ FlightGlobal and FlightJobs websites
- ◆ GOOSE Recruitment website
- ◆ Targeted emails to pilots known to GOOSE Recruitment and FlightGlobal
- ◆ Pilot forums
- ◆ Social media, including LinkedIn, Twitter and Facebook (including pilot groups)

DATA ANALYSIS

The responses from the survey were analysed to identify the most important trends and points of interest in the research. Comparisons have also been made to the data collected in The Pilot Survey 2020 and 2021. In addition, our experts around the world have reviewed the data to ensure that it reflects the realities of their local markets as well as global trends.

We believe that the combination of the survey's unique scale and reach and our market expertise means that this report delivers a representative view of trends and opportunities in employment and remuneration in our industry, right across the world.

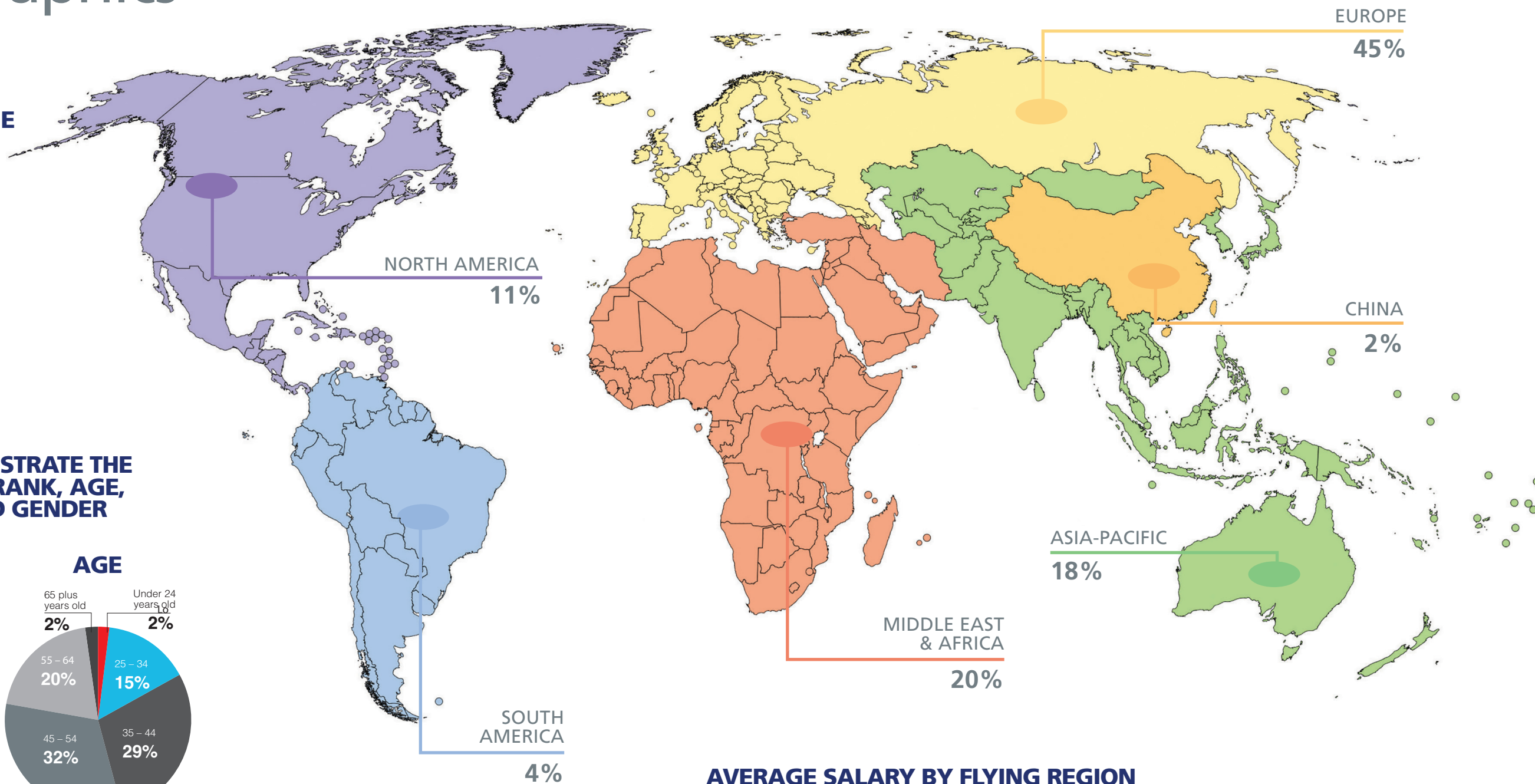
Please note, quotes from pilots represent their thoughts and views and not those of GOOSE Recruitment or FlightGlobal.

At the time that pilots took part in this survey, the Omicron variant of COVID-19 had not been identified.

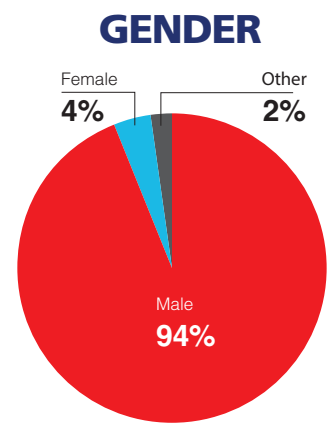
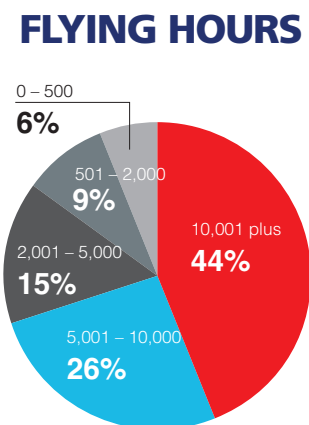
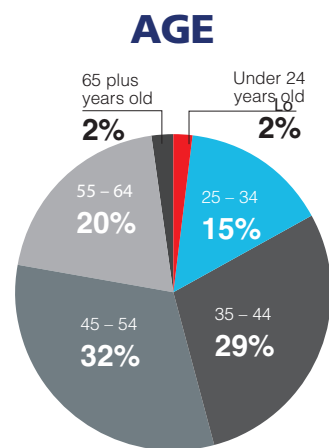
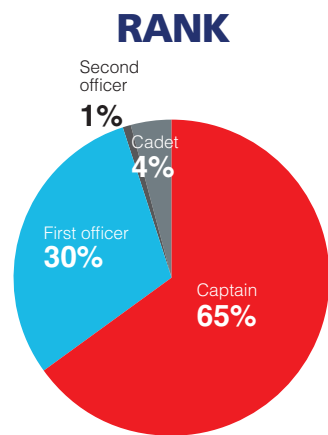


