

The Pilot Survey 2021



GOOSE 
RECRUITMENT

 **FlightGlobal**

#thepilotsurvey2021

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Welcome



GOOSE Recruitment is the name in aviation and pilot 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, the Faststream Recruitment Group is a global people specialist in shipping, maritime and offshore oil and gas recruitment. We know what it is to be truly 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 weekly Flight International, which marked its 110th anniversary in 2019, and established monthly boardroom title Airline Business which enters its 36th year in 2021. 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
jobs.flightglobal.com

Welcome *continued*



Mark Charman
CEO & Founder of GOOSE Recruitment

Mark is the CEO of GOOSE Recruitment and founded 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 Federation, he is a renowned thought-leader in specialist recruitment. Mark’s involvement as a speaker, panellist and writer provides a headhunter’s perspective into human factors in the workplace.



Katie Mann
Global Sales Manager – Recruitment Portfolio

Katie is the Global Sales Manager of the Recruitment Portfolio for the FlightGlobal arm of DVV and has worked for the business for over eight years.

She has a wealth of knowledge in the recruitment sector and is highly motivated and successful in talent attraction, and brand solutions to most effectively advise clients and jobseekers on their recruitment needs.

Introduction

The global aviation market is experiencing one of the biggest challenges of its time: the COVID-19 pandemic. Few sectors have been hit harder than aviation and we have never seen a period like it. Air travel and its associated operations have become less viable and people fear contracting this new virus via air travel. On top of that, the fragile economy has made its impact on aviation operations too.

With significant changes to how the aviation industry can operate and grow, businesses are having to adapt to this period in not only the products and services they offer but also the people they need to attract and retain in their business for a successful future.

The impact of the year on aviation recruitment trends has been significant. GOOSE Recruitment and FlightGlobal have worked in partnership for a consecutive year to create a unique survey to establish how the events of 2020 have impacted the global pilot recruitment market. This report aims to highlight and establish trends in employment rates, pay, job seeking and retention,

employee engagement, mental health and the future of aviation and pilots.

The data collected in this survey represent a huge cross-section of the marketplace. Many airlines may recognise the breakdown from their flightcrew.

We look to uncover the changes that we have seen since our last survey and expose the good and the bad of the industry, looking at employment from a pilot’s perspective and discovering where the industry excels and where it falls short.

It covers areas such as: Which pilots are still employed and flying? Who is unemployed? Are unemployed pilots in recruitment processes? Do pilots feel valued? Is management perceived to be making the right decisions? Is the sector still as attractive as it once was? Who will be seeking a non-pilot career? Are pilots stressed? These are just a few of the questions which are so unique to the industry and ones that only pilots themselves will be able to answer.



Methodology

The Pilot Survey 2021 was open for four weeks and closed on 30th October 2020. A total of 2,598 pilots took part in the survey, which surpassed our survey in 2020 by 94%.

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 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, including PPrune
- ◆ Pilot careers targeted emails
- ◆ Social media, including LinkedIn, Twitter, 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. 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.

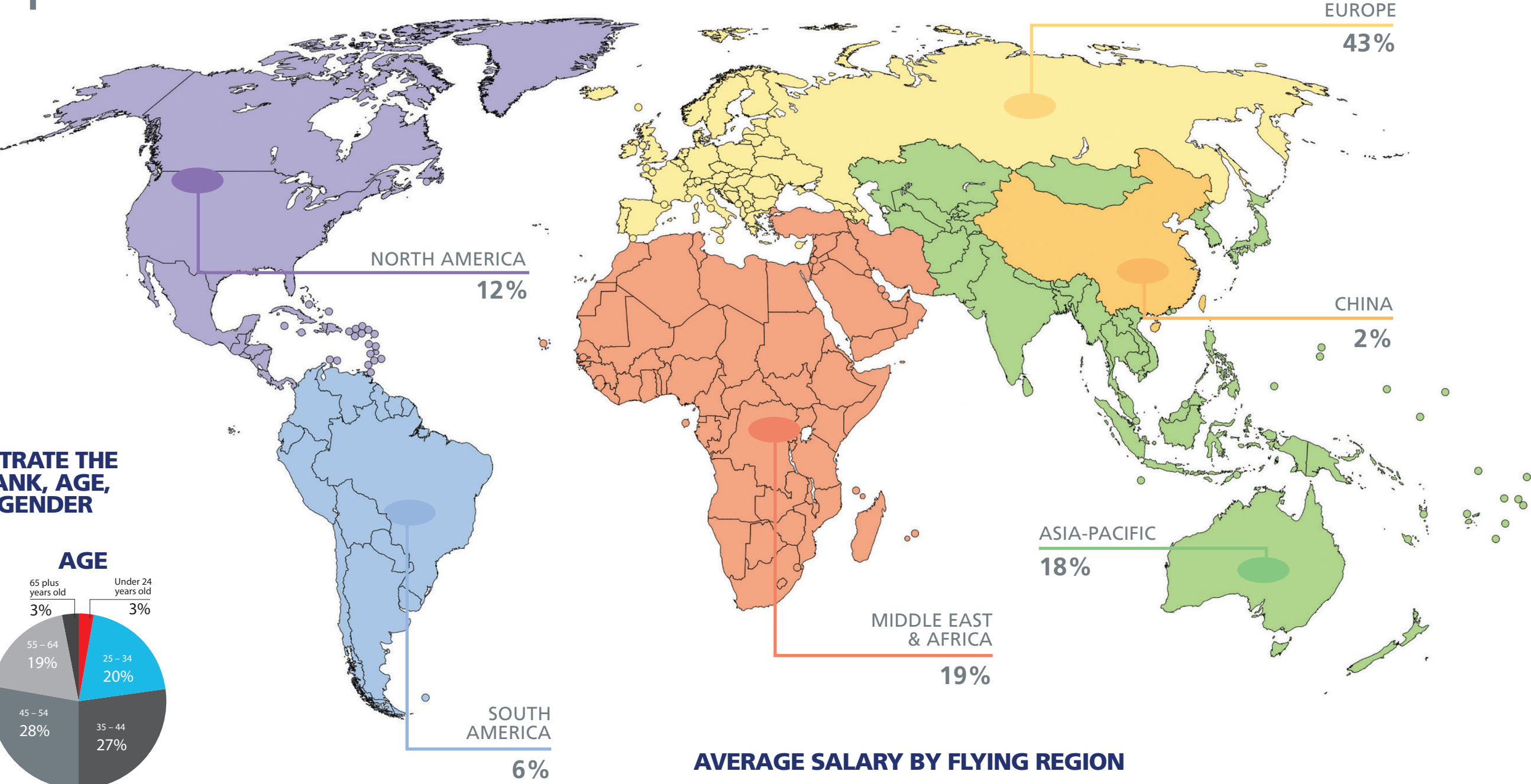
We believe that the combination of the survey's unique scale and reach and our market expertise means that this report delivers a representative view of trends and opportunities in employment and remuneration in our industry, right across the world.

