

Airlines for America®

We Connect the World

The State of U.S. Commercial Aviation

Updated November 10, 2026

https://www.airlines.org/dataset/state-of-us-aviation/

U.S. Airlines Facilitate the Safe and Efficient Movement of People and Goods Worldwide

Data Reflects Passenger and Cargo-Only Operations*

> 1M **employees** around the world



Powering ~28K **flights** per day across the globe



Carrying ~2.7M **passengers** per day to/from ~85 countries



Moving ~61K **tons of cargo** per day to/from more than 220 countries



Sources: A4A, U.S. Bureau of Transportation Statistics, Diio by Cirium and company literature

* Headcount as of Dec-2025; other statistics reflect daily average for 2025

The Street: Times Have Changed

"**[W]e no longer believe cost structures to be the primary determinant of profitability** the way they once were, before the industry successfully de-commoditized and **product/network quality took on increased relevance** with consumers."

Jamie Baker, J.P. Morgan (Feb. 12, 2026)

"In the post-COVID world, the industry has been forced to adapt as **consumer preferences shifted**. Premium products, loyalty programs, and network breadth moved to the forefront, and airlines with those offerings have fared materially better… **Gone are the days when airlines could profitably operate on rock-bottom fares as industry costs have converged, and consumers are demanding a better experience**."

Conor Cunningham, Melius Research (April 22, 2026)

Airlines Increasingly Offer Multiple Classes of Service to Appeal to a Wide Range of Travelers

Basic Economy



- Least Expensive
- Most Restricted re: Changes/Refunds
- Lower Boarding Priority
- No Advance Seat Selection
- Least Personal Space
- Carry-On Limits
- Buy-on-Board Meal Options

Standard Economy



Premium Economy



First/Business

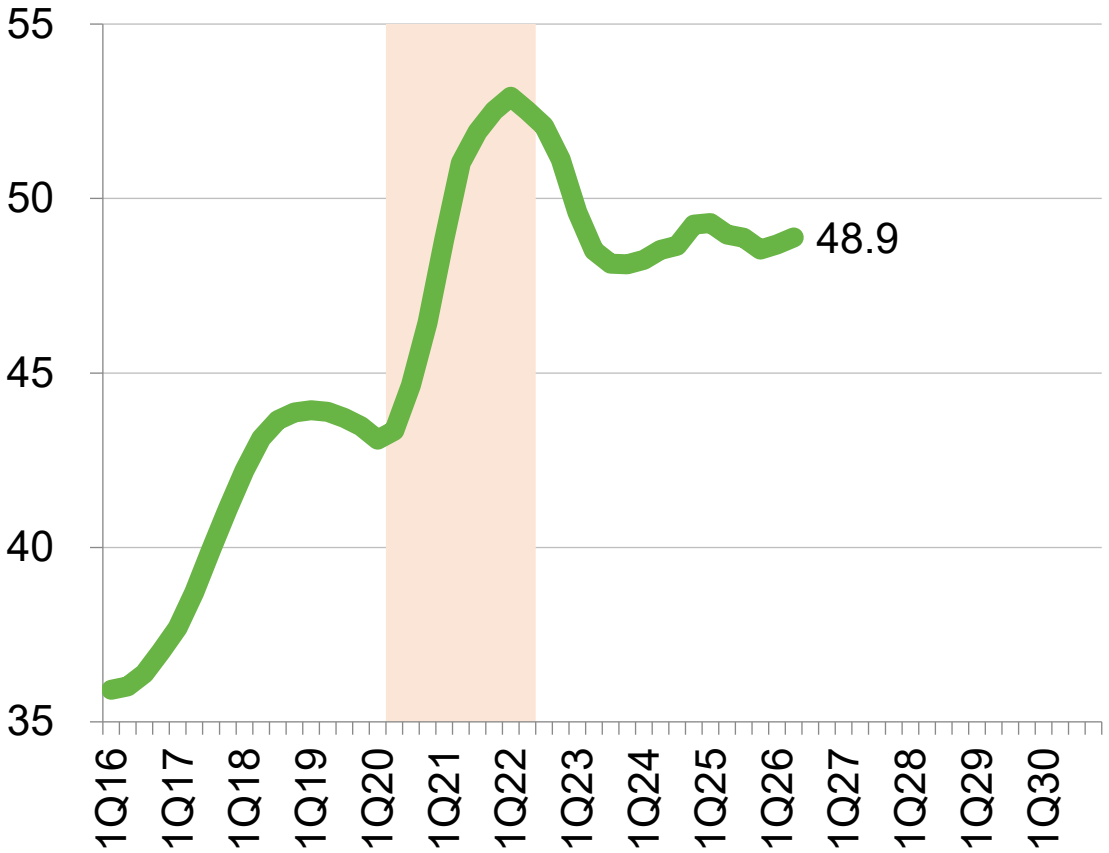


- Most Expensive
- Changeable/Refundable
- Higher Boarding Priority
- Advance Seat Selection
- Most Personal Space
- Complimentary Bags and Meals
- Additional Perks

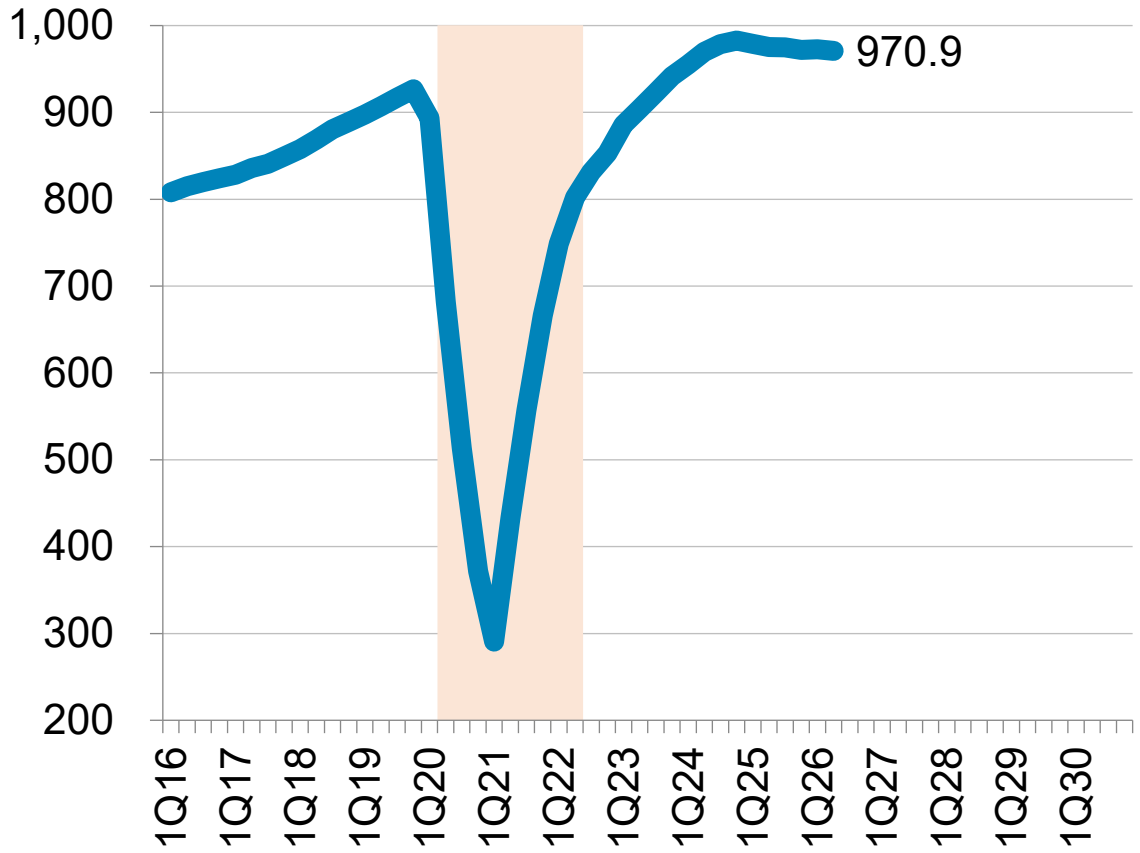
For U.S. Airlines, Air-Cargo Volumes Grew in 2Q 2026 While Air-Travel Volumes Fell

Air-Cargo Demand Rose 1.7% Year-Over-Year; Passenger Enplanements Fell 0.7%

Annualized Air Cargo Revenue Ton Miles* (Bils)



Annualized Scheduled-Service Passengers (Mils)



Source: U.S. Bureau of Transportation Statistics (Form 41 Schedule T1 and T100 segment data)

* Cargo revenue ton miles (RTMs) flown on U.S. passenger and cargo-only airlines in scheduled and nonscheduled services

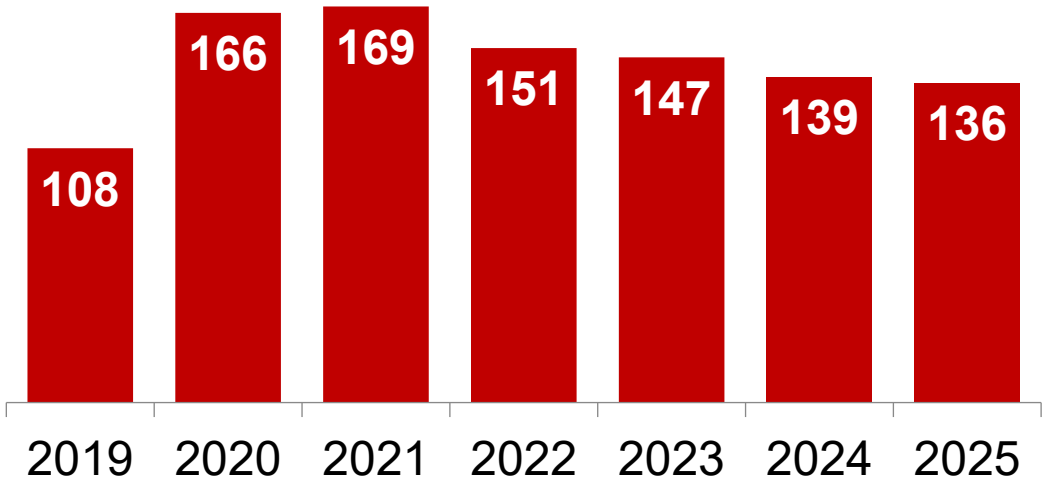
Airlines Have Prioritized Debt Reduction, Accompanied by Heavy Cash Outlays for Interest