Demographics

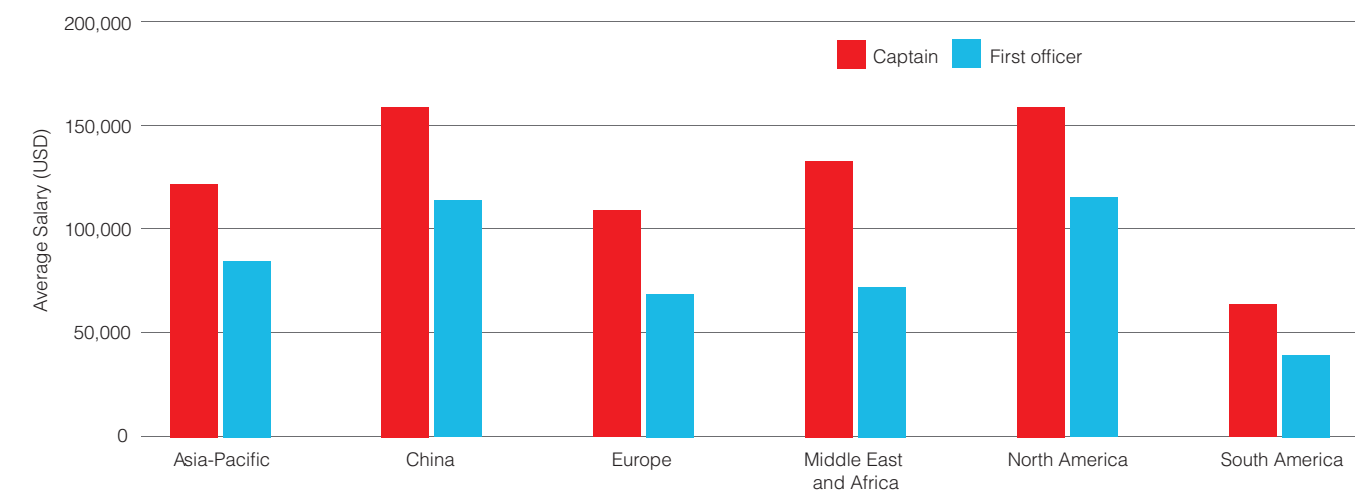
THIS WORLD MAP DEMONSTRATES THE BREAKDOWN OF RESPONDENTS BY FLYING REGION



THESE CHARTS ILLUSTRATE THE RESPONDENTS BY RANK, AGE, FLYING HOURS AND GENDER



AVERAGE SALARY BY FLYING REGION



Pilot employment market



The incomparable fall in demand for air travel caused by the global pandemic turned the lives of tens of thousands of pilots upside down in 2020 alone. We reported in The Pilot Survey 2021 that over half of the world's pilots were no longer flying and that 30% were facing unemployment.

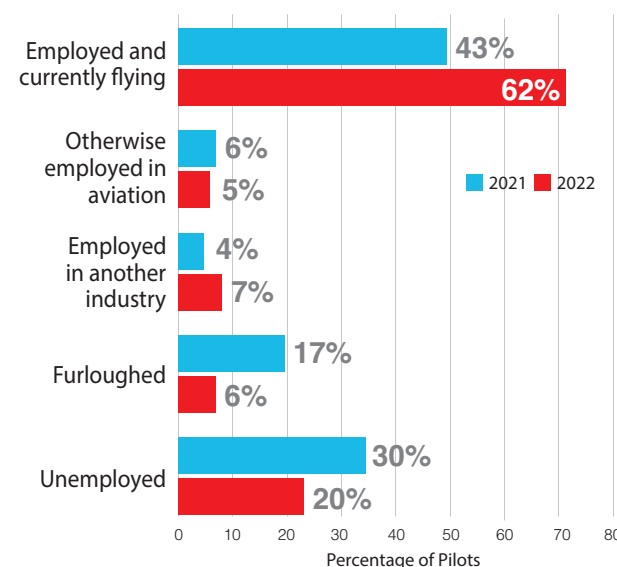
Twelve months on, we wanted to see how the employment landscape had changed for pilots and whether the sector was moving towards more positive times.

In 2022, we see that one in five trained pilots are still facing unemployment despite the numerous changes that have been made to permit air travel more freely. In total, 38% of pilots are still not flying.

For those who flew most recently in China, these pilots are still facing the highest rates of unemployment at 37% down only from 43% last year.

Significantly the Asia-Pacific region has seen an uptick in unemployment year on year with 23% stating they were unemployed in the last survey, increasing to 25% this time. This region also has the lowest percentage of pilots stating that they are employed and flying (53%). The

EMPLOYMENT PROFILE OF PILOTS



Asia-Pacific region has experienced more lockdowns, travel restrictions and border controls than many others over the last year. For example, Singapore has been proactive in implementing lockdowns and closing borders when COVID-19 cases have risen. We have also seen some expatriates return home from the region due to concerns over quarantine or being stuck for long periods away from friends and family.

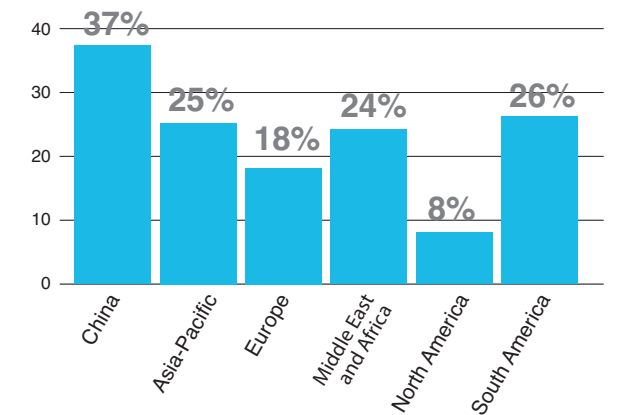
South America has shown the biggest decrease in unemployment amongst pilots dropping from 41% to 26%. We also see that unemployment has fallen from 20% to 8% in North America. The percentage of pilots employed and flying in this region has increased from 54% to 81%. This has been aided by their domestic market remaining relatively stable throughout the pandemic as well as fewer restrictions on movement enforced by the US government. The North American market has also been encountering an ageing pilot workforce and the threat of facing a catastrophic skill shortage that could create obstacles to continue 'business-as-usual' for domestic and international air travel. In 2020 alone, we reported that 16% of pilots flying in the North American region would retire by the end of 2021. This year, 20% of unemployed pilots who were most recently flying in the North American region were planning on retiring.

Mark Charman explains: "There have been uplifts in the salaries of first officers in North America of nearly 20% in the last two years. This can be explained to an extent by the shortage of this rank in the region and airlines having to pay a premium to recruit. With the high rates of pilots at retirement age, pilots are a valuable asset in Northern America right now."

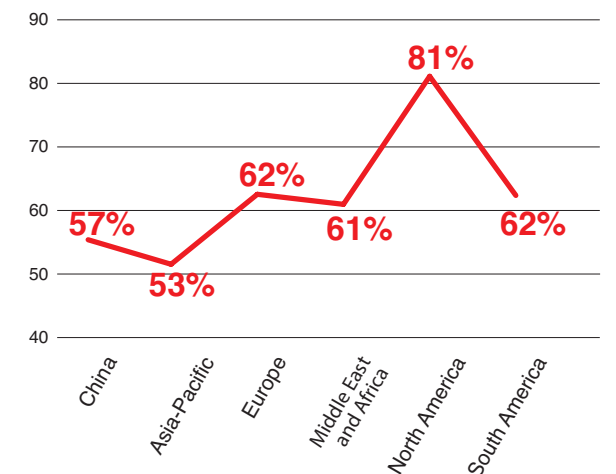


THERE HAVE BEEN UPLIFTS IN THE SALARIES OF FIRST OFFICERS IN NORTH AMERICA OF NEARLY 20% IN THE LAST TWO YEARS. THIS CAN BE EXPLAINED TO AN EXTENT BY THE SHORTAGE OF THIS RANK IN THE REGION AND AIRLINES HAVING TO PAY A PREMIUM TO RECRUIT. WITH THE HIGH RATES OF PILOTS AT RETIREMENT AGE, PILOTS ARE A VALUABLE ASSET IN NORTHERN AMERICA RIGHT NOW. MARK CHARMAN

UNEMPLOYED PILOTS BY FLYING REGION



EMPLOYED AND FLYING PILOTS BY FLYING REGION



Pilot unemployment

For the 20% of pilots who responded that they were unemployed, we wanted to find out more about their situation and what their plans were. We started by asking “Are you currently unemployed due to the pandemic?” 82% agreed that they were, highlighting a small decrease from 84% last year. Those respondents who stated that their unemployment was not due to the pandemic, quoted reasons ranging from finding it difficult to secure work because of low flying hours, failed medicals, and not being current.