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

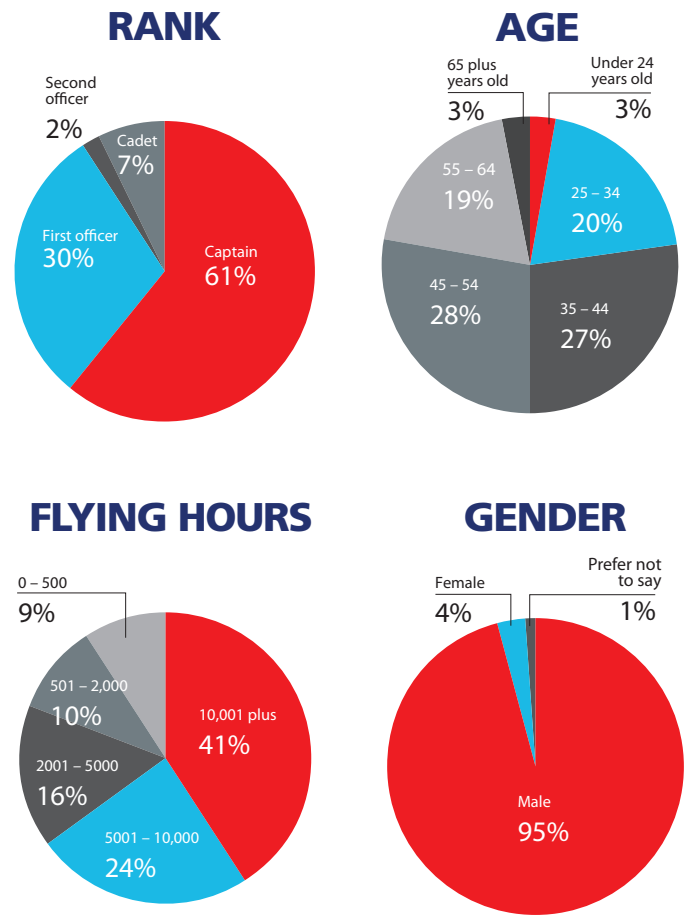


Demographics

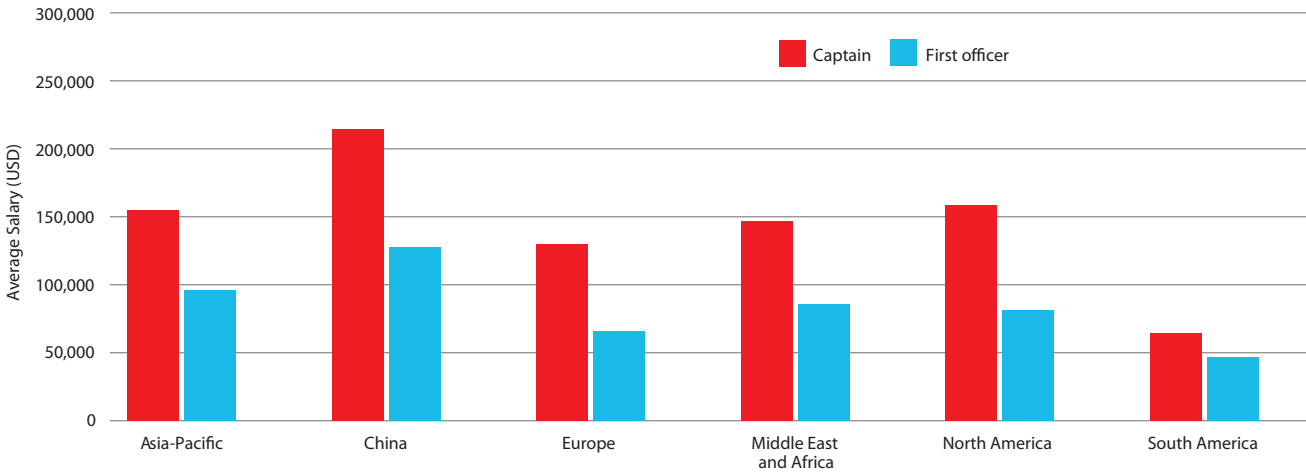
THIS WORLD MAP DEMONSTRATES THE BREAKDOWN OF RESPONDENTS BY FLYING REGION



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



AVERAGE SALARY BY FLYING REGION



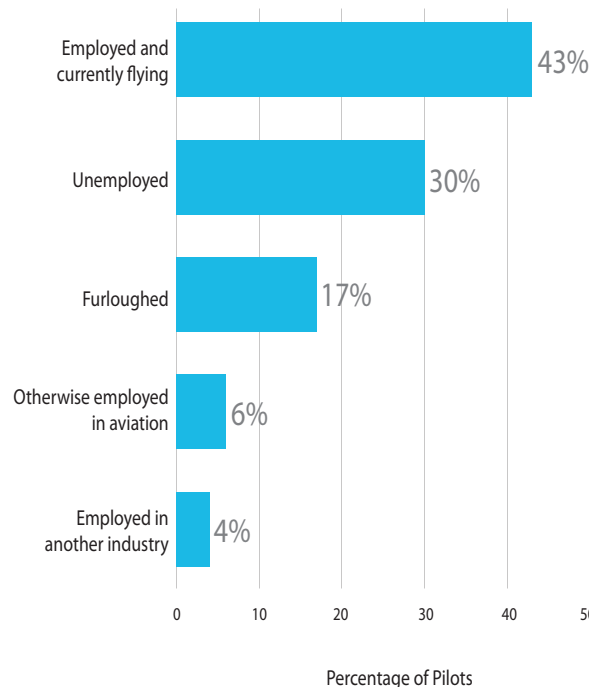
Pilot employment market

The COVID-19 pandemic has had a significant impact on the aviation industry and there is nobody that this affects more than pilots. The severe decline in demand for air travel from passengers as well as national and regional government travel restrictions has forced several airlines to declare bankruptcy. Some have ceased operations while others have recorded historic levels of reduction in flights, as well as accelerating aircraft retirement.

