

The Pilot Survey 2023



GOOSE 
RECRUITMENT

 **FlightGlobal**

#thepilotsurvey2023



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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 provides news, analysis, conferences and recruitment solutions to help people and businesses learn more, network and grow in the aviation industry. FlightGlobal is one of the industry's leading news sources and includes respected publications Flight International and Airline Business, aviation event Dailies and FlightGlobal.com. A growing conferences program within the FlightGlobal portfolio, including Airlines 2023 in London, is addressing key market issues and questions in aviation. FlightJobs is a leading aviation specific job site that supports individuals throughout their careers and enables organizations to find the best aviation talent. For more information about us visit FlightGlobal.com

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 for 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

The past five years have been marked by significant ups and downs in the aviation sector. A period of exceptional activity was followed by the worst crisis the industry has ever faced, before 2022 saw a significant bounce-back in demand for air travel.

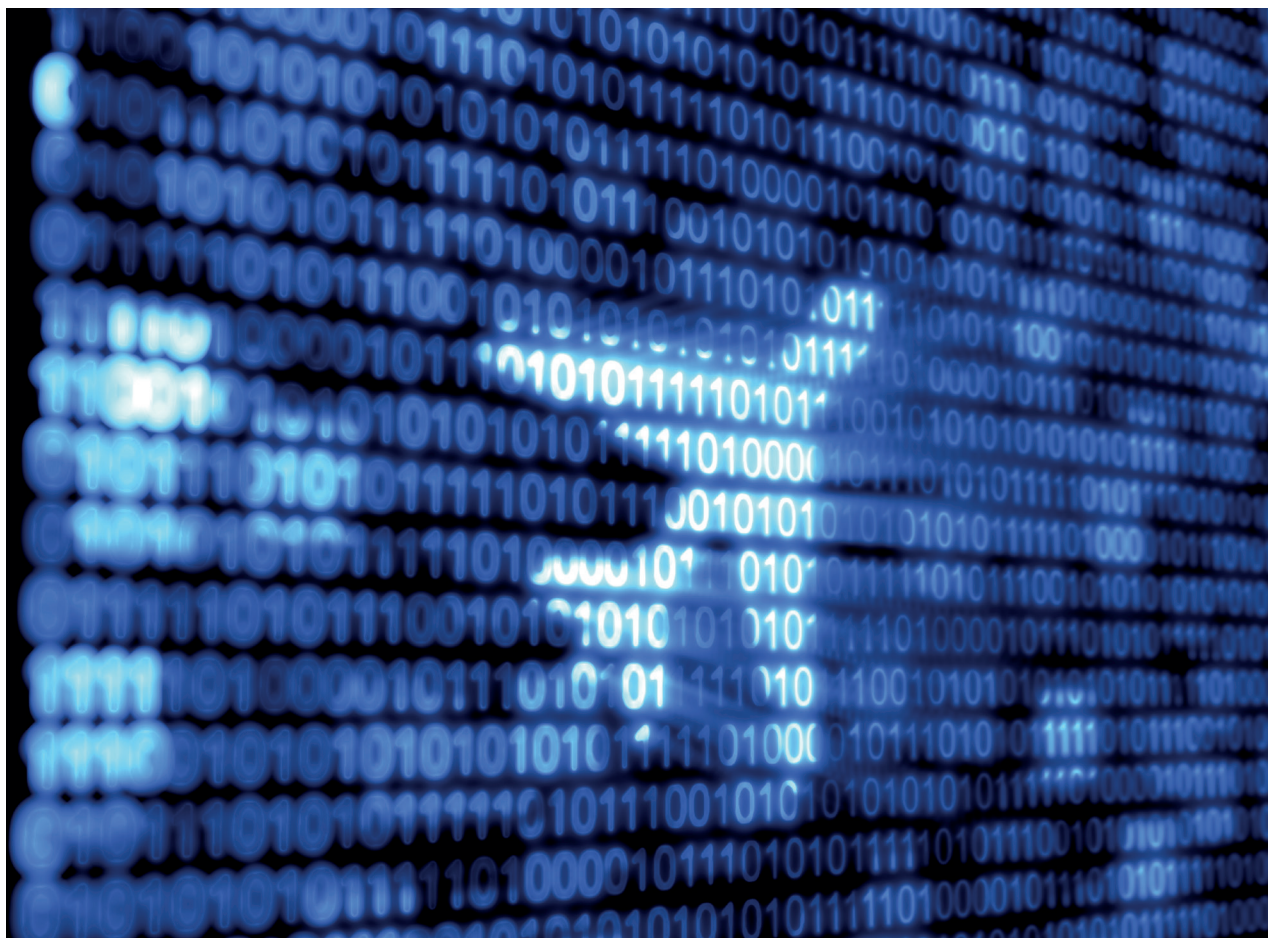
Today's consumers, both individuals and businesses, are demanding that air travel meets their expectations. They want air travel to be faster, and more convenient, with additional options and destinations readily available. Even more so, they want affordable air travel whilst also requiring that airlines and aviation businesses improve their carbon footprints.

The reliance on airlines to meet these ever-increasing demands for air travel is more vital than ever. With the threat of a global recession on the horizon, keeping consumers happy will be a tactic that airlines and aviation businesses will want to utilise. Many will have already started crisis planning, reflecting on the lessons learnt from previous economic downturns.

It is not just consumer demands that need to be met. Pilots have suffered too, with loss of employment, stress, health concerns, and emotional disruptions to name a few. Many pilots have been patient, waiting for this recovery to happen and regain some of what they lost in the process. This could mean some significant changes to the pilot profession, from pay and benefits to job seeking and retirement, as well as the future skill pool of the profession.

We look to uncover these changes and reveal what pilots want in this new year. We want to expose the good and bad of the sector, looking at the profession from a pilot's point of view.

In our fourth year of collaborating, GOOSE Recruitment and FlightGlobal have created The Pilot Survey 2023. This report covers topics including employment, retention, reward, diversity, inclusion and equity, job security and the future of the pilot profession.



Methodology

The Pilot Survey 2023 was open for four weeks and closed on the 6th of November 2022. A total of 1,184 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
- ◆ 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 Surveys that were released in 2020, 2021 and 2022. 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.

REMUNERATION DATA

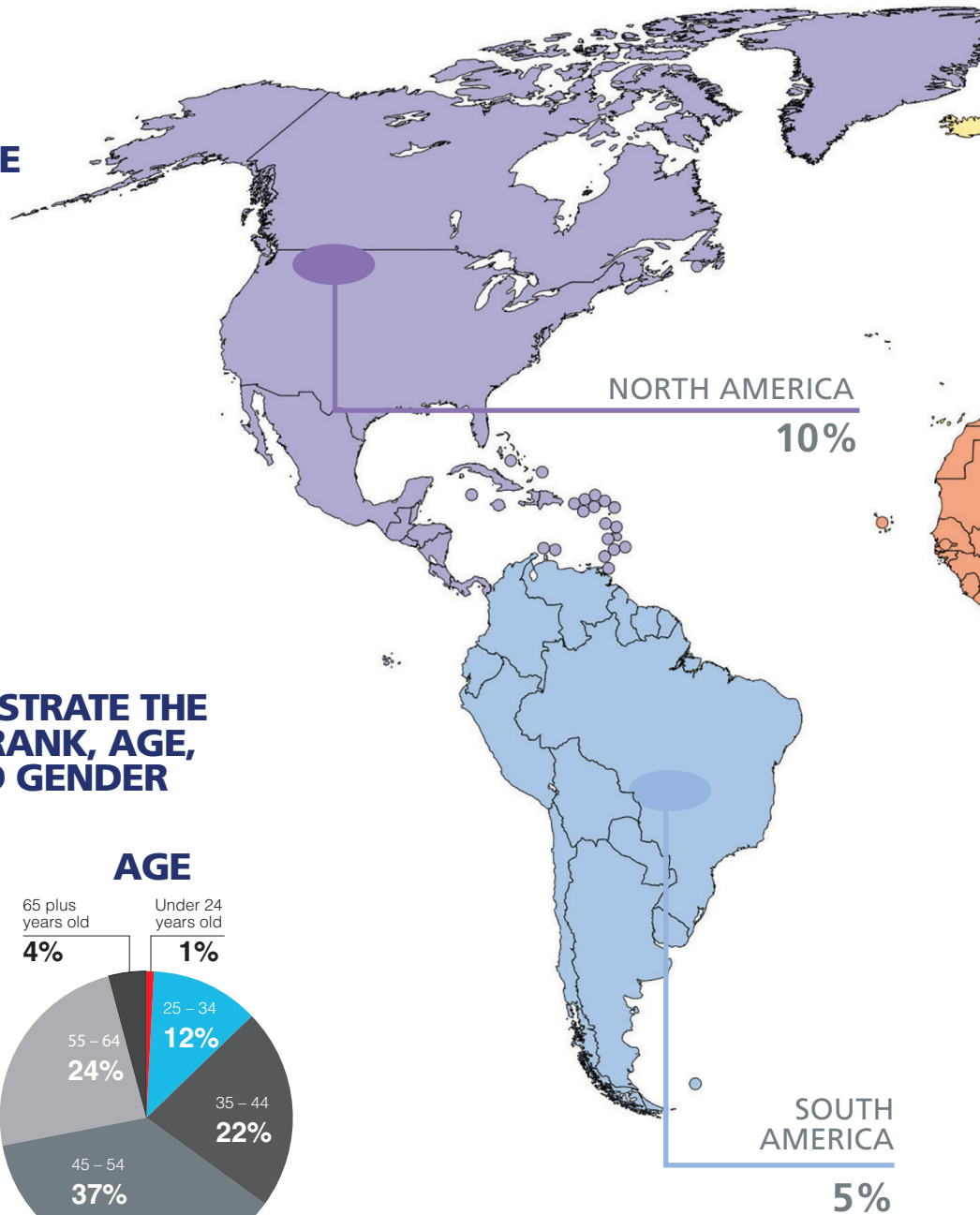
All salary information was provided directly by the respondents and has been converted to United States Dollars (USD) using the OANDA (www.oanda.com) currency converter. The currency conversions were made at the end of November 2022. OANDA provides the latest foreign exchange average bid/ask rates compiled from leading market data contributors. The respondent's salary information was provided in United States Dollars (USD), the Euro (EUR) and British pound sterling (GBP).