For those who were unemployed due to the pandemic, among the responses were:

- ◆ My working contract as a captain was terminated due to the global pandemic. I hope this situation will go back to normal soon, I just want to fly again. **Captain, previously flying in Asia-Pacific**
- ◆ I think that airlines are using the pandemic as an excuse to hire cadets instead of experienced pilots so that they can cut costs. **First Officer, previously flying in the Middle East and Africa.**
- ◆ My flying career has been severely set back due to the pandemic and my family has paid the highest price for it. **Captain, previously flying in China.**
- ◆ I was made redundant after 14 years of service by an unscrupulous airline that took complete advantage of the UK government furlough scheme and then got rid of us as soon as it ended. **First Officer, previously flying in Europe.**
- ◆ The company I was working for went bankrupt during the pandemic. Due to the many restrictions around the world, I was unable to keep current and my licence, rating and medical lapsed. Due to now being unemployed, I am unable to afford to reactivate my ATPL to qualify for jobs. I’m now facing potential early retirement. **First Officer, previously flying in Asia-Pacific.**

We continued by asking “What is your job seeking status?” 71% were actively seeking a new pilot job, whilst 10% were already in the interview process for at least one pilot job. This has increased from 3% year on year. Whilst this does show some improvement over the last year, it still speaks volumes of the extent to which unemployed pilots are still finding it difficult to secure interviews for

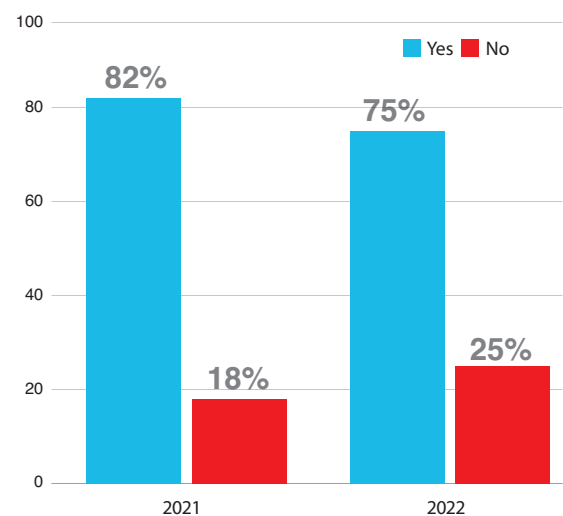
new jobs. Captains were slightly more likely to be in the interview process than first officers at 11%.

When pilot interviews are hard to obtain, what sacrifices will pilots make to secure a new role? We asked, “Would you take a pay cut for a new pilot opportunity?” 75% agreed that they would, which has fallen from 82% back in 2021. Captains were more likely to take a pay cut than first officers at 76% and 69% respectively.

We heard from the pilots who shared their thoughts on taking a pay cut:

- ◆ I would accept the first job available, no matter the salary or the country, just to get current again. **Captain, previously flying in the Middle East and Africa**
- ◆ We are already paid too little for a job that carries so much responsibility. Also, the cost of living is constantly

WOULD YOU TAKE A PAY CUT FOR A NEW PILOT OPPORTUNITY?



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going up – a pay cut is not an option. **First Officer, previously flying in Europe**

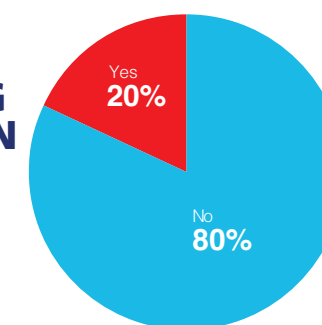
- ◆ After two years without a salary and a family with two children, yes, even a salary pay cut could be very welcome...unfortunately. **First Officer, previously flying in the Middle East and Africa**
- ◆ I don't think it is about whether I would take a pay cut or not. Rather, I think employers and new start-ups especially will use this 'opportunity' to drive pay and terms and conditions down. **Captain, previously flying in Europe**
- ◆ Pilots have been underpaid for years, particularly first officers. So, taking a pay cut is part of becoming a pilot. I earned more money as a supervisor in a retail store before I had to take a pay cut to get my first job on the flight deck (pre-pandemic). **First Officer, previously flying in Europe**

◆ As a professional who came up through the industry, I appreciated the obstacles and difficulties of advancing to a level where I could benefit from my time building and the required experience to operate at the upper end of the aviation spectrum. To take a salary reduction would be providing my experience and expertise to a corporation that obviously exploits the circumstances of the pandemic situation. **Captain, previously flying in Asia-Pacific**

◆ I understand the needs and economic issues that airlines are dealing with at present. For which I as their future employee, would be willing to chip in by taking a commensurate pay cut. **Captain, previously flying in the Middle East and Africa**

◆ Having been unemployed for over a year whilst living off savings, it's no longer possible to relocate and be paid a percentage less than before. The cost of living has increased in most places, and I feel that for the

ARE YOU CURRENTLY IN A HOLDING POOL WITH AN AIRLINE?



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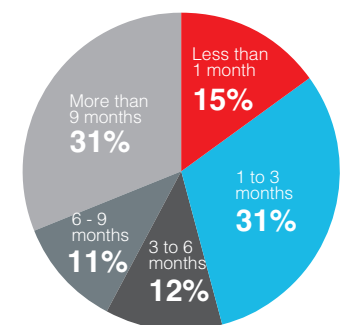
I DON'T THINK IT IS ABOUT WHETHER I WOULD TAKE A PAY CUT OR NOT. RATHER, I THINK EMPLOYERS AND NEW START-UPS ESPECIALLY WILL USE THIS 'OPPORTUNITY' TO DRIVE PAY AND TERMS AND CONDITIONS DOWN. SURVEY RESPONDENT

responsibility and the qualifications, I deserve to be paid accordingly. The fact is for me to return to aviation it will have to be a bumper salary or I'll just hobby fly. **Captain, previously flying in Asia-Pacific**

◆ The aviation industry received tax breaks and government subsidies to survive. Pilots and other workers should not suffer pay cuts because we are the ones who suffered and are being coerced to get vaccinated or lose our jobs. What if you're allergic to the vaccine? No one cares. **Captain, previously flying in Asia-Pacific**

Holding pools have been created at airlines during the pandemic for unemployed pilots. We wanted to find out just how many were in a holding pool and how long they had been part of one. Only 20% of unemployed pilots responded that they were currently in a holding pool. First Officers were more likely than captains to be in a holding

HOW LONG HAVE YOU BEEN IN THIS HOLDING POOL?



Pilot unemployment *continued*

pool at 24% and 18% respectively. Unemployed pilots in China (36%) and Europe (24%) were the most likely to be in a holding pool.

For those in holding pools, we enquired how long they had been waiting in it. 31% had been in the holding pool for more than nine months, 11% for six to nine months, 12% for three to six months, 31% for one to three months and 15% for less than a month.

We found that pilots who had previously been employed by the airline that they were in a holding pool with, were more likely to have been waiting in the pool for more than six months at 48% compared to 42% of those who had never worked for the airline before.

