

Gender in Aviation

Celebrating progress while looking to the future

September 2024





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1. Introduction

Aviation provides substantial economic and social benefits, enhancing the quality of life for billions of people worldwide. It links cultures, businesses, and families, fostering opportunities for trade, investment, tourism, and access to education. The widespread connectivity is largely attributed to competition and innovation among airlines and other players in the supply chain, resulting in more affordable air travel.

Passenger demand is expected to more than double over the next twenty years, growing at an average annual growth rate of 3.7% per year. To accommodate the additional movements, a larger workforce across all occupations in the value chain will be needed.

This study sheds light on gender diversity in the aviation industry, based primarily on data sourced from the IATA 25by2025 initiative. It provides the first consolidated results of progress made in recent years as well as highlighting some of the general challenges and opportunities that exist.

This paper creates the basis for the discussion on next steps for achieving a more gender-diverse industry. The findings will help airlines plan strategies and programs, identify and advocate for supportive regulatory policies, and collaborate on joint efforts to continue building opportunities for achieving more diversity in labor markets and societies.

The structure of the report is as follows:

- Section 1: Introduction.
- Section 2: Global context, which includes the discussion of gender diversity and its current situation, the economic benefits of gender diversity, and women in aviation.
- Section 3: Overview of IATA's 25by2025 initiative and details of the signatories and data used in the analysis.
- Section 4: Survey results.
- Section 5: Looking ahead and steps towards an inclusive and diverse aviation industry.
- Section 6: Concluding comments.

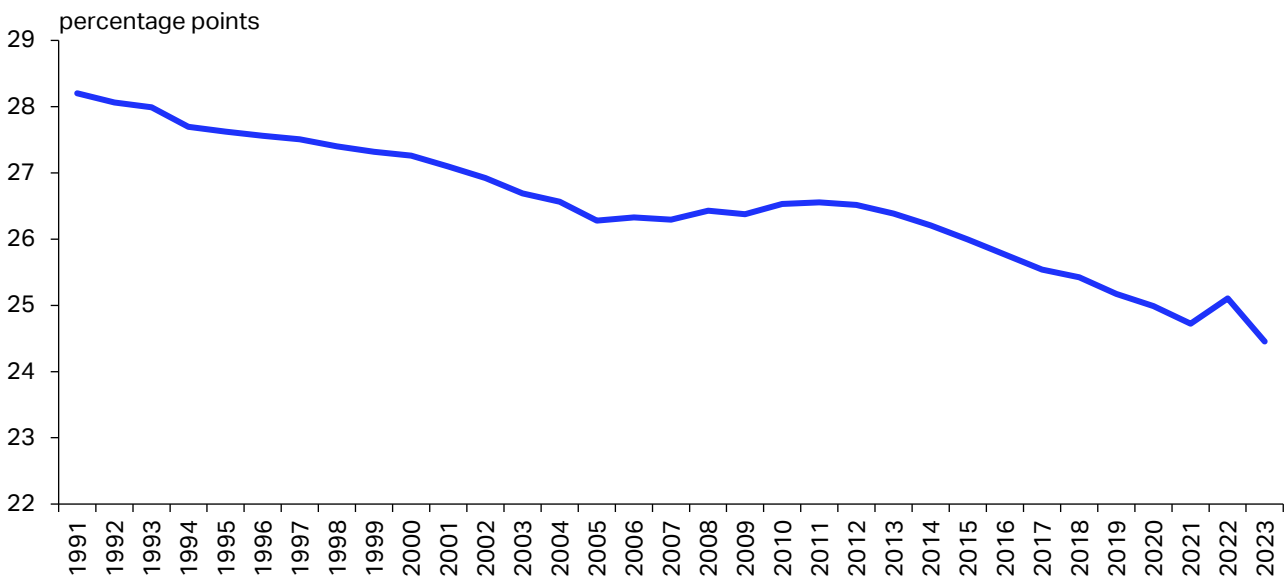
2. Global context

2.1. Gender diversity: the current situation

The issue of gender diversity and representation is not new. Nor is it unique to aviation. Despite progress towards gender diversity and equality over an extended period, gaps remain at both the global and country level. One way to demonstrate the difference is through the labor force participation rate (LFP), which is defined as the ratio between the total labor force divided by the working-age population.¹

Typically, the female labor force participation rate lags that of male participation. Globally, in the early 1990s, the gap between male and female LFP rates was around 28 percentage points. Over time, this difference has steadily narrowed, to around 24 percentage points currently (Figure 1).

Figure 1: Gap between male and female labor participation rates (percentage points), 1993-2023



Source: Adapted from the World Bank²

On average, unemployment is higher among women than men, and women are more likely to both work fewer hours and receive lower wages than their male counterparts. The International Labor Organization (ILO) estimates that women, on average, earn around 20% less than men across the world, and part of this wage gap remains unexplained, even after adjusting for factors such as education, experience, tenure, hierarchical position, etc.³

While gender gaps persist worldwide, their extent varies significantly across countries. For example, in 2021, Yemen and Iraq ranked among the countries with the highest gender gaps in LFP (61.6 and 60.7 percentage points, respectively), whereas countries such as Sweden and Luxembourg were among the countries with the lowest gender gaps in LFP (6.3 and 7.0 percentage points, respectively) (Figure 2). These differences reflect a range of factors, including cultural and social considerations, and differences in labor market structures and dynamics. These complex drivers at the individual country level present a considerable challenge to closing the gender gap; there is no simple solution to addressing the issue of gender diversity at a global level.

¹ The labor force is defined as the number of people in or available for paid employment; it includes employed plus unemployed persons who are actively seeking work. The working age population refers to people aged 15 to 64.

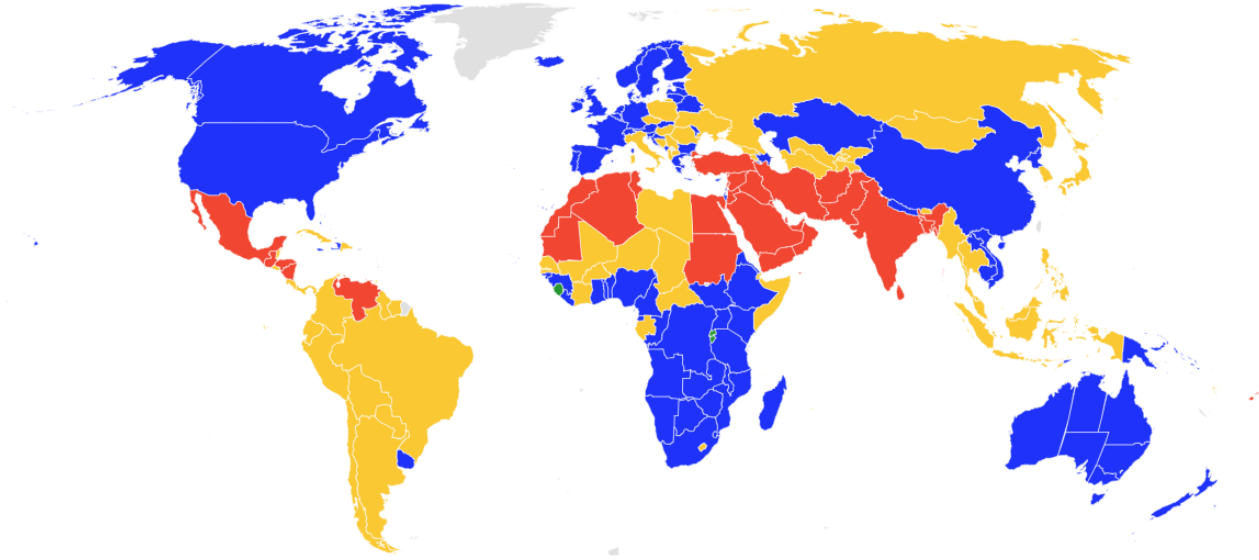
² World Bank, [Ratio of female to male labor force participation rate \(%\)](#). The ratio of female to male labor force participation rate (%) is calculated by dividing female LFP rate by male LFP rate and multiplying by 100.

³ ILO, [Women in Business and Management: Understanding the gender pay gap](#).

Figure 2: Differences between male and female labor participation rates, 2021

Gender gap (percentage points)

■ No gap ■ 0 - 15 percentage points ■ 15 - 30 percentage points ■ Above 30 percentage points



Source: Adapted from ILO (2022)⁴

Note: Boundaries shown in this map do not imply endorsement of any territorial claims or borderlines by IATA or ILO.

2.2. The economic benefits of gender diversity

Improving gender diversity and reducing gender gaps has the potential to deliver economic benefits at the global, national and individual firm levels.

The ILO estimates that the reduction of gender gaps will drive an increase in economic activity and boost global Gross Domestic Product (GDP).⁵ The World Bank projected that gender equality – defined as equal treatment and opportunities for men and women – would have improved human capital wealth by a significant 20% globally under gender equality in earnings, leading to substantial gains from 2014 to 2017 in global wealth⁶ and an estimated increase in income of \$24,586 per person globally.⁷

Other World Bank research, using employment data from 184 countries from 1996 to 2019, indicated that achieving gender parity in employment would have raised GDP per capita by more than 20%.⁸ Analysis from the McKinsey Global Institute suggests that advancing women’s equality would add \$12 trillion to annual GDP,⁹ under the scenario that all countries made the same rate of progress toward gender equality as the fastest-improving country in their region (Figure 3).

