

2025 SURVEY | 10th Edition

Gender & Diversity *in Aviation*

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About the Survey

2025 marks the tenth anniversary of Mason Hayes & Curran's survey on gender and diversity in the Aviation sector. The survey was conducted during the summer and early autumn of 2025, covering various aspects of diversity including gender, ethnicity, religion and sexual orientation in the aviation sector.

We are grateful to all respondents who shared their insights with us. Your feedback and comments ensure we can continue to monitor trends, assess current attitudes and highlight the evolving diversity profile of the aviation industry. Amongst the many comments, one participant said,

"DEI has helped to get rid of the private school boys club that existed in Ireland previously and equivalent globally."



Christine O'Donovan

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Introduction

Ireland's aviation sector continues to grow and expand. The International Air Transport Association (IATA) reported growth in 2025, with August passenger demand up 4.6% year-on-year, capacity up 4.5% and load factors reaching 86%. Growth creates opportunity and pressure, often at the same time. Our survey seeks to explore the real-lived experiences of the aviation workforce in the area of inclusion. It examines whether conditions are improving as the sector grows, in light of the need for talent and resources.

We mark a significant milestone this year: a decade of tracking diversity in aviation. Over that time, we have seen gradual improvement in workforce diversity, with the pace of change arguably somewhat slower at leadership level.

The 2025 results point to some progress at the most senior levels within organisations, alongside signs of strain elsewhere.

The external landscape is also shifting fast. Public debate over workplace diversity has intensified, and some institutions have publicly stepped back from or relaxed their diversity, equity and inclusion (DEI) efforts. At the same time, new EU reporting rules are reshaping employer obligations. The 2025 Gender Pay Gap Amendment Regulations provides that employers with 50 or more employees are now subject to gender pay gap reporting obligations. The impending implementation of the EU Pay Transparency Directive, expected in June 2026, will also bring new obligations for employers in the financial services sector.

From the beginning, the purpose of this survey has been to present evidence, encourage open discussion and inform practical action. Reports alone are not instruments of change, but they provide transparency, information and insights that can lead to informed decisions and a change in attitudes and approach.



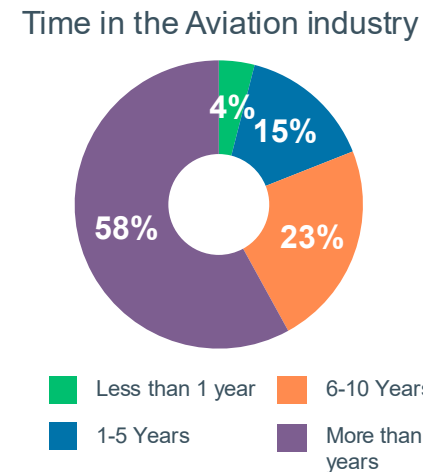
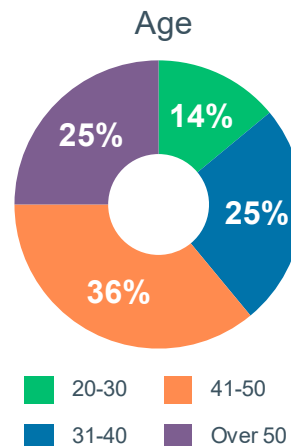
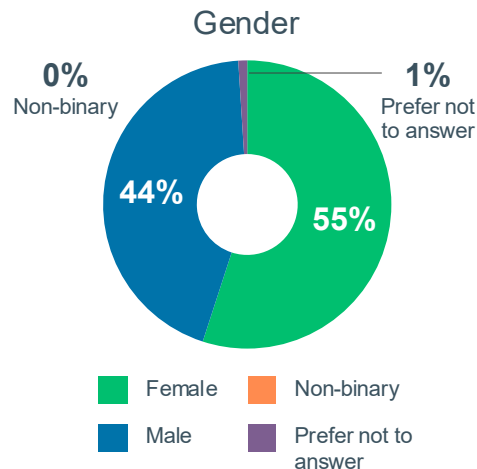
Diverse views help to ensure a wide range of perspectives are taken into consideration when making decisions.

