

Future Skies: Tomorrow's Voices

Survey Report April 2024

CANSO



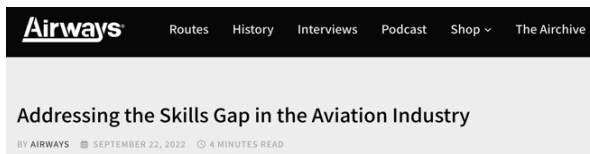
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Background

In preparation for the “Future Skies: Tomorrow’s Voices” day at Airspace World 2024 organised by CANSO, Engage 2 and Firstfruits Services, a global survey was conducted of those 28 and under working in the aviation industry and those currently studying with the intention of entering the industry. The purpose was to enrich the event with tangible insight on the perspectives of the next generation of aviation professionals, putting their voices at the centre of the narrative. The impetus for this event stemmed from the rising concern across the industry regarding the difficulty in attracting the right talent and retain a workforce that can deliver the future vision of aviation.

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The Pilot Shortage May Be Easing Slightly, But Aviation Now Needs Mechanics



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The Aerospace Talent Shortage Is Complex. Solutions Can Be Simple.

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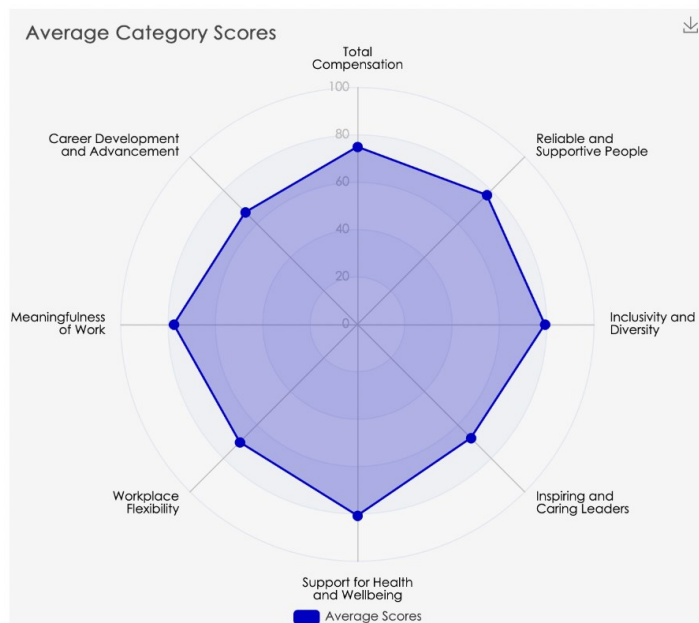
Following the completion of the survey, a focus group of next generation voices was convened to review and discuss the findings. Some of the focus group participants then presented the findings in Geneva in two engaging sessions, including a final discussion around next steps for the industry.

Survey methodology and approach

The Future Skies: Tomorrow’s Voices survey focused on the factors that influence the attraction and retention of young professionals (18-28) in aviation. Drawing on research from McKinsey and the World Economic Forum¹, eight factors were chosen to develop a holistic view of next generation perspectives.

These eight factors are: total compensation, career development and advancement, meaningfulness of work, workplace flexibility, support for health and wellbeing, inspiring and caring leaders, inclusivity and diversity, and reliable and supportive people.

Through the bespoke surveying platform, quantitative Likert scale were formulated into a score out of 100 for each of the eight factors, as well as an



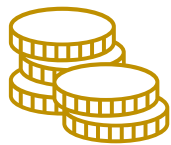
¹ WEF Future of Jobs Insight Report, May 2023; McKinsey Quarterly July 2022 “The Great Attrition”



overall score which can be compared across various demographic variables. What follows is a summary of each factor, highlighting key statistics as well as some reflections from the next generation focus group.

Survey respondent: "Aviation is a passion of mine. If my organisation continues to support me with a competitive wage, benefits, flexible/remote working conditions, and some interesting projects, I can't see myself doing anything else."

Factors for attraction and retention



Total compensation – 75.0

Responses regarding salary and remuneration were largely positive. 82% of respondents agreed their current salary was sufficient to live on. 53% agreed that their salary was competitive compared to similar industries, 25% gave a neutral response with 21% disagreeing.

For students, this factor remains important in choosing a job, ranking third in the list of influencing factors, with 94% seeing it as influential.