⁴ [ILO \(2021\). Gender gap in labour force participation rates.](#)

⁵ [ILO \(2017\). World Employment and Social Outlook: Trends for women 2017.](#)

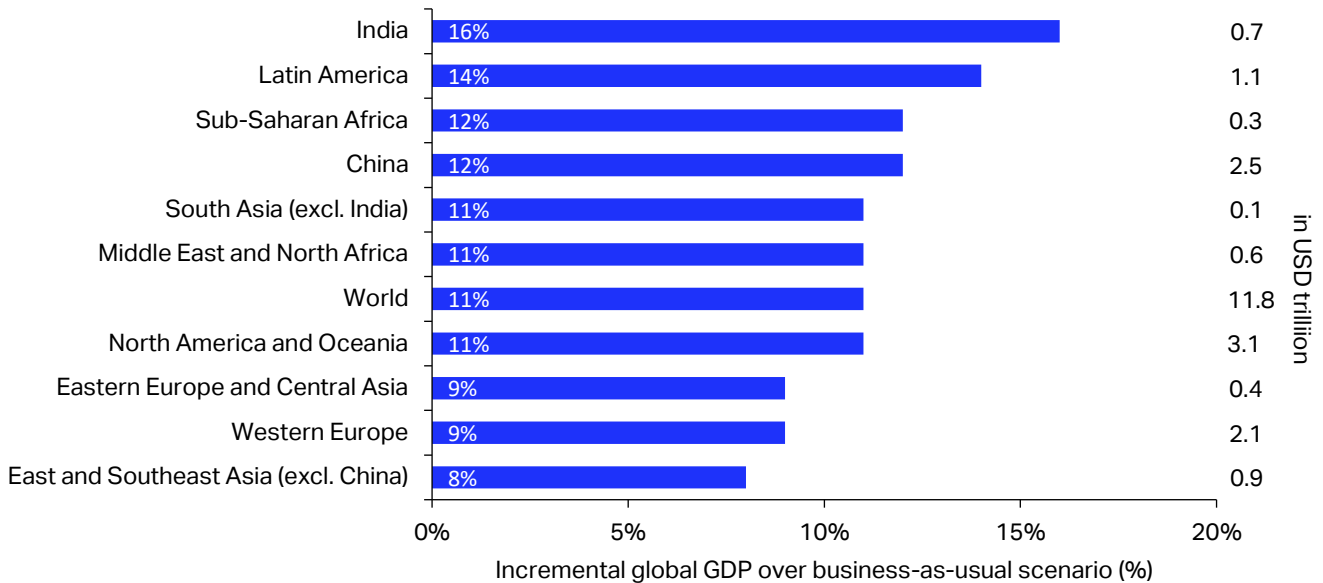
⁶ [Wodon et al. \(2020\). The costs of gender inequality notes series. How large is the gender dividend? Measuring selected impacts and costs of gender inequality.](#)

⁷ Human capital wealth is defined as the economic value of a worker’s experience and skills.

⁸ [Pennings \(2022\). A Gender Employment Gap Index \(GEGI\): A Simple Measure of the Economic Gains from Closing Gender Employment Gaps, with an Application to the Pacific Islands.](#)

⁹ [McKinsey Global Institute \(2015\). The Power of Parity: How advancing women’s equality can add \\$12 trillion to global growth.](#)

Figure 3: Global GDP estimations in various countries if every country matched the progress toward gender parity of its fastest-moving neighbor



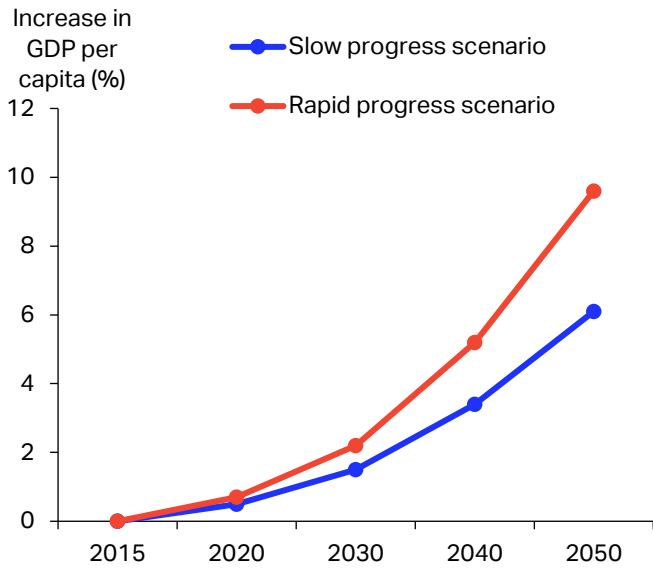
Source: Adapted from McKinsey & Company (2015)¹⁰
 Note: Sample = 95 countries

Unsurprisingly, ILO research indicates that the regions with the largest gender gaps (for example, Africa, the Arab States and Southern Asia) would benefit the most from reforms to drive gender diversity. Areas with smaller gender gaps, such as North America and Europe, would also see an increase in their level of GDP and income from additional reforms, albeit to a lesser degree.¹¹

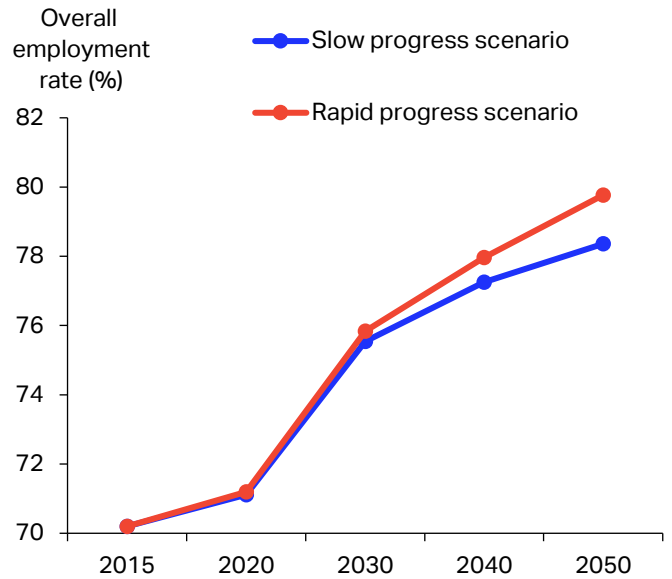
The generation of such benefits is, of course, dependent on the pace of change and any supporting regulations implemented. This highlights the potential role of policy action as a cornerstone of initiatives aimed at progressing diversity. For example, in 2016, the European Institute for Gender Equality (EIGE) estimated that improving gender equality would lead to a rise in EU GDP per capita of between 6.1% and 9.6%, which amounts to EUR 1.95-3.15 trillion by 2030 (Figure 4: Panel A). At the same time, this study forecast an increase of 10.5 million jobs in 2050, if additional women entered the labor force and lifted employment rates close to 80%¹² (Figure 4: Panel B).

¹⁰ McKinsey & Company (2015). McKinsey Quarterly 2015 Number 4.
¹¹ ILO (2022). The gender gap in employment: What's holding women back?
¹² https://eige.europa.eu/newsroom/economic-benefits-gender-equality?language_content_entity=en

Figure 4: Economic benefits of closure of gender gap in the EU
Panel A: Effects on income (GDP per capita)



Panel B: Effects on Employment

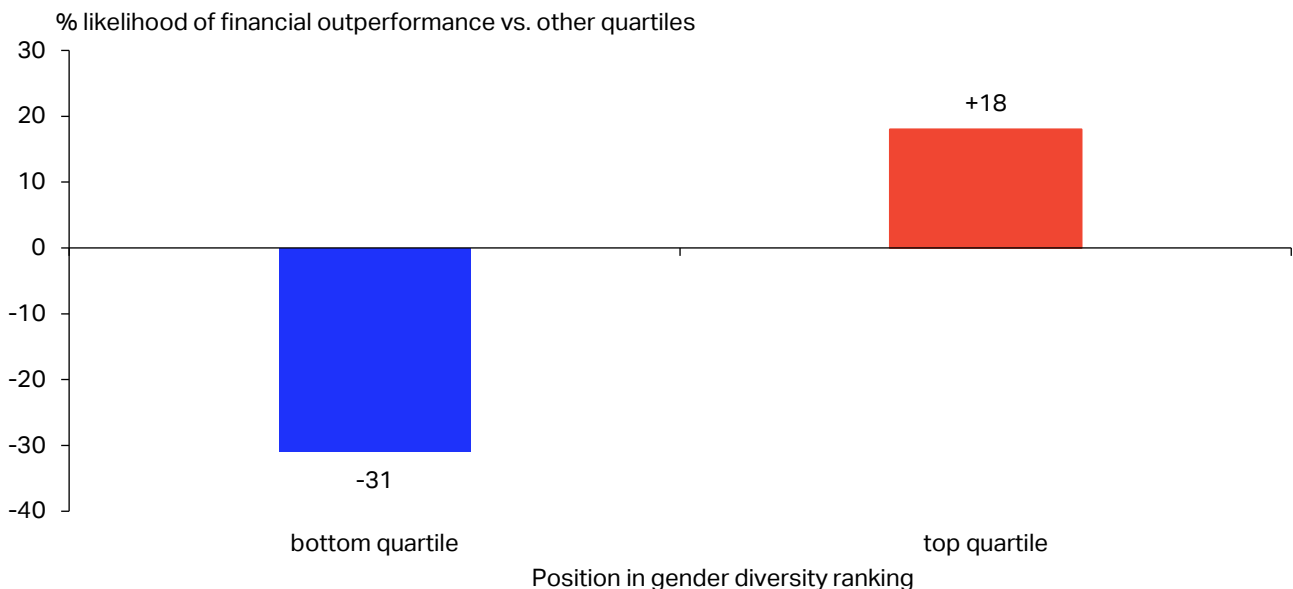


Source: Adapted from European Institute for Gender Equality ¹³

Notes: *Slow progress* scenario: 2-14% closure of gender gap in computing and 4-12% closure of gender gap in engineering; *rapid progress* scenario: 5-14% closure of gender gap in computing and 9-12% closure of gender gap in engineering.

For individual companies, a rise in workforce diversity is linked to improved financial performance. McKinsey analysis suggests that companies with executive teams in the top quartile for gender diversity in 2023 were 18% more likely to achieve financial returns above the regional industry median when compared to the average of the other quartiles. Conversely, companies in the bottom quartile were 31% less likely to financially outperform the regional industry median (Figure 5).

Figure 5: Difference in likelihood of financial outperformance top vs. bottom quartile diversity ranking



Source: Adapted from McKinsey (2023)¹⁴

Elsewhere, more inclusive, and diverse workplaces have been found to create better outcomes for customers, increase innovation, improve talent attraction and retention, enhance reputation and branding, and generate

¹³ [European Institute for Gender Equality, Economic Benefits of Gender Equality in the European Union.](#)

¹⁴ [McKinsey & Company \(2023\). Diversity matters even more: The case for holistic impact.](#)



higher financial returns.¹⁵ Using a sample of 1,700 companies across eight countries analyzed in 2019, the Boston Consulting Group found that diverse management teams, including gender diversity, were 19% more innovative than less diverse teams.¹⁶ In this way, increased diversity can be an important source of competitive advantage for individual companies.