We enquired how stressed unemployed pilots were feeling, asking them to rate their stress level from one (not stressed) up to five (very stressed). Pilots who were in a holding pool were more likely to rate their stress level at four or five (40%) than those who were not in a holding pool where only 28% rated their stress at this level.

"Holding pools can offer some hope to unemployed pilots, but the conundrum is what to do whilst you wait. What do you do for work and money whilst in the pool? Do you accept a lesser flying job or a job outside of aviation and risk compromising on the hold pool offer? This is the reality that pilots are facing and could potentially be adding to the already stressful situation they find themselves in," Charman comments.



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MARK CHARMAN

Returning to the cockpit

The perception and the reality of returning to the cockpit after time away is a topic that we couldn't ignore this year. We were interested to find out how confident unemployed pilots felt about returning to the cockpit. We also wanted to hear from the pilots that had previously been unemployed in the pandemic who had secured a new job about how long it had taken them to find their new job, as well as how confident they felt returning to the cockpit.

With the length of unemployment varying between pilots, from only recently losing a pilot job to those who have not flown since the start of the global pandemic, we expected to see a huge variation in confidence levels at the prospect of getting back in the cockpit.

Nearly a quarter of unemployed pilots were not at all confident about getting back in the cockpit. Unemployed pilots in North America and Europe were feeling the least confident at 40% and 28% respectively.

"I don't think that anyone could blame an unemployed pilot for losing some confidence whilst facing unemployment. Whether it is temporary or permanent, unemployment can lead to stress, anxiety, depression, and other mental health challenges. On top of this, uncertainty related to COVID-19 only adds to the angst. We hope that the sector and airlines are already planning on how they can make the transition from unemployment to flying again run smoothly and safely," Sophie Wild notes.

HOW CONFIDENT DO YOU FEEL ABOUT GETTING BACK IN THE COCKPIT?	
Very confident	40%
Somewhat confident	36%
Not at all confident	24%

We heard from the pilots about how they were feeling:

- ◆ When you are not current on type after almost two years and the airlines continue to ask, "last flight in the last 6/12 months", you are not so confident. **First Officer, previously flying in the Middle East and Africa**
- ◆ I feel I will not be looked at because I am now 50. Unfortunately, experience counts for very little now. **Captain, previously flying in Europe**

- ◆ I will choose my role and airline very carefully. When I got a better one, I'll leave. No more loyalties. **Captain, previously flying in the Middle East and Africa**
- ◆ My age and experience now feel like they are against me. Too old and overqualified. **Captain, previously flying in the Middle East and Africa**
- ◆ I have had periods off on maternity leave so this isn't the longest I haven't flown before so I am confident my skills will return. **Captain, previously flying in Europe**
- ◆ Many of my colleagues decided to get out for good: most of them were disgusted by the way airlines treated them. **Captain, previously flying in Europe**

For those who were employed and flying, 27% had previously been unemployed in the pandemic. The biggest percentages of pilots in regions who had previously been unemployed were flying in China (41%), South America (27%) and Europe (25%).

We asked all these pilots how long it had taken them to secure a new job. Globally, 12% took less than one month, 14% one to three months, 13% three to six months, 17% six to nine months and 44% more than nine months. First Officers found it took longer than captains, with 55% of this rank taking over nine months to find a new job, versus captains where only 32% of them found it took this length of time.

We continued and asked these same pilots how confident they felt getting back in the cockpit. 9% were not at all confident, 44% were confident but it took some time to feel the same as before and 47% felt very confident.

"The perception versus the reality of returning to the cockpit is paramount here. Whilst 24% of unemployed

Returning to the cockpit *continued*

“

I HAVE HAD PERIODS OFF ON MATERNITY LEAVE SO THIS ISN'T THE LONGEST I HAVEN'T FLOWN BEFORE SO I AM CONFIDENT MY SKILLS WILL RETURN. SURVEY RESPONDENT

pilots felt unconfident getting back in the cockpit, those who have been unemployed and secured jobs were much more confident in reality,” says Charman.

However, when we isolated the answers from pilots who had taken nine or more months to find a job, we saw confidence levels fall. 15% were not at all confident, 51% were confident but it took some time to feel the same as before and only 34% felt very confident.

Wild notes: *“Being unemployed and searching for a job can play havoc with confidence levels. Many people suffer from confidence issues when they simply have to interview for a job, especially if it has been a long time since their last. Add in the pressures and the consequences of not doing a good job in the cockpit on your return and I can see why many pilots are not feeling as confident as they may once have.”*

We heard from pilots about their return to the cockpit after previously being unemployed:

HOW LONG DID IT TAKE TO SECURE A NEW PILOT JOB BY FLYING REGION						
	China	Asia Pacific	Europe	Middle East Africa	North America	South America
Less than 1 month	20%	6%	13%	17%	14%	17%
1 to 3 months	20%	11%	15%	11%	25%	17%
3 to 6 months	20%	14%	15%	17%	11%	16%
6 - 9 months	0%	23%	17%	15%	22%	0%
More than 9 months	40%	46%	40%	40%	28%	50%



◆ I had only 200 hours of multi-crew flying when the pandemic stopped my activity so coming back took a lot of practice to get up to speed after 18 months of a break. **First Officer flying in Europe**

◆ Once you enter the cockpit, everything returns in your mind like before, just a bit slow at the beginning but after two days everything was back to normal. **Captain flying in the Middle East and Africa**

◆ I was still confident in my skills but not confident about securing a job. Luckily, I was 747 type-rated and cargo was hiring. **First Officer flying in Europe**

◆ It was hard to get back to work after time off in the pandemic. I had to work hard on my mental health and my family were suffering too. It was too much and a difficult time. **Captain flying in South America**

◆ I did some contract work and sim seat support in the interim. This kept me sharp. **Captain flying in North America**

◆ Flying aircraft has come back okay after two years off, but new procedures and IT systems have been hard to adjust to. Perhaps being 62 doesn't help. **First Officer flying in Europe**

◆ My greatest period of stand-down was eight months. The training provided by my airline was excellent to ensure we had the necessary skills again to comfortably

perform our roles, recognising that we would be required to slow it down due to lack of recency.

Captain flying in Asia-Pacific

“

I DID SOME CONTRACT WORK AND SIM SEAT SUPPORT IN THE INTERIM. THIS KEPT ME SHARP. SURVEY RESPONDENT

Pilot job security

We reported at the beginning of 2020 that the demand for experienced pilots was at a record level and the industry was plagued with concerns over experienced pilot shortages, yet still that year, 52% of pilots were concerned about their job security. The impact of the pandemic increased these worries and in 2021 we reported that 82% of pilot respondents were concerned about their jobs. This year employed pilots were asked again if they were concerned about their job security and 61% agreed that they were.

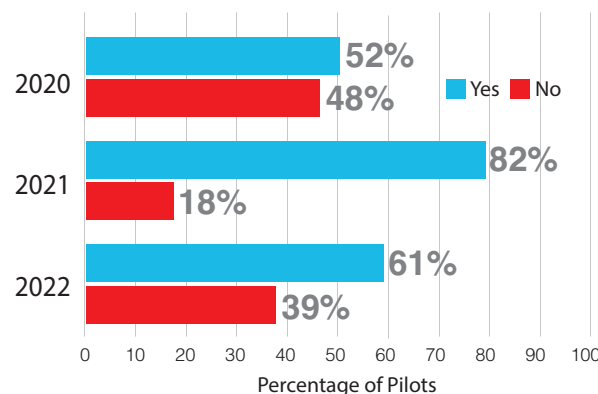
Why do more pilots than not still have concerns over their job security? We have seen employment increase; we have also seen air travel become more viable and a global vaccination programme established. Pilots responded and COVID-19 still topped their concerns at 40%, although down year on year from 65%.