Debt Levels Fell ~$33B From 2021 to 2025, But Interest Expense Remains Elevated

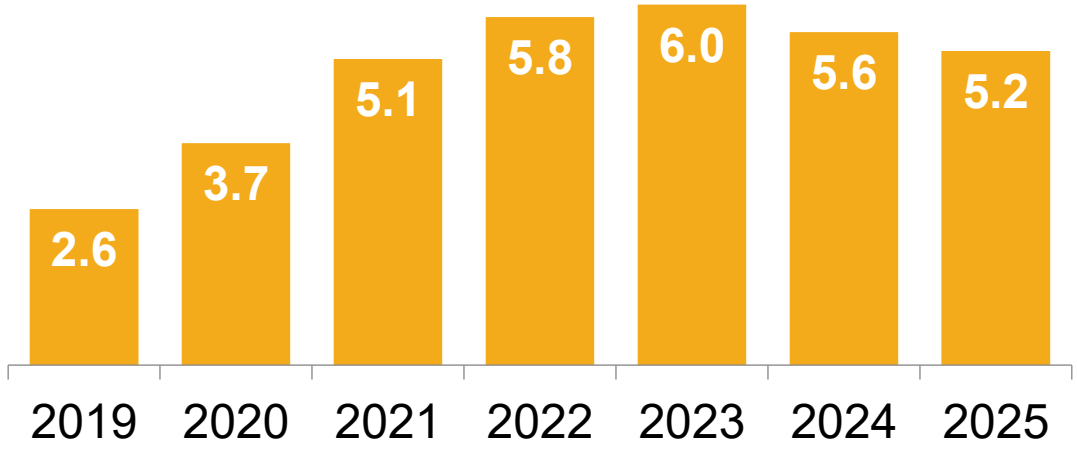
"To suggest that the airlines should have better prepared for this environment seems akin to suggesting Pompeii should have invested more heavily in firefighting technology." (Jamie Baker, JPMorgan, March 22, 2020)

"For 2021 and beyond, we anticipate a major deleveraging cycle as **the industry will have no choice but to address its significant debt load**." (Michael Linenberg, Deutsche Bank, July 1, 2020)

Year-End Total Debt* ($ Billions)



Interest Expense ($ Billions)



Source: Alaska/Hawaiian, Allegiant, American, Delta, Frontier, JetBlue, Southwest, Spirit, Sun Country and United 10-Ks

* Long-term debt and finance leases + operating lease liabilities + pension and postretirement benefits

In 1H 2026, U.S. Passenger Airlines Collectively Saw Profitability Fall From 1H 2025

14% Higher Operating Expenses Outpaced 13% Higher Revenues

Financial Results: Jan-Jun 2026	$ Billions	% Chg. YOY	% of Category
Passenger	114.9	11.3	87
Cargo	2.4	18.1	2
Other[1]	14.1	28.1	11
Total operating revenues	**131.4**	**13.0**	**100**
Salaries, wages and benefits	40.8	6.2	32
Aircraft fuel and taxes	31.5	43.8	25
Maintenance materials and repairs	7.5	10.8	6
Landing fees and airport (terminal/hangar) rents	8.6	8.2	7
Depreciation and amortization[2]	5.8	4.2	5
Regional capacity (branded codeshare partners)	5.5	5.5	4
Other[3]	27.5	7.4	22
Total operating expenses	**127.4**	**14.2**	**100**
Interest and other non-op expenses, net	(2.6)	357.4	n/a
Pre-tax profit/(loss)	**1.4**	**(65.6)**	**n/a**
Pre-tax margin[4]	**1.1%**	**(2.5 pts)**	**n/a**

1. Sale of frequent flyer award miles to airline business partners, transportation of pets, in-sourced aircraft and engine repair, flight simulator rentals, inflight sales, etc.
2. Related primarily to ownership of aircraft, ground support equipment, information technology, etc.
3. Aircraft rents, professional fees, food/beverage, insurance, commissions, GDS fees, communications, advertising, utilities, office supplies, crew hotels, etc.
4. Pre-tax profit/(loss) ÷ total operating revenues

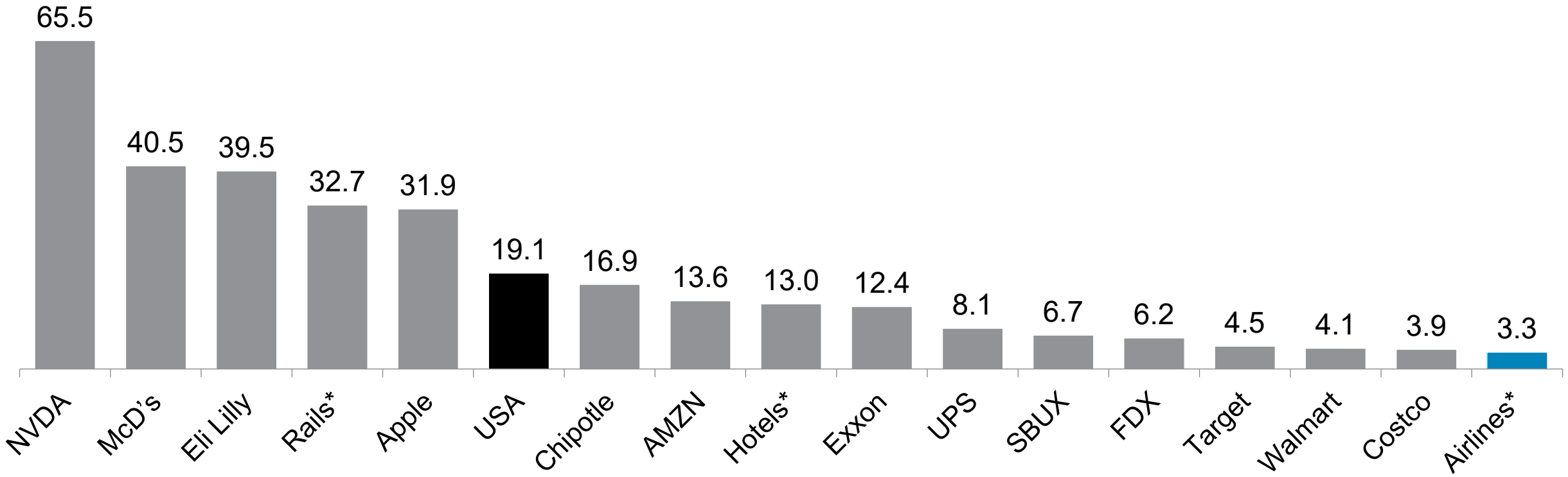
Source: SEC filings of Alaska/Hawaiian, Allegiant, American, Delta, Frontier, JetBlue, Southwest, Spirit, Sun Country and United

Numerous Fortune 500 Brands Enjoy Significantly Higher Profitability Than U.S. Airlines

Retaining Multiples More in Profit for Every Dollar of Revenue Generated in 2025

Pre-Tax Profit Margin (%) for Selected U.S. Companies and Industries in Fiscal Year 2025

Note: Profit Margin = (Revenues – Expenses) ÷ Revenues

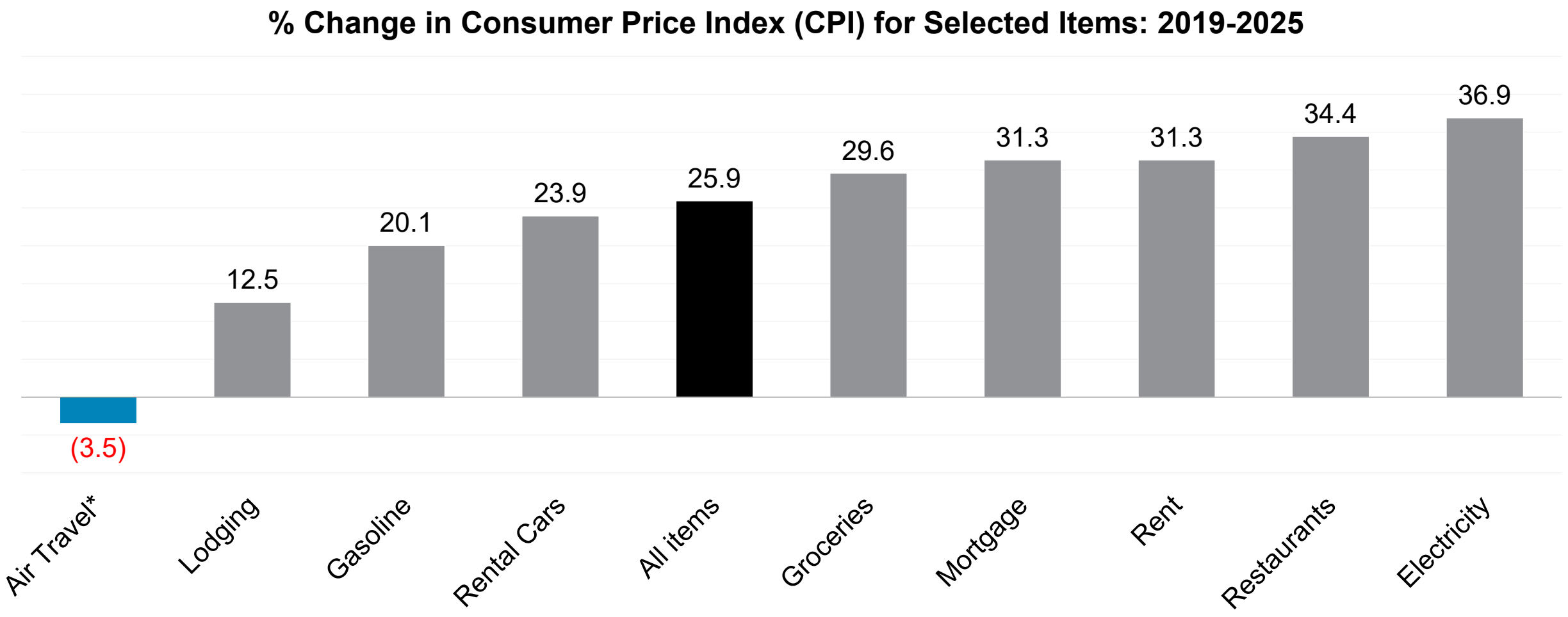


Sources: A4A, U.S. Bureau of Economic Analysis and company SEC filings

* Airlines = U.S. passenger airlines; Hotels = Choice/Hilton/Hyatt/Marriott/Wyndham; Rails = CSX/Norfolk Southern/Union Pacific

Since 2019, Consumers Have Faced Higher Prices for Housing/Food/Fuel But Not for Air Travel

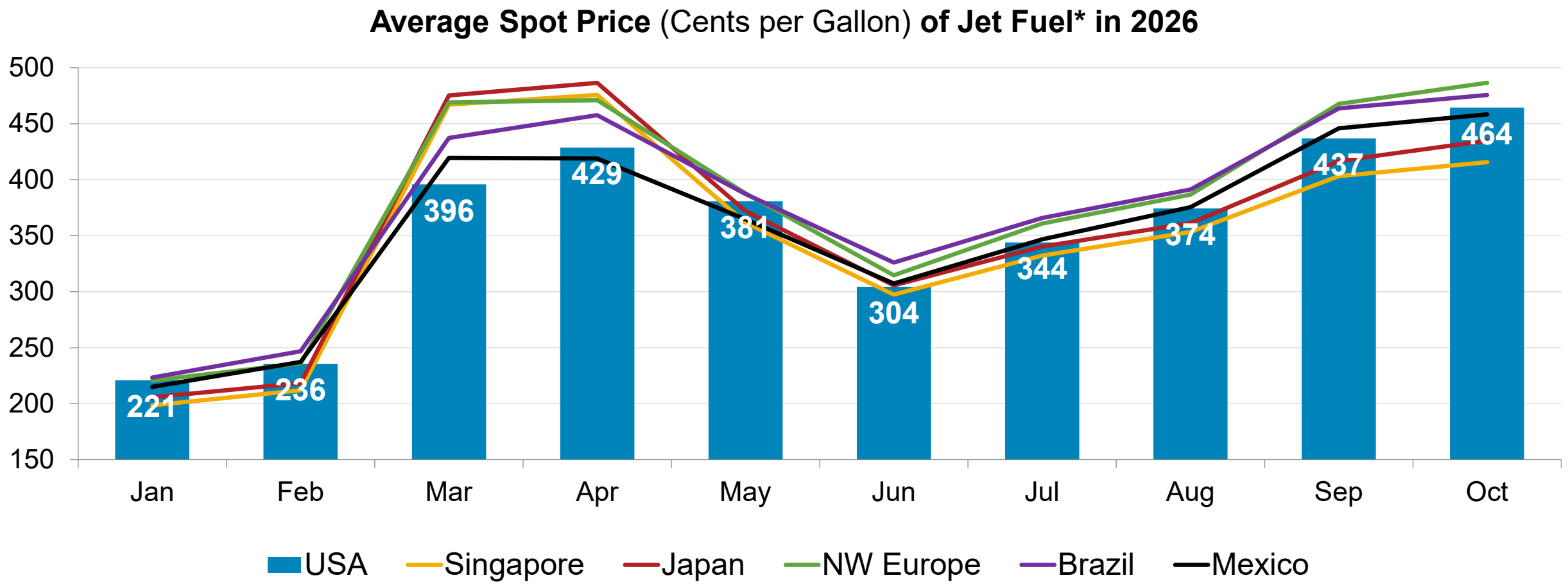
CPI for Airline Fares *Fell* 3.5% from 2019-2025