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

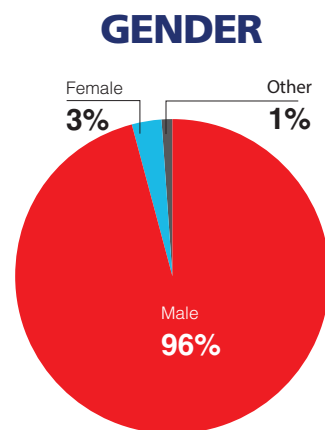
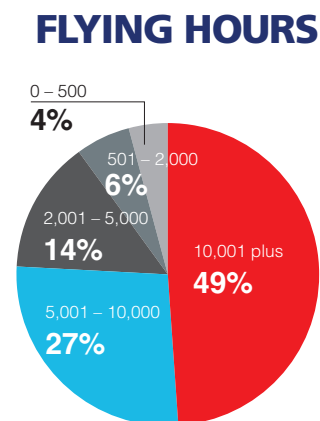
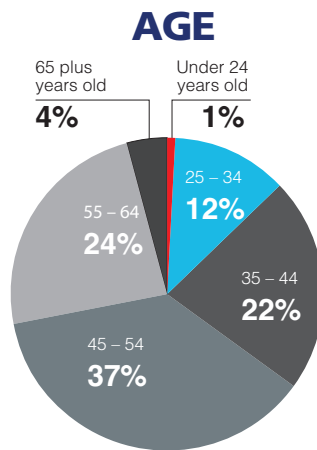
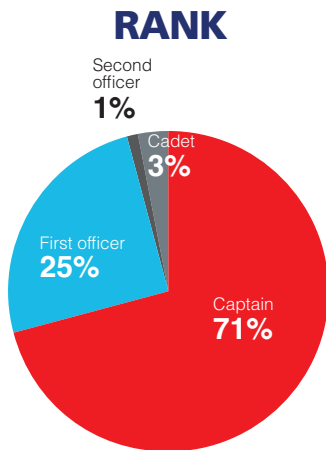


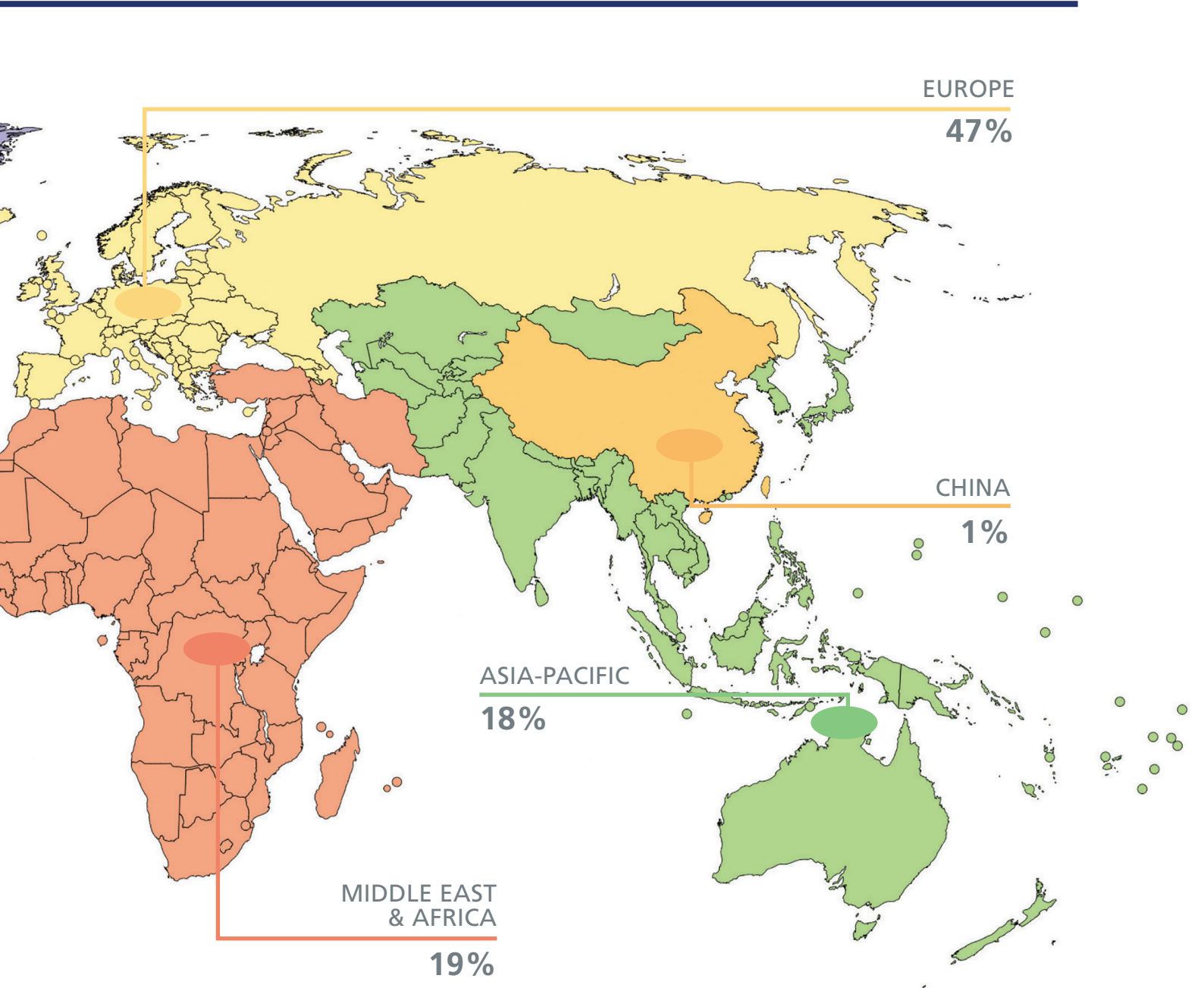
Demographics

THIS WORLD MAP DEMONSTRATES THE BREAKDOWN OF RESPONDENTS BY FLYING REGION

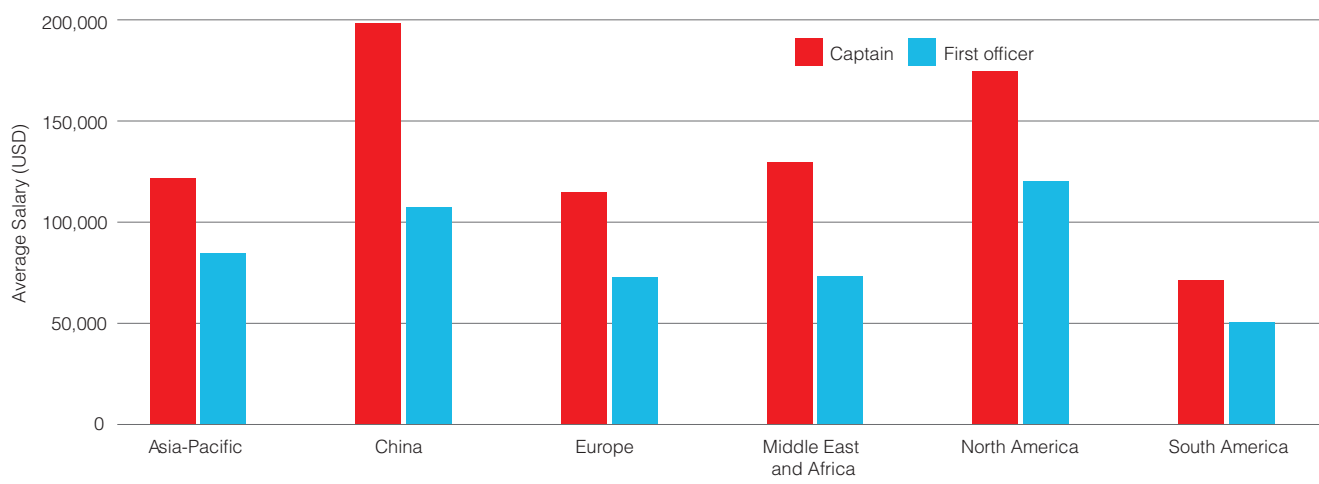


THESE CHARTS ILLUSTRATE THE RESPONDENTS BY RANK, AGE, FLYING HOURS AND GENDER





AVERAGE SALARY BY FLYING REGION

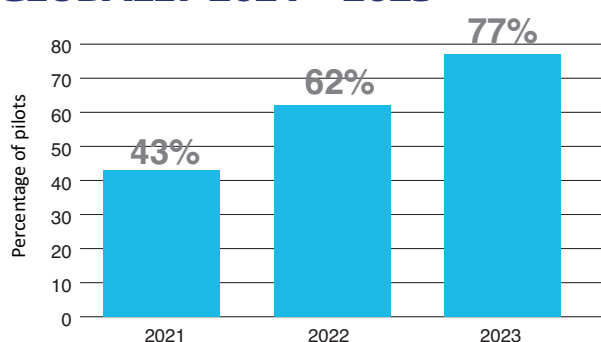


Pilot employment and careers



Pilot employment rates are typically one of the first indicators of upward or downward trends in air travel. We reported in The Pilot Survey 2022 an increase in pilot employment, and we wanted to see if there was a further uptick, one year on.