Pilots shared their thoughts:

- ◆ With the world still in the grips of the pandemic and airlines still trying to cope. Uncertainty prevails. **Captain flying in Asia-Pacific**
- ◆ I'm still concerned about another lockdown. **First Officer flying in Europe**
- ◆ The general volatility of the industry being very susceptible to global crises causes concern regarding job security. **Captain flying in the Middle East and Africa**

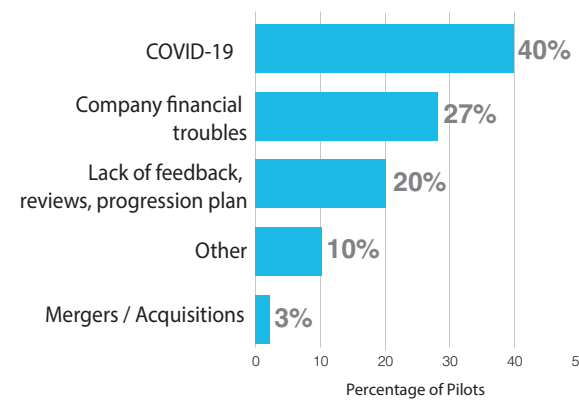
- ◆ This COVID-19 pandemic destroyed many lives, but I'm not losing hope, since I believe in the V-shape recovery of aviation. I firmly believe that behind the thunderstorm, there is a silver lining. **Captain flying in Asia-Pacific**
- ◆ After the 'honeymoon' has worn off I'm not sure how motivated I will be with a harder job for much worse T&Cs than two years ago. Fortunately working is no longer a necessity, so I may retire early especially if my medical became an issue (especially if any health issues were made worse by the job). **First Officer flying in Europe**
- ◆ In addition to just the concerns of COVID-19, there are other factors, like the negative image that is being pointed

ARE YOU CONCERNED ABOUT YOUR JOB SECURITY?



“ THIS COVID-19 PANDEMIC DESTROYED MANY LIVES, BUT I'M NOT LOSING HOPE, SINCE I BELIEVE IN THE V-SHAPE RECOVERY OF AVIATION. I FIRMLY BELIEVE THAT BEHIND THE THUNDERSTORM, THERE IS A SILVER LINING. SURVEY RESPONDENT

WHAT HAS MADE YOU THE MOST CONCERNED ABOUT YOUR JOB SECURITY?



toward the aviation industry against the railway and other forms of transport. Plus, the development of pilotless flying vehicles. I strongly believe that today's generation of pilots is possibly the last. **Captain flying in Europe**

- ◆ It appears only Northern America is back to post-covid passenger numbers. The rest of the world, especially developing nations, are still struggling to get vaccines, and are still not travelling. **Captain flying in the Middle East and Africa**
- ◆ I'm currently working for a large budget airline; however, no company is immune to the effects of both COVID-19 and the economy. **First Officer flying in Europe**
- ◆ My company is just barely hanging on. Severe cost-cutting and large-scale retrenchments across the company. Passenger numbers are still way down compared to pre-covid. We are no longer the market leaders. **Captain flying in the Middle East and Africa**

Company financial troubles were the second most common reason for job security concerns at 27%, up from 21% in 2021, followed by the lack of feedback, reviews, and a progression plan at 20% up from 8% in 2021.

“ Understandably, the unpredictable nature of the pandemic could be causing some job security concerns. Yet we are seeing more pilots this year being concerned because of the lack of feedback, reviews, and progression plans. People become concerned about their job security when they aren't receiving the feedback or reviews, they

are used to. Aviation leaders, managers and HR face the challenge of being pulled in different directions. Performance evaluations can take up a lot of time and focus for everyone involved. Many people are simply wary of performance reviews and will do anything to avoid them. Unfortunately, what this is manifesting is that 20% of pilots are concerned for their job security because of the lack of them,” Charman explains.

For those who are performing well and exceeding their objectives, not evaluating their performance collaboratively could be one of the worst things you can do. When good or even great performance is not recognised, celebrated, or rewarded, it can make employees feel despondent. In the worst-case scenarios where they feel they have failed to receive the recognition and opportunities they deserve; it can lead to staff turnover.

On the other side, if you have employees who are not performing well, ignoring the situation could be bad for all parties. If poor performance is not identified and talked about rationally, employees who need support or better direction can end up struggling and performance decreases further.

An unfortunate outcome of abandoning performance evaluations is the loss of communication and stability that regular feedback enables. Consistent feedback keeps employees on track and working towards agreed goals, and it also helps them feel a sense of connection which is critical in these times.

“ I'M CURRENTLY WORKING FOR A LARGE BUDGET AIRLINE; HOWEVER, NO COMPANY IS IMMUNE TO THE EFFECTS OF BOTH COVID-19 AND THE ECONOMY SURVEY RESPONDENT

Pilot retention

We asked pilots who were employed and flying whether in the next 12 months they would change jobs. 56% agreed that they would, a small uptick since our 2021 report.

When we then looked at those pilots who had previously been unemployed during the pandemic and had secured a new job, this rose to 68%. Notably, in this group of respondents, two-thirds had had to take a pay cut to secure a new position.

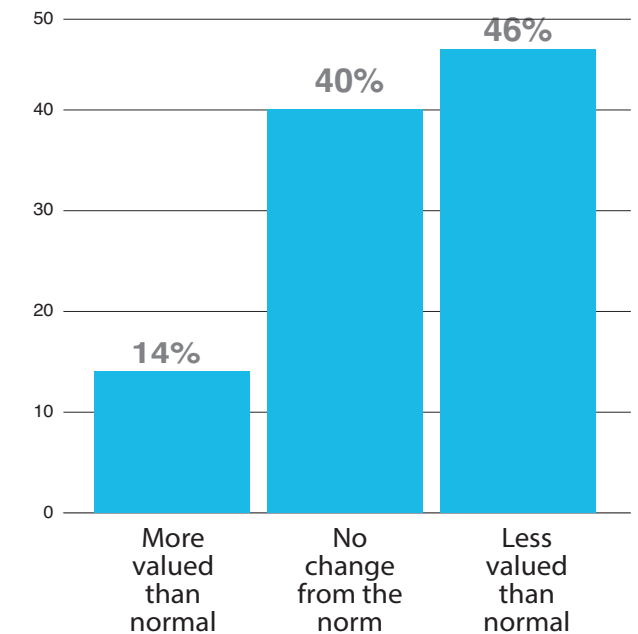
Wild says: "Job security has significantly improved year on year, but many factors can influence a job move. From seeking career progression, requiring better work-life balance, wanting to work for an airline with values that match your own as well as desiring a more competitive reward package."

Only in North America and South America did we see a decrease in the percentage of pilots planning to change jobs in the next 12 months. In North America, it decreased from 41% down to 38% and in South America, it decreased from 68% down to 66%. Those flying in the Middle East and Africa saw the biggest increase in desire to change jobs, from 60% in 2021 to 66% in 2022.

We followed this question by asking "How valued do you feel by your employer at the moment?" 46% felt less valued, a decline from 49% in our 2021 report. 40% said



HOW VALUED DO YOU FEEL BY YOUR EMPLOYER?