2.3. Women in aviation

At a global level, disaggregated data by occupation type within aviation is both limited and patchy in scope and reliability. That said, the gender composition within the industry remains very segregated. For example, cabin crew employment is heavily female-dominated, while flight deck crew (including pilots) is largely male-dominated.

International Civil Aviation Organization (ICAO) data for 2021 indicates that the share of female licensed personnel in aviation, which includes pilots, air traffic controllers, and maintenance technicians was around 5.1%.¹⁷ More specifically, at that point, globally, women comprised 4.7% of all pilots, 3.1% of aircraft maintenance engineers, and 21.1% of air traffic controllers.¹⁸

There are regional differences in the employment patterns of pilots and air traffic controllers. 4.4% of pilots are female in the USA¹⁹, 5.2% in the UK²⁰ and Asia Pacific leads with a 6.2% share. Latin America & Caribbean features by far the highest share of female air traffic controllers, reaching 34.5%.

India ranks highest in terms of gender diversity in aviation, and women account for 14% of airline pilots in the country.²¹ This is indeed a success story, driven by a wide range of factors such as outreach programs to improve corporate policies, strong family support, company investments, and state and government subsidy programs. India's 20-year focus on recruiting women into Science, Technology, Engineering and Mathematics (STEM) career fields, which includes pilots, is now delivering results.²²

Globally, the number of female pilots continues to slowly rise. For example, in the US, the number of female commercial pilots (especially among younger age groups) increased by around 52% between 2018 and 2023, from an admittedly low base (Figure 6). As a share of the total, the number of female pilots increased from 5.6% to 8.2% over this period. Separately, the UK Civil Aviation Authority reports that between 2019 and 2023, there was a 26% rise in the number of pilot licenses issued to women.²³

¹⁵ [PwC \(2018\). Diversity is the solution, not a problem to solve.](#)

¹⁶ [Boston Consulting Group \(2018\). How diverse leadership teams boost innovation.](#)

¹⁷ [ICAO. Regional Personnel By Gender Analysis.](#)

¹⁸ [ICAO. Regional Personnel By Gender Analysis.](#)

¹⁹ [FAA. U.S. Civil Airmen Statistics.](#)

²⁰ [CAA. Pilot licence holders by age and sex.](#)

²¹ [India Graduating Record Numbers Of Female Pilots - AVweb](#)

²² [How does India have twice as many women airline pilots as the US? | Business and Economy News | Al Jazeera](#)

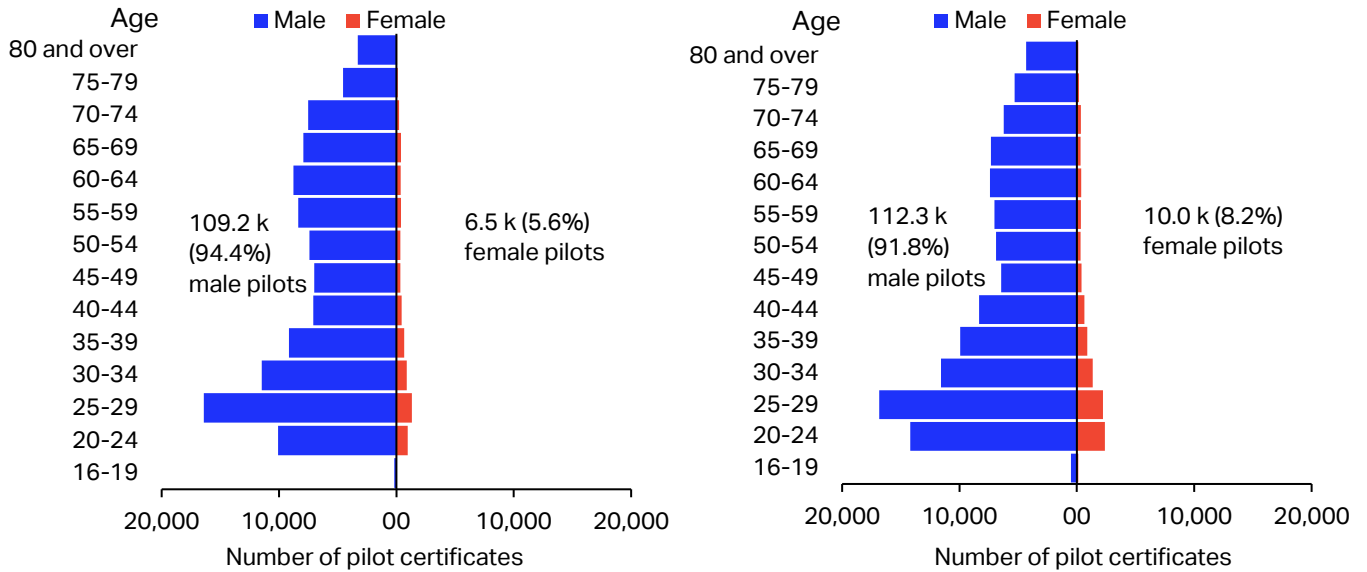
²³ [UK aviation industry sees highest number of licences issued to women but mountain still to climb | Civil Aviation Authority \(caa.co.uk\)](#)



Figure 6: Estimated active female commercial pilots by gender and age group (USA)

Panel A: 2018

Panel B: 2023



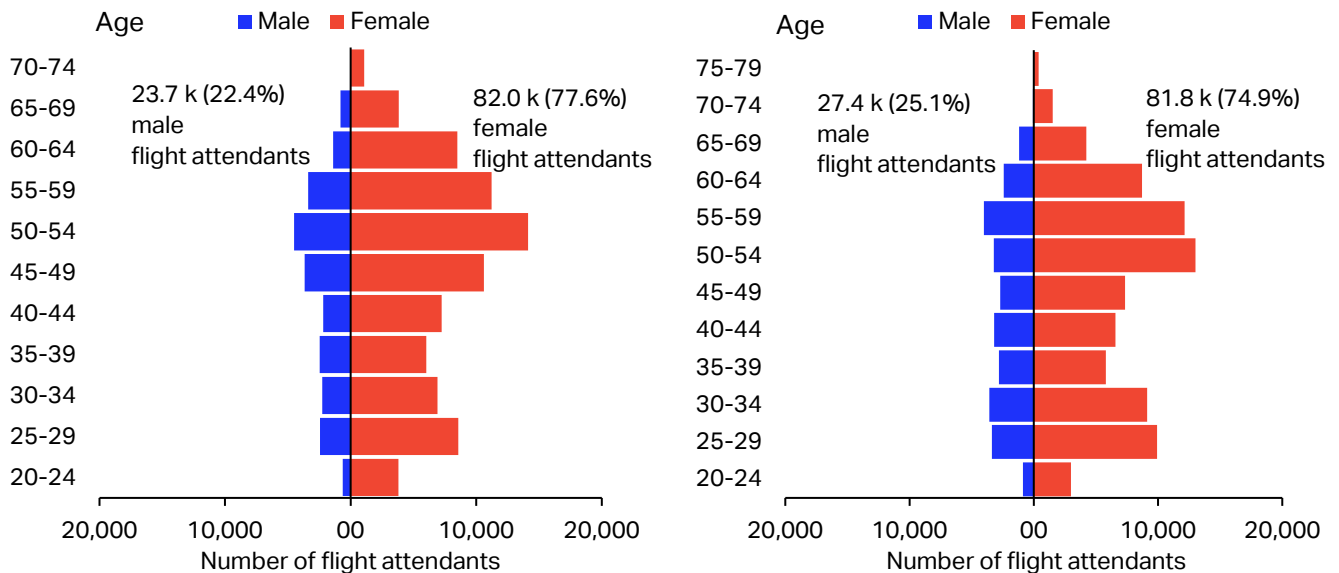
Source: FAA statistics²⁴

In 2022, the US Census Bureau estimated that there were around 110,000 flight attendants employed in the US. Of these, around 74.9% were female (Figure 7). While still heavily oriented towards females, the share has declined from 77.6% in 2018.

Figure 7: Estimated flight attendants by gender and age group (USA)

Panel A: 2018

Panel B: 2022



Source: Adapted from DATA USA (2022)²⁵

Across a range of programs and initiatives, significant efforts are being made to make the air transport industry more gender diverse going forward. At the global level, one such program is IATA's 25by2025 initiative.

²⁴ [FAA, U.S. Civil Airmen Statistics.](#)
²⁵ [DATA USA \(2022\). Flight Attendants.](#)

3. Overview of IATA's 25by2025 initiative

3.1. Background



In 2019, after winning the Diversity & Inclusion Team Award, the then CEO of Air New Zealand stood before an audience of predominantly male airline CEOs and posed a powerful question: "How can we do more to change the gender balance in our industry?" He specifically called out to IATA, asking, "What can you do to help?" This moment sparked the creation of the 25by2025 initiative.

As women increasingly lead travel decisions, a diverse, equitable, and inclusive aviation industry benefits everyone. Diversity, Equity and Inclusion (DE&I) policies are critical in driving innovation, enabling the creation of products and services that reflect the world's diversity. From CEOs and senior managers to pilots and ground crew, fostering a diverse and inclusive workforce offers a competitive advantage for both customers and employees. With over 200 industry leaders already committed to change, the aviation sector is making progress – but the question remains: Are we moving fast enough to achieve true gender balance?

3.2. Objectives

When the 25by2025 initiative launched in 2019, only three IATA member airlines had female CEOs, and it was estimated that just 19% of senior roles were held by women. This clearly highlighted the gender gap in aviation and the need for action to help close it within a meaningful timeframe. Through 25by2025, signatories are committing to boosting female representation in both senior positions and roles where women are traditionally under-represented, typically in the flight deck, maintenance, and engineering. This initiative is open to all airlines and aviation-related organizations, including non-IATA members, driving a much-needed push for gender diversity across the entire industry.

Specifically, signatories to the 25by2025 initiative seek to improve female representation by aiming to achieve at least one of the following two objectives:

- a) *Growth goal:* To increase the share of female employees by 25%, or
- b) *Level goal:* To achieve a minimum of 25% share of female employees.