THE PERCENTAGE OF PILOTS EMPLOYED AND FLYING GLOBALLY 2021 – 2023



In 2023, we see that globally 77% of pilots are now employed and flying, a considerable lift if we compare back to 2021.

Pilots in North America were the most likely to be employed and flying with 82% responding with this as their employment status, followed by pilots flying in Europe at 79%. Pilots in China were the least likely to be employed and flying at just 53%. This could be linked to the strict zero-COVID policies that the Chinese government have had in place. However, at the time of writing this report, new guidelines easing some of its policies have come into play.

We know that employment has increased globally, but have pilots had to make any changes to the type of flying they do to ensure they can return to the skies? We asked pilots "Has the impact of the pandemic changed the type of flying you do?" 57% agreed that it had. We found that in the Asia-Pacific region a staggering 81% of pilots had to change the type of flying that they did, followed by pilots flying in South America at 70%. Pilots in Europe were the least likely to have changed the type of flying out of all the regions and 52% agreed.

To identify the trends in the changes in flying by pilots, we asked them to provide some commentary that proved enlightening in what they have experienced.

- ◆ Downgraded from long-haul to short-haul flights.

Captain flying in South America

- ◆ I fly less as the company has decreased flights. **First officer flying in Europe**

- ◆ I had to change my aircraft type during the pandemic to ensure job security. Now flying has become more hectic. **Captain flying in Asia-Pacific**

- ◆ Smaller route network due to aircraft being slow to return to service after being grounded during COVID. **First officer flying in Asia-Pacific**

- ◆ I have now flown for three different airlines in the last four years, and every change comes with less salary and conditions. **Captain flying in South America**

- ◆ I lost my employment in 2020 as a captain in long-haul business aviation due to COVID-19 travel restrictions. I was unemployed for two and a half years. I was working as a correctional officer until I got a new position on another type this August. **Captain flying in Europe**

- ◆ My airline went bust and I had to seek other employment. The only options available were to live overseas with an aircraft owner living in his hotel on call 24/7 or to freelance at Bournemouth Airport. I chose the latter to have a life but earn about half. **Captain flying in Europe**

- ◆ I now do more freight flying and less passenger flying. **Captain flying in Europe**

- ◆ I was made redundant at the end of last year from a big company flying long haul. I am now flying regionally with a small local company. I'm home every night, so great hours and a great quality of life but half the salary.

Captain flying in Europe

- ◆ I am now doing cargo flying, previously I did passenger. Cargo is mostly night flying which is more tiring than passenger flying which was a mix of day and evening work. **Captain flying in the Middle East and Africa**

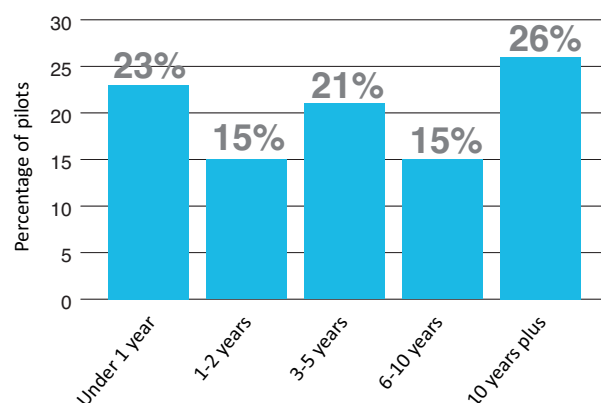
- ◆ The pandemic has drastically reduced the number of career opportunities, and carriers have exploited this by providing poor terms and conditions. As the pandemic has now begun to ease and aviation is once again beginning to gain momentum, carriers are unfortunately continuing to exploit pilots, using our sheer love of what we do as a tool of exploitation. **First officer flying in Europe**

- ◆ From long haul to short haul. I've been out of the flight deck for more than two years. I'm here to make good quick cash as I've been burnt by a previous employer and the industry in general and want out as soon as I can afford it. I hope all aviators, cabin crew, ground staff etc. can really get their own back on unscrupulous employers and screw them over as much as possible after the way we were all treated.

Captain flying in the Middle East and Africa

The longevity of tenure with an employer helps to portray the state of the pilot employment market too. We asked pilots who were employed and flying how long they had been with their current employer. 23% had been with their employer for less than one year, whereas over a quarter had been with their employer for over ten years.

NUMBER OF YEARS WORKING FOR THEIR EMPLOYER



Pilot employment and careers *continued*

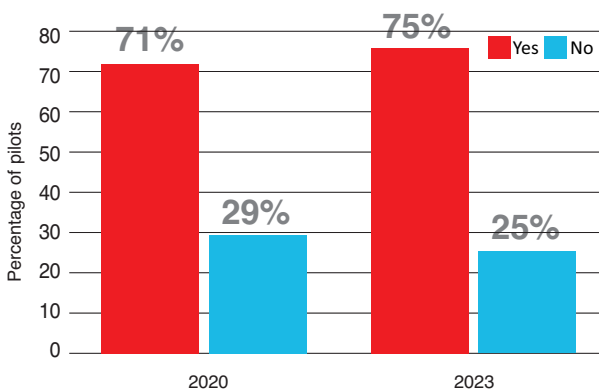
In our survey last year, we asked pilots if they were planning on seeking a new job in the next 12 months and 56% agreed that they were. The longevity with an employer of under one year versus the job-seeking numbers from last year portrays that not all pilots who are job-seeking will start a new job. If the numbers had aligned, it would have suggested high turnover and instability in the marketplace.

Mark Charman says: *“Sometimes pilot candidates can plan to change jobs, even apply for opportunities, take part in interviews, and get offered roles. Yet, reality can set in. It can be easy at this point to become nostalgic about their time in their airline and can persuade themselves (and be persuaded by others) that things are better than they think. They might reverse their decision and pick the safe option – staying put.”*

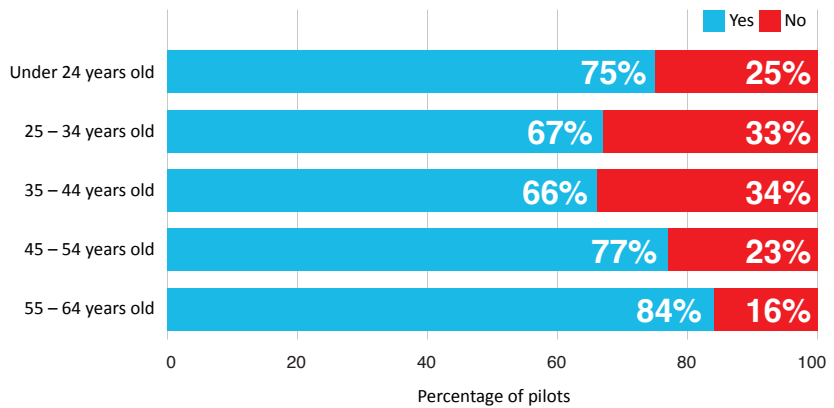
Whether pilots plan to fly to retirement age can create an impression of what the future of employment might look like. We brought our question back from 2020, and asked pilots “Do you plan to fly to retirement age?” This year 75% said that they would, an increase since we last asked this question.

There are many reasons why pilots may want to retire earlier. They can often work long hours which can lead to

DO YOU PLAN TO FLY TO RETIREMENT AGE? 2020 VERSUS 2023 RESPONSES



FLYING TO RETIREMENT AGE BY AGE GROUP



burnout and a loss of interest in their career. The high-pressure nature of the job, along with the responsibility for the safety of passengers and crew, can lead to increased levels of stress. Aviation is subject to economic and market fluctuations, that can lead to uncertainty and job insecurity. We need to consider the conditions that pilots work in too. Having to deal with irregular schedules and long periods away from home can become increasingly unbearable.

The future retirement age of pilots may require a change in forecasting for pilot recruitment teams, especially when considering the ages of the respondents in our survey. As shown in the data, the youngest and two oldest age groups have the most pilots planning to fly until the typical retirement age. However, the number of pilots planning to fly until retirement decreases for those between 25 and 44 years old. If pilots in this age group retire earlier than expected, recruitment teams may need to focus more on succession planning and recruitment to fill these positions. This highlights the importance of considering the potential impact of early retirement on pilot recruitment and planning accordingly.