Throughout 2020 we have been at the forefront of the ongoing coverage of the aviation downturn and we wanted to see the real impact this has had on the employment profile of pilots across the world.

A staggering 30% of pilots are now unemployed. In direct contrast, we reported in our 2020 survey that the demand for pilots was at a record high, particularly in growing markets such as China, Asia-Pacific and the Middle-East. These regions were struggling to supply the number of pilots required to meet the demand for air travel. Notably this year we saw levels of unemployment in China reach 43%, with South America at 41% close behind. North

EMPLOYMENT PROFILE OF PILOTS



America fared the best out of the flying regions with 20% of pilots unemployed.

Katie Mann said: *"North America's flying market has remained more buoyant than most. This is down to the domestic market remaining relatively stable as well as the lack of national lockdowns enforced by the US government so far."*

17% of the pilots we surveyed identified their employment status as furloughed. We acknowledge that 'furlough' has different meanings in different countries with a huge variety of compensation packages on offer. In most cases, local governments have offered some assistance in monetary terms to those whose employment has been affected by the pandemic. 20% of all first officers are currently on furlough and additionally, 17% of captains are too. China had the largest group of pilots on furlough at 24%. Europe at 16% and South America at 14%, were the lowest furloughed groups. However, pilots in these two regions have also been affected by unemployment, hinting that airlines in these regions have had to make tough decisions faster than others.

There have been many stories in the press of pilots taking on new roles during the pandemic. We have seen pilots take on jobs at supermarkets and online retailers like Amazon as a couple of examples. This feels like an extreme representation of the market, however, 4% of the pilots we surveyed are facing this as a reality.

"Whilst 43% of pilots state they are currently employed and flying, it is simply a shocking reality of the state of the aviation industry that more than half of the world's pilots are not employed as pilots and flying as they have trained to do so," Mann stated.

Pilot unemployment

For pilots in the unfortunate position of being unemployed, we wanted to find out more information about their situation. We asked, "Are you currently unemployed due to the pandemic?" 84% said yes. Many pilots provided more detail on their answer:

◆ "I was a training captain with Thomas Cook for a significant period of my career, but I was made redundant in September 2019. I secured a new position as a captain at Flybe. I was then made redundant again in March 2020. At 61, I feel I have little chance of any further employment as a pilot."

◆ "The airline I flew for grounded 50% of their fleet. The priority was to keep the locals employed and I suffered redundancy as an ex-pat."

◆ "The base and the company I was flying at declared bankruptcy at an early stage when the pandemic hit Europe."

◆ "I resigned from my previous employer in December 2019 to join a major airline in the Middle-East in March 2020. However, due to the COVID-19 crisis, my employment offer has now been withdrawn."

◆ "I have lost four flying jobs due to the pandemic this year."

There was a huge number of pilots impacted by the collapse of both Thomas Cook and Flybe. Many ex-Thomas Cook pilots had secured employment at Flybe, only to suffer the consequences of unemployment again due to another airline's demise. Others had resigned from airlines on the promise of a contract with a new employer, only to have this withdrawn as the pandemic hit. Overall, the consequences of the virus have been a decline in flights leading to the deterioration in the financial stability of airlines, both creating redundancies from airlines to produce the 30% unemployment level.

Whilst many were forced into unemployment, others did make their own decisions:

◆ "I was working in China until January 2020. I left because of the Coronavirus outbreak and the company's financial situation was bleak."

◆ "I couldn't face the prospect of being stuck in a country away from my family due to travel restrictions, so I made the difficult decision to resign. I currently have no prospect of new employment. I had to prioritise being with my family over flying."

We continued by asking "What is your job seeking status?" 66% of pilots were actively seeking new pilot roles, whilst only 3% were currently in the interview process for at least one pilot job. This speaks volumes of the reality of the pilot recruitment market. Captains were the most likely to be in the interview process with 5%

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I WAS A TRAINING CAPTAIN WITH THOMAS COOK FOR A SIGNIFICANT PERIOD OF MY CAREER, BUT I WAS MADE REDUNDANT IN SEPTEMBER 2019. I SECURED A NEW POSITION AS A CAPTAIN AT FLYBE. I WAS THEN MADE REDUNDANT AGAIN IN MARCH 2020. AT 61, I FEEL I HAVE LITTLE CHANCE OF ANY FURTHER EMPLOYMENT AS A PILOT. SURVEY RESPONDENT

Pilot unemployment *continued*

of unemployed captains in this group, with only 2% of unemployed first officers.

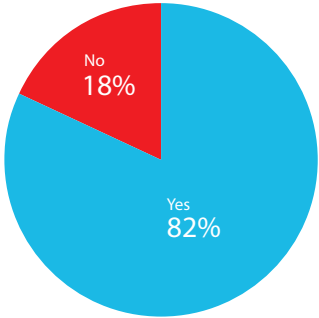
PILOT JOB SEEKING STATUS	
I am actively seeking a new pilot job	66%
I am waiting for the aviation sector to recover before I look for a new pilot job	15%
I am seeking non-pilot roles	9%
Retiring / Retired	7%
I am in the interview process for at least one pilot job	3%

If the recruitment market is bleak, what sacrifices will pilots make to secure a new role? We asked, "Would you take a pay cut for a new pilot opportunity?" 82% agreed that they would. Those who normally fly in North America were the least likely to take a pay cut at 71%, whilst those flying in the Middle-East and Africa were the most likely at 88%. First officers were more likely to take a pay cut than captains (84%, 79% respectively).