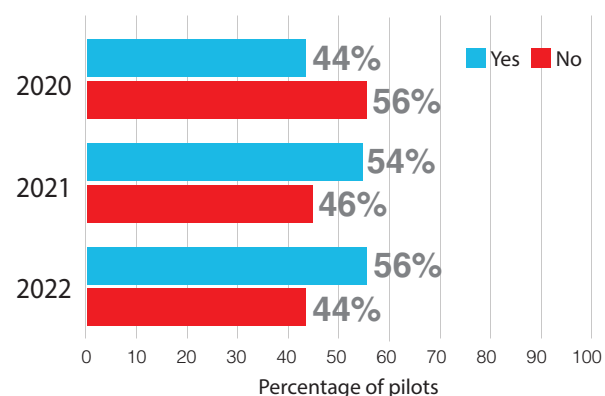


to horrible conditions regarding testing, quarantines, and hotel accommodations. Not once have we received a thank you from upper management or any acknowledgement while they were comfortable in their homes with their families. I have therefore decided to resign. **Captain**



SINCE THE PANDEMIC, MY COMPANY HAS SHOWN ITS TRUE COLOURS AND TREATS US LIKE EXPENDABLE TOOLS. THERE IS ABSOLUTELY NO REGARD FOR US AS HUMANS, LET ALONE AS VALUED EMPLOYEES. SURVEY RESPONDENT

ARE YOU PLANNING ON CHANGING JOBS IN THE NEXT 12 MONTHS?



they felt no change from the norm, up from 37% in 2021 and 14% said they felt more valued than normal which was the same percentage as in 2021.

Pilots flying in the Middle East and Africa were the most likely to feel less valued, suggestive of why they saw the biggest increase in pilots looking to change jobs in the next 12 months. We heard from the pilots flying in the Middle East and Africa who felt less valued:

◆ There are too many COVID-19 applied restrictions and working practices that have not been lifted and have now become the norm. **Captain**

◆ I don't feel valued at all, I'm just a number to my employer. **First Officer**

◆ Since the pandemic, my company has shown its true colours and treats us like expendable tools. There is absolutely no regard for us as humans, let alone as valued employees. **First Officer**

◆ The 'if you don't like it then leave' management model is in overdrive. **Captain**

◆ Throughout the pandemic, I've been forced to operate in all places around the world and have been subject

Pilot health and well-being



Aviation is a high-consequence industry because if a pilot makes a mistake or something goes wrong with the aircraft, the consequences can be catastrophic. Add to that the increasing pressure on making air travel greener, the threat of cyber security attacks making customer and payment data more vulnerable, and top it off with a global pandemic, aviation is becoming more highly regulated than ever before.

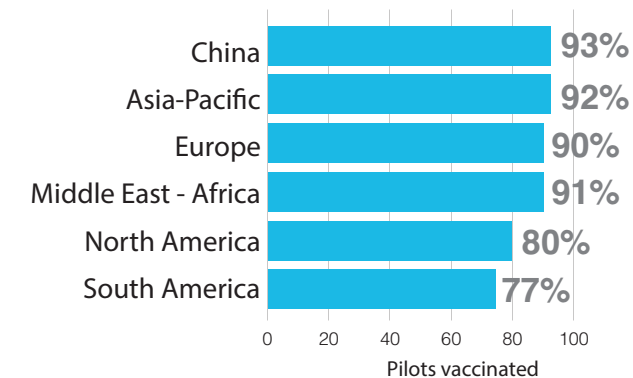
COVID-19 vaccinations are already a requirement for public life in many parts of the world but there is also increasing pressure for specific professions, including flight crew, to have mandatory vaccinations. Travel has been one of the most cited reasons for the spread of the pandemic on a global scale. The pressure to make air travel itself viable has come with increasing regulations for passengers including PCR testing, face masks, social distancing and in some cases proof of vaccinations to be admitted entrance to some countries, despite still having to quarantine in some cases. We wanted to find out not only what percentage of the pilot population had received their double vaccinations but also how many believed it should be a mandatory requirement for all pilots.

90% of pilot respondents confirmed that they had been

double vaccinated against COVID-19. Those flying in China and Asia-Pacific were the most likely to be double vaccinated at 93% and 92% respectively. Pilots flying in North America and South America were the least likely at 80% and 77%.

"We were a little surprised that only 80% of pilots flying in North America were double vaccinated. Back in August 2021, United Airlines was the first major US carrier to require all its domestic staff to be fully vaccinated against COVID-19. With American, Southwest, JetBlue and Alaska Airlines telling staff in October that they must be vaccinated under the Biden administration's federal contractor rules. Airlines particularly in the US appear to have moved quickly to mandate vaccinations," says Wild.

HAVE YOU BEEN DOUBLE VACCINATED AGAINST COVID-19?

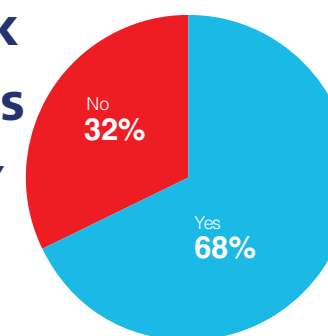


The debate continues whether vaccinations should be mandatory for all. Austria plans to introduce mandatory vaccinations for the whole population by February 2022. Care home workers in the UK were set a deadline of the 11th of November 2021 to be double vaccinated to keep working. In Moscow, Russia a mandate was set for people in public-facing jobs to be double vaccinated and businesses were set to be monitored to ensure that at least 60% of their workforce complied by the 15th of July 2021.

So, should it be compulsory for pilots to be double vaccinated to fly? 68% of pilot respondents stated they felt it should be. 32% disagreed.

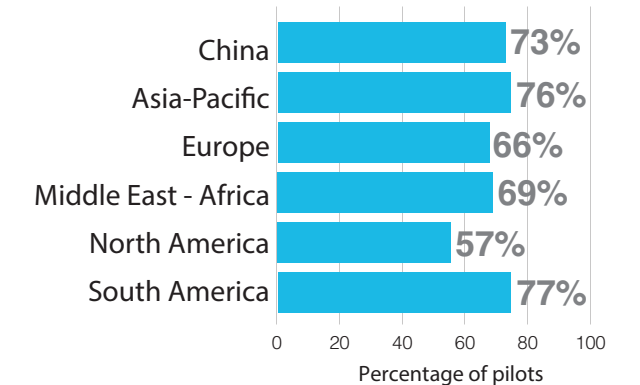
Whilst South America was the region with the lowest level of double vaccinations, it was the region with the largest percentage of pilots who believed that double vaccinations should be compulsory for pilots at 77%. North America had the largest percentage of pilots against compulsory vaccinations with only 57% agreeing to it, followed by Europe at 66%.

DO YOU THINK DOUBLE VACCINATIONS SHOULD BE COMPULSORY FOR ALL PILOTS?



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DO YOU THINK DOUBLE VACCINATIONS SHOULD BE COMPULSORY FOR ALL PILOTS?



"There has been one fundamental argument in favour of making double vaccinations mandatory and that is that they reduce the risk of serious illness from COVID-19. Less serious illnesses mean less pressure on hospitals as well as fewer deaths. However, if the lockdowns were anything to go by, anything that has tried to be enforced has received considerable resistance from some parts of the population. Many believe it is their human right to choose whether to administer a vaccination into their body, 'my body, my choice'. There are many reasons for and against the vaccination and the pilot community is not alone in having mixed feelings. This is a global issue, and the debate continues," notes Charman.