Source: U.S. Bureau of Labor Statistics

* Per BLS, "air travel" includes applicable taxes fuel surcharges, airport, security, and baggage fees (for first checked bag)

Jet Fuel Prices Reached All-Time Monthly High in October

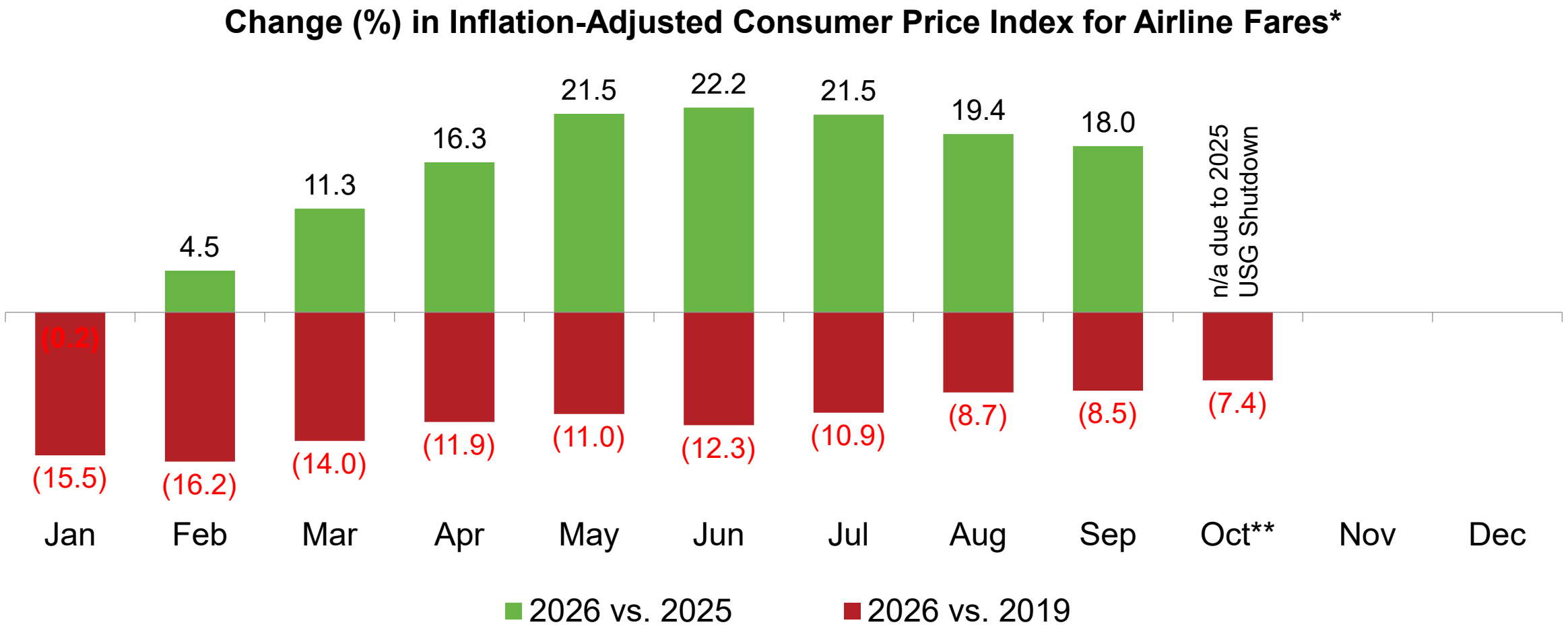


Source: Argus Media

* USA = Argus US Jet Fuel Index™ (https://www.airlines.org/dataset/argus-us-jet-fuel-index/) average of Chicago/Houston/Los Angeles/New York refining centers

Since June, YOY Fare Increases Have Moderated; Remain 7-9% Below 2019 Levels

Post-2019, Airfares Have Lagged Overall U.S. Inflation and Jet Fuel Prices

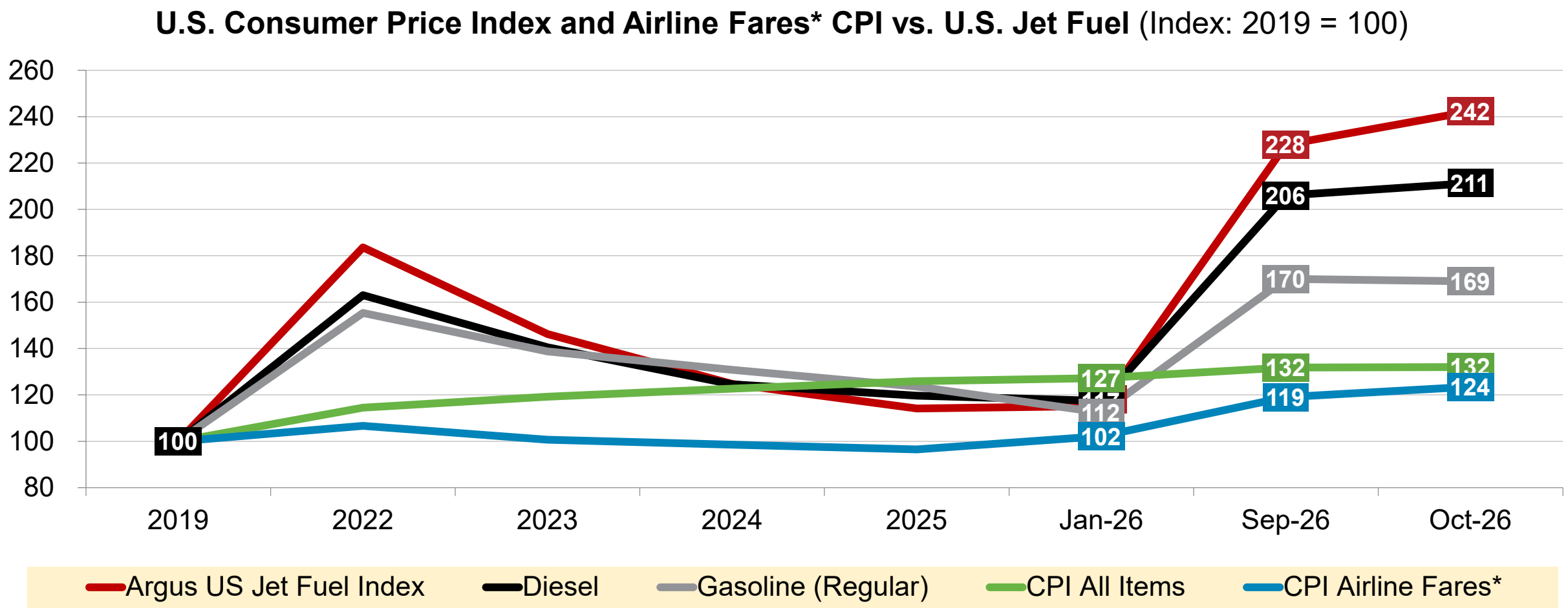


Sources: U.S. Bureau of Labor Statistics (not seasonally adjusted)

* Includes applicable taxes fuel surcharges, airport, security, and baggage fees (for first checked bag) ** No data for Oct. 2025 due to USG shutdown

From January to October, the Price of Jet Fuel Rose 5x More Than the Price of Air Travel

Post-2019, Airfares Have Lagged Overall U.S. Inflation and Jet Fuel Prices



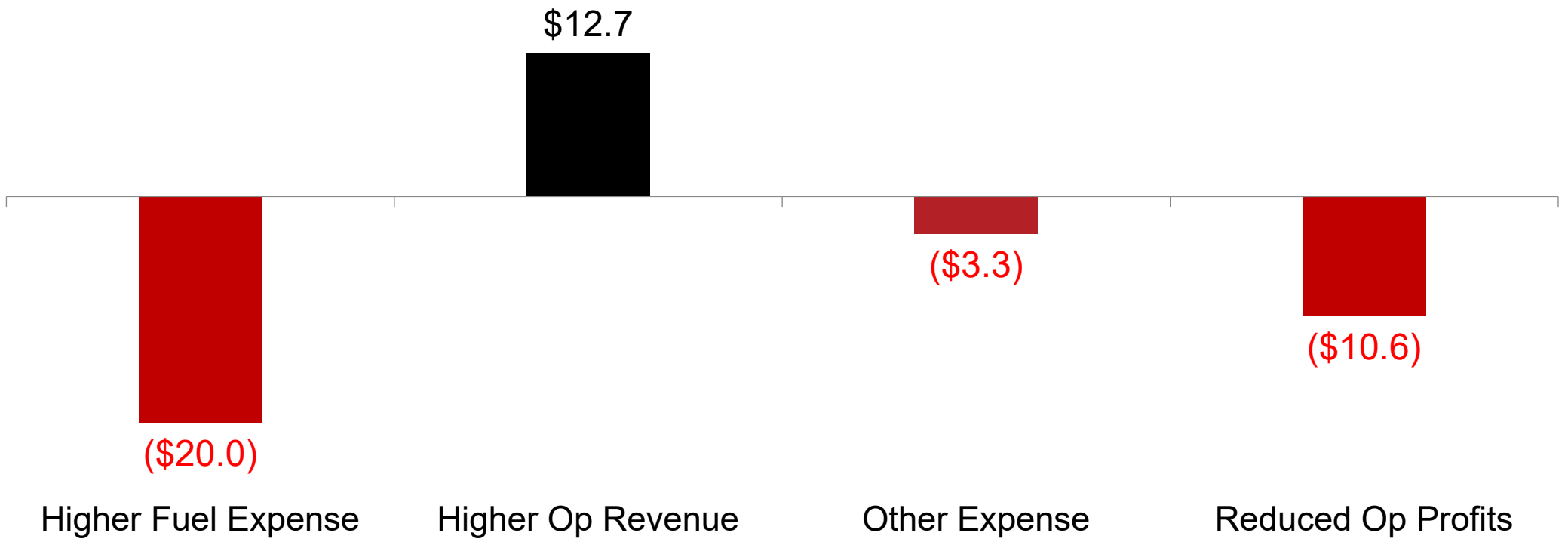
Sources: U.S. Bureau of Labor Statistics, Federal Reserve Bank of St. Louis (FRED) and Argus US Jet Fuel Index™

* Includes applicable taxes fuel surcharges, airport, security, and baggage fees (for first checked bag)