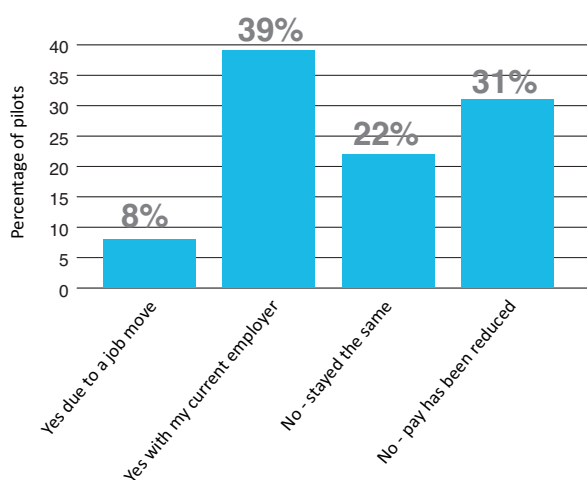
“Fail to plan, prepare to fail. It can be uncomfortable to think about pilot teams of the future, the people who will replace those who will retire, early or not or the pilots that will leave for other airlines and professions. However, it is a strategic move to start planning and make deliberate and continued efforts to recruit, train, develop and retain individuals for the future. It is also an opportunity to look at the current composition of your teams and find gaps where you could make improvements with diversity and inclusion choices,” says Charman



Pilot reward

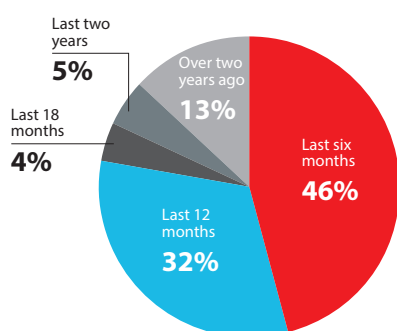
With the global pressure on salaries, we wanted to focus part of the survey on pilot reward. We asked pilots “Have you received a pay rise in the last five years?” Globally, 53% had not received a pay rise. More concerning was that nearly one-third of pilots responded that they had a pay reduction. We looked at the responses by geographic regions with some startling results. 48% of pilots flying in the Asia-Pacific region had seen their pay reduced and so had 36% of pilots flying in South America. On a more positive note, nearly three-quarters (73%) of pilots flying in North America had seen their pay increase.

HAVE YOU RECEIVED A PAY RISE IN THE LAST FIVE YEARS?



Sophie Wild says: “When pay stays the same, or even worse pay is reduced, it can have a detrimental impact on people. As inflation and the cost of living goes up, and pay goes down or doesn’t keep up, it impacts people’s quality of life. This can lead to increased stress levels as well as cause feelings of being undervalued.”

WHEN DID YOU LAST RECEIVE A PAY RISE?



For those who did receive a pay rise, whether with their employer or due to a job move, we asked when they received this. 46% received a pay rise in the last six months, 32% in the last 12 months, 4% in the last 18 months, 5% in the last two years and 13% over two years ago.

“There were no surprises here. You can see the lack of pay rises during the worst part of the pandemic. 78% of pay rises were given in the last 12 months which aligns with the aviation sector’s recovery. You can also see that a further 13% of pay rises were before the pandemic started,” says Charman.

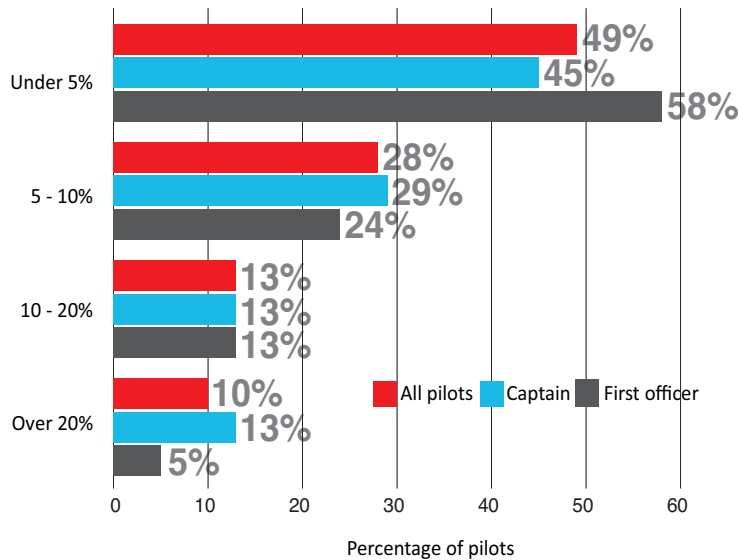
The percentage of a pay rise can make a big difference to the recipient. We asked pilots what percentage of their salary their pay rise was. Overall, 49% had a pay rise of under five per cent, 28% received a five to ten per cent pay rise, 13% received a ten to twenty per cent pay rise and just 10% received a pay rise of over twenty per cent. We saw that captains were more likely to take home bigger pay rises than first officers. 26% of captains received a pay rise of over ten per cent versus 18% of first officers.



IN THIS NEW ERA, AIRLINES ARE ASKING FOR MORE PROFICIENCY BUT LESS PAY.

SURVEY RESPONDENT

WHAT PERCENTAGE WAS YOUR PAY RISE?



AIRLINES KEEP ON RECRUITING BRAND-NEW PILOTS, PAY PEANUTS AND FURLOUGH THEM AFTER TWO YEARS JUST TO GET NEW GUYS.

SURVEY RESPONDENT

Looking at pay rises by region, 26% of pilots flying in South America received a pay rise of twenty per cent or more, followed by pilots flying in North America at 22%. Looking at the smaller pay increases, 58% of pilots in Europe received a pay rise of five per cent or less, followed by pilots flying in the Asia-Pacific region with 49% of these receiving a pay rise of five per cent or less.

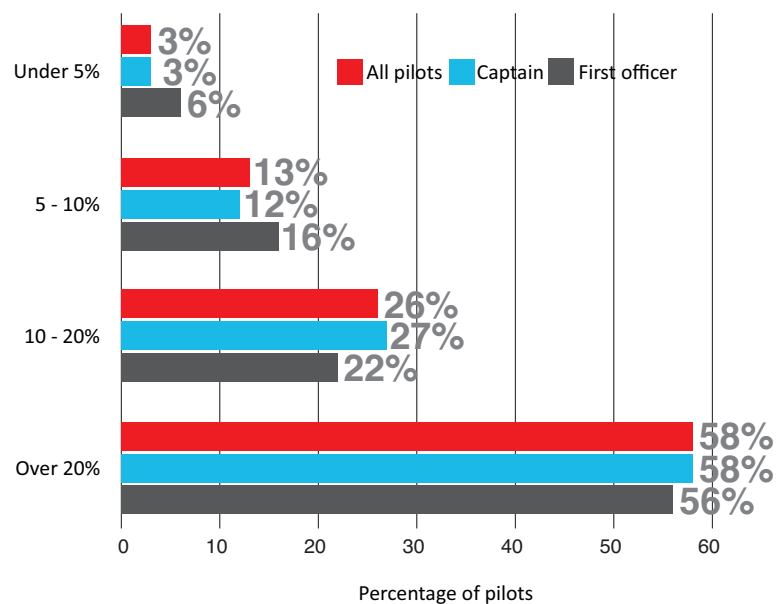
Wild says: "Inflation and the price of goods have been going up and often not in line with the percentage of pay rises. Pilots don't just want pay increases to match the uptick in the cost of living. Many want pay rises to ultimately improve their lives and advance their opportunity to better things."

It is also important to look at pilots who received a pay decrease as this affected nearly a third of the pilot respondents. Globally, 84% of pilots who had seen their pay decrease stated it was by over ten per cent. 58% stated it was over twenty per cent, a considerable pay decrease for anyone. Pilots flying in the Asia-Pacific region were the most likely to have had a pay decrease of twenty per cent or more at 75% of these respondents.

"Amid the pandemic, I think pilots were understanding that cuts needed to be

made and they sacrificed salaries and benefits for the good of their airline and the aviation sector. I don't see this goodwill holding out for much longer. Pilots will want to see their pay return to what it once was, as well as many who will expect it to reach inflation rates and cost of living levels. I predict that 2023 will be a year with more remuneration crisis talks than ever before, direct from the pilots themselves but also up to board level," says Charman.

WHAT PERCENTAGE WAS YOUR PAY DECREASE?



Pilot reward continued

So, do pilots believe their salary is keeping pace with the cost of living? 85% of pilots responded that they disagreed. We wanted to hear directly from these respondents:

◆ UK/European aircrew salaries have stalled and significantly reduced in real time over the past two decades, COVID-19 has only made this situation worse. Perhaps with a more acute pilot shortage here, our salaries may increase to somewhere near that of pilots flying in the US. **First officer flying in Europe**

◆ Salaries keep decreasing, as does job security. **First officer flying in the Middle East and Africa**

◆ In this new era, airlines are asking for more proficiency but less pay. **Captain flying in South America**

◆ Airlines pilots are getting a lower salary and especially a worse roster. We experience fatigue at work, and the benefits this sector used to have are disappearing. **First officer flying in Europe**

◆ Airlines keep on recruiting brand-new pilots, pay peanuts and furlough them after two years just to get new guys. **Captain flying in the Middle East and Africa**

◆ Employers think of pilots as bus drivers. **Captain flying in Europe**

◆ The basic salary in my airline has not changed since the airline started 14 years ago. The cost of living has gone up. We are flying more while being paid less. It's an unacceptable situation that's forcing many to reconsider their careers in aviation. **Captain flying in the Middle East and Africa**



PILOT CONTRACTS ARE GETTING WORSE EVERY TIME THERE'S A DOWNTURN IN THE ECONOMY. WE ARE EXPECTED TO WORK MORE FOR LESS MONEY AND POORER BENEFITS, WHILE MANAGEMENT IS GETTING BONUSES WHILST ERODING OUR CONDITIONS OF SERVICE. SURVEY RESPONDENT

◆ Pilot contracts are getting worse every time there's a downturn in the economy. We are expected to work more for less money and poorer benefits, while management is getting bonuses whilst eroding our conditions of service. **First officer flying in Asia-Pacific**

◆ Pilot salaries need to be increased to a decent level. It's at the same level today that it was in 2011. **Captain flying in Asia-Pacific**