We moved along in our line of questions around health and well-being to find out how stressed pilots who are



I'M NOT STRESSED ABOUT THE ILLNESS ITSELF FROM COVID-19, BUT I AM ABOUT ITS POTENTIAL IMPACT ON FURTHER TRAVEL RESTRICTIONS AND LOCKDOWNS. BRINGING PASSENGER NUMBERS DOWN AGAIN. SURVEY RESPONDENT

Pilot health and well-being *continued*

employed and flying were feeling. In 2021, we reported the average stress level for all pilots was rated on average at level three out of five (one being not stressed and five being very stressed). Pilots employed and flying responded as less stressed this year, with an average level of 2.6.

Job security (47%) and COVID-19 (25%) were the biggest stress factors in 2021, whereas in 2020 we reported that pilots were the most stressed by management (41%) and rotations (29%). In 2022, management (28%) has returned as the biggest stress factor, with job security (26%) closely behind.

We heard from the pilots about what was making them feel stressed:

- ◆ It is so difficult to commute during my days off. I spend my days off continuously reading amended COVID-19 restrictions in different countries (even though I am double vaccinated) and planning a safe and flawless trip home. It is a time-consuming task. **Captain flying in the Middle East and Africa**

- ◆ I'm not stressed about the illness itself from COVID-19, but I am about its potential impact on further travel restrictions and lockdowns. Bringing passenger numbers down again. **First Officer flying in Europe**

- ◆ I had to leave my partner behind in Europe and international commuting like all international travel is a nightmare. **Captain flying in North America**

- ◆ I don't know how long this virus will continue, and the lack of feeling stable in my job. **Captain flying in South America**

- ◆ Poor decisions by management are affecting the financial stability of the company. This is therefore affecting staff morale despite the staff being dedicated to keeping the company going. **First Officer flying in the Middle East and Africa**

We wanted to secure a general picture of how pilots are feeling this year and asked them to choose the top three words or phrases that best captured their state of mind. The top answer was optimistic.

The significant changes to air travel this year have made their mark on the pilot community and optimism from

HOW ARE YOU FEELING? PLEASE SELECT THREE WORDS OR PHRASES THAT BEST CAPTURE YOUR STATE OF MIND THIS WEEK		
	2021	2022
Successful	9%	15%
Stressed	33%	28%
Happy	11%	21%
Worried and anxious	41%	26%
Productive	15%	22%
Failing	4%	4%
Calm and collected	27%	27%
Frustrated	38%	34%
Distracted	9%	9%
Restless	15%	14%
Optimistic	31%	37%
None of the above	3%	3%

the front will be beneficial in setting a feeling across the industry.

The second top answer was 'frustrated'. The pandemic has been unpredictable, and a pilot cannot determine the outcome of how it impacts them flying. Even for those who are employed and flying, many pilots mentioned reduced hours and terms meaning that they may not be flying as much as they wish they could as well as not being compensated in the way that they were before the pandemic.



I HAD TO LEAVE MY PARTNER BEHIND IN EUROPE AND INTERNATIONAL COMMUTING LIKE ALL INTERNATIONAL TRAVEL IS A NIGHTMARE.

SURVEY RESPONDENT

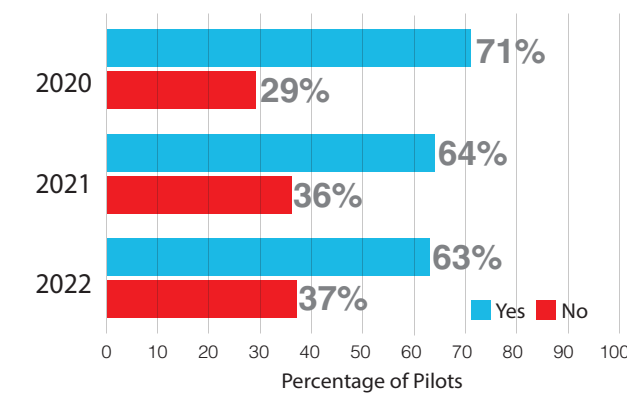
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Pilot referral

The world has been in a pandemic mode for nearly two years, and it has been highly publicised that people's wants and needs in their careers have changed for many in this period, with more time to think about what is important to them and what they want to prioritise in their lives going forward. How do pilots feel about this? We asked all pilots whether employed or not, "Given the investment to become a pilot, would you do it again?"

63% of pilots would choose their career again, falling from 64% last year. We saw the biggest fall from 2020 to 2021 with only a 1% decrease from 2021 to 2022. We did see that in the Asia-Pacific region this fell from 66% in 2021 down to 61% in 2022.

GIVEN THE INVESTMENT TO BECOME A PILOT, WOULD YOU DO IT AGAIN?



Wild explains: "The Asia-Pacific region has seen unemployment in pilots increase over the last year and it could be understood that there is a more negative feeling about their chosen career. If you have spent significant amounts of money to train as well as the time investment into obtaining your stripes, I'm not surprised that some pilots feel like they wouldn't repeat their career."

With a larger percentage of pilots agreeing that they would repeat their career than not, we wanted to hear why they would:

- ◆ It's not only a job but also a passion. It should be better paid though. **Captain flying in South America**

- ◆ If you are passionate, it is a very rewarding job. I have been flying for 30 years and still have the same pleasure

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to sit in the cockpit as I did on my first flight. **First Officer flying in Europe**

- ◆ Being a pilot is amazing. Flying sure beats a corporate job any time. **Captain flying in Asia-Pacific**

- ◆ Being a pilot for me is a life reason, it is what I like to do, and I do it not considering it as a job but a passion. I love it, even though I am slowly getting disappointed with what I see. It's a profession not respected anymore. **First Officer flying in the Middle East and Africa**

- ◆ A childhood dream accomplished through a forest of obstacles: nobody else wanted it just me. **First Officer flying in Asia-Pacific.**

The future of aviation is dependent on enticing young people to the profession and making the sector attractive as a long-term career. We asked, "Would you advise young people to become a pilot?" 45% of pilots said they would versus 71% in 2020.

Those flying in Europe and North America had a more favourable view on recommending a career to young people year on year, with Europe increasing from 34% to 38% and in North America from 54% to 63%.

We heard from the pilots that would not recommend a pilot career to young people:

- ◆ Resilience is required to become a pilot. I'm just not sure how resilient young people are anymore. No other sector costs this much time and effort nor mental strain to maintain your licence, your job, and your peace of mind. **First Officer flying in the Middle East and Africa**

- ◆ I don't think anyone should become a pilot anymore. The conditions in most areas have become so insecure and

Pilot referral *continued*



it will be impossible for future pilots to have any family life due to changing bases and countries. **Captain flying in Europe**

◆ Although I have personally been able to have a successful career, the risks are simply too big compared to the possible gains. I have had to move between three countries to stay employed. The terms and conditions are in a terminal spiral dive, especially in Europe. **First Officer flying in North America**

◆ Automation will downgrade pilots' roles and responsibilities. It will not be a good professional career anymore. **Captain flying in Asia-Pacific**

◆ I think that for young people the same age as my children, the occupation is less likely to be as lucrative. It seems that there are plenty of salesmen and personnel in the financial sector earning more than very highly qualified pilots. **Captain flying in North America**

"55% of pilots not recommending a career as a pilot to young people is a staggering statistic. One that raises huge concerns over the effect of the pandemic and how it will impact attracting young people to not only aviation



AUTOMATION WILL DOWNGRADE PILOTS' ROLES AND RESPONSIBILITIES. IT WILL NOT BE A GOOD PROFESSIONAL CAREER ANYMORE. SURVEY RESPONDENT

but to a career as a pilot. If those working in the sector themselves are struggling to recommend the career, what does the future of the sector look like? A time will be shortly upon us where the sector needs to come together and make an intentional drive towards a reinvention strategy, rather than one of survival. To plan how aviation can come back stronger and cement the position as a pilot as a viable long-term career for young people," says Charman.