Deutsche Bank Projects That U.S. Airlines Will Recapture 60-65% of the Incremental Fuel Bill

Latest Forecast for 2026 Projects $12.7B More Revenue Against $20B Higher Fuel Expense

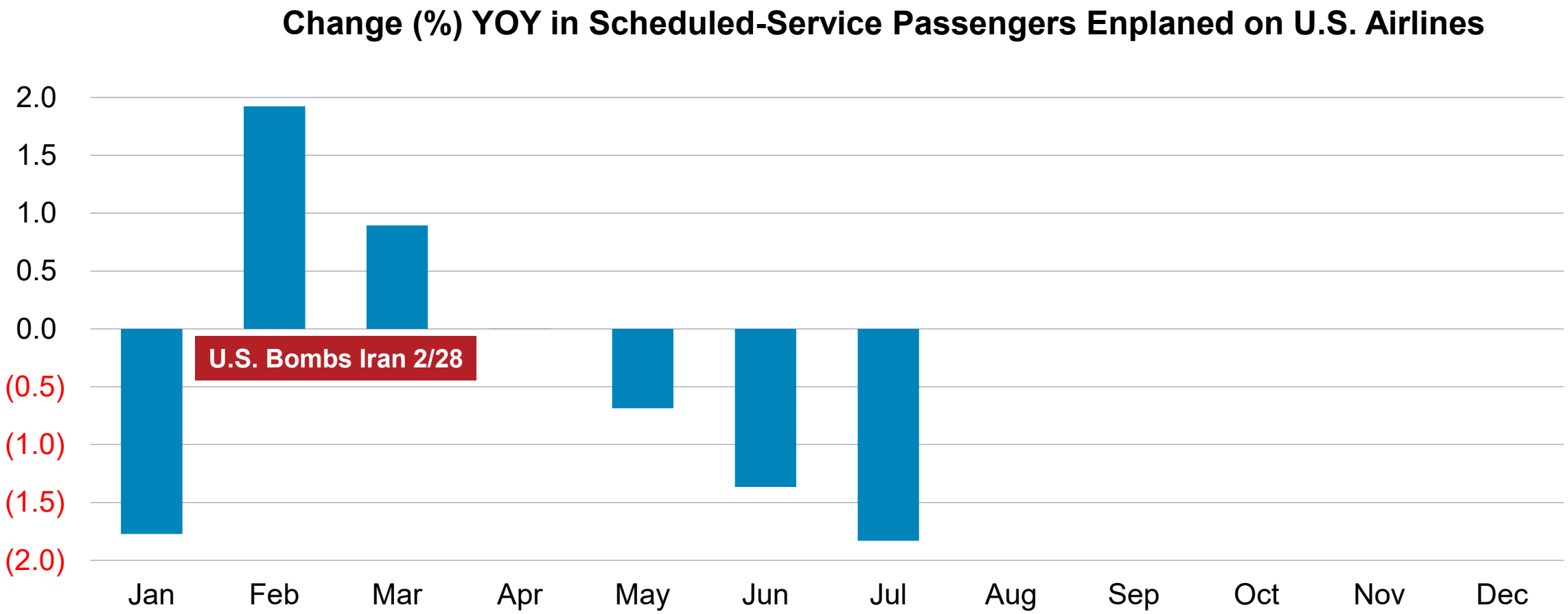
***Change* in Deutsche Bank's 2026 Forecast (in Billions) for U.S. Airlines (October 6 vs. Late February)**



Source: Deutsche Bank Research, "Airlines: Sep Q '26 Preview/Dec Q '26 Outlook: Projecting a more gradual recovery as fuel prices remain higher for longer," (Oct. 6, 2026)

U.S. Airline Passenger Growth Has Decelerated in Every Month Since February

YOY Declines Began in May, Reaching -1.8% in July (Latest DOT Data Point Available)



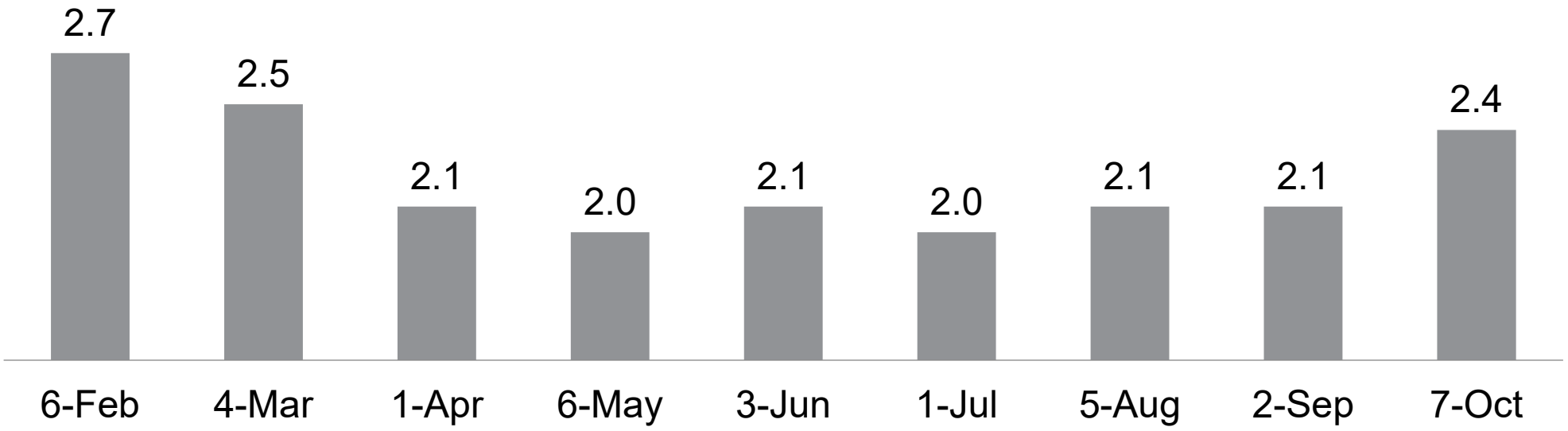
Source: U.S. Bureau of Transportation Statistics (Schedule T1)

Standard & Poor's (S&P) Has Lowered Its Expectations for U.S. Economic Growth in 2026

Real GDP Growth Expectation Pegged at 2.1%, Down From Pre-War (Feb. 6) Outlook

"The **upward revisions to forecasted GDP growth for 2026 and 2027** stem from three key factors. First, the National Economic Accounts annual update revealed stronger-than-estimated GDP growth in early 2026. Second, robust September data boosted our estimate of third-quarter GDP growth to 3.8%. Finally, significant upward revisions to disposable personal income suggest stronger near-term PCE than previously projected." S&P (Oct. 7, 2026)

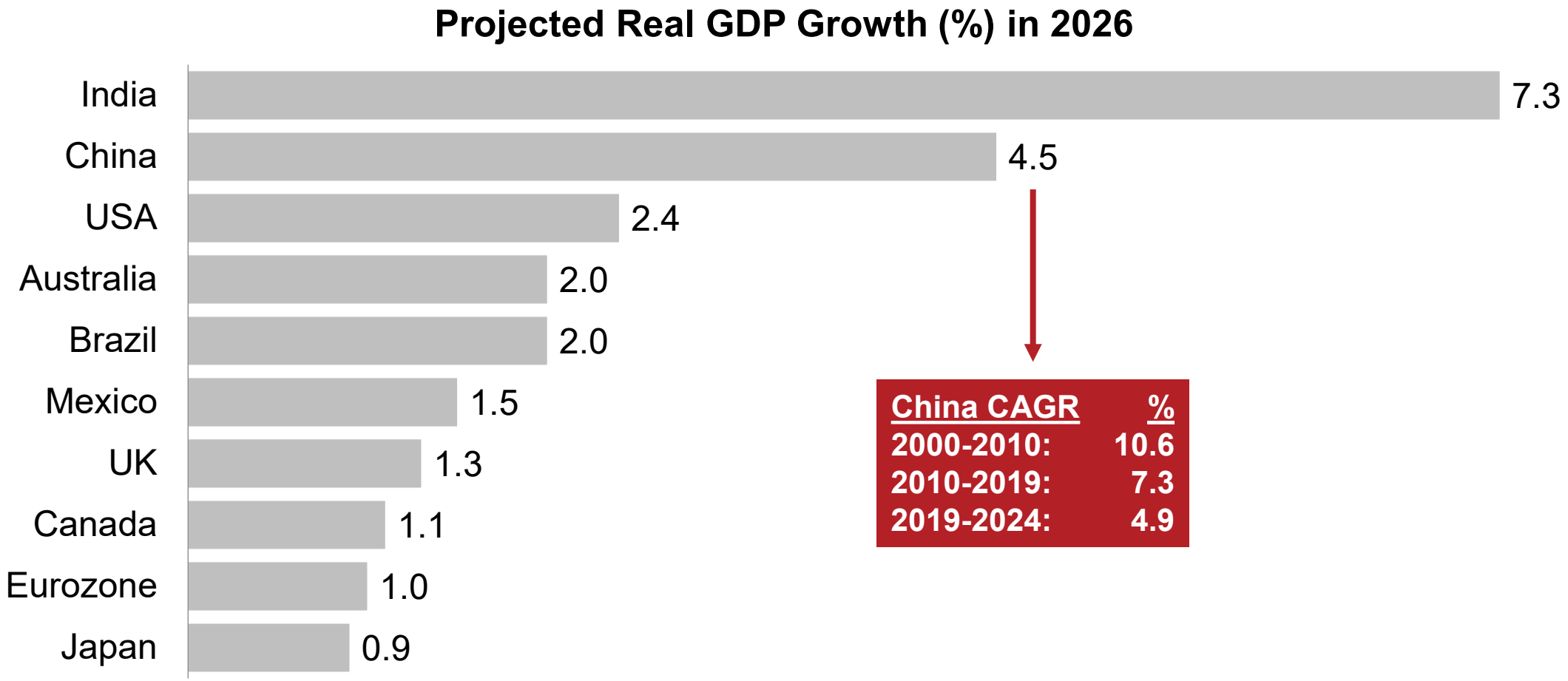
S&P Projected Real U.S. GDP Growth (%) for 2026 by Date of Forecast



Source: Standard & Poor's U.S. Economic Outlook (October 2026)