A diverse employee base drives decisions based on merit, rather than transactions being done by members of a boys club.

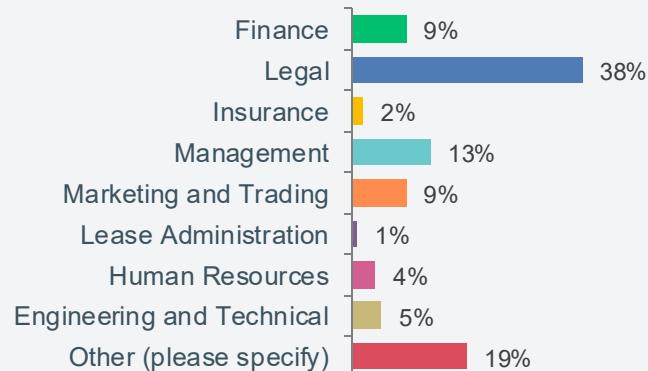
Profile of Participants

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The department (technical) I work for is mainly male orientated. This is not intentional, just the nature of the role. In the same way most nurses are female, most technical roles in aviation are male.



Business area



Aviation Industry: On the Road to Diversity?

The 2025 data shows progress at the top and pressure impacting at other levels within organisations. Leadership diversity has improved after years of decline, yet participation by 'minority' groups has fallen and fundamental cultural challenges persist.

A quarter of respondents now identify with at least one minority group, down from 35% in 2024. The year-on-year drop is the steepest in the survey's ten-year history, reversing gains achieved since 2021. Minority representation had recovered gradually since the pandemic but has now fallen back to levels last seen in 2020. The data suggest that progress remains cyclical, with gains eroding when recruitment and retention pressures rise.

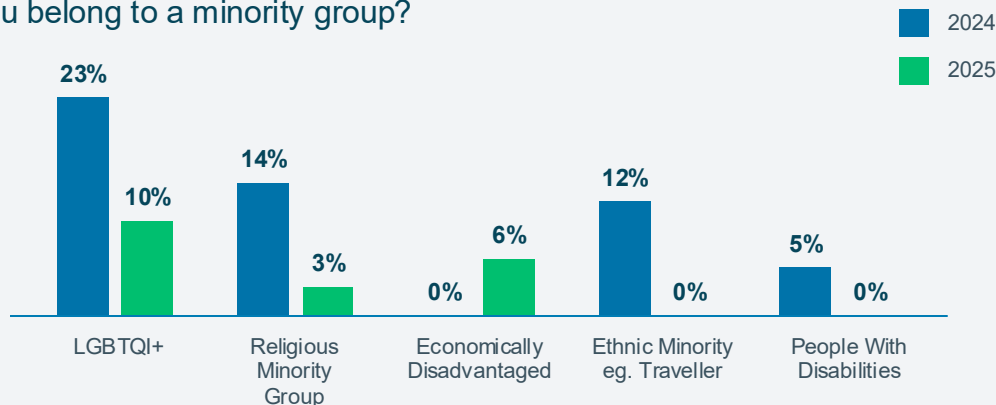
The overall diversity profile of the general workforce shows modest improvement. Two-thirds (66%) of respondents reported that over 30% of their employees identify as female or part of a minority group, up from 59% last year. The base is widening, continuing a steady rise over the past decade, which should support progression if momentum holds.

Leadership diversity tells a more nuanced story. After several years of decline, we are now seeing tentative progress. Nearly a quarter (24%) of companies have achieved the generally-accepted target of 30% diversity representation in their C-suite, up from 17% in 2024. Board-level representation has also improved: 19% of companies report more than 30% diversity on their boards, up from 10% last year.



Promoting minority groups has led to an increased amount of quality candidates for senior management and C-suite roles.

Do you belong to a minority group?



These gains reverse a prolonged period of stagnation. It is a welcome improvement and should foster a level of sustainability. Diversity at senior levels peaked in 2020, when 22% of companies reported more than 30% female or minority representation in the C-suite and 12% at board level. Both measures slipped steadily between 2021 and 2023 before this year's recovery.