Career development and advancement – 67.0

Of the eight factors, career development and advancement gave the lowest satisfaction score. Nearly 20% disagreed or strongly disagreed that their role had a clear path of progression, with one third of respondents not agreeing that adequate resource was devoted to their development.



McKinsey's research into these factors across multiple industries concluded that career development and advancement is the most influential in choosing and remaining in a job.

Forming clear, accessible and well-supported pathways is therefore crucial to retain talent, and is something the ATM industry must look at more closely.

For students, this factor ranked fifth in importance, with 83% agreeing it is an important factor when choosing a job.



Meaningfulness of work – 77.6

As we will discuss later, the younger generation working in aviation are passionate about the work that they do. 72% strongly agreed with the statement, "I am proud to work in this industry", with only 1% disagreeing. 92% agreed that they find their work meaningful, rewarding and challenging.

For students this factor ranked first, with 96% agreeing it is an important factor when choosing a job (and 71% strongly agreeing).



Workplace flexibility – 70.3

Satisfaction levels with flexibility around work location brought mixed responses. 43% agreed that their organisation offered adequate flexibility around working location, whilst 32% disagreed. Perspectives on the flexibility around hours of work was more optimistic with 73% showing a positive sentiment.



For students, this factor ranked eighth in importance, with 78% agreeing it is an important factor when choosing a job.

Support for health and wellbeing – 80.7



Support for health and wellbeing received the highest average score in the survey. 76% of respondents agreed that their health and wellbeing was adequately supported, 66% agreed their role does not cause undue stress and the expected workload is appropriate.

For students this factor ranked fourth, with 91% agreeing it is an important factor when choosing a job.

Inspiring and caring leaders – 67.8

There is a mixed picture regarding young professionals' perceptions of leadership. On one hand there is strong positivity around the culture created by leadership, with 59% agreeing they feel supported and celebrated by leadership.



However, responses were much more varied regarding how inspiring leaders are, with 43% agreeing (and of these, only 13% strongly agreeing), 34% responding neutrally and 23% disagreeing.

This response may not necessarily mean that there is no vision within the organisations, but may rather indicate how the communication of the vision is not connecting with the younger generation.

There is an appetite within the younger generation to be involved in shaping the industry and their organisations; however, there was a mixed response regarding leadership's openness to innovation and new ideas. 52% of respondents agreed that their new ideas and innovation are valued, however 28% disagreed.

For students, this factor ranked sixth, with 82% agreeing it is an important factor when choosing a job.





Inclusivity and diversity – 79.2

Most respondents are positive about inclusivity and diversity in their organisation, with 74% agreeing they personally feel included and comfortable, and 75% perceiving their organisation as inclusive and diverse.

However, some individual qualitative feedback indicated there is work to do, as evidenced in the survey quote below.

For students this factor ranked seventh, with 74% agreeing it is an important factor when choosing a job.

"The aviation industry faces challenges related to diversity, with certain demographics underrepresented in various roles as well as the aged organisational and administrative management."

Reliable and supportive people – 77.3

79% agreed they feel supported and celebrated by colleagues, and 83% agreed their organisation is an enjoyable place to work. Maintaining a healthy culture is crucial, as McKinsey's data highlights that a lack of reliable and support people is the second most common reason for a young professional to leave a job.



For students this factor ranked second, with 93% agreeing it is an important factor when choosing a job.