15% agreed that it did and as the minority, we wanted to find out why they believed this to be:

◆ Pilot pay is crazy right now. It is easy to job-hop for more money if the job doesn't suit you. So many jobs, and so few pilots. **Captain flying in North America**

◆ Pace with the cost of living yes. Allowing for self-renewal or self-maintaining an ATPL licence... Nope. **First officer flying in Asia-Pacific**

◆ There are still high-paying jobs out there if you are willing to put up with the downsides, however, I'm very happy to be working from my chosen base at a far lower salary. **Captain flying in Asia-Pacific**

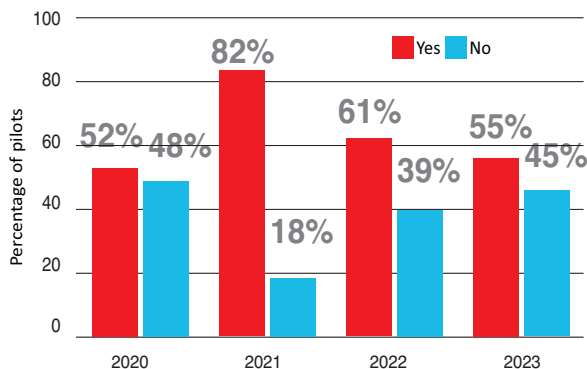
◆ With my new job, my basic salary is indexed to European inflation. **First officer flying in Europe**

◆ Our salaries are significantly above the cost of living anyway, so we're in a privileged position, even if our companies don't give raises in line with the cost of living. **First officer flying in Europe**

Pilot job security

We asked pilots “Are you concerned about your job security?” Globally, 55% agreed that they were, a reduction since our last survey and nearly back to pre-pandemic levels. Why are so many pilots still concerned about their jobs when we have seen the aviation sector make such a good recovery? We asked the pilots to choose a reason.

ARE YOU CONCERNED ABOUT YOUR JOB SECURITY?



The top reasons globally were the lack of feedback, reviews and progression plan (22%), company financial troubles (22%) and the cost of living crisis (17%).

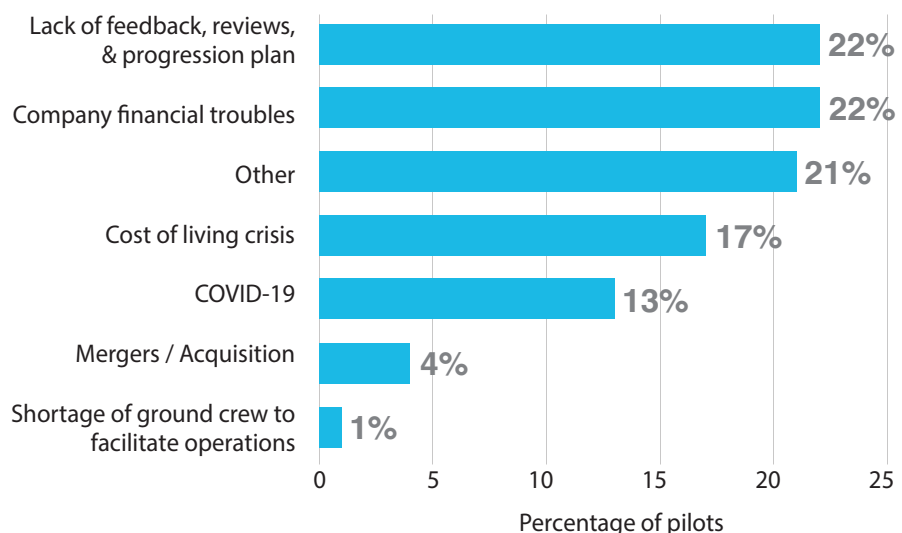
Charman says: “People become concerned about their job security when they aren’t receiving feedback or reviews. Business leaders, managers and HR faced the challenge over the last few years of being pulled in different directions to manage the COVID-19 crisis. Performance evaluations can take up a lot of time and focus for everyone involved and with furlough and redundancies so prevalent, reviews were likely to not have been a priority. We wonder if employers have just not got back into the habit of conducting feedback sessions with their employees. This may cause issues if not resolved and

returned soon, as in experience, pilots that are concerned with their job security, tend to start planning a new job search.”

We cannot escape that we are potentially on the brink of a global recession. The cost of living has increased exponentially, along with the rate of inflation and energy prices. There is the potential that if travellers have less spare cash to spend, air travel may decrease which would lead to fewer flights and pilots needed. In North America, this was the top job insecurity factor (29%) for pilots flying in this region. Pilots flying in the Asia-Pacific region were the least concerned (13%) by this.

21% of pilots noted other reasons for being concerned about their job and left some commentary. We noted trends, including their age, believing they would be substituted for lower salary crews, a potential global recession, the war in Ukraine and airline-union relationships. A pilot flying in North America said: “Pilot job stability has become a myth.”

WHY ARE YOU CONCERNED ABOUT YOUR JOB SECURITY?



Pilot retention

With employment rates nearly back to pre-COVID-19 levels, retention has once again become a priority for airlines and aviation businesses in their people strategies. With more pilots employed and flying, has this impacted their desire to change jobs or stay put in the next 12 months?

We asked pilots who were employed and flying whether they were planning on changing jobs in the next 12 months. 63% agreed that they were, an all-time high finding since we started the Pilot Survey in 2020. Captains were more likely than first officers to be planning on seeking a new job in the next 12 months at 65% and 57% respectively. Regionally, pilots flying in South America (87%) the Asia-Pacific region (68%), and the Middle East and Africa (68%) were the most likely to be planning on seeking a new job. Pilots flying in North America were the least likely to be planning on searching at 45%.

Wild says: *"This is a huge figure, and we were not expecting job-seeking levels to be so high. For any business leader, it could be very alarming to consider having to replace nearly two-thirds of your pilot team over the next 12 months."*

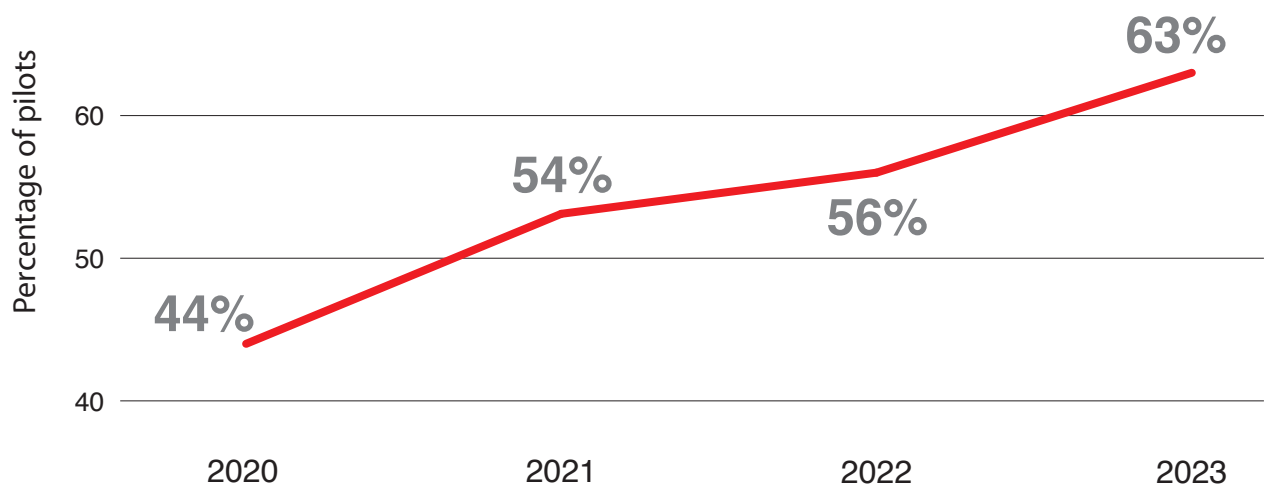


THE PANDEMIC ADDED ANOTHER DIFFICULTY LEVEL TO TRAINING AS A PILOT. NOT ONLY WAS IT PHYSICALLY IMPOSSIBLE AT TIMES, BUT THE IMPACT IT HAD ON THE STABILITY OF THE SECTOR AND JOB MARKET COULD HAVE DETERRED SOME POTENTIAL PILOTS FROM EVER TRAINING.

SOPHIE WILD

When comparing the results from the survey in 2020 and today, we saw those stating that they were retiring fall from 8% down to 2% in 2023. The pilot profession lost many pilots during the pandemic period to retirement and early retirement. We shared over the last two years that some pilots approaching retirement age had decided to

PILOTS PLANNING ON CHANGING JOBS 2020 - 2023





Pilot retention *continued*

call it quits when furlough and redundancies were rife in the sector. What is potentially concerning is whether the pilots who retired have been replaced in equal measures through new pilots qualifying.

Wild explains: *“The pandemic added another difficulty level to training as a pilot. Not only was it physically impossible at times, but the impact it had on the stability of the sector and job market could have deterred some potential pilots from ever training. We are back in a period where experienced pilots are in demand and low-hour pilots are struggling to find opportunities. We hope that in the recovery of the sector we see new pilots training once again and more trainee opportunities becoming available globally for the sake of the future of the sector.”*

We have seen job searching increase year on year since we started our survey in 2020, but what is making more pilots want to find a new job? Job-seeking motivations can vary and be impacted by multiple factors. We considered whether pilots were simply more confident and optimistic with how well the aviation sector has recovered in 2022. We’ve also seen a lot of pilots be forced to make changes to the type of flying they do, which might be a motivator to find a new pilot job. Could pilots simply be less loyal than they once were? Is a pilot job at one airline for life inconceivable in the future?