At first, we were surprised that this figure wasn't higher but there are many considerations to take on board when contemplating taking a pay cut.

Mark Charman commented: *"Some pilots, particularly highly experienced ones will be hesitant about taking a pay cut due to the concerns over devaluing the profession. The acceptance of a deterioration of terms at this point could lead to an industry-wide reduction in times to come. Some pilots will fear this change and will remain firm in the value that their qualifications, experience and skills lend to the industry and may even disapprove of those pilots that would be willing to take a pay cut. However, with so many unemployed pilots, there is a risk that the desperation to secure a new role for financial stability will be too attractive and we could be at risk of seeing remuneration packages decline over the next two years."*

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



“**I’VE BEEN FLYING SINCE THE EARLY ’90S AND I’VE ENDURED THE GLOBAL FINANCIAL CRISIS, 9/11 AS WELL AS SARS AND THE REPERCUSSIONS OF UNEMPLOYMENT.**

SURVEY RESPONDENT

We next asked, "Is this the first time you have been unemployed during your flying career?" For 69% of pilots, this was their first time experiencing unemployment, whilst nearly a third had been through it before in their flying career. Unsurprisingly, captains with additional years in the profession were more likely to have been unemployed before (36% had been previously), whilst for first officers, only 26% had been unemployed before.

Breaking this down further into regional differences, pilots who normally fly in China (45%) had been unemployed before and for those who had previously flown in North America (43%) had previously been unemployed. Pilots shared their experiences with us:

- ◆ "This is the third occasion that an aviation downturn has pushed me into unemployment in my career."
- ◆ "I've been flying since the early '90s and I've endured the global financial crisis, 9/11 as well as SARS and the repercussions of unemployment."
- ◆ "In the '80s, '90s and '00s company failures were frequent. I was lucky to have stable employment for 26 years, with a few near bankruptcies in the airlines I flew for. The good times are over, at least in my lifetime but probably for good."

Common themes for their current situation was their age with many feeling forced to retire and general issues with aviation businesses and airlines going into administration.

Pilot job security

In an industry where the demand for pilots in 2019 was at a record high, this year we asked pilots who identified themselves as employed and flying or furloughed if they were concerned about their job security. 82% said yes. This is a steep uptick from 52% last year. With more airlines in early 2020 announcing closures, including Flybe, Air Italy and AtlasGlobal and further casualties as the pandemic spread through the world, the impact on pilots and their feelings of insecurity in their roles has been immense.

We must consider that aviation has been one of the hardest-hit industries during this time, along with hospitality and other forms of travel. We would predict that those employed in these industries would feel a similar way.

Even those who had remained employed during the pandemic were concerned about their job security, particularly those flying in the Middle East and Africa (85%) and South America (86%). There will be an impact on pilots of not only seeing their colleagues lose their jobs but also the collapse of airlines and the lack of air travel throughout the pandemic. Job insecurity comes at

a cost to pilots and has been linked to several adverse health outcomes, including loss of self-esteem, anxiety and stress.

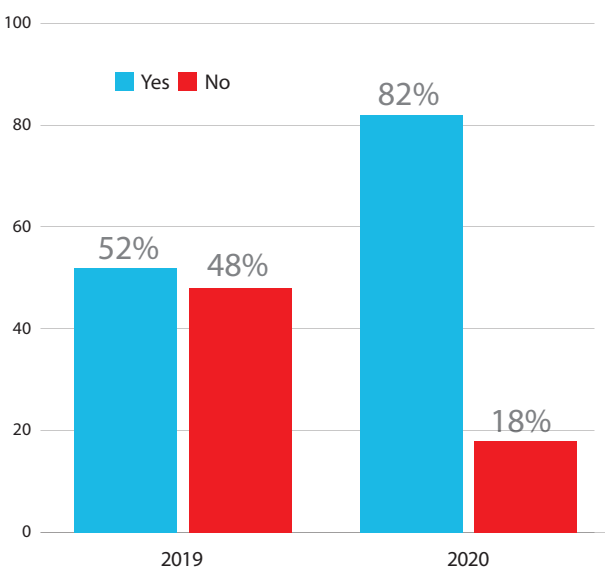
Furlough has not created a feeling of security amongst pilots and if anything, it is increasing their concern for their future career. For those who had been on furlough in 2020, 95% were concerned about their job security.

We continued by asking what exactly was making them feel concerned about their job security. It was no surprise that 65% were concerned because of COVID-19. We asked for more detail from pilots:



Pilot job security *continued*

ARE YOU CONCERNED ABOUT YOUR JOB SECURITY?



◆ “My airline is only flying 20-40% of the pre-COVID sectors daily and although we are still employed, we are hardly flying. This is not sustainable. Further job cuts seem to be imminent.”

◆ “COVID-19 is a serious threat to the aviation community. Even though my airline has preventive measures in place, one slip and we can have a super spreader closing departments.”

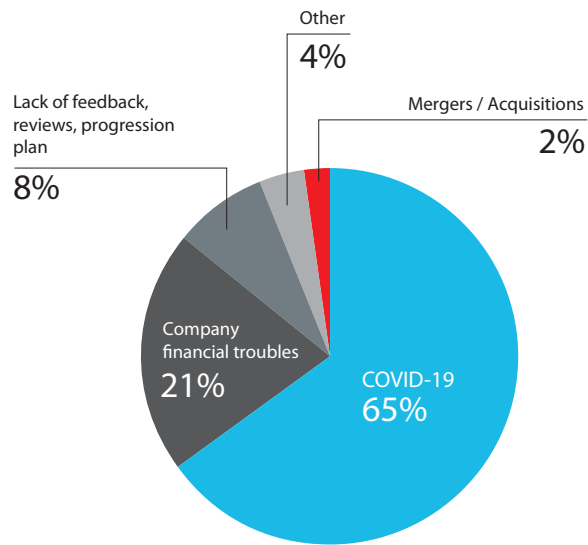
In particular, we wanted to highlight the commentary from one pilot who said:

◆ “We see that almost all airlines are firing pilots to reduce the cost. Later, we can expect they will try to hire a flight crew with a worse contract.”