The introduction of the European Union (Gender Balance on Boards of Certain Companies) Regulations 2025 reinforces that momentum. The new rules implement Directive (EU) 2022/2381, came into force on 30 May 2025, and are designed to improve gender balance on corporate boards. Whilst the regulations may not apply to many of the corporates in the aviation sector, they do require listed companies to achieve at least 40% representation of the underrepresented gender among non-executive directors by mid-2026. They require companies to have quantitative objectives, transparent selection processes and priority rules in selection processes together with information, penalties and reporting obligations. It is to be acknowledged that many organisations (which may not be in scope currently) have pursued gender balance on boards voluntarily, and this is encouraging as these rules signal a new phase of transparency and accountability for leadership diversity across Europe.

Over the past decade, leadership diversity gains have tended to follow periods of broader workforce growth. When hiring and representation widened from 2018–2020 and again in 2024–2025, C-suite and board diversity also improved. However, progress tends to decline when workforce expansion slows, underlining the need for consistent management focus to sustain and maintain balance.

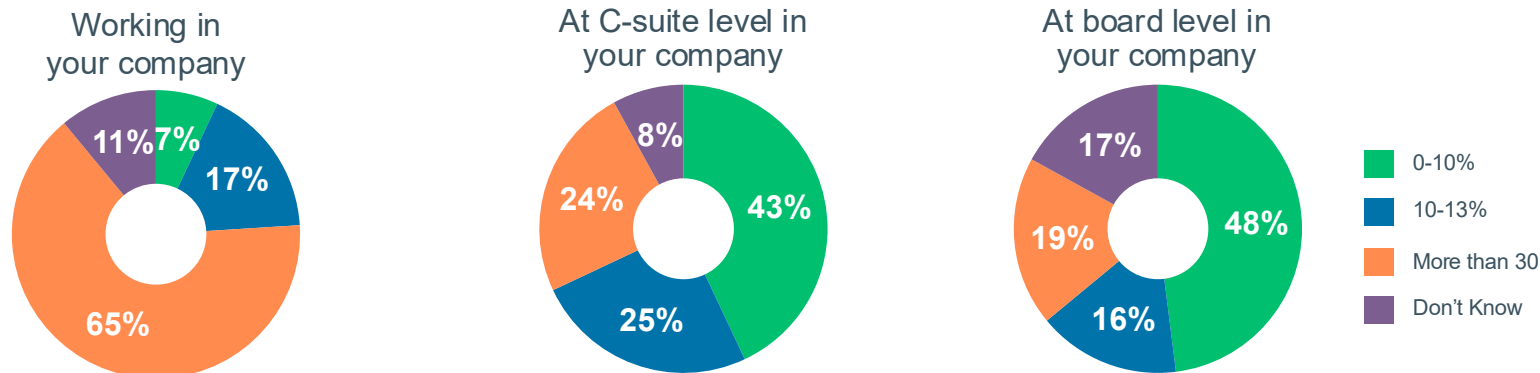
Change is not yet widespread – this is not unexpected. Over the past year, only 6% of respondents reported improvement at C-suite level and 10% saw progress in board composition. Most organisations saw little or no change.

Real progress starts with a clear understanding of the workforce by gender, background and experience. It requires gender pay gap reporting, analysis of results and programmes that provide structured support while sponsoring and mentoring minority candidates. Only consistent, collective action can turn tentative gains into lasting sustainable transformation.

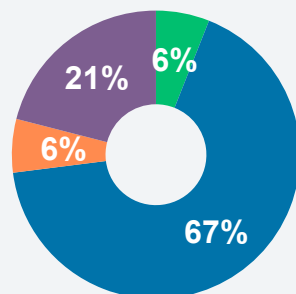
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In the sector DEI certainly has driven a stronger consciousness about female participation, stronger mentoring etc. However, at senior levels it still appears to be male dominated and, while anecdotal, I suspect there is a significant gender pay gap.