“Sometimes it can seem easier to change jobs, whether it is for career progression, money, or work-life balance, to secure what you want. This is rather than having what can be perceived as a difficult conversation with your manager about the changes you need. This is when establishing and maintaining open and honest communication with employees is going to be important in retaining people going forward, and helping to keep those employees you want,” says Charman.

We asked the pilots to choose a reason for their job-seeking. A better salary and benefits package was the top response at 43%. Looking more specifically at regions, 64% of pilots flying in South America and 52% of those flying in North America answered this way. When we analysed the data further against other responses from the pilots, globally 75% of respondents who had received a pay decrease were planning on looking for a new job. In another question, when we asked pilots if they thought their employer offered enough benefits, 76% answered

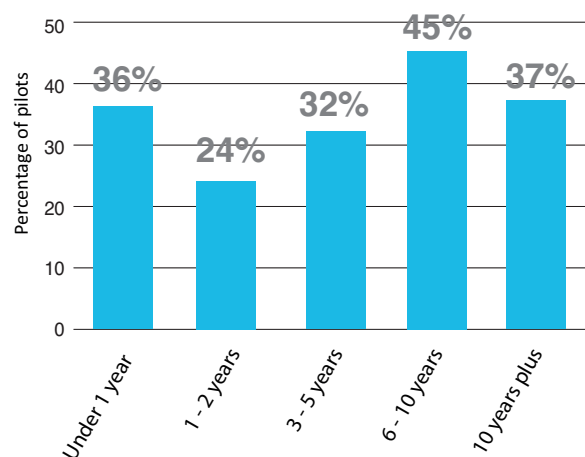
that they did not. Salary and benefits are having a huge impact on job seeking.

Charman continues: *“We can see the impact that pay and benefits are having on job-seeking levels. Pilots want more – more money and more benefits. However, with the second highest motivator for job-seeking being a better work-life balance, employers should not ignore this either. The benefits an employer offers do not always have to be monetary. Including a good mix and embracing ways of improving work-life balance could be a real distinguisher in the market as an employer of choice and play an important part in candidate attraction and employee retention.”*

WHAT IS YOUR BIGGEST MOTIVATOR TO CHANGE JOBS IN THE NEXT 12 MONTHS?	
Better salary and benefits	43%
Better work-life balance	31%
Career progression path	9%
Relocation	7%
Job security	6%
I only took this job because of COVID-19	4%

With 35% of pilots planning to stay put in their current job, we were interested to see what factors influenced this. Firstly, the time spent with an employer had some impact. Pilots that had been with their employer for six years and over were less likely to be job-seeking.

PILOTS STAYING WITH THEIR EMPLOYER BY YEARS EMPLOYED



Pay rises also had a small impact. If a pilot had received a pay rise in their current job, job seeking reduced to 52%. Job security played a part too and those who were not concerned with their job security were more likely to stay with their employer at 50%.

We asked the pilot respondents to give their specific motivators to stay with their current employer. The top answer was work-life balance at 39%, followed by salary and benefits at 28% and job security at 14%.

WHAT IS YOUR BIGGEST MOTIVATOR TO STAY IN YOUR CURRENT JOB?	
Work-life balance	39%
Salary and benefits	28%
Relationships with colleagues and management	4%
Company culture and values	7%
Job security	14%
Clear progression path	6%
Supported me through the COVID-19 pandemic	2%

Looking at both the motivators for job seeking and remaining with an employer was interesting when we compared it to the responses we received to the question,

“Is work-life balance or salary more important to you?” 82% of pilots globally responded that work-life balance was more important.

“Achieving a good work-life balance helps pilots avoid burnout, maintain their physical and mental health and have more satisfaction and enjoyment in their personal lives,” says Wild.

So why are so many pilots looking for a new job because they want a better salary and benefits? When we asked pilots if they thought their employer was invested in them, 68% did not think that they were. Could this be the answer?

Charman says: *“If pilots don’t feel invested in by their employer, they can feel decreased levels of job satisfaction and motivation and may feel undervalued and unappreciated. They can start focussing on money at this point because they don’t feel they are getting anything else.”*

Interestingly, career progression did not play a major factor in job seeking or staying with an employer. Normally in a rank-based profession, career development will be important, but is there progression available once you have earned your captain stripes? Without new challenges or a structured career path to follow, it seems other factors gain momentum in career motivations.



IF PILOTS DON'T FEEL INVESTED IN BY THEIR EMPLOYER, THEY CAN FEEL DECREASED LEVELS OF JOB SATISFACTION AND MOTIVATION AND MAY FEEL UNVALUED AND UNAPPRECIATED. THEY CAN START FOCUSING ON MONEY AT THIS POINT BECAUSE THEY DON'T FEEL THEY ARE GETTING ANYTHING ELSE.

MARK CHARMAN

#thepilotsurvey2023

Diversity, equity and inclusion

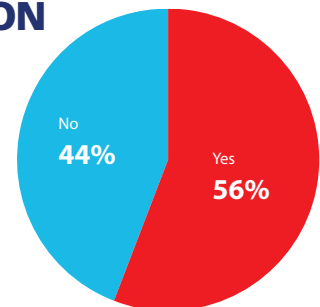
For the first time in our pilot survey, we wanted to take a moment to focus on diversity, equity, and inclusion in the profession. We started by asking pilots, “Do you think there is enough diversity and representation in the pilot profession?” 56% agreed that they believed there was. Notably, when we looked at the gender of the respondents, only 47% of females agreed that there is enough diversity and representation.

It is important to define diversity separately from inclusion and equity when analysing these responses. Diversity refers to the presence of a wide range of individuals with different backgrounds, experiences, and perspectives within the pilot profession.

Wild says: “The pilot profession has traditionally been male dominated, but there has been an increasing focus on diversity in recent years. As a result, representation has increased, including more women and people from different racial and ethnic backgrounds, but there is more to be done. I think that when you are discussing diversity you must look at the socio-demographics of pilots too. In the past, training to be a pilot has been viewed as something only people from affluent families can take part in. However, we are now seeing flight schools, for example, offer financing options. Overall, while the cost

of training to be a pilot can be significant, there are now at least options available to help aspiring pilots afford the cost of training, which we believe will continue to improve diversity.”

DO YOU THINK THERE IS ENOUGH DIVERSITY AND REPRESENTATION IN THE PILOT PROFESSION?



For the pilots that said there was not enough diversity and representation, we felt it was essential to share their commentary on this question:

◆ It is completely male dominated where I work. **Captain flying in Europe**

◆ The costs of entry prevent a significant proportion of the population from accessing the profession. **Captain flying in Asia-Pacific**

◆ Far too many straight white men. Needs more diversity, but systemic misogyny and homophobia stop some great candidates. **First officer flying in Europe**

◆ Most pilots come from similar (Defence/Armed forces) backgrounds. The proportion of civilian or women pilots is almost nil. **Captain flying in Asia-Pacific**

◆ Need far more women and ethnic minorities. **First officer flying in Europe**

◆ More women are needed. **Captain flying in South America**

◆ Due to previous employment patterns and value systems, the western pilot population has been overwhelmingly white male. It is also true that today companies are realising this aspect and trying to diversify their hiring population. However, due to lead time in training, cost of training and resistance to change in some organisations, the lack of diversity will persist in the future as well. **First officer flying in North America**

◆ Regionalism (right of abode) and licence requirements (regulations of regulators within regions) globally ensure that pilots cannot truly cross-pollinate, even during times of pilot shortages. The fact that some regions of the world are desperately short of experienced pilots, yet many experienced pilots around the world simply cannot apply for those jobs, is proof that the industry is not diverse nor represented globally. **Captain flying in Asia-Pacific**

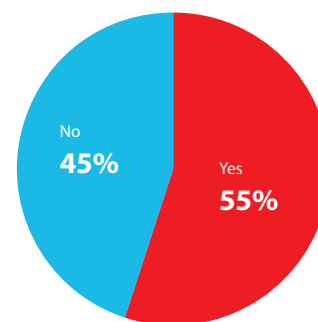
◆ Only wealthy people can get into flying. **First officer flying in Europe**

◆ Different aspects of diversity are either seriously undervalued or neglected completely even by the Authorities. **Captain flying in Asia-Pacific**

◆ Aviation tends to be a 24/7 365 days per year lifestyle with a maximum of 6 weeks' notice of extended periods away from home frequently. This is not conducive or attractive to lots of people's family lives so does not appeal to broaden diversity. **Captain flying in Europe**

We continued by asking pilots, "Do you think more needs to be done to promote diversity in the pilot profession?" 55% agreed. There are many ways any profession can be made more diverse, as well as inclusive.

DO YOU THINK MORE NEEDS TO BE DONE TO PROMOTE DIVERSITY IN THE PILOT PROFESSION?



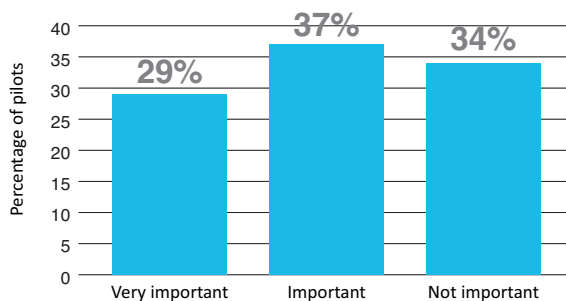
Charman says: "Initiatives in airlines such as diversity training, mentorship programmes and targeted recruitment efforts are a great start. As is supporting the participation of underrepresented groups in aviation, such as women and people of colour through resources and support for these groups to help them succeed in their careers. At the c-suite level encouraging the development of a more diverse talent pipeline means that the importance of diversity is coming from the top. This could include initiatives such as outreach programmes, internships and other opportunities that can help to introduce young people from underrepresented groups. Finally, it is important to identify and address any barriers that may be preventing greater diversity and representation. This could consist of addressing issues such as discrimination, unconscious bias, and other factors."