In turn, IATA provides the industry the necessary tools and support to promote and share best practices. A progress update is shared annually at the IATA *World Air Transport Summit*, which takes place alongside IATA's Annual General Meeting.

What committing to 25by2025 means to you

- Report annually on key diversity metrics
- Increase the number of women in senior positions and under-represented areas by **25%**, or up to a minimum of **25% by 2025**
- Increase female nominations from your airline for IATA governance roles to a minimum of **25%** (IATA members only)
- Work with IATA to increase the number of women appointed to IATA governance roles to a minimum of **25%** (IATA members only)

What IATA commits to with 25by2025

- Create a forum for sharing best practices on diversity & inclusion and collate industry metrics in an annual update
- Increase the number of women participating at events, panels and conferences to a minimum of **25%**
- Increase the number of women appointed to IATA governance roles to a minimum of **25%**
- Increase the number of women in top senior positions to a minimum of **25%**

3.3. Signatories and data collection

Since launching in September 2019, a total of 215 signatories have signed up to the initiative, with new signatories still being added as recently as July 2024 (Table 1).

Table 1: New IATA 25By2025 signatories by year.

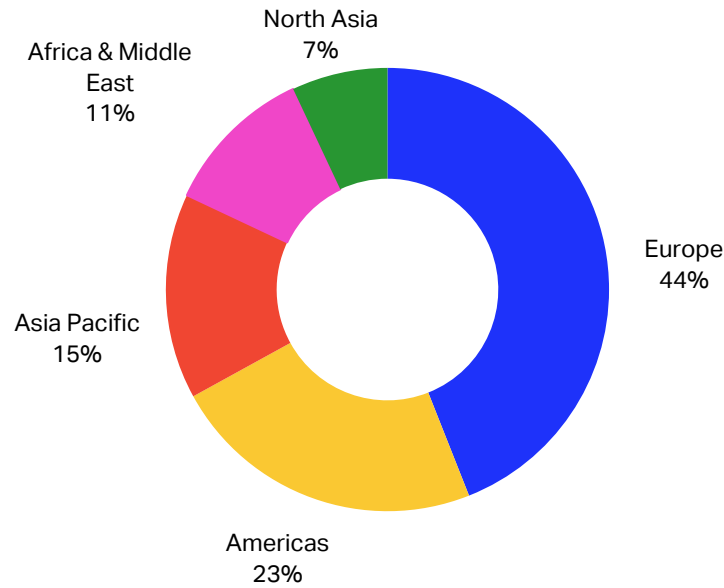
Year	Number of new Signatories each year
2019	51
2020	17
2021	35
2022	77
2023	29
2024 (to date)	6

Source: IATA

As befits a global industry, signatories to the 25by2025 initiative come from all regions across the globe. As of September 2024, the geographical distribution of signatories is as follows: Europe 44%, the Americas 23%, Asia Pacific 15%, Africa & Middle East 11%, and North Asia 7% (Figure 8).



Figure 8: Regional distribution of IATA 25by2025 signatories



Source: IATA

Various types of organizations have signed up for the 25by2025 initiative, including service providers, associations/governments, ground handlers, air navigation service providers (ANSP), aircraft lessors, airports, manufacturers, and travel agencies.

Airlines are the largest group of signatories (Table 2), and collectively they account for approximately 62% of global passenger air traffic.²⁶ This underlines both the wide reach of the initiative and the widespread acknowledgement of the value and need for such programs.

Table 2: IATA 25by2025 signatories by organization type

Type of signatory	Number of signatories	% of total signatories
Airlines	173	80.5%
Service providers	15	7.0%
Associations/Governments	11	5.1%
Manufacturers	4	1.9%
Air navigation service providers (ANSP)	4	1.9%
Ground handlers	3	1.4%
Travel Agency	2	0.9%
Airports	2	0.9%
Aircraft leasing	1	0.5%
Total signatories	215	100%

Source: IATA 25by2025 survey

²⁶ As measured by Revenue Passenger Kilometers (RPK) in 2023. Source: IATA Sustainability & Economics, DDS.



Signatories to the 25by2025 initiative are asked to report annually (commencing in 2021) on key diversity metrics. The extent and level of detail of information provided via the annual survey is determined by the individual signatory. The surveys request information on the relative female and male representation across several types of roles to monitor the initiative's progress. To this end, signatories provide data on:

1. **Organization size:** Including overall gender proportions.
2. **Senior roles:** Total number of senior leaders, and number of women in that group. Signatories self-define "senior roles/positions", in accordance with their organizational structure. This is typically defined as board-level minus one. All signatories are asked to keep this definition constant across the reporting years.
3. **Under-represented groups:** Total size of the group and the number of women within it, again with a consistent definition maintained across reporting periods.

While data sharing is voluntary, 137 organizations have submitted data for more than one year, and 104 have consistently reported for the period 2021-2023. To maintain comparability over time, in the following section progress is evaluated using data from these 104 signatories. It is important to note that these results are not necessarily representative of the various parts of the aviation value chain or the industry as a whole.

The 104 signatories who reported statistics for all three years included 82 airlines, 8 service providers, 5 associations/governments, 3 ground handlers, 2 air navigation service providers, and a single aircraft leasing company, airport, manufacturer, and travel agency. The 82 airlines that have consistently completed the survey account for 43% of the total 2023 passenger numbers. The respondents span five regions: Africa & Middle East (11), the Americas (27), Asia Pacific (13), North Asia (8) and Europe (45).

4. Survey Results

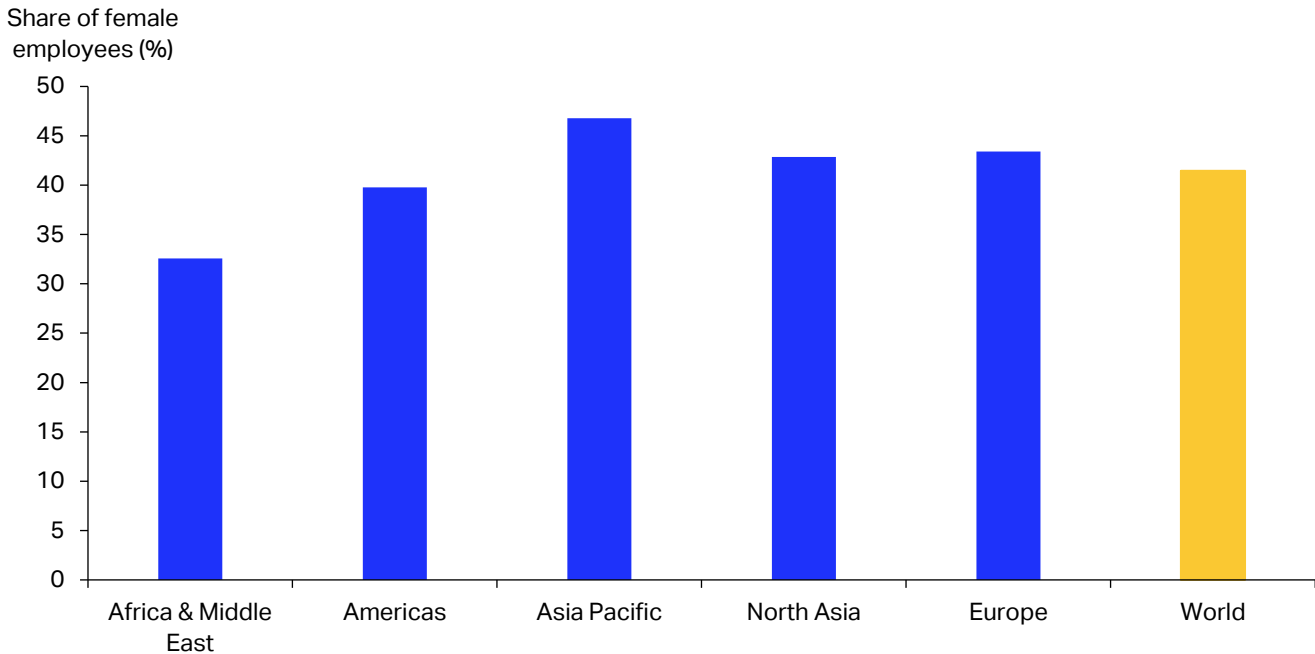
At the time of the covid-19 pandemic in 2020, 25by2025 had 60 signatories, and with borders closing and airlines furloughing staff, it was unclear if gender diversity would remain a priority. However, it appears that signatories were determined not to lose the progress they had made on this front. As borders re-opened and the industry recovered, airlines rehired staff with their gender balance obligations in mind²⁷.

4.1. 2023 snapshot of survey results

In 2023, female employees accounted for 41% of the signatories' total workforce. This proportion of female employees shows considerable variation at a regional level (Figure 9). For example, Asia Pacific has the highest share of female employees at 47%, while Africa & Middle East has a 33% female employee share on average.

²⁷ Please note that in section 4 "signatories" refers to *reporting* signatories, who have completed the 25by2025 survey in each of 2021, 2022 and 2023.