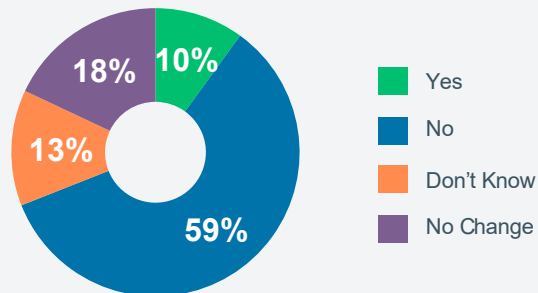
What is the percentage of employees who identify as female or as a member of a minority group?



Has the composition of the C-suite in your company changed in the last 12 months, leading to a better balance of members who identify as female or from minority groups?



Has the composition of the non-executive board in your company changed in the last 12 months, leading to a better balance of members who identify as female or from minority groups?



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More balanced decision making at a senior level is crucial, also culture still eats strategy for breakfast and a more inclusive culture benefits everyone.

ESG with an Emphasis on 'S' (Social)

A new finding this year reveals divided opinion on regulatory intervention. Exactly 50% of respondents believe additional legal supports are needed to advance diversity, equity and inclusion in 2025, while the other 50% disagree. The results show a sector at a crossroads, balancing accountability with autonomy.

Across Europe, sustainability reporting is moving from aspiration to obligation, and for many organisations this may now include disclosure of their diversity, equity and inclusion approach and metrics.

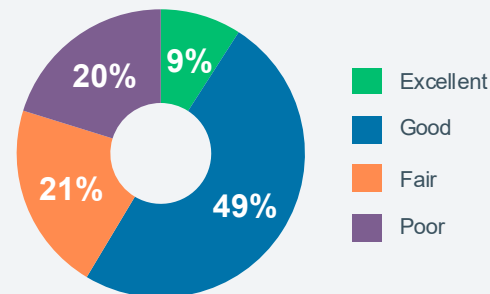
The Corporate Sustainability Reporting Directive (CSRD) has widened the scope of EU non-financial reporting rules to cover all large companies and SMEs listed on regulated EU markets. It has also expanded the scope of non-financial reporting requirements. The new framework already applies to public-interest entities with more than 500 employees and, as matters currently stand, will be phased in for other in-scope companies from 2027.

At the same time, growing pushback against the scope and complexity of the rules has led to some political rollback. The outcome of ongoing EU negotiations on CSRD simplification measures outlined in the Omnibus proposals is eagerly awaited, hopefully before the end of the year.

The increase in sustainability reporting also extends beyond Europe. Frameworks such as the International Sustainability Standards Board (ISSB), the Global Reporting Initiative (GRI), and the US Securities and Exchange Commission's emerging climate disclosure rules are advancing more global progress. In aviation, the International Civil Aviation Organization (ICAO) is also advancing guidance on sustainability metrics, complementing these global standards. Together, they reinforce the worldwide shift towards the need for consistent, reliable and comparable ESG data.

The shift from aspiration to obligation marks a clear turning point for business. As sustainability reporting increases across jurisdictions, expectations for credible and independently assured data are rising fast. For aviation, the implications are significant. Environmental performance will remain a priority, but social reporting is fast becoming the real test of culture and credibility. It will show which organisations are making measurable progress and which are still finding their path.

How would you rate the overall workplace culture in your organisation in terms of supporting diversity and inclusion?



Gender Pay Gap & Pay Transparency

Gender pay gap reporting has entered a new phase. Since 2022, large employers have been required to publish their data, with the threshold falling from 250 employees in 2022 to 150 in 2024, and now to 50 in 2025. The change brings a large number of companies within scope for the first time.

This year, just over a third (34%) of respondents said their organisation conducted a gender pay gap analysis, up from 18% in 2024. Broader legal obligations are driving greater participation. Progress, however, remains limited. Among those reporting, 28% said their figures had improved, 62% saw no movement, and 10% reported a widening gap. These figures are identical to last year's results, indicating that mandatory reporting alone does not guarantee progress.

Although formal pay gap reporting is still relatively new, three years of data reveal a consistent pattern: measurement has increased, but improvement is slow. Real progress will depend on how companies use their findings, not just on the data they publish.