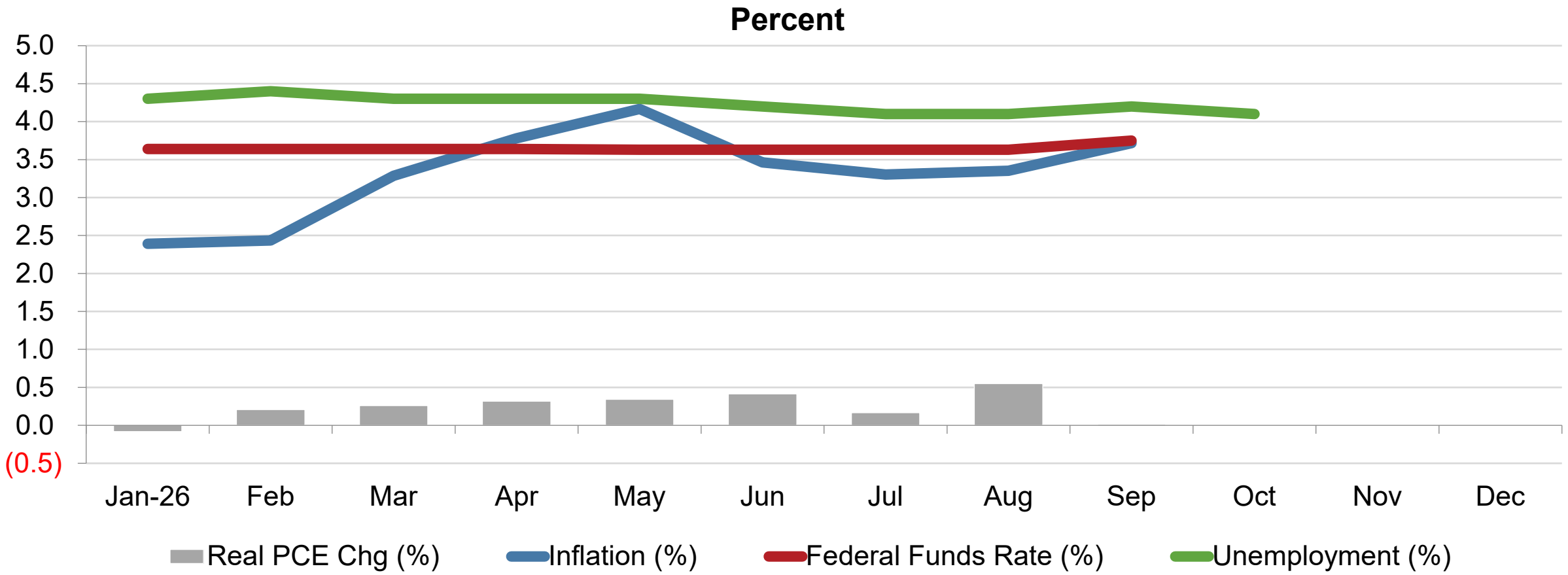
Wells Fargo Showing Lackluster Growth for Many Large Economies in 2026

Japan/Europe/Canada/UK Growing ~1%



Source: Wells Fargo International Economic Forecast (Oct. 15, 2026)

Despite Key Headwinds, U.S. Personal Consumption Expenditures Rose 0.55% in August

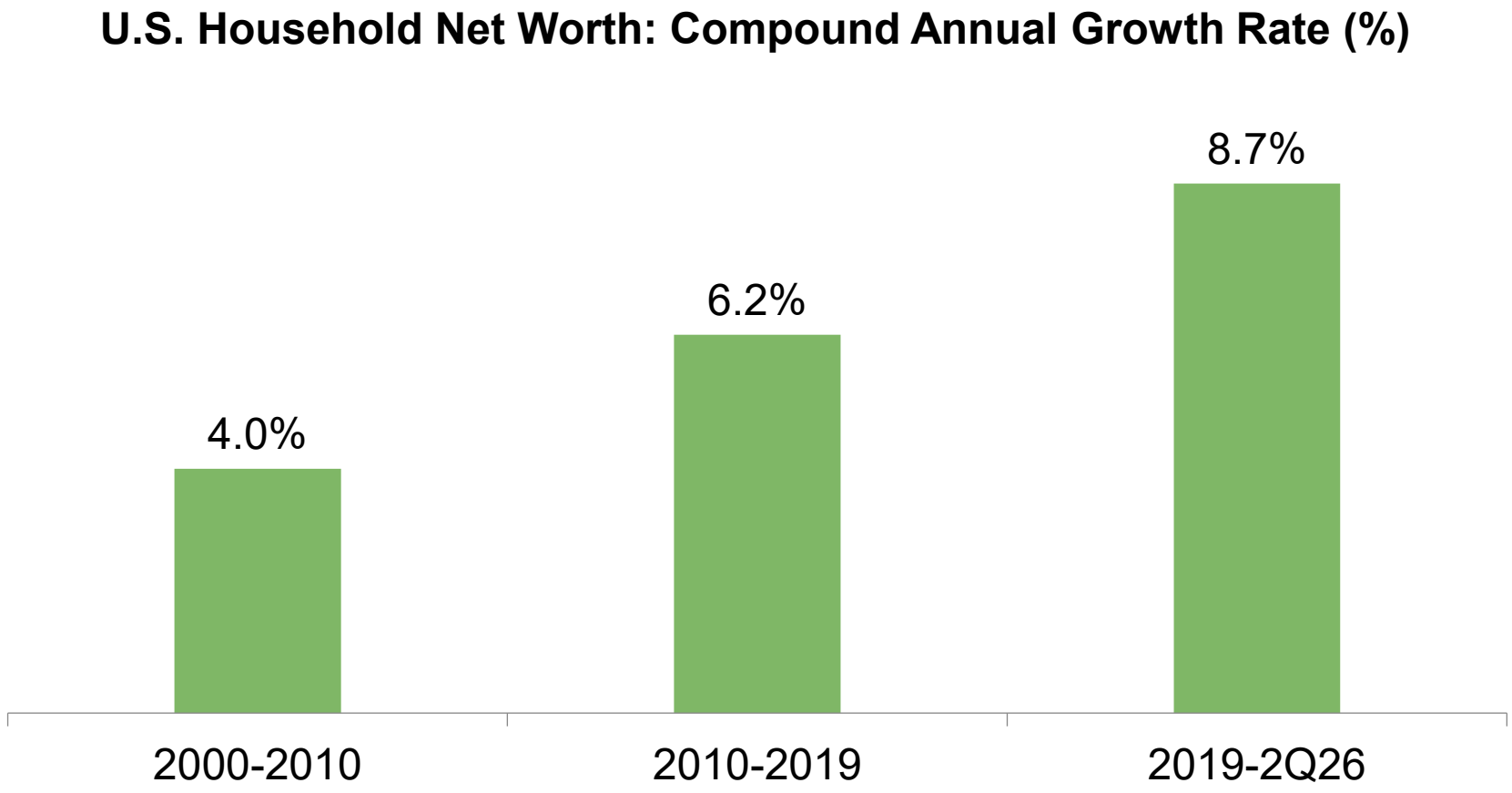


Source: U.S. Bureau of Economic Analysis and Bureau of Labor Statistics via Federal Reserve Bank of St. Louis

Note: Personal consumption expenditures (PCE) and inflation are seasonally adjusted and annualized

American Households' Gains in Net Worth Have Accelerated Post-Pandemic

These Gains Have Helped Fuel Demand for Air Travel, Lounges and More



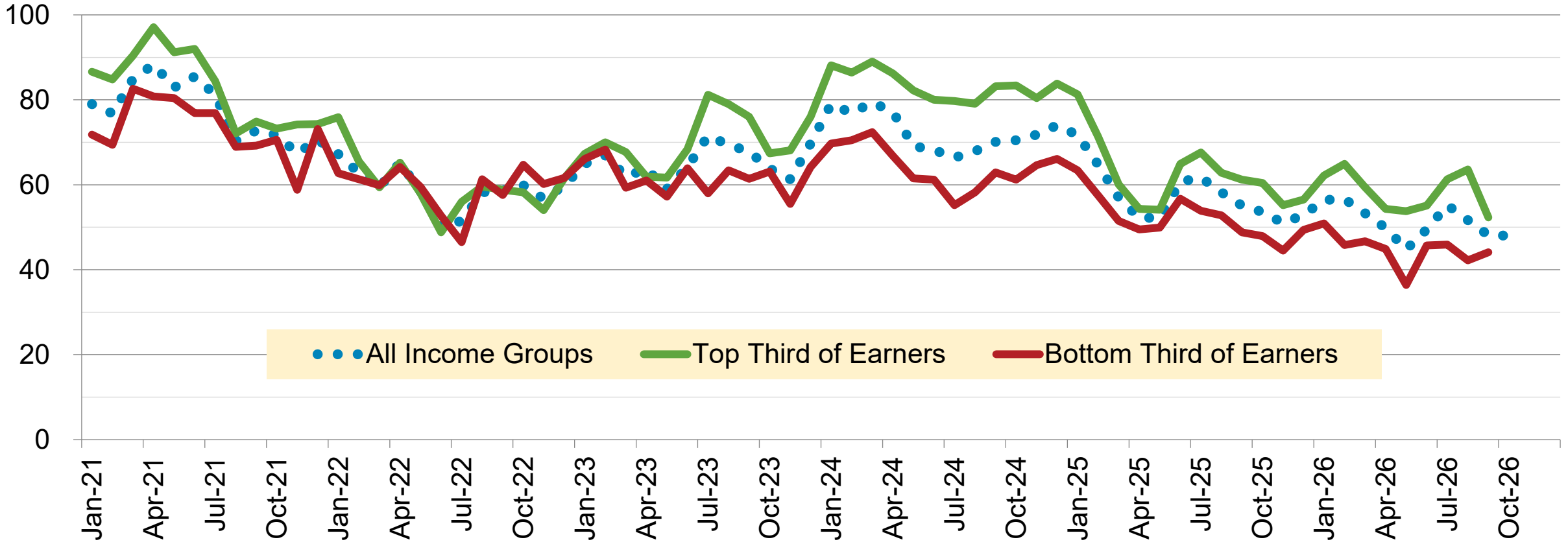
Source: Board of Governors of the Federal Reserve System (US) via FRED®

Note: Household net worth = assets (e.g., cash savings, investments, retirement funds, home market value, vehicles) minus debts

Overall U.S. Consumer Sentiment Slipped in August, September and October

Large Spread Between Upper and Lower Tiers of Income

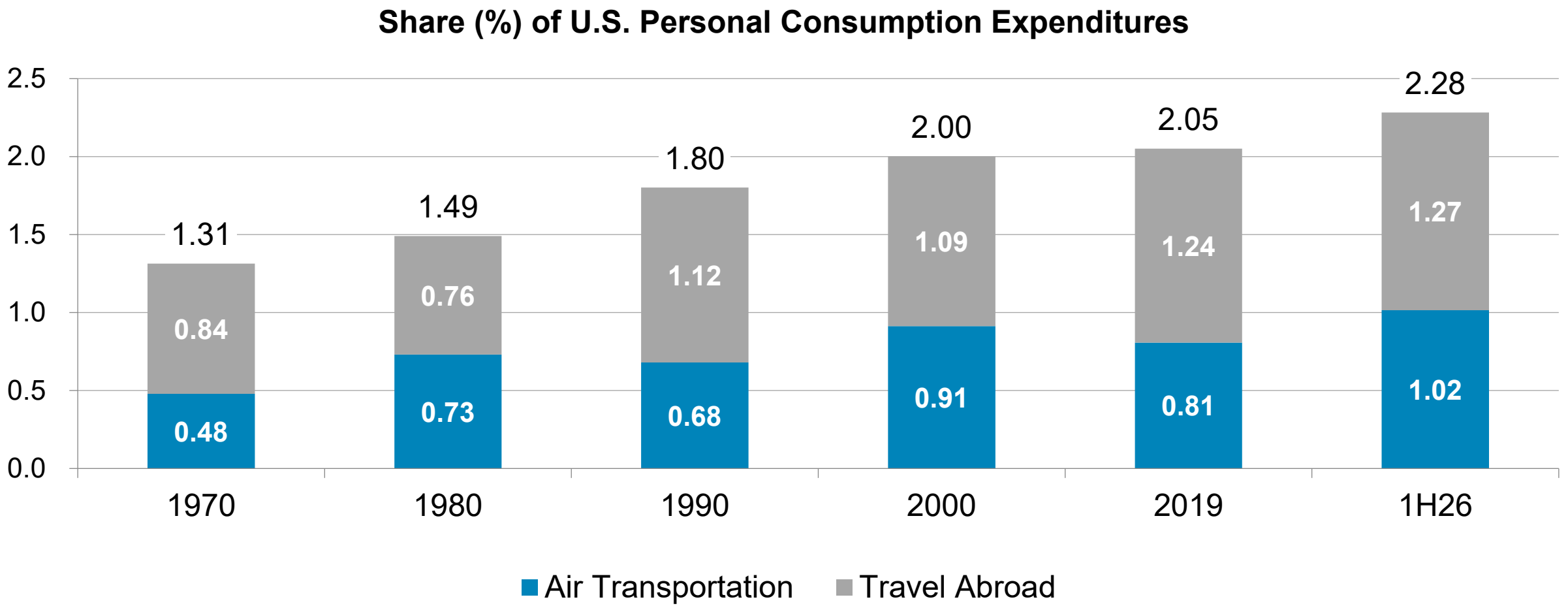
U.S. Consumer Sentiment by Income Tier: Index: 1Q 1966 = 100