Whilst we have no evidence of this taking place, we do wonder if we will see any deterioration of terms once airlines are in a better position to fly and re-hire, especially with unemployment as high as it is.

8% of pilots were concerned about their job security because of the ‘lack of feedback, reviews and progression plans’. Although this is a smaller number, we noticed that the commentary was similar to some of those who were concerned because of COVID-19. Lack of communication was flagged multiple times.

WHAT IS MAKING YOU MOST CONCERNED ABOUT YOUR JOB SECURITY?



Mann considered “In a period where the COVID-19 crisis is breeding uncertainty and emotional disruption, leaders in airlines and aviation businesses need to communicate to create clarity, set expectations, build resilience and catalyse positive change. Pilots become concerned about their job security when they are not receiving feedback. Although many leaders have learnt that their businesses cannot survive without a knowledgeable, engaged and aware workforce, clearly many are not hitting the mark.”

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WE SEE THAT ALMOST ALL AIRLINES ARE FIRING PILOTS TO REDUCE THE COST. LATER, WE CAN EXPECT THEY WILL TRY TO HIRE A FLIGHT CREW WITH A WORSE CONTRACT.

SURVEY RESPONDENT

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Pilot retention

With levels of job insecurity high, what impact does this have on the pilot recruitment market? We asked pilots that were employed and flying or furloughed in the next 12 months whether they would change jobs. Over half of these pilots agreed that they would.

When we looked at the group that were employed and flying, 43% were still planning to seek a new opportunity in the next 12 months. 82% of these pilots also agreed that it was the pandemic that had impacted their decision to seek new roles.

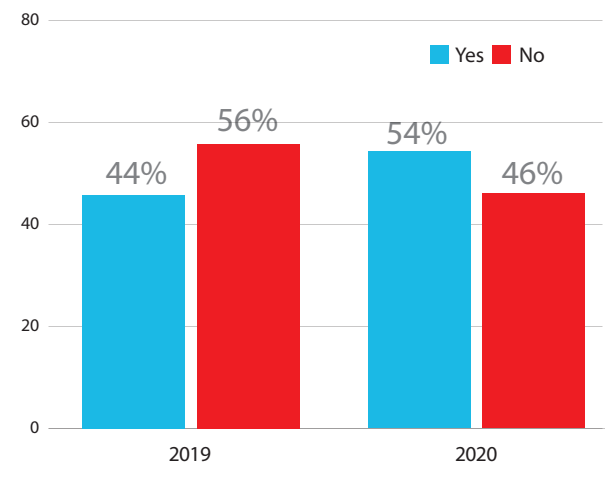
Charman noted “We were initially surprised by this. We would have thought that those who were employed would not be active in a new job search and would see their employment as a safe port in a storm. However, when you combine this with current job insecurity levels, it perhaps is not quite so surprising that many may feel they need a backup plan, just in case.”

Looking at just those who were currently furloughed, 81% agreed they would be looking for a new job in the next 12 months. This may astonish some readers that it was not closer to 100%. However, those in senior positions in airlines may be reluctant to ‘start again’ in a new airline. It will also depend on the communications by their management team and whether they have used the furlough scheme as a means to secure much-needed funding. 92% of these pilots agreed that it was the pandemic that had impacted their decision to seek new roles.

“What was interesting was that when we asked those on furlough if they were concerned about their job security, 95% said that they were. However, only 81% were planning on seeking a new role. In our experience of working with pilots, we have found that those in coveted senior positions for legacy airlines were passionate about staying with their current employer. Some have been reluctant to consider other opportunities and would only do so if they were eventually made redundant,” said Charman.



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



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Employee engagement

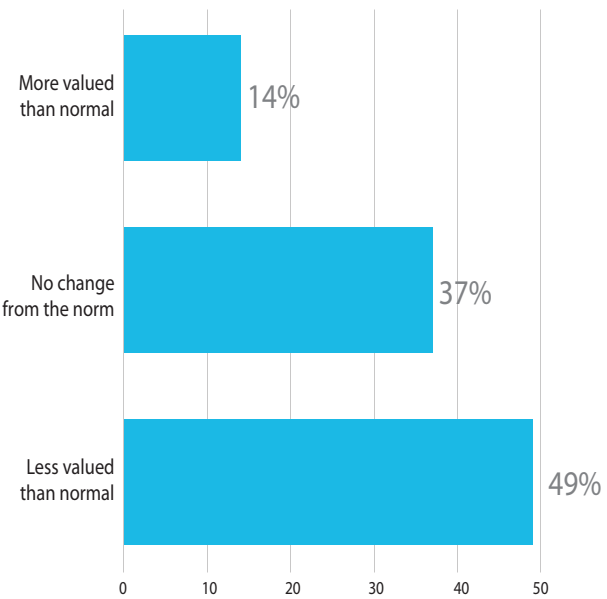
At the turn of 2020, the COVID-19 virus began rapidly disrupting lives, economies and workplaces. This global pandemic has forced airlines to make drastic changes to their businesses and as a result, there is the potential for it to have disrupted employee engagement.

We asked pilots that were employed and flying or furloughed how valued they felt by their employer? Nearly 50% responded that they felt less valued than normal, with just 14% stating that they felt more so.

Charman explained *“We have seen the impact that the pandemic has had on our employees. People have needed more support and reassurance than ever. It is not difficult to see how employees can feel less valued than they might normally do. Without clear and regular communications from the top, an interest in an employee’s wellness and career growth, can make employees feel alone and not valued for what they are doing and or have done in the past.”*

When a pilot doesn’t feel valued, it can have a devastating effect. People lose interest in their role and the airline they work for. On top of this, there is the risk that in a connected world, pilots will be keen to share poor experiences of employee engagement with airlines through their networks. Whilst the aviation industry

HOW VALUED DO YOU FEEL BY YOUR EMPLOYER?