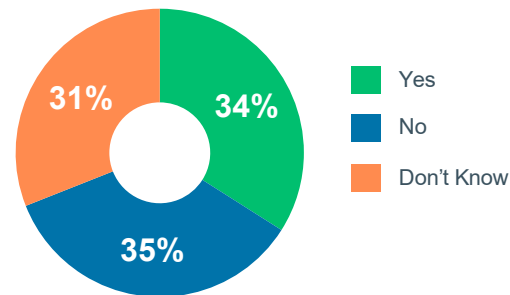
The forthcoming implementation of the EU Pay Transparency Directive will improve access to information and verifiable data, requiring clear pay structures and employee access to salary information. This is due to be implemented across EU Member States by June 2026.

The Directive will require employers to disclose gender pay gaps, include pay ranges in job advertisements, and explain pay differences between employees performing the same work. The new measures reinforce the shift from voluntary disclosure to mandatory accountability. Notable amongst the changes are that the burden of proof in pay discrimination cases shifts to the employer, to prove that there has been no direct or indirect discrimination regarding pay. The Directive also requires EU Member States to set out rules on effective, proportionate and dissuasive penalties including fines and compensation for employees.

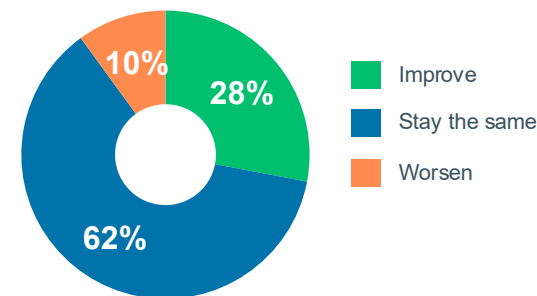


Our culture of not disclosing salaries / bonuses is hiding the huge difference between remuneration of men and women / minority groups.

Has your company conducted a gender pay gap analysis in the last 12 months?



If your company undertook gender pay gap reporting in the last 1-2 years, did the statistics: improve, stay the same, or worsen?



Diversity, Equity and Inclusion: Navigating Global Headwinds

As EU pay transparency expands, attention is turning to the broader cultural approaches outside of the EU which affect organisations operating in Ireland and other EU Member States. UK financial regulators dropped planned diversity and inclusion rules for financial firms in March 2025, following parliamentary concerns about extensive data gathering and reporting requirements.

In the US, several major corporations have faced political and legal pressure to scale back diversity programmes. Some have quietly rebranded their initiatives under new terms such as “*opportunity strategy*” or “*workplace equity*.” The global debate has become polarised, testing how organisations frame and sustain their commitments.

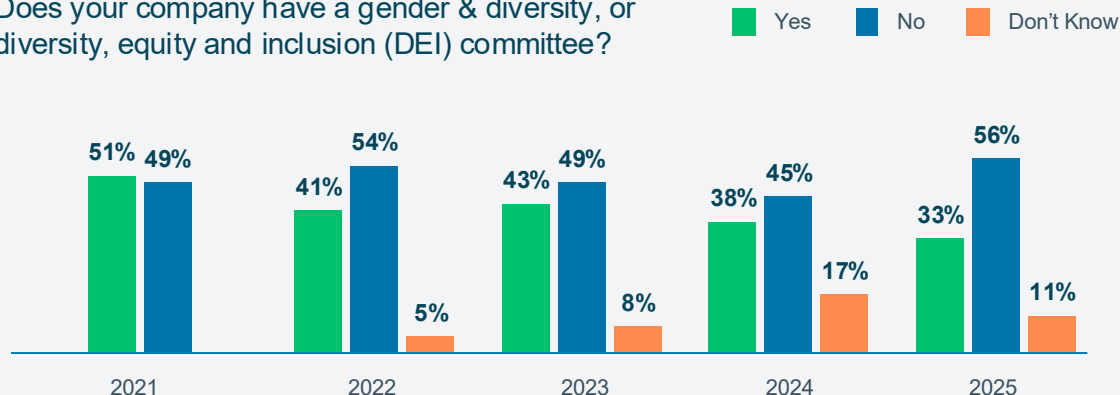
Across the last decade, DEI structures in aviation followed an upward curve until 2021, when more than half of respondents (51%) reported having a formal diversity committee. That progress has since reversed. One third of respondents (33%) now have one, down from 38% in 2024 and continuing a steady four-year decline. The pattern mirrors wider industry cycles: early enthusiasm and investment followed by resource pressures and shifting corporate priorities.