Sources: University of Michigan

U.S. Consumers Are Prioritizing Experiences, Including Air Travel and Travel Abroad

From 2019 to 1H 2026, Higher Air Transport Share of Spend Translated to an Additional $45.5B



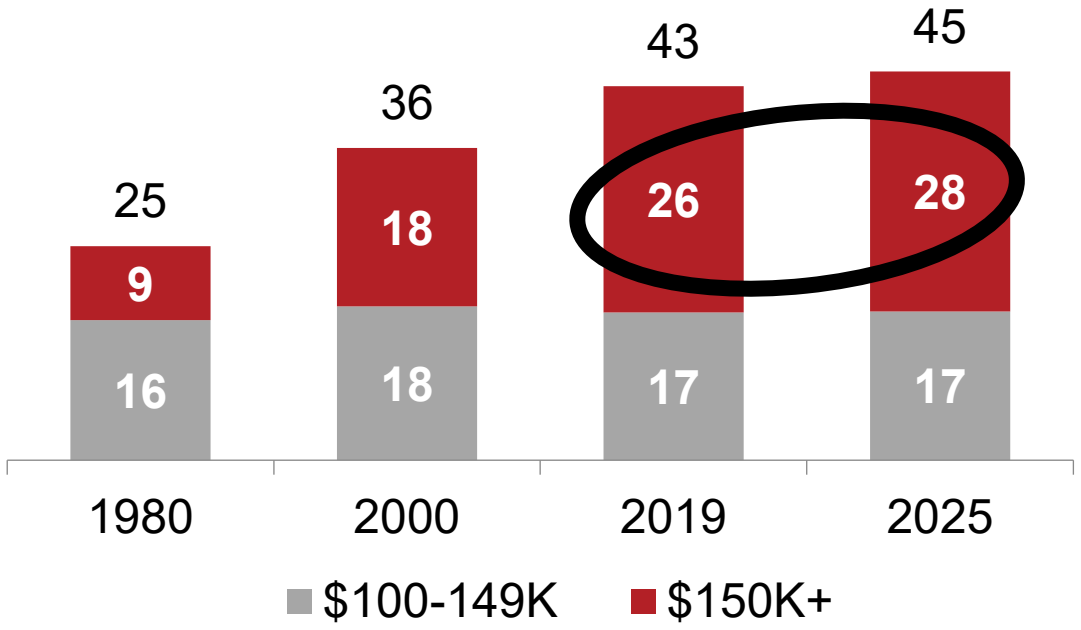
Source: U.S. Bureau of Economic Analysis

Note: Travel abroad defined by BEA as “foreign travel by U.S. residents”

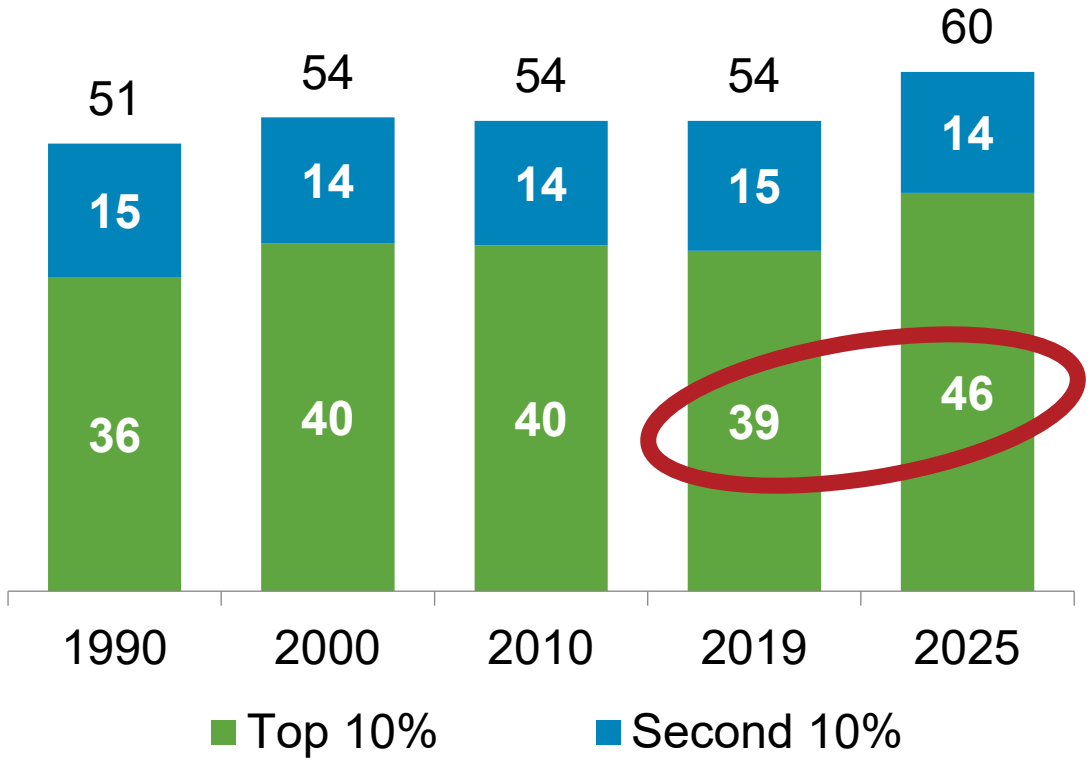
Increasing Share of Upper-Income Households = Expanding Pool of Premium Travelers

Plus… Highest-Income Americans Responsible for 46% of Spending, Up From 36% in 1990

Share (%) of U.S. Households With $100K+ in Pretax Income (2025 Dollars)



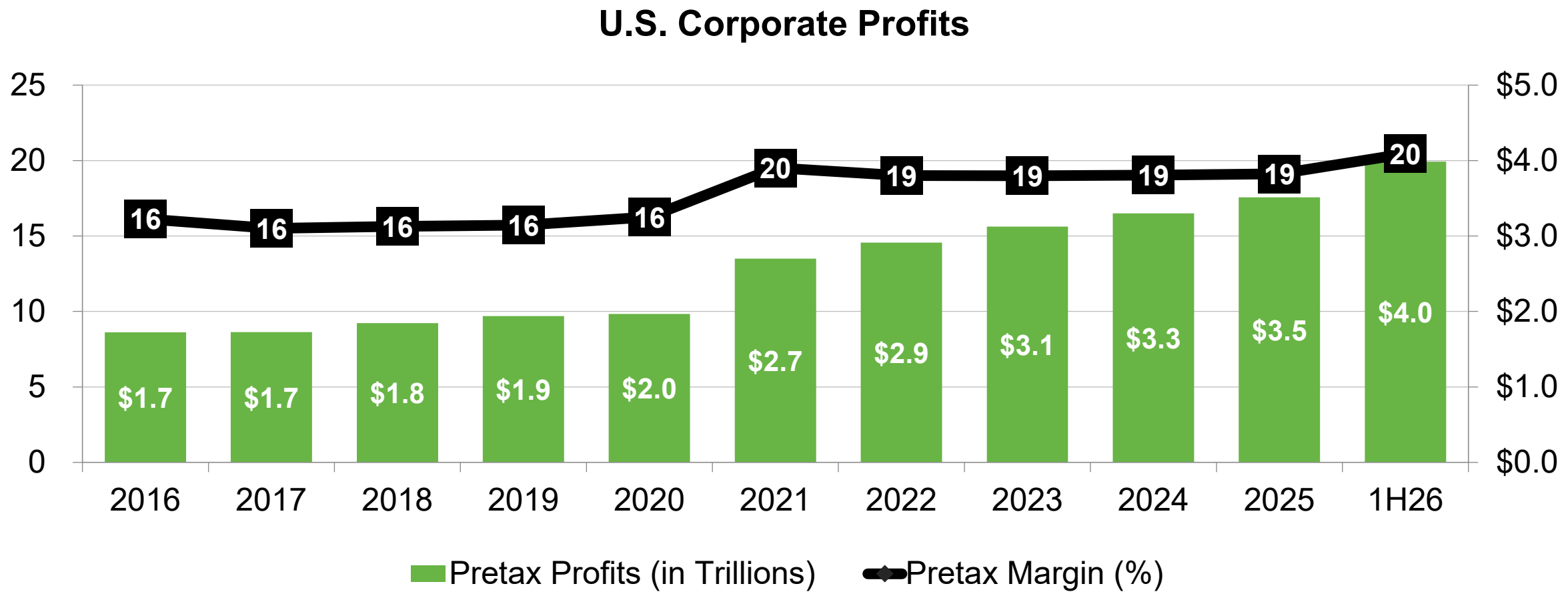
Share (%) of U.S. Consumer Spending by Top 20% of Earners



Sources: U.S. Census Bureau ("Income in the United States," published September 2026) and Moody's Analytics review of Federal Reserve data

Corporate Profits Have Soared, Providing a Favorable Environment for Business Travel

Pre-Tax Profits and Margins Are on the Rise and Structurally Higher Than Pre-Pandemic



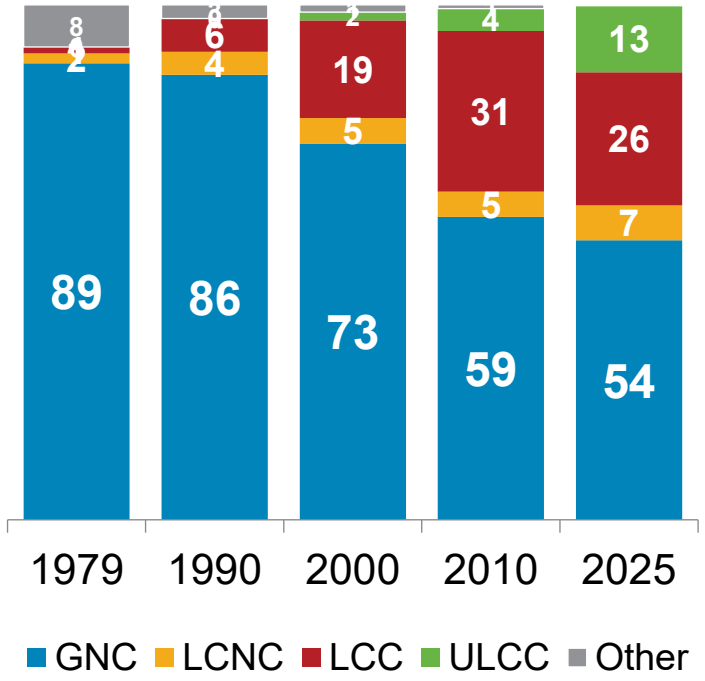
Source: U.S. Bureau of Economic Analysis

Note: Profits are seasonally adjusted at annual rates.