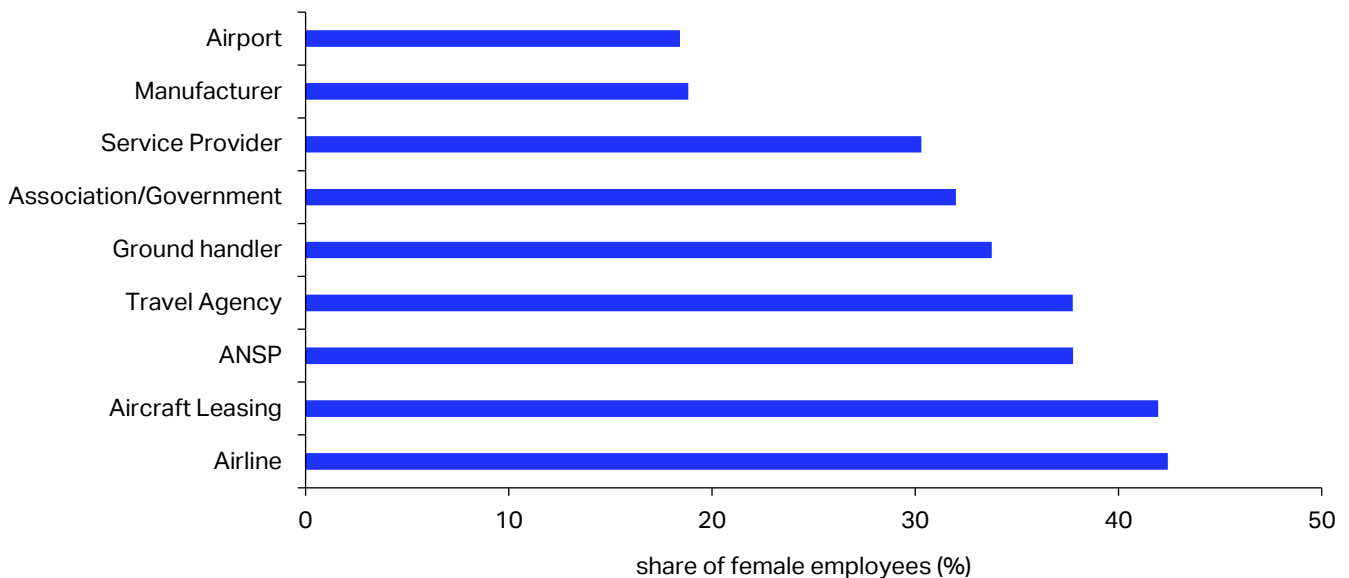
Figure 9: Share of female employees in aviation by regions in 2023 (25by25 signatories)



Source: IATA 25by2025 survey

Female representation also differs significantly across the aviation value chain (Figure 10). The IATA 25by2025 data show that the airport and manufacturing business sectors are the most male-dominated, with an 18.4% and 18.8% share of females respectively. Airlines report the highest share of female employees (42.4%), which is underpinned by the high proportion of female flight attendants, as discussed previously.

Figure 10: Share of female employees in aviation by organization type in 2023

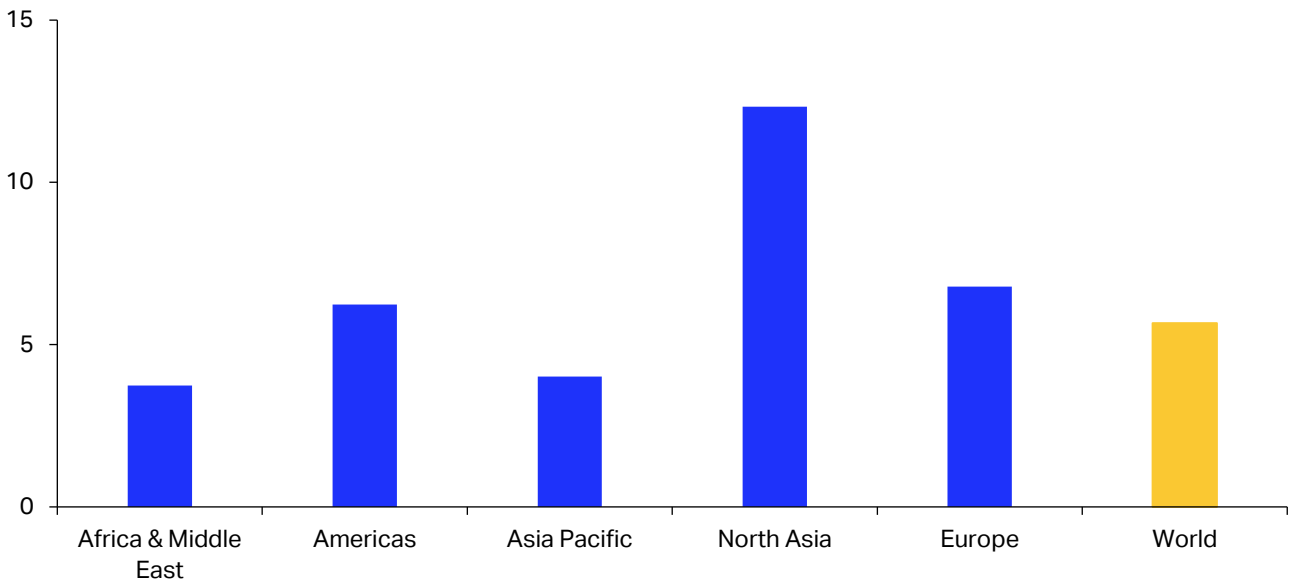


Source: IATA 25by2025 survey – please note the sample size across the wider value chain varies and is not representative

Despite this relatively large female representation among all airline employees, women in flight deck roles remain under-represented. The IATA 25by2025 data show that in 2023, on average 6% of all flight deck personnel employed by the reporting signatories were female. Once again, considerable differences exist across regions, with a range from 3.7% in Africa and the Middle East to 12.3% in North Asia (Figure 11).

Figure 11: Share of female flight deck employees by region in 2023

Share of female flight deck employees (%)

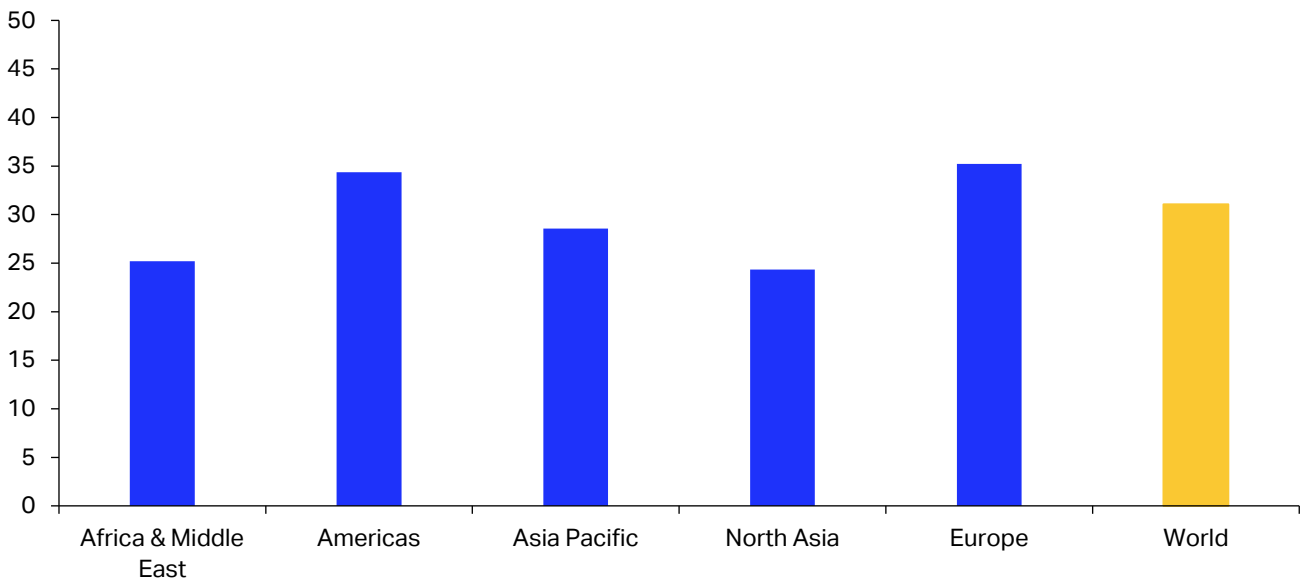


Source: IATA 25by2025 survey

In terms of senior roles, outcomes are higher, with women holding 31% of such positions on average across the reporting signatories. Notably, every region, with the (marginal) exception of North Asia (at 24%), reported women holding more than 25% of senior roles (Figure 12).

Figure 12: Share of female senior employees in aviation by region in 2023

Share of female senior employees (%)



Source: IATA 25by2025 survey

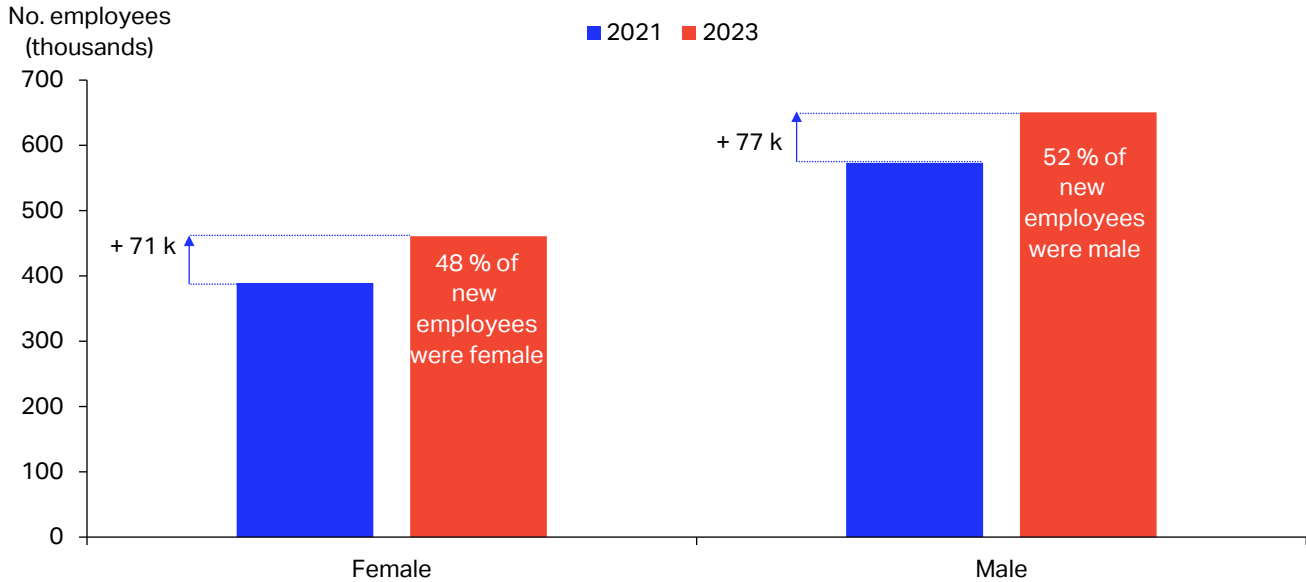
4.2. Employment trends between 2021 and 2023

Progress towards transforming the large and established aviation workforce takes time. Nonetheless, the IATA 25by2025 data show that trends in hiring new employees are changing positively. Between 2021 and 2023,



around 149 thousand net new workers have been employed, and almost 48% of these were women across all surveyed signatories (Figure 13). This translates into a 1.0 percentage point increase in the female share of total employment. Given the size of the total labor force in aviation, this represents a significant outcome achieved during a short period of time.