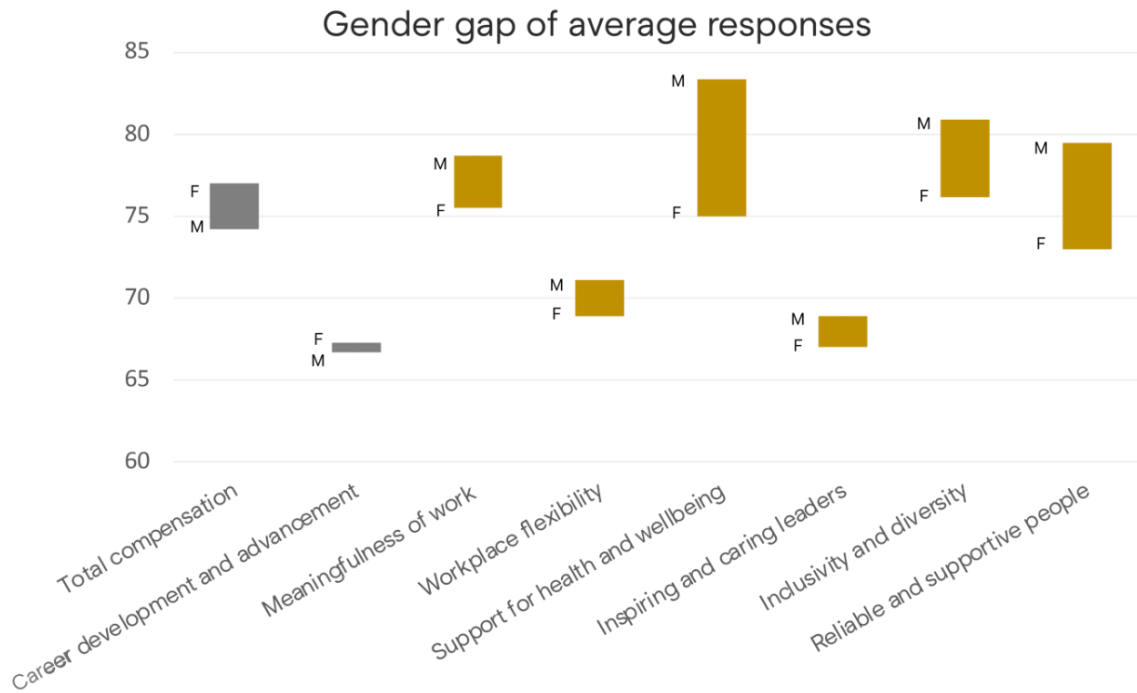
Perspectives by gender

The graph overleaf presents the spread of scoring between male (M) and female (F) respondents across the eight factors. The coloured bar shows the difference between the average scores of men and women.

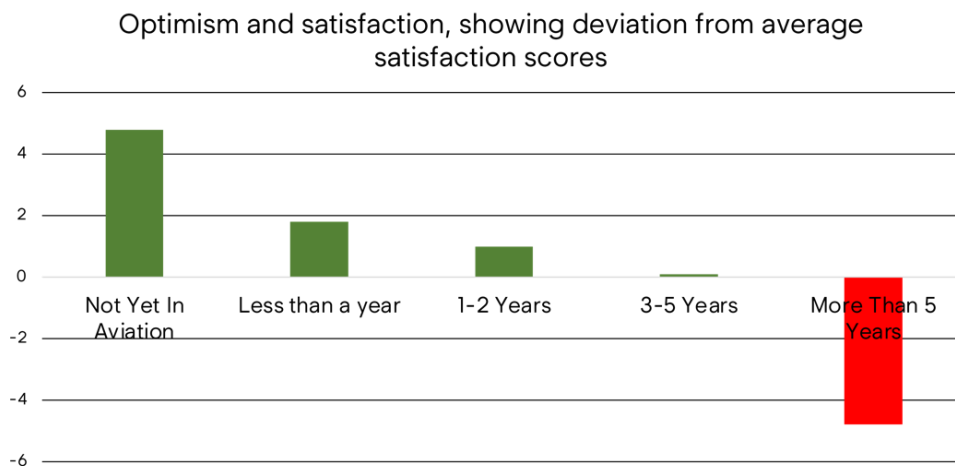
These responses subvert a common narrative around this area, whereby female scores for total compensation and career development and advancement are slightly more positive than male responses. Perhaps aviation is making progress in equal treatment of men and women at the start of their careers.

However, it is in the cultural areas of focus, such as support for health and wellbeing, reliable and supportive people, and inclusivity and diversity, that we see a substantially lower score from female respondents.





Another demographic trend of note is the correlation between the overall score and time spent in the industry.



Environmental perspectives

The next generation's thoughts and expectations on corporate responsibility around environmental impact has been much talked about and has raised concerns regarding the attractiveness of the aviation industry.

When surveyed on their perspectives, the respondents were relatively positive about what was being done by their organisation and the industry, although we should note this may be a biased sample (of those already working in the industry)



and not a reflection of the generation as a whole. Others may have chosen not to pursue a career in aviation due to environmental concerns.

66% of respondents believe their organisation is doing what it can to address environmental concerns, with only 14% disagreeing. For 12% of respondents, they joined the industry to make a difference in this area, 69% are concerned about the area but it didn't influence their decision to join the organisation, 19% are not concerned about the environmental impact of the organisation. 77% feel they can be part of the environmental solution in the industry.