A new question this year underscores the shifting sentiment. Four in ten respondents (40%) believe the term 'diversity, equity and inclusion' should be

rebranded to better reflect their organisation's goals or to increase impact. Opinion is evenly divided on whether further legal supports are needed, with exactly 50% in favour and 50% opposed. The split shows a sector questioning not only the language of diversity but the approach itself.

The data shows other warning signs. 7% of companies have scaled back or ended DEI training programmes in the past year, and 5% have rebranded or reframed them. These may appear small shifts, yet they mark a change in direction not seen in earlier years.

Does your company have a gender & diversity, or diversity, equity and inclusion (DEI) committee?



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DEI initiatives in our industry remain weak, and their positive impacts are not yet visible. The lack of real progress continues to maintain a homogeneous status quo - one that is prone to groupthink and blind spots in decision-making.

Despite this, the value of formal diversity structures is widely recognised. Nearly two-thirds (63%) of organisations without a formal committee believe they would benefit from one. The gap between awareness and action remains difficult to close.

Workplace culture results paint a mixed picture. Almost half (49%) of respondents rate their workplace culture as good in supporting diversity, with 9% saying excellent. However, 41% rated theirs as fair (21%) or poor (20%). Across ten years of data, these figures have changed little. Gains in policy and representation have not always translated into better day-to-day experience, suggesting that culture is slower to evolve than compliance. Inclusion still depends as much on leadership and behaviour as on policy.

Nearly a third (32%) of companies have implemented or promoted DEI training programmes in the past 12 months, down from 36% in 2024. The decline is modest but consistent with the broader trend of slowdown. The global debate may have created uncertainty, but the need for inclusive systems remains, regardless of terminology.

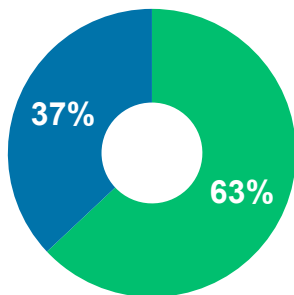
The data exposes more than a gap between belief and action. It reveals a sector navigating political headwinds, while facing varying levels of regulatory and reporting requirements and duties across the globe.

Closing that gap and achieving a harmonised and consistent approach will depend on leadership willing to keep inclusion evidence-based, outcome-driven and separate from the noise of debate.

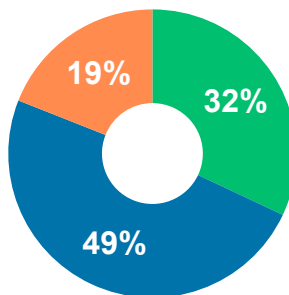
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It's down to management that change will happen and unfortunately some are still biased towards women and youth. It will be a long time coming before change can happen - DEI needs to be implemented and driven by incentives / laws before it's adapted.

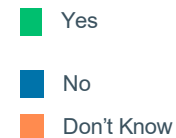
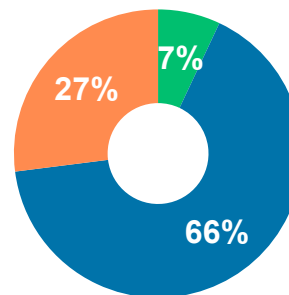
Do you think your company would benefit from a gender and diversity/DEI committee and active DEI programmes?



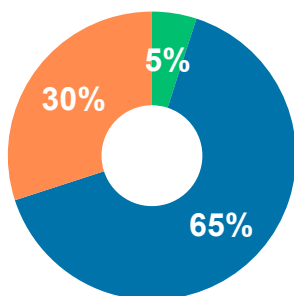
Has your company implemented or promoted any diversity, equity and inclusion (DEI) training programmes in the last 12 months?