Figure 13: Number of net new female and male employees in 2021 and 2023



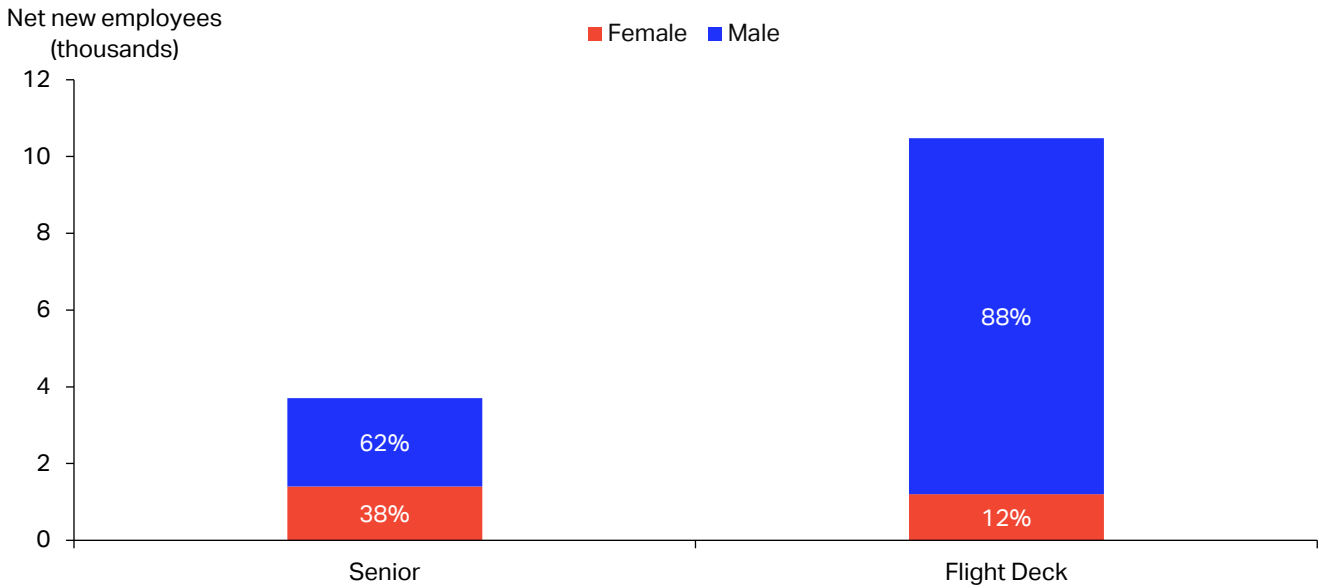
Source: IATA 25by2025 survey

The 25by2025 data also show progress in relation to the number of women in the so-called senior roles. In 2020 in the first round of data collection from 60 signatories, only 24% of senior positions were held by women. Whilst this cannot be used for an absolute comparison as more signatories have been added, it provides a pre-pandemic insight into the shape of female leadership in aviation at that time.

Between 2021 and 2023, around 4,200 senior employees were hired by the signatories, of which 38% were women. This allowed for the female proportion in senior roles to rise to 31%, and representing an increase of 1.6 percentage points since 2021.

Another important development observed in the IATA 25by2025 airline data relates to the 10,500 net additional flight deck employees hired between 2021 and 2023. Of these net new hires, around 12% were women (Figure 14), a significantly higher share than the 5% share of female flight deck employees in 2021. This has contributed to a 37% increase in the number of women in these positions, signaling progress towards a more diverse flight deck workforce. This significant rise could be attributed to the larger and more focused investment of the industry on attracting and training female employees into this sector of the labor force in recent years.

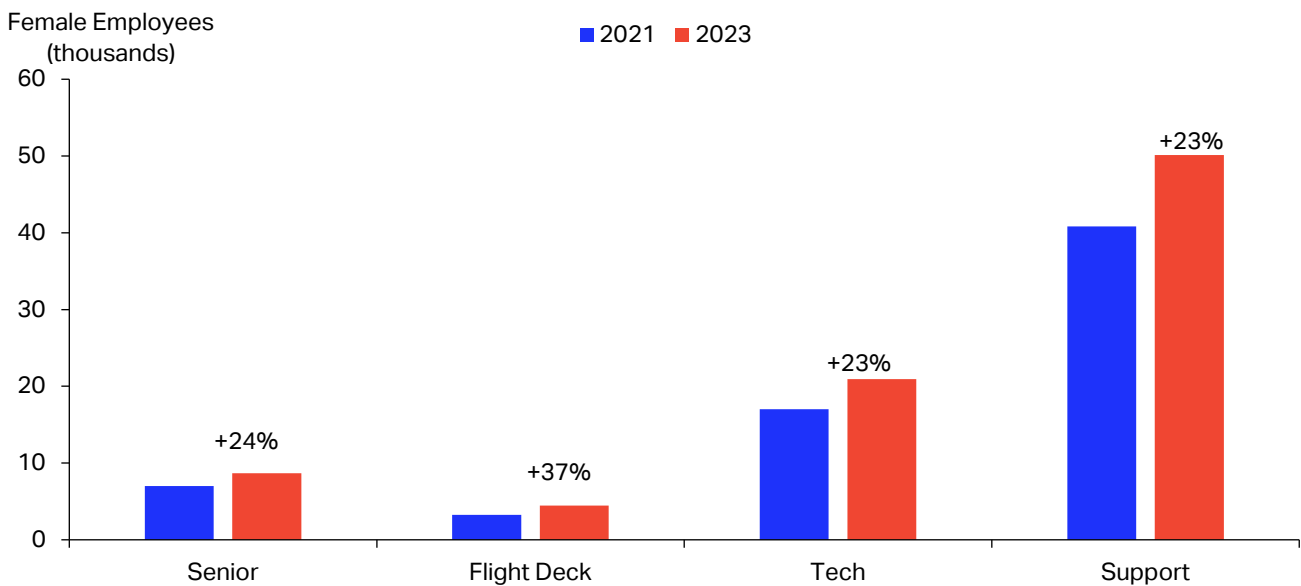
Figure 14: Gender share of net new employees in aviation by business type from 2021 to 2023



Source: IATA 25by2025 survey

Across all reporting signatories, the number of females in senior roles increased by 24% (Figure 15). In parallel, the number of female employees in technical and in support roles both rose by 23%.

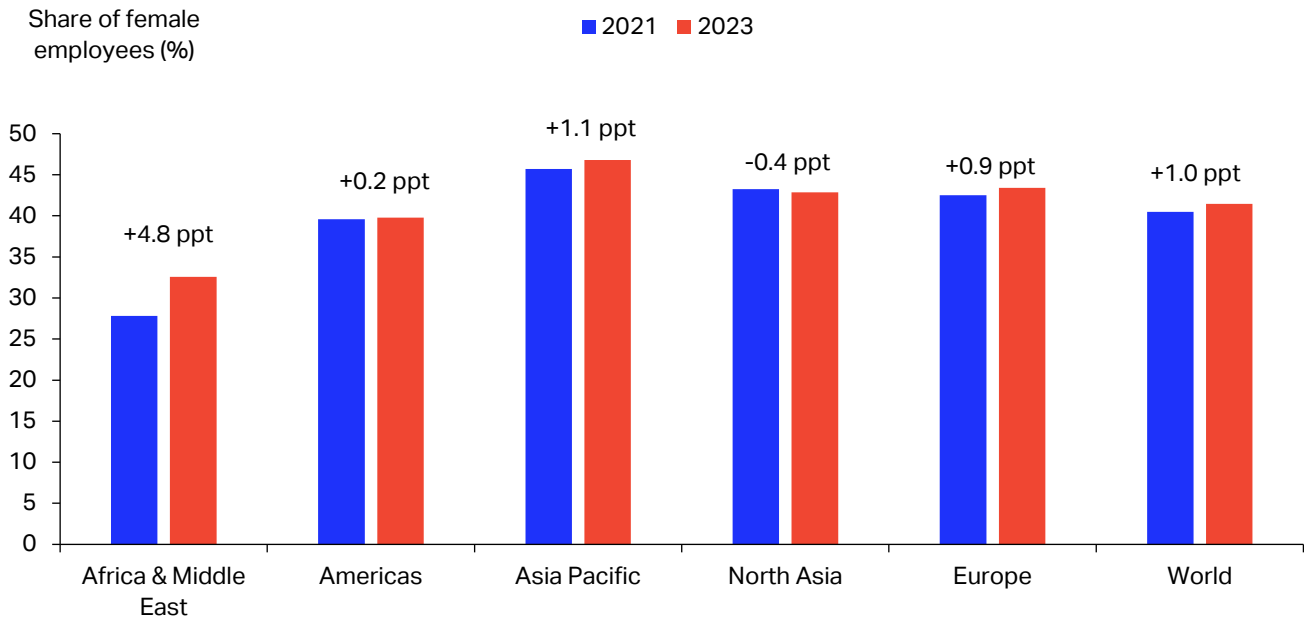
Figure 15: Share of female employees by type of role



Source: IATA 25by2025 survey

The IATA 25by2025 data also show that the female share of the total number of employees rose across most regions. Africa & Middle East registered the largest jump (4.8 percentage points) and North Asia decreased slightly (down a modest 0.4 percentage points) (Figure 16).

Figure 16: Share of female employees by year and region



Source: IATA 25by2025 survey

Analyzing the individual reported role types shows that, with the exception of support roles, an increase in the female share between 2021 and 2023 was registered.

The share of female senior employees rose across all regions, leading to an overall change of 1.6 percentage points. In Asia Pacific this share grew the most, by 3.4 percentage points (Figure 17: Panel A).