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AIRLINES ARE IN SURVIVAL MODE. EMPLOYEE VALUE AND CONCERNS ARE A LONG WAY FROM SHAREHOLDER AND MANAGEMENT MINDS AT THE MOMENT. SURVEY RESPONDENT

is struggling now, we know that it will bounce back. Airlines that are not prioritising employee engagement and making their pilots feel valued may have a tough time in future recruitment campaigns. One of the key goals of employee engagement is to create advocacy, not animosity.

We were keen to see what the differences were between those who were currently employed and flying versus those who were furloughed. Those who were employed and flying were more likely to feel more valued or felt no change from the norm at 59%. 68% of pilots who were furloughed felt less valued than normal, with only 8% feeling more so.

“We can see the effect that being furloughed has had on pilots. High numbers feel insecure about their jobs, they are seeking new roles, as well as or because of how undervalued they currently feel. This has got to be a distressing time for these pilots. It could be easy for employers to negate communication with employees on furlough and it might be difficult to deliver the right message when they simply don’t know what the future will bring,” said Charman.

“

THERE HAS BEEN VERY LITTLE TO NO COMMUNICATION FROM MY AIRLINE TO THEIR EMPLOYEE BASE AS TO THE TRUE EFFECTS OF THE DOWNTURN, THEIR PLANS, WARNINGS, PREPARATION OR ANYTHING. I HAVE SIMPLY LOST TRUST IN THEM. SURVEY RESPONDENT



We continued by asking whether pilots who were employed and flying or were furloughed had faith in their employer to make the right decisions in the pandemic? Over 54% agreed that they did. Those who fly in the North America region were the most likely to have faith in the employer to make the right decision with 74% agreeing. Those flying in China were the least likely at 36%.

So, why did 46% not think their employers would make the right decisions? We asked for further commentary from these pilots:

- ◆ *“I feel like airlines are forgetting about the years their pilots have put in and helped make them a success. We are the casualties in this and I have little faith in any further decisions management will make.”*
- ◆ *“There has been very little to no communication from my airline to their employee base as to the true effects of the downturn, their plans, warnings, preparation or anything. I have simply lost trust in them.”*
- ◆ *“Airlines are in survival mode. Employee value and concerns are a long way from shareholder and management minds at the moment.”*

Pilot referral

We wanted to find out if those surveyed would choose a pilot career again if they had the chance. This year only 64% agreed in comparison to 71% in our previous survey. Those flying in North America (77%), South America (73%) and Asia Pacific (66%) were the most likely to repeat their career choice. Those flying in China (58%) and the Middle-East and Africa (59%) were the least likely.

We wanted to find out why over a third of pilots would not repeat their career:

- ◆ "I love flying but have found that being a professional pilot far more stressful than I ever imagined. It has poor job security and there are frequent challenges to overcome."
- ◆ "Salaries have reduced continuously since I first started working as a pilot. The lifestyle has decreased, and job security has become more vulnerable."
- ◆ "If I would have known what this career entails and what kind of a sacrifice it demands in terms of health, sleep and family life I would not have chosen it even if the training had been for free."

Taking this further we enquired whether they would recommend a career as a pilot to young people and only

2019 VS 2020 – GIVEN THE INVESTMENT TO BECOME A PILOT, WOULD YOU DO IT AGAIN?		
Region pilots flying in	2019 - Yes	2020 - Yes
Asia-Pacific	69%	66%
China	80%	58%
Europe	67%	60%
Middle East - Africa	68%	59%
North America	81%	77%
South America	96%	73%

46% agreed that they would. This has decreased from 57% in our 2020 survey. Those flying in Europe were the least likely to recommend a pilot career at 34%, whereas in South America and North America, 55% and 54% would recommend, respectively.

To find out why this had also dropped significantly, we asked for more commentary:

- ◆ "I still love to fly, but the attitudes of some CEO's breaks down the essence of aviation. Duty and rest time limits are considered as targets instead of limits. Together with the ticket prices that are becoming unrealistically low, this makes the investment young people have to make to become pilots impossible unless they have rich parents."
- ◆ "I would tell young people who want to be pilots that it is nothing like they imagine. There is no glamour to it. It is not rewarding. Flying through the night, constantly jet-lagged, missed time with family, poor work/life balance, ever-deteriorating employment conditions are the reality. If you want to fly, then do a trade, run your own business, and when you want to, fly privately, in good weather, with no schedules or stress."
- ◆ "I have two children who are pilots and what do they have now? They are concerned about tomorrow, financially unsafe and with no future. I feel I was a bad father. They followed my dream, but it becomes a nightmare."



SALARIES HAVE REDUCED CONTINUOUSLY SINCE I FIRST STARTED WORKING AS A PILOT. THE LIFESTYLE HAS DECREASED, AND JOB SECURITY HAS BECOME MORE VULNERABLE. SURVEY RESPONDENT

Stress

We noted in our 2020 survey that the working environment of a pilot can be highly stressful, due to aviation being a high-consequence industry. When you add a global pandemic as well as high unemployment and furlough levels, we wanted to find out if pilots were more stressed this year.

We asked pilots how they would rate their stress level from 1 to 5 (1 being not stressed and 5 being very stressed) on a normal day. Overall, pilots answered at an average stress level of 3 – a half-point increase from last year.

We analysed the data further to see if there were differences between those who were still flying in comparison to those who were furloughed. Those flying in China (45%) and the Middle-East and Africa (32%) were the most likely to rate their stress levels at either 4 or 5. Pilots flying in North America were the least stressed with 59% rating their stress level at just 1 or 2.

For pilots who were furloughed, we saw very different results. Pilots that usually fly in South America (47%) and pilots that usually fly in North America (43%) rated their stress levels at 4 or 5. Whilst for those who usually fly in China who were furloughed, we saw the stress levels of 4 or 5 drop down to 30%.

We pressed further and asked pilots to pick the one aspect that made them feel the most stressed at present out of seven factors: safety, passengers, management, rotations, commute, COVID-19 and job security.

Stress factors have changed dramatically in comparison to last year where management and rotations were the most highlighted areas. This year job security and COVID-19 have had the biggest impact on stress levels.