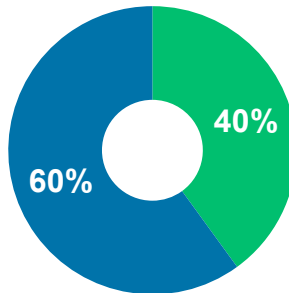
Has your company scaled back or ended diversity, equity and inclusion (DEI) training programmes in the last 12 months?



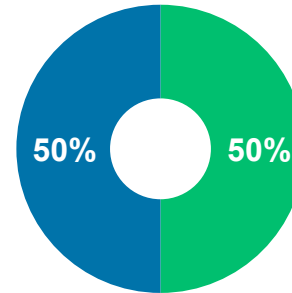
Has your company rebranded or reframed programmes previously associated with diversity, equity and inclusion (DEI)?



Should the term 'diversity, equity and inclusion (DEI)' be rebranded to better reflect your company's goals or to increase impact?



In your view, are additional legal supports - such as new/updated laws, reporting requirements or compliance obligations - needed to advance diversity, equity and inclusion (DEI) in 2025?



Career Progression

Work-life balance remains the defining challenge for career progression. 41% of respondents named it their biggest obstacle, a figure largely unchanged over the past three years. In fact, since 2016 it has consistently topped the list, rarely dipping below 40%. The aviation sector's global reach and round-the-clock demands continue to strain flexibility and retention.

Motivations for career moves are also shifting. A better work-life balance or remote options are now the main reasons employees change roles, cited by 32% of respondents. Improved remuneration ranks second at 25%, while only 7% cite perceived discrimination or lack of opportunity. Flexibility has overtaken promotion as the key factor in retaining staff, marking a shift in employee priorities.

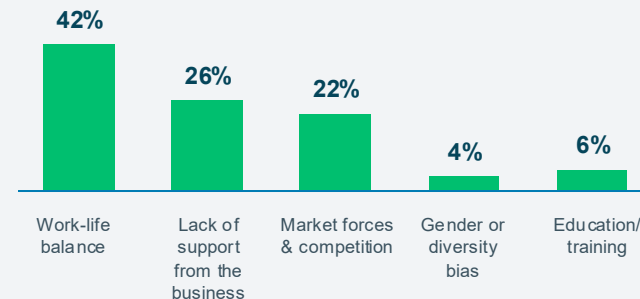
Promotion equity has also weakened. While most organisations (72%) reported internal promotions, a figure consistent with the 70–75% range seen over the past five years, only 20% said men and women were promoted in equal numbers. That's down from 31% last year and well below the 35% peak in 2019. The results suggest that progress in leadership representation has not yet translated into sustained advancement.

The lack of clarity around promotion tracks remains a concern. Fewer than half (45%) of respondents said their organisation's process is clear and transparent, unchanged from last year and consistent with results since 2018. The lack of clarity can slow career development and restrict the flow of diverse talent into senior roles.

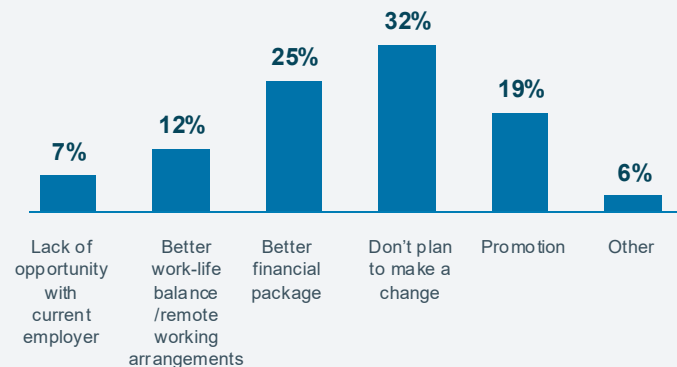


I have just left my employer for progression reasons.

What is your single biggest challenge to career progression and promotion in 2025/2026?



What would be the main reason for you to change employer in 2025/2026?