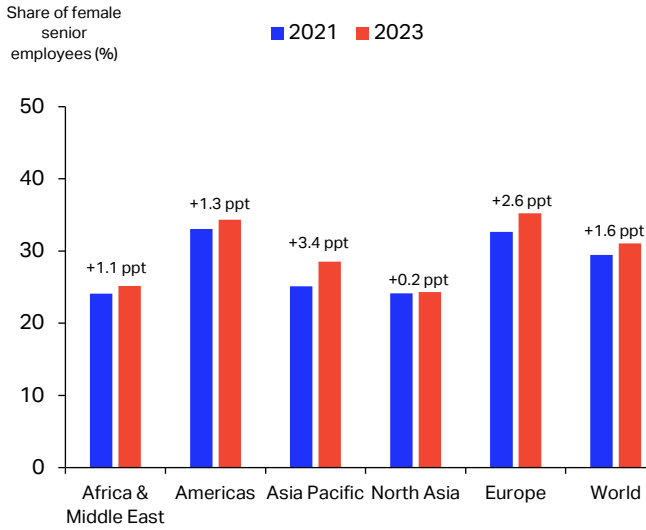
For flight deck employees, where females are the most under-represented, the female share also improved across all regions (Figure 17: Panel B). The stand-out region was North Asia, which more than doubled its female share of flight deck employees over the past two years and is the only region to report a double-digit level. In 2023, 12% of the region's reported pilots and flight deck crew were female, up from almost 6% in 2021. This is an impressive feat given the industry disruption by the pandemic which also impacted the training of new pilots, a highly specialized career path.

Female shares across technical roles also rose in every region, with Europe exhibiting the largest gain, up 2.9 percentage points (Figure 17: Panel C).

In terms of support roles, where females are relatively well represented, the female employee share declined in both Africa & Middle East and the Americas. This resulted in a slight overall decrease of 0.3 percentage points across all signatories (Figure 17: Panel D). The reduction occurred even though the number of women in support roles grew by 23% in the same period. Therefore, the slight decrease in the overall female share results from males increasingly entering into service jobs, such as flight attendants. Interestingly as part of their commitment to better gender balance, some airlines have also included a commitment to employ more males in the cabin with a commitment to 'not less than 45% of either gender'.

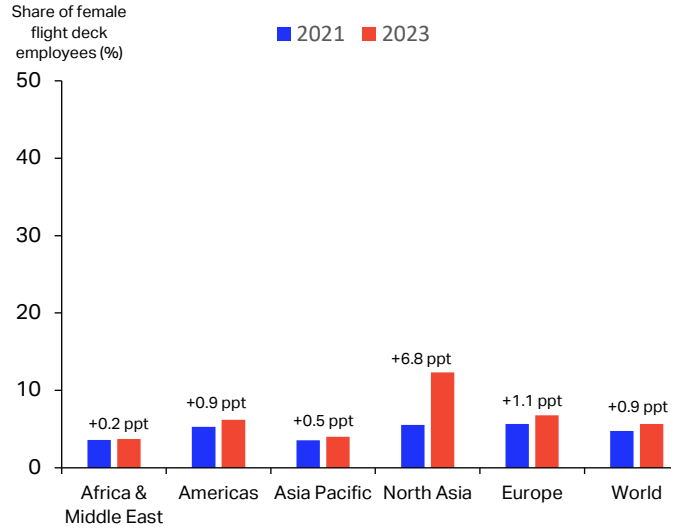
Figure 17: Share of female employees within positions by year, region, role

Panel A: Senior employees



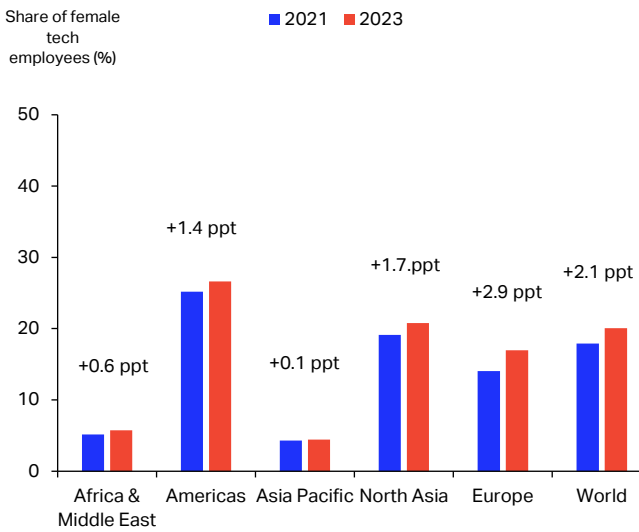
Source: IATA 25by2025 survey

Panel B: Flight deck employees



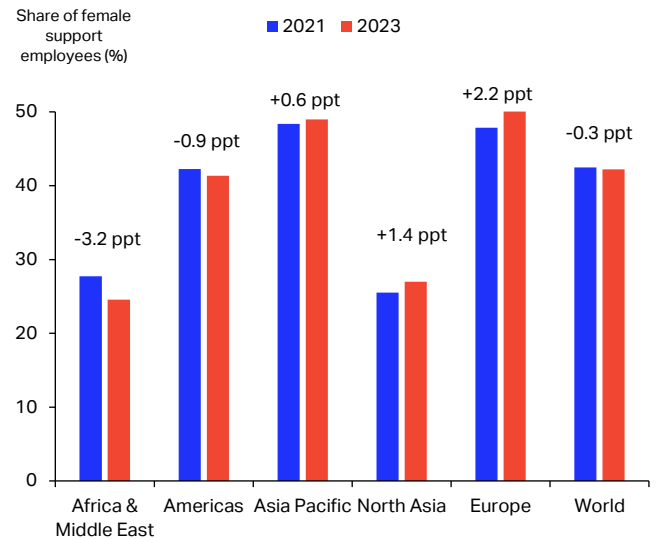
Source: IATA 25by2025 survey

Panel C: Technical employees



Source: IATA 25by2025 survey

Panel D: Support employees



Source: IATA 25by2025 survey

4.3. Achieving the 25by2025 goals

Although historical data for all signatories is not available, the progress towards achieving IATA 25by2025 goals for those who have reported is encouraging. The initiative's goals are set for 2025, and many signatories have already achieved them (Figure 18).

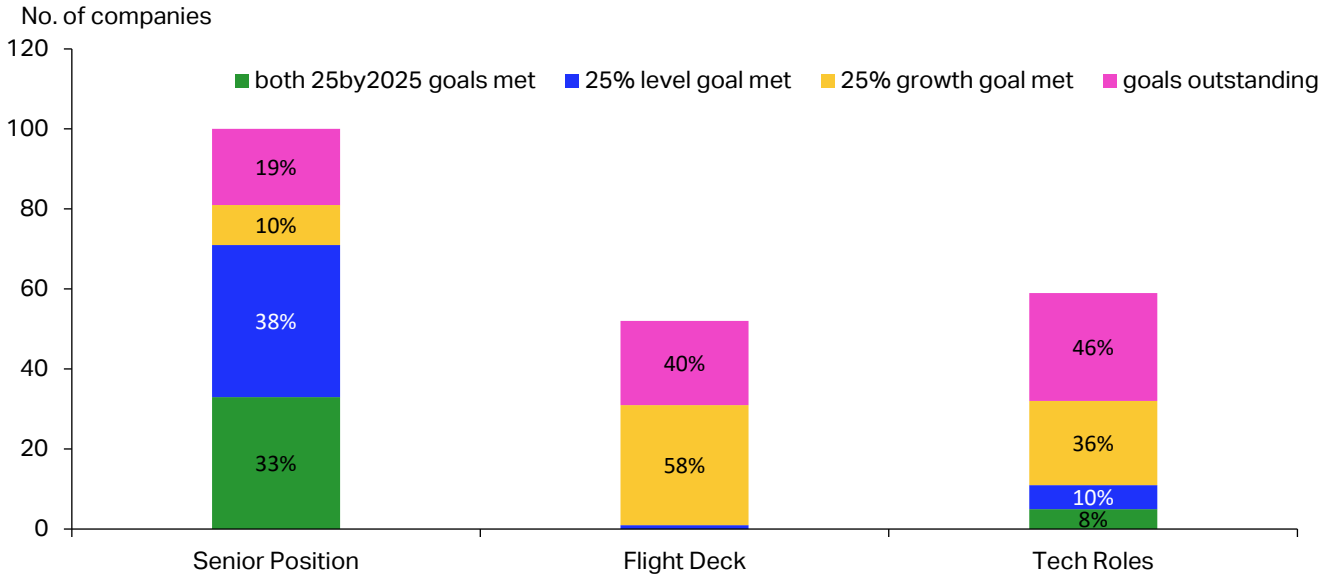
By 2023, 33 of the 100 signatories reporting data on senior roles had met both a growth and level target (although only one was required). These signatories increased the female share in senior positions by at least 25% and achieved at least 25% female representation in senior roles. Furthermore, 38 additional signatories achieved the level goal, and an additional 10 signatories have met the growth goal.

More than half of the signatories reporting flight deck employees (30 out of 52, or 58%) were able to achieve the growth goal, increasing the share of female flight deck employees by at least 25%. Looking at technical roles, 5



(out of 59 signatories, 8%) have met both 25by2025 goals, 6 (10%) have met the 25% level goal, and 21 (36%) have met the 25% growth goal.