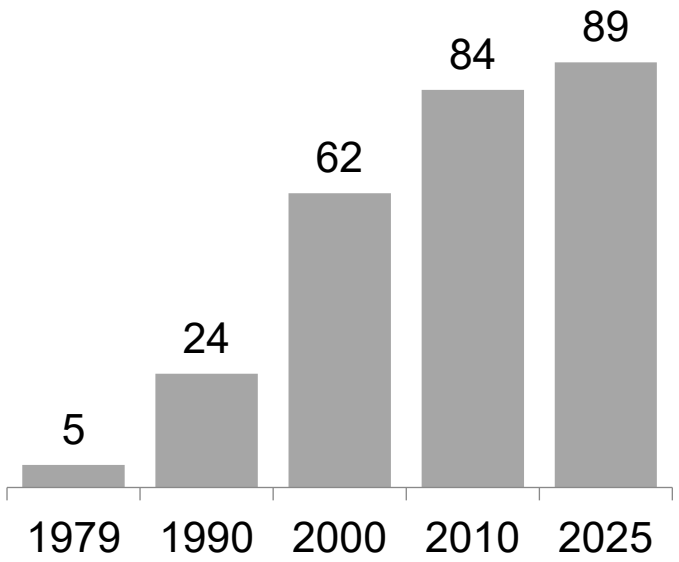
From 2000-2025, the Number of Competitors per Domestic Air Trip *Rose* From 3.33 to 3.47

Global Network Carrier Share of Domestic Passengers Fell From 73% in 2000 to 54% in 2025

% of Domestic O&D Pax by Airline Business Model

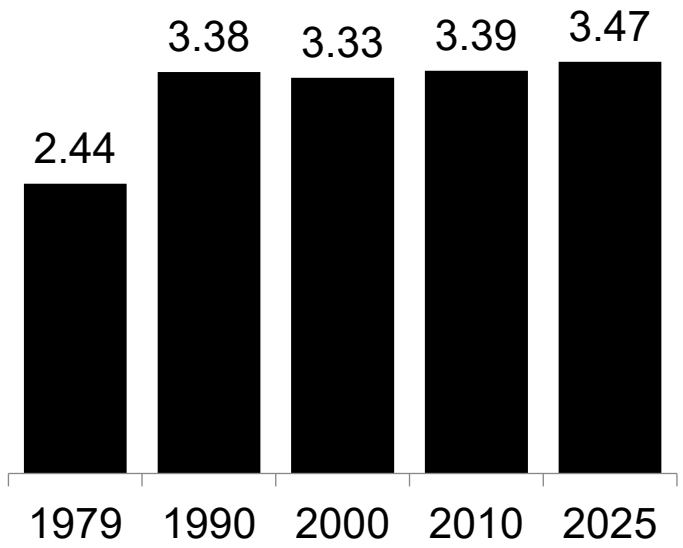


% of Domestic O&D Pax With Access to Lower-Cost Carriers



Average # of Competitors* in Domestic O&D City Pairs

* Per DOT and GAO, carrying at least 5% of O&D passengers in the city pair; average is passenger-weighted across city pairs.



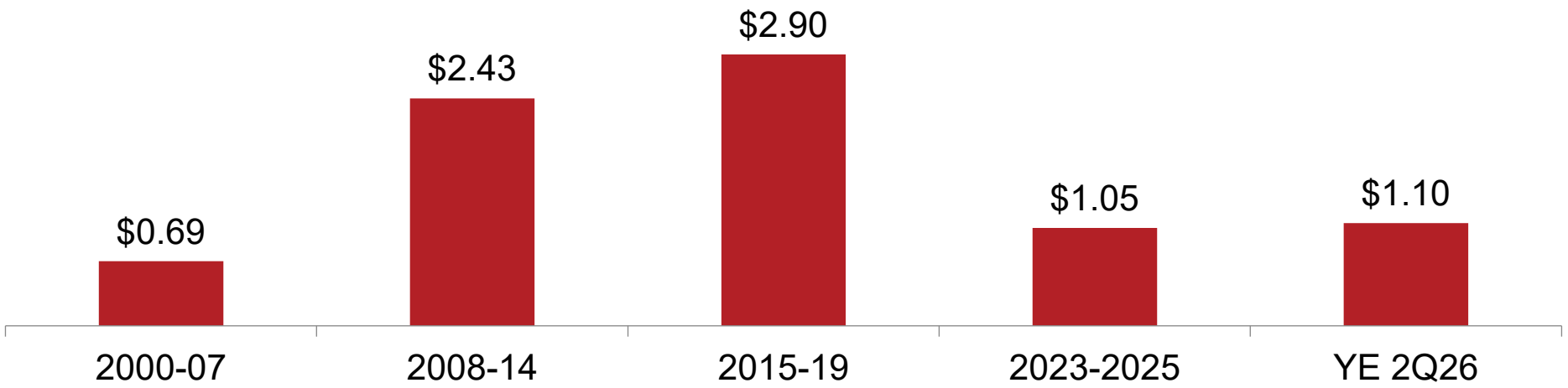
Source: Econic Partners analysis of DOT O&D survey data. Global network carriers (GNCs) include AA/DL/UA and predecessor airlines (e.g., US Airways, America West, TWA, Northwest, Continental) and defunct legacy network carriers (e.g., Eastern, Braniff). Low-cost carriers includes Southwest, JetBlue, Breeze, Reno Air, Midway, Pro Air, Kiwi International, AirTran, Accessair, Independence, Eastwind, National, ValuJet, ATA, Skybus, People Express, Vanguard, Virgin America, Western Pacific, Air South, and Morris Air). Lower cost network carriers include Alaska, Hawaiian and Aloha. Ultra low-cost carriers (ULCCs) include Allegiant, Frontier, Spirit, Sun Country, and Avelo.

Post Pandemic, Airline Revenues From Reservation Change Fees Have Fallen Sharply

Widespread Elimination of Change Fees and Same-Day Standby Fees Has Boosted Travel Flexibility

On Aug. 30-31, 2020: United/Alaska/American/Delta announced a widespread elimination of change fees.

U.S. Airline Change-Fee Revenues — Annual Average, in Billions



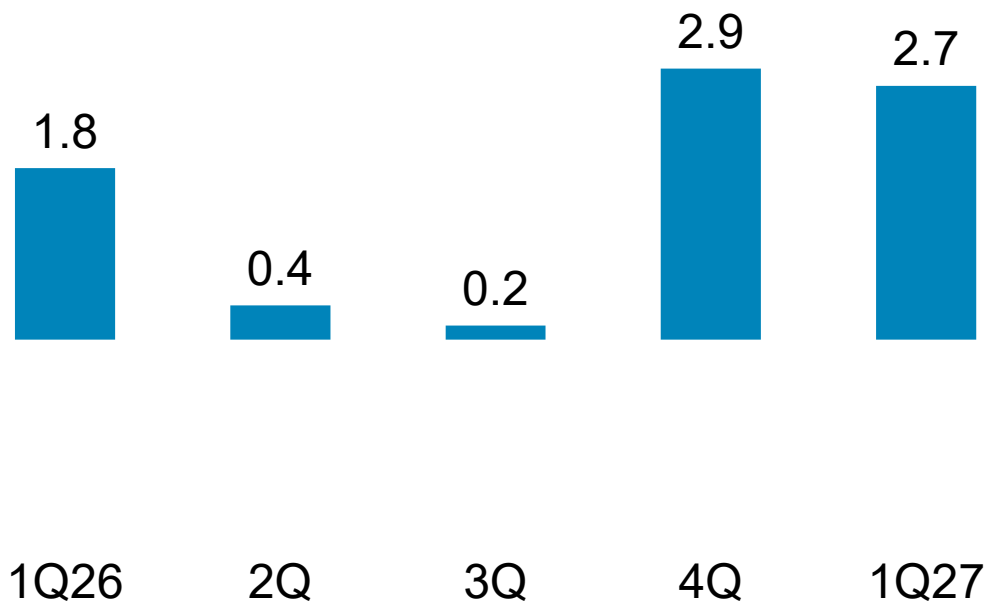
"**It makes me feel a lot better as a consumer**. It makes me feel more willing to book something now."
— Brett Snyder, CrankyFlier.com (Aug. 31, 2020)

Sources: U.S. Bureau of Transportation Statistics Form 41; Kyle Arnold, *The Dallas Morning News* (Aug. 31, 2020); Savannah Levins, 11 Alive (April 4, 2022)

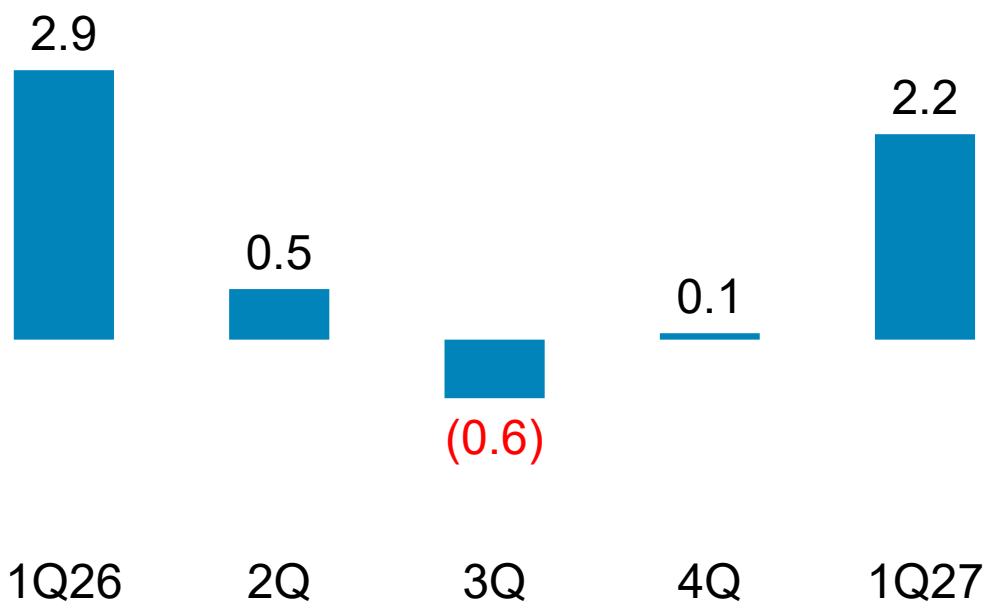
With Fuel Prices Elevated, U.S. Airlines Pared Apr-Sep 2026 Capacity Growth