Support for employees returning from extended leave has shown little movement. 41% of organisations now offer these programmes, compared with 38% when first measured in 2021. Stronger return-to-work structures could help retain experienced talent and improve gender balance at senior levels.

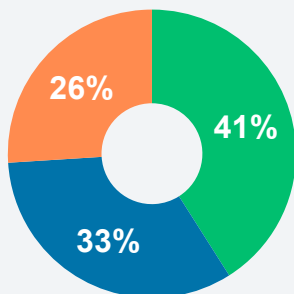
Across ten years of data, the same themes persist. A decade of results shows that lasting progress hinges on flexibility, fairness and transparency. Addressing these connected challenges will determine how effectively aviation organisations attract and retain diverse talent in the years ahead.



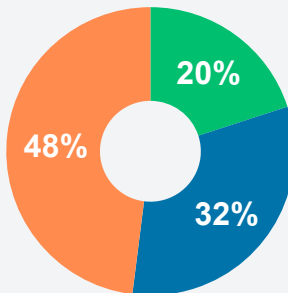
In our industry, there is no clear or transparent promotion track, which makes career progression inconsistent and subjective...

It's great to see the aviation industry becoming more inclusive and welcoming, but there's still a long way to go. We need more active support from senior leaders, especially male sponsors, to really make a difference.

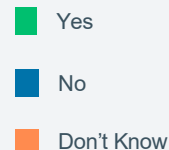
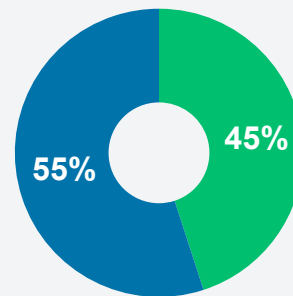
Does your company provide support for employees returning to work after extended leave (eg maternity/paternity leave, medical leave)?



If internal promotions took place in your company in the last 12-18 months, was there an equal number of men and women promoted?



Is the promotion track clear and transparent in your current company?



Conclusion

After ten years of reporting on diversity in the aviation sector, the picture is one of partial progress and recurring challenges. The cliché 'a lot done, but more to do' is apt. On a positive note, senior representation is rising again after several years of decline. However, minority candidate recruitment and participation have fallen, and promotion equity is still weak. Many organisations have policies in place but continue to struggle to convert them into measurable results.

The 2025 data points to a sector in transition. Four in ten respondents (40%) believe the term 'diversity, equity and inclusion' no longer reflects what is needed, and opinion is evenly split on whether stronger legal measures are required. Diversity committees are less common, and workplace culture ratings remain mixed. The findings suggest an industry that genuinely values inclusion but is struggling to sustain momentum, amid shifting global attitudes and new regulatory pressures.

Across the decade, one lesson is consistent: progress comes in cycles. Gains in leadership visibility have not always extended through the pipeline. The most resilient organisations are those that treat inclusion as a discipline rather than a stand-alone initiative, embedding it in leadership, measurement and long-term planning.

As the sector continues to grow and reporting pressures intensify, the opportunity lies in connecting diversity with accountability and long-term strategy. Sustained improvement will depend on transparency, visible leadership and cultures that treat difference not as a compliance merit, but as a source of strength.

“ Overall the landscape is improving...However, ageism is a concern - I have not witnessed older professionals moving around or being hired / promoted into roles.

“

Working in the legal sector it seems to me that we are ahead of those working in the aviation sector 'proper' - law firms tend to have better DEI programmes and statistics, although there is always more we could do - including supporting those in the wider aviation sector!



Christine O'Donovan

Partner, Aviation &
International Asset Finance

OUR TEAM

Our award-winning advice on aviation financing transactions ranges from cross-border legal and tax structuring and regulation to alternative funding and joint ventures.

We also advise on contentious issues such as bankruptcy and insolvency. Along with leading local and international lessors and financiers, we also work closely with credit agencies and government bodies.

MARKET RECOGNITION

“Mason Hayes & Curran is a very attentive team that takes a hands-on approach.”

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“They provide excellent service and value to our transactions, and I wouldn't hesitate to recommend them to others looking for similar representation.”

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