Figure 18: Distribution of surveyed signatories achieving IATA 25by2025 goals (as of 2023)

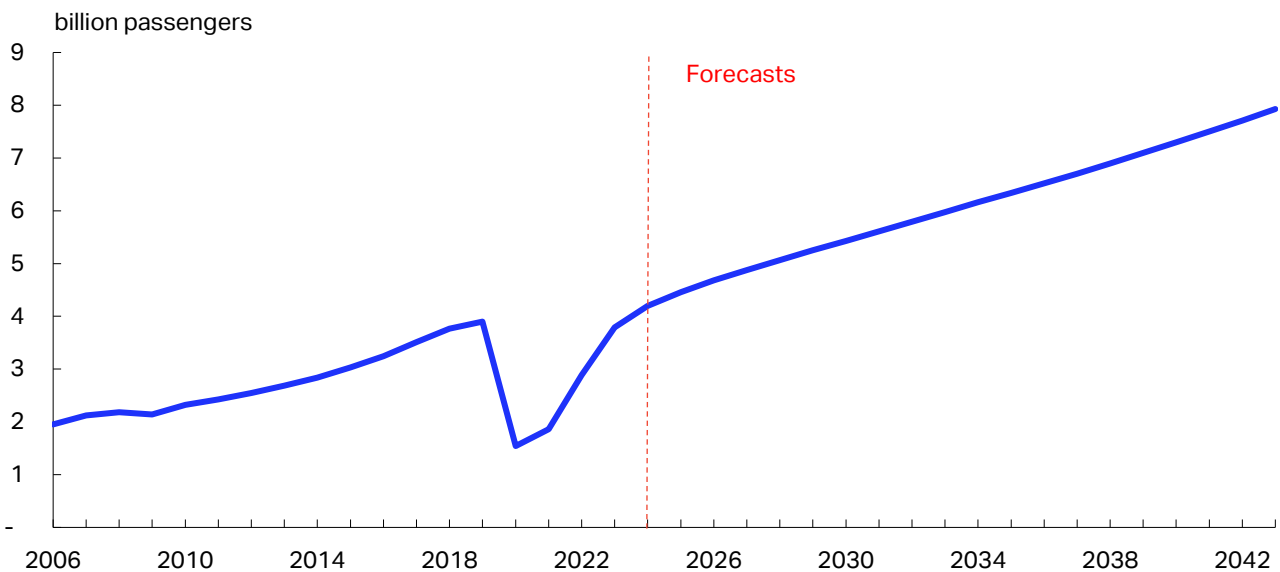


Note: IATA 25by2025 initiative established two goals: 1) Growth goal: To increase the share of female employees in under-represented roles by 25% in under-represented roles 2) Level goal: To achieve a minimum of 25% share of female employees in under-represented roles. Source: IATA 25by2025 survey.

5. Looking ahead

The aviation sector continues to expand and is projected to grow steadily in the long term. Passenger demand is expected to more than double over the next twenty years, growing at an average compound growth rate of 3.7% per year. The number of passenger journeys per year is forecast to reach around 8 billion in 2043, up from 3.8 billion in 2023 (Figure 19).

Figure 19: Long-term forecast scenarios, passengers (billion)



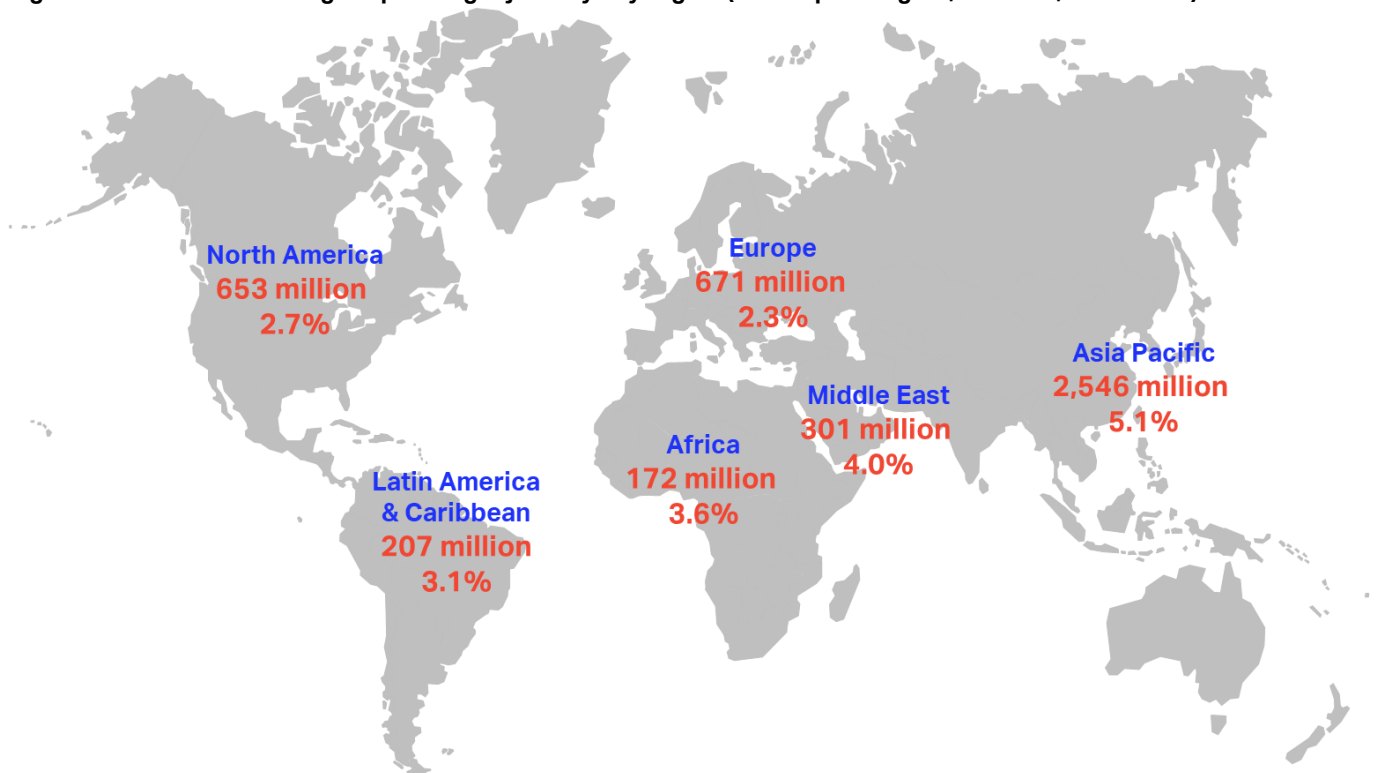
Source: IATA/Tourism Economics Air Passenger Forecasts, May 2024 update

Note: *Upside potential*: Air passenger demand benefits from more favorable macroeconomic conditions; *Downside risk*: Weaker macroeconomic conditions inflict lasting damage

However, this growth is expected to unfold at a somewhat slower pace in the more mature air transport markets of Europe and North America, respectively at 2.3% and 2.7% per year from 2023. That said, given the size of these markets, even relatively more modest growth rates will see more than 650m additional passenger journeys per year in these two regions by the end of our forecast horizon.

In contrast, emerging markets, notably the Asia Pacific and Middle East regions, are expected to experience more robust growth rates, with traffic increasing at rates of 5.1% and 4.0% per year, respectively, well above the global average rate. Asia Pacific alone is expected to add an additional 2.5 billion passenger journeys per year by 2043, and account for around 46% of total global passenger traffic, up from 35% currently. While growing quicker than the mature air transport markets, Africa is expected to grow broadly in line with the global average rate of 3.6% per year. For the Latin America and the Caribbean region, average annual growth is expected to be a little more modest at around 3.1% per year.

Figure 20: Growth and change in passenger journeys by region (million passengers, % CAGR, 2023-2043)



Source: IATA/Tourism Economics Air Passenger Forecasts, May 2024 update

With this expected market growth comes the need for a larger workforce – across all occupations in the industry value chain – to accommodate the additional demand. At the same time, automation and artificial intelligence (AI) will also change the nature of many jobs in the aviation industry. It is inherently difficult to predict the impact of new technologies on employment and skills for aviation, but this serves to highlight the importance of flexibility, adaptability and training.

All of these challenges present a sizeable opportunity for the industry to continue to progress its Diversity, Equity, and Inclusion (DE&I) goals – both in relation to gender and more broadly. Importantly, understanding long-term changes in demand patterns (flight operations, network choice, pricing strategies) and tackling disparities remain a priority. Underpinning all of this is the need for a reliable and comprehensive data set to understand the various elements of diversity, and to inform decision-making and strategy and program planning.



5.1. Steps towards an increasingly inclusive and diverse aviation industry

With only a year remaining for the 25by2025 initiative, it is crucial to reflect on the next steps. How does the industry continue advancing towards a more inclusive and diverse employee composition? Since the launch of the 25by2025 initiative, notable strides in enhancing gender diversity across various regions and employment categories have been made.

However, this progress is just the beginning. The economic benefits of fostering gender and other forms of diversity are clear: they drive innovation, improve decision-making, and enhance financial performance and in the case of our industry enable us to build a workforce as diverse as the world which aviation serves.

The first step is bringing together the signatories for the first IATA *Global People Forum* in September 2024. This forum will provide an opportunity to reflect on the achievements so far and identify areas for continued collaborative work.

The focus of the Forum is on three key themes with major implications for diversity and areas ripe for collective action:

The Future of Talent Attraction and Retention: Economic and societal shifts are reshaping the talent landscape. From talent migration and evolving educational needs to new regulations on pay and reporting, as well as shifting workforce expectations, these factors are transforming our industry's diversity.

AI and the Workforce: AI will profoundly impact our industry, but its effects on DE&I are less understood. How can we harness AI's benefits and ensure our workforce is future-ready while maintaining a strong focus on passenger safety?

The Power of Culture and Leadership: The 25by2025 initiative has shown how crucial CEO and senior leadership support is for driving industry change. What more can be done to sustain our DE&I focus beyond 2025?

6. Concluding comments

Aviation provides significant economic and social benefits worldwide, linking cultures, businesses, families and loved ones. The demand for air transport services is forecast to continue to steadily increase over the next twenty years and this expected growth will require a larger workforce.

Attracting new talent to the industry to meet this demand presents a clear opportunity to reinforce and progress aviation's DE&I initiatives – including, but not limited to, gender.

Increasing gender diversity offers sizeable economic benefits at the global and national level, increasing economic activity, living standards and incomes. At the corporate level, fostering greater gender diversity drives innovation, improves decision-making, increases financial success and delivers a source of competitive advantage.

Although the air transport industry remains quite gender-segregated across roles and occupations, progress towards enhancing gender diversity is being made via initiatives such as the IATA 25by2025 program. This is heartening to see. However, implementing widespread and fundamental change is a gradual process, and the 25by2025 initiative is merely a starting point.



A more diverse air transport sector, one which promotes equality among passengers and its labor force, is a necessity for airlines and for guaranteeing the sector's growth. In this context, these gradual steps must continue, and the ongoing commitment of all industry stakeholders is required to drive a significant global impact.

25by2025 therefore is not the final step but rather the first in a series of industry-driven actions aimed at embedding DE&I at the core of our business operations. Our collective commitment to DE&I – across the entire air transport value chain – must remain at the forefront of our industry's agenda and continue to drive meaningful dialogue and ongoing transformation.

Geneva
September 2024

Appendix – Signatories to IATA's 25by2025 initiative





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