Perspectives on applications and training

Most respondents found the application process for their role clear and helpful. 80% of respondents strongly agreed that their role-specific training was necessary, 75% considered the time take for this training was appropriate and 98% agreed the cost was appropriate (however 98% were funded by the organisation or government grants, so perhaps this only represents a personal view of appropriateness!).

Concerns expressed ranged from logistical issues, course content, structure, and duration, to financial aspects and grading systems. There were recurring suggestions for more focus on practical and industry-relevant training, better instructors, and more role-specific training.

Organisational strategies and industry policies

Respondents were asked to select organisational strategies they believed would improve talent attraction and retention. The top selected were:

1. Offer higher wages (101 selections)
2. Improve talent progression and promotion processes (86 selections)
3. Provide effective reskilling and upskilling (72 selections)
4. Improve internal communication strategies (70 selections)
5. Support employee health and wellbeing (66 selections)

Respondents were asked to select industrial policies (i.e. wider than their organisation) they believed would make a significant difference to attraction and retention. The top selected were:

1. Funding for reskilling and upskilling, particularly in digital and data literacy (78 selections)
2. Tax and other incentives for companies to improve wages. (75 selections)
3. Improvement to school systems (65 selections)
4. Quality or access of transport services (55 selections)
5. Childcare availability for working parents (51 selections)



Perceived factors and barriers to attraction and retention

In two questions allowing free-text answers, respondents were able to share their perspectives on the key factors they see influencing attraction and retention, and the barriers preventing other young professionals from entering the industry.

The top perceived key attraction and retention factors were:

1. Passion
2. Excitement/challenges
3. Salary/pay
4. Work environment
5. Career advancement

The top perceived barriers were:

1. Salary/pay
2. Environmental concerns
3. Lack of awareness of the industry
4. Training costs
5. Work-life balance

The frequent mentions of passion were intriguing. Despite the many issues raised across this survey, the young professionals in aviation are passionate about the industry with 98% expecting to still be working in the industry in 5 years – an extraordinary figure. The reasons for this passion and its impact on our industry require further investigation.

The findings raise questions about how wide a pool of talent is being brought into the industry. Will we have the right talent for the future if we only attract people who are passionate about aviation? What about those with the skills and competencies required, but who don't carry a specific passion for the industry? Are we creating different pathways for that talent pool?

"I can't envision myself pursuing anything unrelated to aviation. It's both my professional path and my favourite hobby, and it's always the subject of my discussions. The continuous challenge and evolution within the field, along with the endless opportunities for learning and innovation, are incredibly stimulating to me."



Enabling change

This survey has highlighted some interesting trends, but there is now a need for deeper insight at an industry-wide and organisational level. We need to understand how the voices of the next generation can shape improved attraction and retention and enable delivery of the future vision.

There is also a need to evaluate how the young generation are receiving the messages put out by organisations. Through the survey and wider conversations around this topic there is a common theme that whilst organisations may be crafting messages aimed at young professionals, there is a disconnect and they often do not land as expected.

The CEOs' breakfast with young professionals on the Thursday morning of Airspace World 2024 demonstrated how interested the next generation are in participating in the conversation regarding how the industry progresses. The opportunity to interact with senior leaders from a range of organisations allowed for an interesting exchange, with innovative ideas such as reverse mentoring and cross-organisation networks.

The findings of this survey, alongside the many perspectives shared through the focus groups, CEOs breakfast and panel sessions, makes a clear case that our organisational attractiveness needs to be addressed. Whilst much work is underway in collaborative discussions in global fora, there is a need for organisations and their leaders to assess how they can better incorporate the voices of the young people in their ranks and redesign organisations to be fit for the future, putting pathways in place to co-develop the workforce of tomorrow.

Throughout the process of the Future Skies: Tomorrow's Voices initiative, engagement from next generation talent has been impressively strong. During the survey, focus groups and event at Airspace World, there have been many young voices eager to contribute to the conversation, to engage with leadership and play a part in shaping the future of aviation. Together, we can be spurred on to deliver the future vision and catalyse our future skies.

With thanks to all the young professionals who participated in the survey, focus groups and panels. Thank you also to Eduardo Garcia, Michelle Bishop and Angy Odysseos of CANSO, for helping with the survey and the hard work in making the day at Airspace World a success!