WHAT IS MAKING YOU FEEL THE MOST STRESSED?	
Job security	47%
COVID-19	25%
Management	10%
I don't get stressed	7%
Safety (non COVID-19 related)	5%
Commute	3%
Rotations	2%
Passengers	1%

Pilots delivered some thought-provoking commentary on why they were stressed. Pilots aged 35 to 44 years old are the most stressed by job security

- ◆ "In the current climate of border restrictions and lockdowns, people are unable to travel, naturally airlines are reacting to this by reducing pilot numbers."
- ◆ "If the pandemic continues into 2021 with no recovery for the aviation market, the risk to lose my job is high."
- ◆ "The demand for air travel is much lower than the airline capacity offer, which makes the current size and employment levels unsustainable in the medium to long term."
- ◆ "The airline industry is in worse shape than after 9/11."

Pilots flying in Europe are the most stressed by COVID-19

- ◆ "Whilst my job is secure, my constant travel means that I become a risk to my family, however good the precautions I take are. I don't want to catch it, and I certainly don't want to pass it on."
- ◆ "The lack of a support plan for the aviation sector or a cohesive pan-EU response is leading to a disjointed national response to the crisis, damaging the aviation industry further and leading to further worries about job security."
- ◆ "The risk of being put in quarantine somewhere remotely in the world during a rotation is making me stressed."



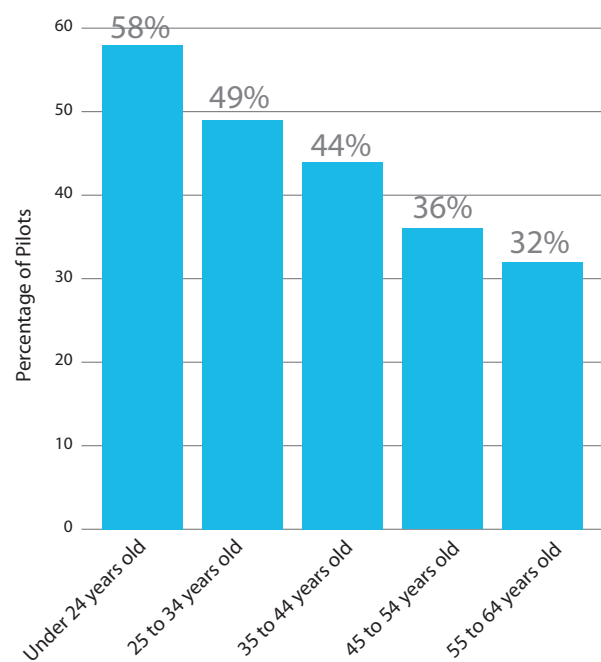
THE AIRLINE INDUSTRY IS IN WORSE SHAPE THAN AFTER 9/11. SURVEY RESPONDENT

Mental health and well-being

If pilots are stressed, how has this impacted their mental health this year? We asked whether pilots felt their mental health had been impacted by the pandemic. 40% agreed that it had. What was most significant was how the age of the pilot affected whether their mental health had been impacted. 58% of those under 24 years old said their mental health had been impacted, 44% of those aged 35 to 44 years old agreed and just 32% of 55 – 64 years olds were impacted.

Charman noted *"It has only been in the last decade that there has been a noticeable shift towards mental health. What was once a taboo subject no longer has such a prominent stigma attached to it, thanks to the emergence of social media and the growing coverage in mainstream media. Controversially we considered whether the younger pilots mental health had been more affected than older pilots or whether they are simply more comfortable talking about it in their generation. Are older pilots aware enough of what mental health is and are they happy to talk about it, or are they simply just more resilient than younger pilots? After all, this is*

DO YOU THINK YOUR MENTAL HEALTH HAS BEEN AFFECTED BY THE PANDEMIC?



not the first significant event in aviation history they have had to go through."

When we analysed the data to compare the different groups of employment types and the impact of the pandemic on their mental health, we saw no noticeable differences in the levels of those affected. However, we received some notable commentary from pilots.

Employed pilots whose mental health had been impacted by the pandemic

◆ "A messy schedule creates a very disorganised mind which is sometimes an issue at work. Applying some specific procedures needs good mental health. I wouldn't be so impacted if I knew I could quit and find another job quickly. The impact of the pandemic means I have no idea how long I'll be stuck in this company and this is what is affecting me the most."

◆ "Working in a foreign country while my wife and children are trapped in our home country, means I have not seen them for five months and I am not likely to see them for another nine months. This is not through choice but due to multiple countries having 14-day quarantine periods, my employer taking away all annual leave owing (five weeks) and having my salary cut in half."

Unemployed pilots whose mental health had been impacted by the pandemic

◆ "I am not in the right state of mind to fly an aeroplane like before."

◆ "I was depressed as I saw my flying career disappearing and there was nothing I could do about it."

◆ "In my 30-year aviation career, I have dealt with pressure, stress etc on the job but I could always determine or direct an outcome. This pandemic has left me completely dependent on the government's decisions. I have lost the control and I don't like it."

◆ "My partner and I are both pilots and we both lost our jobs. We've been forced to sell our house. It's been extremely stressful."

Furloughed pilots whose mental health had been impacted by the pandemic

◆ "The amount of stress and anxiety the pandemic has caused me has permanently scarred my outlook on life."

◆ "Added stress, life plans have had to change, as a single income household it has put an enormous amount of pressure on us all."

◆ "I am very concerned about how I will be able to fund my family and retain my home due to the lack of alternative employment prospects. The unexpected shock of instant furlough in March, followed by a notice of redundancy and loss of income with ongoing long term financial commitment is a constant worry."

We continued this line of research to allow pilots to pick the top three words or phrases that best captured their state of mind.

Understandably, the top answer was 'worried and anxious' with 41% of pilots feeling this way. Concerns over COVID-19, job security and unemployment, make it natural that many would note this as a concern. Notably, first officers were more worried and anxious than captains were.

38% of pilots felt 'frustrated'. The pandemic has been difficult to control and has spread across the world, a pilot cannot determine the outcome of how it impacts them flying. Pilots are used to being in the sky, and with the decline in travel and flights means that they can be stuck at home with no imminent news of when they can take-off again.