Do pilots think diversity, equity and inclusion are important when choosing a new employer? Two-thirds of pilots agreed it was important or very important. Diversity, equity, and inclusion are related but distinct concepts that are often used together in discussions about creating a fair and equitable workplace or society. Inclusion refers to the

Diversity, equity and inclusion *continued*

active effort to ensure that all individuals feel valued and included within a group or organisation. Equity, on the other hand, refers to the idea that all individuals should be treated equally and not be discriminated against based on their background, experiences, or perspectives.

HOW IMPORTANT ARE DIVERSITY, EQUITY, AND INCLUSION TO YOU WHEN CHOOSING AN EMPLOYER?



Let us consider the potential repercussions of employers not doing enough with diversity, equity, and inclusion in their pilot teams.

Charman shares: *"Without equity, for example, airlines could be missing out on a more positive and inclusive work environment. Inclusion can help to create a sense of belonging which can improve morale and job satisfaction among pilots. They are also more likely to promote innovation and resilience too, drawing on diverse perspectives and experiences from their colleagues. I think we need to consider safety and security factors here too. If all pilots are treated equally and with respect, they will feel valued and supported. In this kind of positive work culture, pilots will feel more comfortable to*



IF ALL PILOTS ARE TREATED EQUALLY AND WITH RESPECT, THEY WILL FEEL VALUED AND SUPPORTED. IN THIS KIND OF POSITIVE WORK CULTURE, PILOTS WILL FEEL MORE COMFORTABLE TO SPEAK UP ABOUT SAFETY AND SECURITY CONCERNS AND PILOTS WILL COME TOGETHER TO ADDRESS THESE. MARK CHARMAN

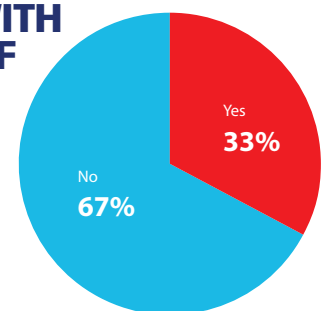
speak up about safety and security concerns and pilots will come together to address these."

The values of a potential employer can be important too. We asked pilots if they would take a job with an airline if they did not align with its values. Only one-third agreed that they would.

Wild says: *"I think airlines are already on to this and we are seeing more job adverts that include an airline's values right from the candidate attraction stage. Savvy human resources leaders will know that culture is important, not only for the airline but for the pilots too. When values misalign, it can create a disconnect between employer and employee."*

Charman adds: *"Shared values also help create positive work environments. When pilots' values match those of their employer they are more likely to be satisfied and fulfilled in their job and contribute more meaningfully. It makes it more likely that pilots will be bought into an employer's goals and priorities too, fostering a sense of shared purpose and commitment. Overall, for a pilot, having values that align with those of their employer is important for both personal satisfaction and the success of the business."*

WOULD YOU TAKE A JOB WITH A COMPANY IF YOU DID NOT ALIGN WITH ITS VALUES?

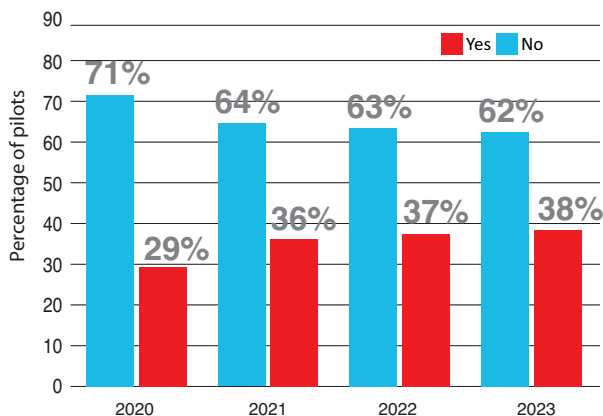


Pilot referral

Since we started our Pilot Surveys, each year we have asked pilots, "Given the investment to become a pilot, would you do it again?" This year 62% agreed that they would, but this marks a continual decline from 71% in 2020.

Wild questions: "Why are we seeing year-on-year decreases? Could it still be the impact of the pandemic, or is it more prevalent issues like pay and benefits? Do more pilots regret their pilot training and wish they had ventured into other careers? Is work-life balance not achievable? Whatever the reason, we hope that we see an uptick in these sentiments soon. We want pilots to fall in love with their jobs again. To make professions attractive, you need ambassadors to promote them, and experienced pilots are the perfect people to do this."

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

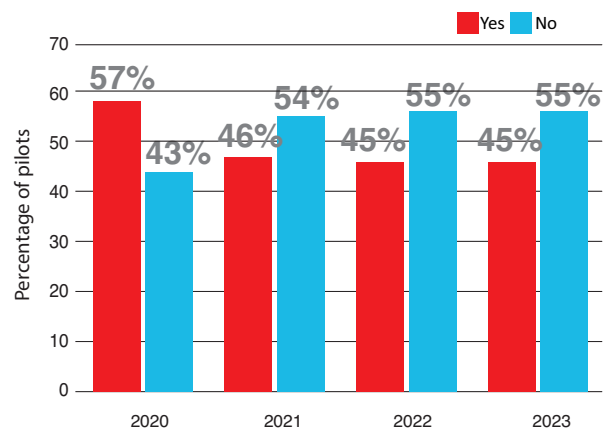


WHY ARE WE SEEING YEAR-ON-YEAR DECREASES? COULD IT STILL BE THE IMPACT OF THE PANDEMIC, OR IS IT MORE PREVALENT ISSUES LIKE PAY AND BENEFITS? SOPHIE WILD

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The future of aviation and the pilot profession is dependent on enticing new people to the sector, particularly young people. After a period where it has been difficult to train to be a pilot, the sector is under more pressure than ever to fill the future skill pool. We asked, "Would you advise young people to become a pilot?" Matching the responses from last year, just 45% agreed that they would.

WOULD YOU ADVISE YOUNG PEOPLE TO BECOME A PILOT?



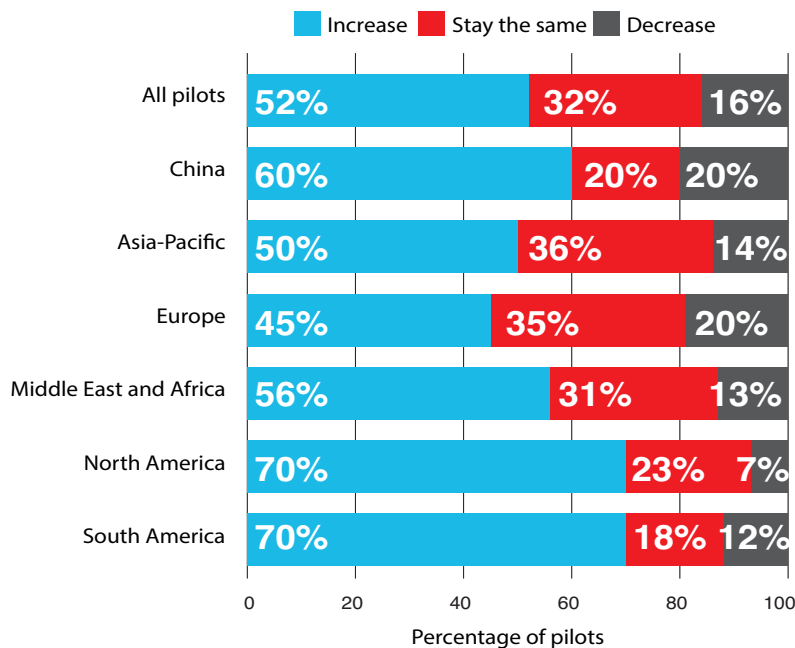
Whilst there is no change year-on-year the significant difference between our findings released in 2020 and now is concerning. The aviation sector has important factors to consider going forward. If pilots won't recommend their careers, how will the pilot profession be promoted and made attractive?

"In a world embodied by choice, career options are nearly limitless for young people. The Institute for the Future (ITF) predicts that 85% of the jobs in 2030 have yet to be created. Not only is aviation competing against alternative sectors and professions today, but also potential new jobs we don't even know about yet. If you also factor in the demands of Generation Z and Generation Alpha (who are yet to enter our workforces) then traditional candidate attraction models might become obsolete. With social media platforms like TikTok, and technology such as Instagram Reels and YouTube Shorts, hiring managers will be under increasing pressure to create micro-moments for these generations in their attraction methods – their attention spans and patience are regarded as less than generations gone by," says Charman.

The future of aviation

We've talked about the impact of reward in the pilot profession, but we wondered what pilots thought salaries would be like in the future. We posed the question, "Do you think pilot salaries will increase, stay the same or decrease over the next two years?" Over 50% believed salaries would increase, with 32% saying they thought it would stay the same and 16% responding they believed they would decrease. Pilots flying in North America were the most optimistic with 70% agreeing that they saw salaries increasing. One-fifth of pilots flying in both Europe and China believed that salaries would decrease.

DO YOU THINK PILOT SALARIES WILL INCREASE, STAY THE SAME OR DECREASE OVER THE NEXT TWO YEARS?