The future of aviation

After nearly two difficult years of the pandemic, we saw a decline in demand for air travel from passengers, airline closures, national and regional government travel restrictions as well as accelerated aircraft retirement. Pilots and other aviation professionals became unemployed, some retired and others left the industry for new occupations. However, with the global vaccination programme now established, what does the future hold for aviation?

We asked pilots their opinion on how people will or will not return to air travel in light of the COVID-19 outbreak. 34% believed that people will return to using air travel as they did pre-COVID as soon as it is feasible, up from 19% in 2021. 53% of respondents said that some specific air travel behaviours will change long-term, but in most cases, people will return to past behaviours, down from 54% in 2021. The remaining 13% of pilot respondents felt that it would have a long-term impact on air travel, down from 27% in 2021.

"We can see that in just one year pilots are feeling more positive about the return to air travel. Over a third now believe that people will return to using air travel as they did pre-COVID as soon as it is feasible. This feeling must have been improved by the year on year increase in employment amongst pilots as well as the decline in travel restrictions in most regions. The sector has worked hard in a short period to make air travel more viable, and passengers have in many cases embraced this opportunity to take to the sky. You cannot miss a good news story in the press or on social media of families and friends reunited, or holidaymakers enjoying a trip abroad. Not to mention the freedom for businesspeople to re-establish face to face relationships. The prospect of COVID testing and face masks for flights has not been welcomed by all, but it has gone a long way to make air travel possible again," notes Wild.

WHEN DO YOU THINK THE AVIATION SECTOR WILL MAKE A FULL RECOVERY TO PRE-COVID LEVELS?	2021	2022
Up to 1 year	10%	20%
Up to 2 years	34%	40%
Up to 3 years	28%	23%
Up to 4 years	12%	6%
Over 4 years	10%	5%
It will never be the same again	6%	6%

With a greater feeling of positivity amongst pilots and the increase in the viability of air travel, we asked "When do you think the aviation sector will make a full recovery to pre-COVID levels?" This question was answered with more optimism year on year with double the number of pilots believing it would return within 12 months.

"It is astounding to see the improvement in optimism from pilots this year. They prove how resilient they are and their ability to work with change. A pandemic like this could change at any time, but we must assume that the demand for air travel, the higher rates of employment as well as the global vaccine programme are making their mark on pilots. They believe in the ability of the sector to recover well and in good time too," says Wild.

If the aviation sector is to recover as quickly as many pilots believe it will, what impact will this have on the pilot employment market in five years? We asked the pilots. 57% believed there would be a shortage of experienced pilots, up from 43% in 2021. 28% felt that there would be a shortage of all levels of pilots, up from 23% in 2021, and just 15% thought that there would be too many pilots, down from 34% in 2021.

Charman says: *"85% of pilots now believe the sector will be facing a shortage of pilots in five years, despite the difficult time it has faced through the pandemic. If this is true, airlines will need to be acting now. We must factor in the pilots we have lost to retirement, especially those who have taken it early as well as those who have left the profession for other occupations. I cannot ignore that pilots don't want to recommend their career anymore either. I must stress the need for a reinvention plan. It is mission critical that aviation as a sector needs to embed a strong value proposition for young people going forward. Let's make sure young people love the sky. We aren't there just yet, but more airlines and aviation businesses are starting to hire more proactively. Gen*

The future of aviation *continued*



Z wants blended lives between work and their home life, they want fulfilling work. It is our job as members of this sector to make this a reality. We cannot let skill shortages create another bust for aviation in the future."

Not only is it important to get young people interested in the sector but we must make sure that qualified pilots can get back to work as quickly as possible, especially those who are facing unemployment. We asked pilots what they thought will be the main difficulties in getting all pilots back to flying. The pilots themselves gave us their thoughts:

◆ Some pilots just don't want to come back. This is a hard and gruelling industry. **Unemployed First Officer, previously flying in North America**

◆ Lack of recency will demand additional training, but airlines won't want to invest, causing safety issues. **Employed Captain, flying in the Middle East and Africa**

◆ Many retired, many changed industry, companies don't value the profession anymore, not worthy. **Retired Captain, previously flying in the Middle East and Africa**

◆ Requalifying pilots and designing training programs to get them safely back in the cockpit will be a concerted industry-wide effort. **Employed Captain, flying in Asia-Pacific**

◆ Some pilots have left the profession out of frustration and a negative attitude from the employers. There was no motivation and a lack of a bare minimum financial support from the employers. **Unemployed Captain, previously flying in Asia-Pacific**

◆ I don't think there is or there will be a shortage of pilots or people wanting to be pilots. However, I do think there will

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MANY RETIRED, MANY CHANGED INDUSTRY, COMPANIES DON'T VALUE THE PROFESSION ANYMORE, NOT WORTHY. SURVEY RESPONDENT

be a shortage of people willing to work for and accept the offers made by airlines. Very similar to the current truck crisis in the UK. **Employed Captain, flying in Europe**

◆ Airlines have pushed pilots to the edge of what is legal and tolerable for years, and now T&Cs are being badly eroded. Partly due to the realities of COVID, partly that feels like just an excuse to put the squeeze on. Many people with a viable alternative will choose not to return to an industry where the work is stressful, they are permanently exhausted and away from home a lot.

Employed Captain, flying in the Middle East and Africa

◆ It is training. Government support is being given for fleet renewal, fleet expansion and rebranding. They need to use these financial means for training and for maintaining employment for pilots. **Unemployed First Officer, previously flying in Asia-Pacific**

◆ I believe that airlines will not pay sufficient compensation to lure pilots back to them - especially when they can earn similar salaries/rewards in other ventures outside. In the corporate/private business aviation field, the compensation market is more competitive due to the limited supply.

Employed Captain, flying in North America

◆ There are no difficulties. The pilots just need the training, and they can return. **Employed First Officer, flying in South America**

◆ I think there will be a real shortage of new pilots as I don't see how you persuade young people to join an aviation career given the costs and lack of employment opportunities. Why would you join when the pandemic has brought the sector to its knees? **Employed First Officer, flying in Europe**

Conclusion

Aviation has worked diligently and with pure resilience to survive the pandemic thus far. Pilots are more optimistic about the future and believe that the return of flying and its associated business activities to pre-COVID levels will be sooner rather than later. With the established global vaccine programme, we also have high hopes for the sector going forward into 2022.

We are learning lessons all the time about life and business, the pandemic has taught many of us what is important to us as individuals as well as what is and will be vital for the aviation sector going forward.

We consider:

- ◆ How will the sector make careers in aviation attractive post-pandemic?
- ◆ Will vaccines become mandatory for all flight crew?
- ◆ When will unemployed pilots secure employment out of holding pools?
- ◆ What will be the impact of currency levels on the future skill pool of pilots?
- ◆ What will it take for more pilots to feel valued by their employers?

◆ Will pilots who have taken pay cuts to secure jobs see their salaries increase over time?

◆ What will it take for pilots to feel secure and comfortable in their jobs for the long term?

In our third consecutive year of running The Pilot Survey, we would like to say a huge thank you to the pilots who have taken part each year. We are privileged to be able to create and share this report again with the aviation community. We have been astounded by the response and support of our last two reports and take our responsibility seriously to share the thoughts, feelings, and realities that pilots face.

We hope that you have found this year's report as thought-provoking and fascinating as it was to research, analyse and produce.

Mark and Sophie