What was positive is that 31% felt optimistic despite this survey being conducted in October 2020. We predict that the news in November 2020 of the vaccine for COVID-19,

HOW ARE YOU FEELING?	
Word or phrase	Percentage feeling like this
Worried and anxious	41%
Frustrated	38%
Stressed	33%
Optimistic	31%
Calm and collected	27%
Productive	15%
Restless	15%
Happy	11%
Successful	9%
Distracted	9%
Failing	4%

will have certainly elevated the pilot community's sense of optimism further.

For the last question about mental health and well-being, we asked what impact the pandemic had on pilots overall. The top answer to this question was that 35% of pilots felt it had made them consider changing their career. Significantly, that means over a third of pilots are not sure if they want to carry on with being a pilot. It was the pilots in the older age groups; 35 to 44 years olds (42%), 45 to 54 year olds (40%) and 55 to 64 year olds (47%) who were the most likely to be considering changing their career. With age, often comes experience and there is an element of risk of losing the most experienced pilots in the marketplace.

"Whilst a reduction in the number of pilots right now may not have an immediate impact on the operations of airlines, we predict that if this percentage of pilots were to hang up their wings, pilot recruitment teams are going to have a tough time ahead. Airlines will potentially need to start planning for the future fallout now," said Charman

On a positive note over a quarter of pilots felt that the pandemic had made them stronger and more resilient than ever before.

Charman said *"A situation like this can quite literally induce 'fight or flight'. We were pleased to see that 28% of pilots have been able to improve their resilience in such a difficult time. That couldn't have been easy with all the uncertainty that we have seen."*

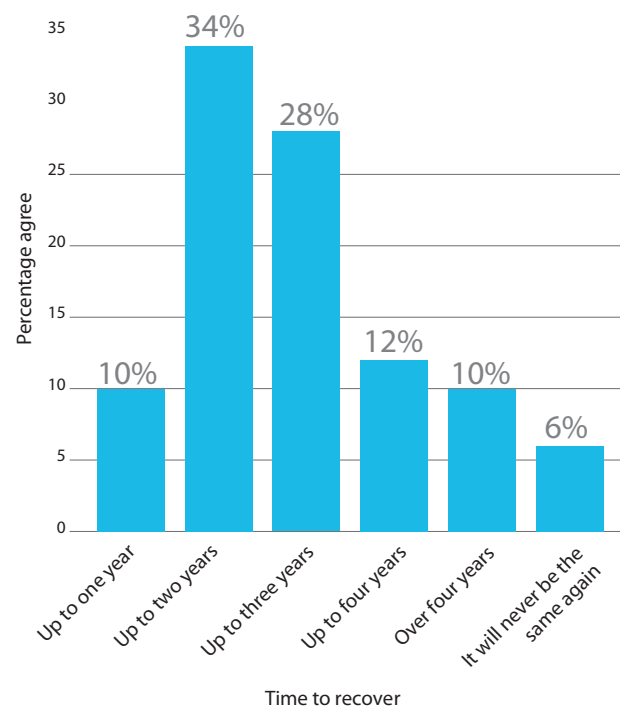
The future of aviation

Whilst a lot of this report has focused on the past year, we wanted to see what pilots had to say about the future of aviation and the pilot recruitment market.

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

"The majority of pilots seem positive that air travel behaviours will return to previous levels. Notably, some pilots felt that business travel may decline due to the popularity of virtual events and meetings. However, cargo aviation has seen an uptick in this time, and this may in turn help to balance out any loss of business travel," commented Mann.

WHEN DO YOU THINK AVIATION WILL MAKE A FULL RECOVERY TO PRE-COVID LEVELS?



The speed of the recovery of aviation will be important to the people who work in the industry. We wanted to find out when pilots thought it would make its comeback and recover fully. 72% of pilots believed that it would take from one to three years. Pilots in this group commented:

◆ "People want and need to travel. As soon as quarantine is replaced with a vaccine and a better testing regime, people will return to flying in their droves."

◆ "As soon as the travel restrictions are a thing of the past, the public will be keener than ever before to travel by air. It has been proved in previous crises that the public has a very short memory. What is a viable alternative to flying?"

With the decline in air travel and the changes we have already seen in the pilot employment market, the recovery will have an impact on the future of pilot recruitment. We asked pilots, what they envisaged the employment market will be like in five years. Interestingly, 43% believed that there will be a shortage of experienced pilots. 23% thought that there would be a shortage of all pilots. 34% said that they thought there would be too many pilots.

Mann considers *"In five years, we could have gone through a full circle. In the last decade there have been too many inexperienced pilots, but too few experienced pilots. Will the gap between skill and experience widen as more pilots qualify and join the mass of low hour pilots? And will the experienced pilots leave this career for good? The next decade in aviation could put airlines in a huge dilemma of how they attract, retain and train talent for the future."*

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PEOPLE WANT AND NEED TO TRAVEL. AS SOON AS QUARANTINE IS REPLACED WITH A VACCINE AND A BETTER TESTING REGIME, PEOPLE WILL RETURN TO FLYING IN THEIR DROVES. SURVEY RESPONDENT

Conclusion

2020 has been the year of survival for aviation and 2021 has started in the same vein. With the announcement of the COVID-19 vaccine, it has brought some optimism to the market and airlines will already be planning on how they can start to recoup some of the huge losses they have experienced.

As businesses operating in the aviation industry, we eagerly anticipate what the impact of the vaccine will bring to help grow the industry back to its former glory. The pandemic has taught many of us new lessons in life and business, and we are sure to see the repercussions of it for some time still to come. We consider:

- ◆ How many pilots will leave the profession for good?
- ◆ Will pilots be willing to relocate to and fly in Asia?
- ◆ How will terms be affected in the short and long term?
- ◆ When will pilots feel secure in their roles again?
- ◆ Who will be the first airline to actively start hiring pilots again?

◆ What impact will employee engagement have on future recruitment campaigns?

◆ Will we lose any more airlines in the aftermath of the pandemic?

◆ Will the industry and career of a pilot remain attractive to young people?

It has been our privilege to share the thoughts and feelings of pilots in this difficult time. We are pleased we have been able to create and share this with the aviation community and we hope that the insights have been interesting and thought-provoking.

Mark and Katie





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