With a mix of opinions on the future of pilot salaries, we enquired "Do you think pilot salaries will make people leave the profession?" Over two-thirds agreed that they thought that it would.

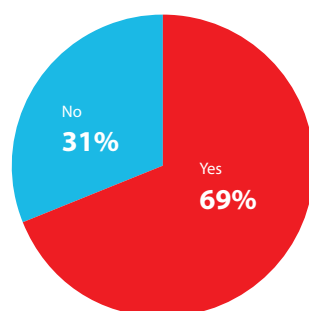
To provide some context to the percentage that agreed, we asked pilots to leave some commentary:

- ◆ There have been cases of pilots taking up IT jobs because it pays them better, demands less of them and avails them a better work-life balance. **First officer flying in the Middle East and Africa**
- ◆ The initial investment versus salary and work-life balance falls short of good judgment. **Captain flying in Europe**
- ◆ The rising cost of living in combination with salary decreases make this a profession that no longer provides a sustainable income for

pilots. Therefore, pilots will look elsewhere for additional income, jeopardizing safety, or will look at other options generating pilot shortages and resulting in flight disruptions. **First officer flying in South America**

- ◆ The furlough/stand-down demonstrated to pilots that they have other skills and can succeed in other industries. It also taught people to live on less than they were previously used to and to reassess life priorities. **Captain flying in Asia-Pacific**

DO YOU THINK PILOT SALARIES WILL MAKE PEOPLE LEAVE THE PROFESSION?





◆ If you can do something else which brings more income, leaving a pilot job will be an option. Most importantly the new generation of pilots will potentially change their minds about starting a pilot career if the salary they will earn will not justify the initial investment to get a pilot license. **First officer flying in the Middle East and Africa**

◆ I work as a pilot in Sweden, and my salary is lower than the average salary in this country. I know many pilots who are leaving this job to do something completely different,

and they have a better and less stressful life. I am still here because I love my job, but eventually, I am afraid I will get tired too if the situation doesn't improve. **First officer flying in Europe**

◆ I have decided to pursue a non-flying career that pays more. **Captain flying in Asia-Pacific**

◆ I have already seen several younger pilots leave citing poor pay and poor work-life balance. **Captain flying in Europe**

The future of aviation *continued*

◆ The liability versus pay is ridiculous when compared to other professions with equivalent liability. **Captain flying in the Middle East and Africa**

◆ Everybody is trying to start a side business to compensate for the lack of increase in salaries. **Captain flying in South America**

◆ Pilots have already left the profession because of salaries. Entry-level pilot salaries in the regional airlines in the US were at a fast food worker level. I don't think we are at a "pilot shortage" level, but certainly making the profession less attractive. **Captain flying in North America**

◆ Pay is too low for junior pilots, and it is too hard financially to wait for the big captain pay checks. **First officer flying in North America**

If a lot of pilots believe people will leave the profession because of salaries what impact will this have on the pilot employment market in the future? We asked pilots, "What do you think the employment market for pilots will be like in five years?" As we head towards 2030, more pilots believe that we will have a shortage of pilots (89%).

Charman says: "If the respondents are right about the future, this is not going to be a war for pilot talent for long, but an out-and-out pilot shortage crisis. We have already seen in North America the difficulties they have faced through the lack of pilots. Heading into a time like this will not be easy for the sector. When people are in demand, their confidence and aspirations go up too. In other skill-short sectors, we have seen examples where salaries have increased up to double the original level just to retain people. With aviation being impacted by energy prices and other associated costs, I don't see pay being a sustainable strategy to be successful in recruitment. People strategies will once again be under the microscope, with multiple factors having to be considered. I believe one of the key strategies will be proactive hiring and recruiting new pilots into training programmes early on. Not only could this be beneficial to loyalty and retention but will benefit the sector as a whole."

WHAT DO YOU THINK THE EMPLOYMENT MARKET FOR PILOTS WILL BE LIKE IN FIVE YEARS?	2021	2022	2023
There will be a shortage of experienced pilots	43%	57%	60%
There will a shortage of all levels of pilots	23%	28%	29%
There will be too many pilots	34%	15%	11%

We wanted to find out if pilots believed the ongoing cost of living crisis would decrease the number of people using air travel. 58% agreed that they thought it would.

"Some people will have less disposable income so they may be less likely to spend money on luxury items like air travel. Additionally, businesses may cut back on travel expenses, such as sending employees on trips to save money. Uncertainty about the economy can make people hesitant to make large purchases, like airline tickets, until the economic situation improves. However, after a period where it was near impossible to travel by air, it could be a much slower decrease than we have seen in other economic downturns, with travellers still determined to make their planned trips," says Wild.

We heard from the pilots that thought air travel would decrease:

◆ Airfares are increasing, most people are having their incomes squeezed and the potentially largest recession coming will mean fewer holidays and business trips. **First officer flying in Europe**

◆ Flying is a luxury, not a priority. **Captain flying in Europe**

◆ Mortgage payments could more than double, at least, for many people, so it is safe to assume discretionary spending on travel will decrease. **Captain flying in Asia-Pacific**

◆ Air travel will decrease. Even though people have waited for travel to return, one needs to think about what is more important - to pay bills or travel. **Captain flying in the Middle East and Africa**

◆ It is looking like a significant recession is likely. If it lasts beyond summer next year then yes, I believe it will impact passenger numbers. **Captain flying in Europe**

◆ The energy crisis is affecting the pandemic recovery; however, it will not stop it, but will slow it down for sure.

Captain flying in Asia-Pacific

◆ The current costs of living are severely impacting middle-income families, from speaking with my acquaintances, most will be putting off travelling abroad next year and will travel domestically. **Captain flying in the Middle East and Africa**

◆ In a recession, one of the first things people let go of is travel and companies will cut their travel expenses to cut costs. **Captain flying in North America**

However, many pilots disagreed and were more optimistic about air travel in the future:

◆ Flying is by far the safest mode of travel, and more efficient, especially for a business traveller. People will always want to fly, whatever the economic situation. **First officer flying in the Middle East and Africa**

◆ I see things continuing to be busy as people seek better work-life balance. Cheap flights can be booked way ahead. **Captain flying in Europe**

◆ Flying will become more popular than ever, now that COVID-19 is winding down. **Captain flying in North America**

◆ Ticket prices are low, allowing more and more people to travel. The profit margin is reducing year by year, therefore consequently, pilot salaries are dropping. **First officer flying in Europe**

◆ People will reduce other outgoings to maintain their ability to visit family or take a break. **Captain flying in Europe**



I SEE THINGS CONTINUING TO BE BUSY AS PEOPLE SEEK BETTER WORK-LIFE BALANCE. CHEAP FLIGHTS CAN BE BOOKED WAY AHEAD. SURVEY RESPONDENT

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◆ People want to get away and remember what holidays were. Lockdowns sucked. It provided the perspective that time was not on your side. Do it now before it happens again. **Captain flying in Asia-Pacific**

◆ Two years without travel has shown the privilege cannot be taken for granted and has increased demand. **First officer flying in Asia-Pacific**

◆ Post-COVID the world has reopened, and the travel industry will only grow. **Captain flying in Asia-Pacific**

◆ There will always be a want and a need for travel, particularly air travel, and people will stretch their budgets to make that happen. **Captain flying in the Middle East and Africa**

◆ People want to travel. Even if demand slumps in the coming recession it is set to increase year over year as the middle class grows and more people feel entitled to travel by air. The volatile vacation market will show steady growth as a certain segment of the population (those buying package deals/all-inclusive deals) and increase their travel frequency. **First officer flying in South America**

◆ Airfares will become cheaper to keep people flying. This will be at the cost of airline employees. Hence airlines struggle to find sufficient staff. **Captain flying in the Middle East and Africa**

For the final part of the future of aviation, we asked, "Are you concerned that autonomous technology is making the role of pilots redundant in the cockpit?" There was a tiny increase since we last asked this question in 2020, and 41% agreed with the statement this year.

Wild says: "This is still a controversial discussion, but we have not seen autonomous technology take over the pilot role yet. Whilst it could happen in the future, it is not clear what will happen. For the time being, pilots are still an essential part of the aviation sector and are likely to remain so for the foreseeable future. The development and deployment of autonomous technology in aviation is a complex and ongoing process, and many factors will determine its ultimate impact on pilots and other aviation professionals."

Final thoughts

The last 12 months in the aviation sector have felt increasingly optimistic. From both a business and personal perspective, we have enjoyed the opportunity to use air travel once again, with minimum restrictions in place. Experiencing a time with so little travel has highlighted the importance of aviation and air travel to individuals. From being united with loved ones to exploring new places and cultures to attending business events, air travel has opened up so many possibilities once again. We hope that this reminder is what helps to ensure that aviation can weather the economic downturn better than it has ever done before.

We consider:

- ◆ How can we make more pilots recommend their careers to young people?
- ◆ Will diversity and representation continue to increase in the profession?
- ◆ Can autonomous technology ever be a real threat to pilots?
- ◆ What impact will the cost of living have on the number of people using air travel?
- ◆ Will we see 63% of pilots change jobs over the next 12 months?

- ◆ What will pilot salaries look like in 12 months?

We are pleased we have been able to create this fourth consecutive Pilot Survey. It is always a pleasure to create these reports. We feel privileged that so many pilots trust us with their thoughts and feelings, and we can share trends and key findings with the wider aviation community.

We hope that you have found this year's report as interesting and enjoyable as it was to research, analyse and produce.

Mark and Sophie