But Current Schedules Show Resurgent Growth

Scheduled U.S. Domestic Capacity
% Change YOY in Available Seat Miles



Scheduled U.S. International Capacity*
% Change YOY in Available Seat Miles



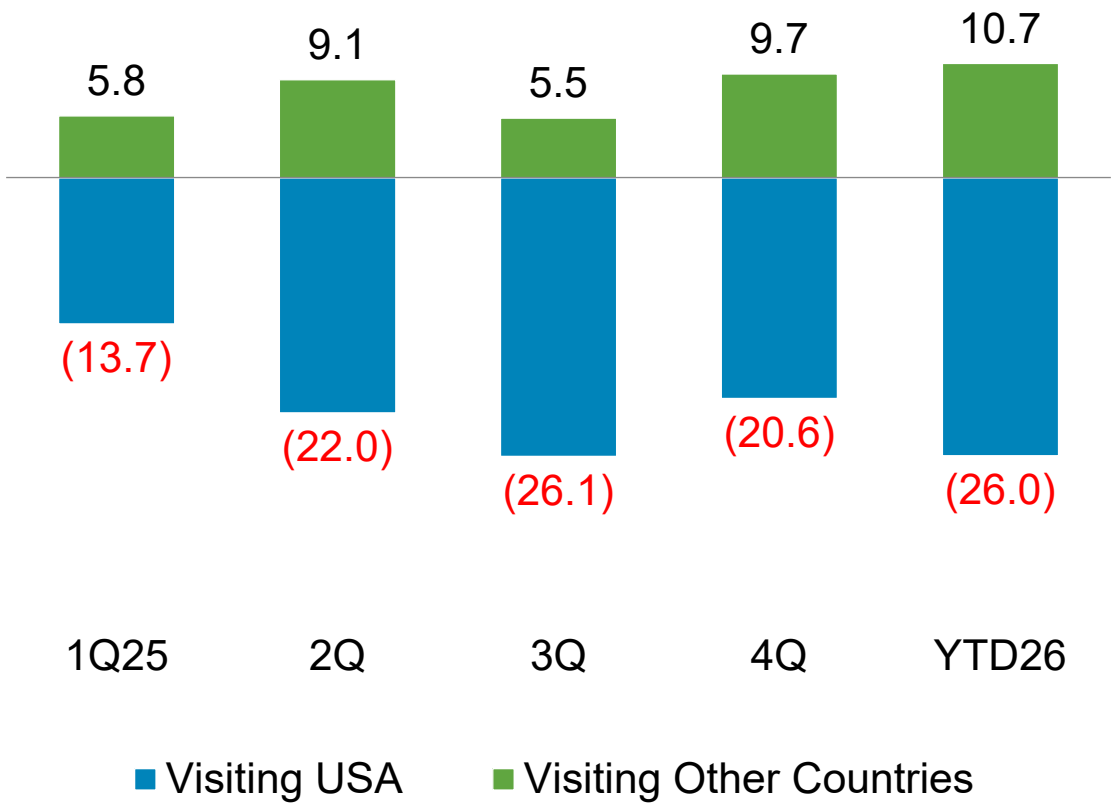
Source: Cirium published schedules (Nov. 7, 2026)

* Alaska (incl. Hawaiian)/American/Delta/JetBlue/Southwest/United

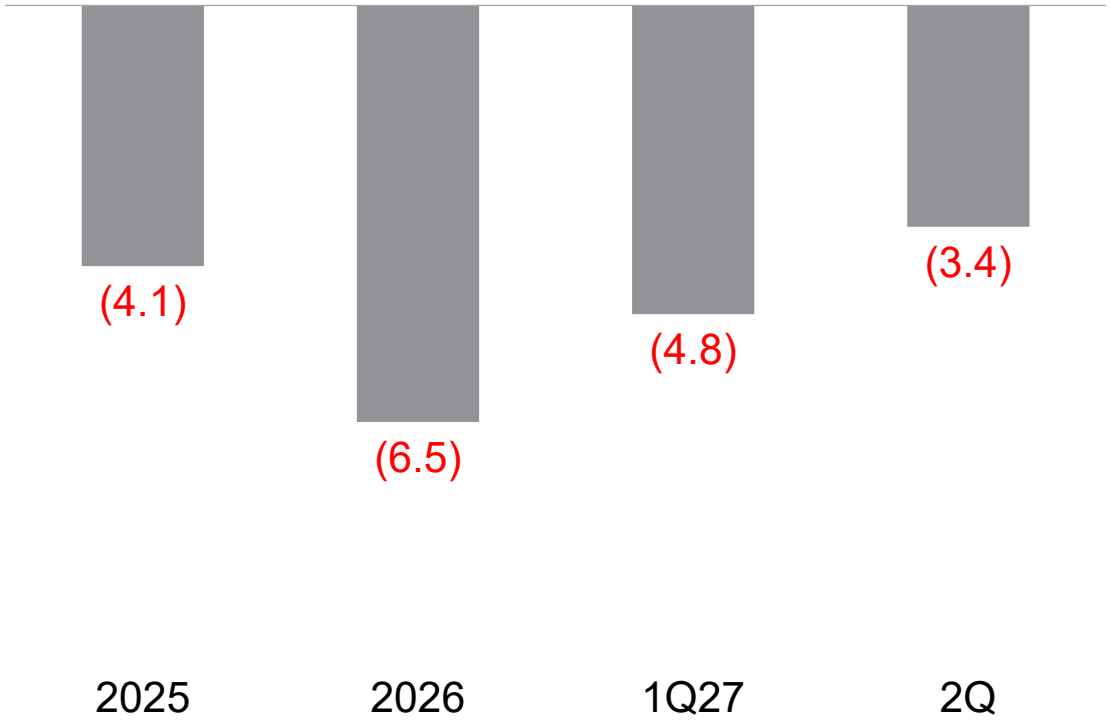
Canadian-Resident Air Trips to the United States Have Fallen Sharply Since 2024

In Response, Airlines Have Reduced Transborder Seats

% Change vs. 2024 in Canadians Returning by Air



% Change vs. 2024 in U.S.-Canada Seats



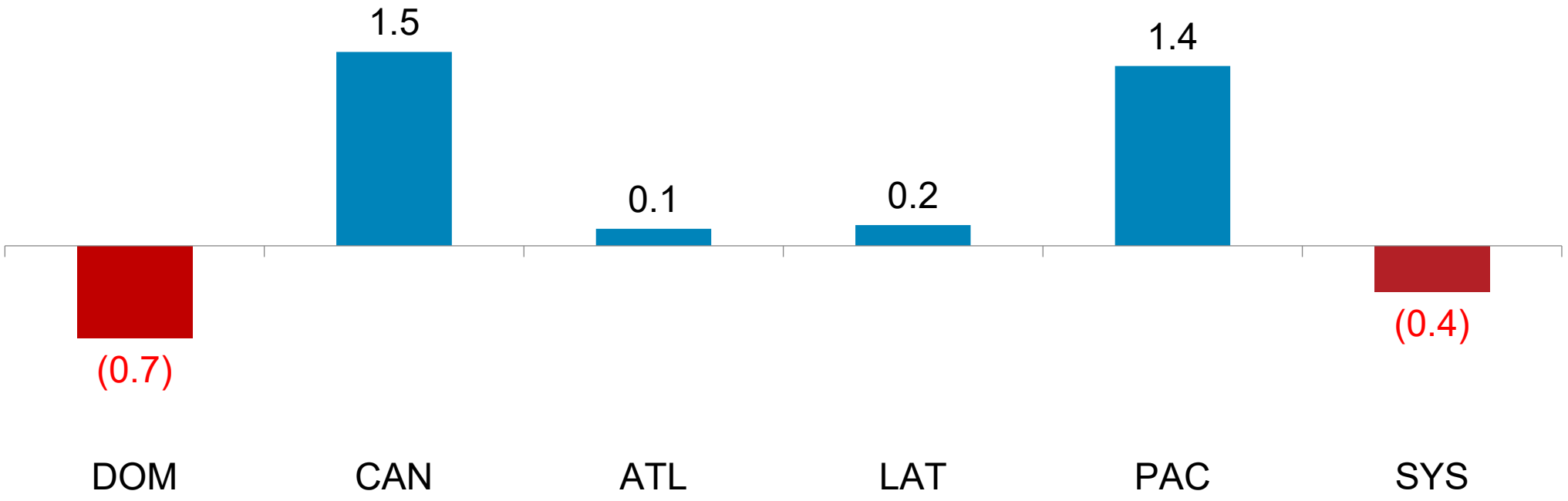
Sources: Statistics Canada (https://www.statcan.gc.ca/en/start) and Cirium published schedules (Nov. 7, 2026) for all airlines offering scheduled service from the United States to Canada

First 10 Months of 2026: A4A Systemwide Load Factor Down

Domestic Down 0.7 Points, Offsetting International Gains

YOY Change (Points) in Load Factor on Alaska/American/Delta/JetBlue/Southwest/United

Jan-Oct 2026 vs. Jan-Oct 2025



Source: A4A member airlines (including Hawaiian Airlines) and branded code share partners

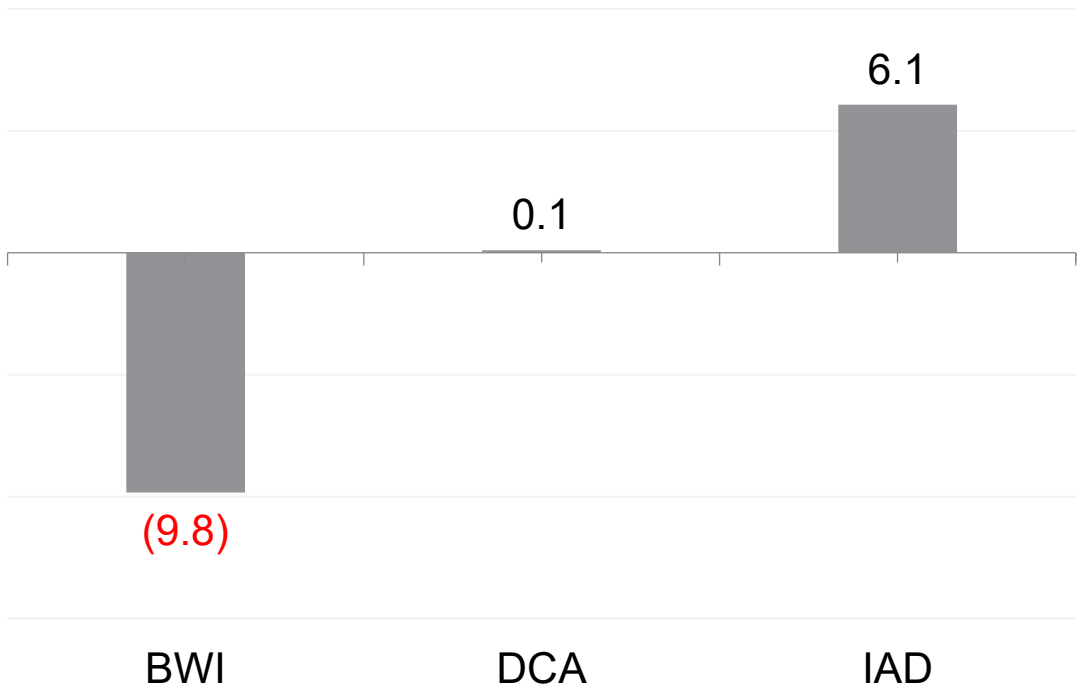
TSA Throughput at Baltimore (BWI) Down ~10% From 2024, Up ~6% at Dulles (IAD)

Washington Reagan (DCA) Unchanged

"Enrico Moretti, an economist at the University of California, Berkeley, said **each federal job in the capital region likely creates 1.6 additional jobs in the local economy over a decade, an effect that would be reversed in the event of job cuts**."

Paul Kiernan and Rachel Louise Ensign
The Wall Street Journal (April 19, 2025)

% Change in Screened Passengers* From 2024 to 2026



Sources: Transportation Security Administration and *The Wall Street Journal* (April 19, 2025)

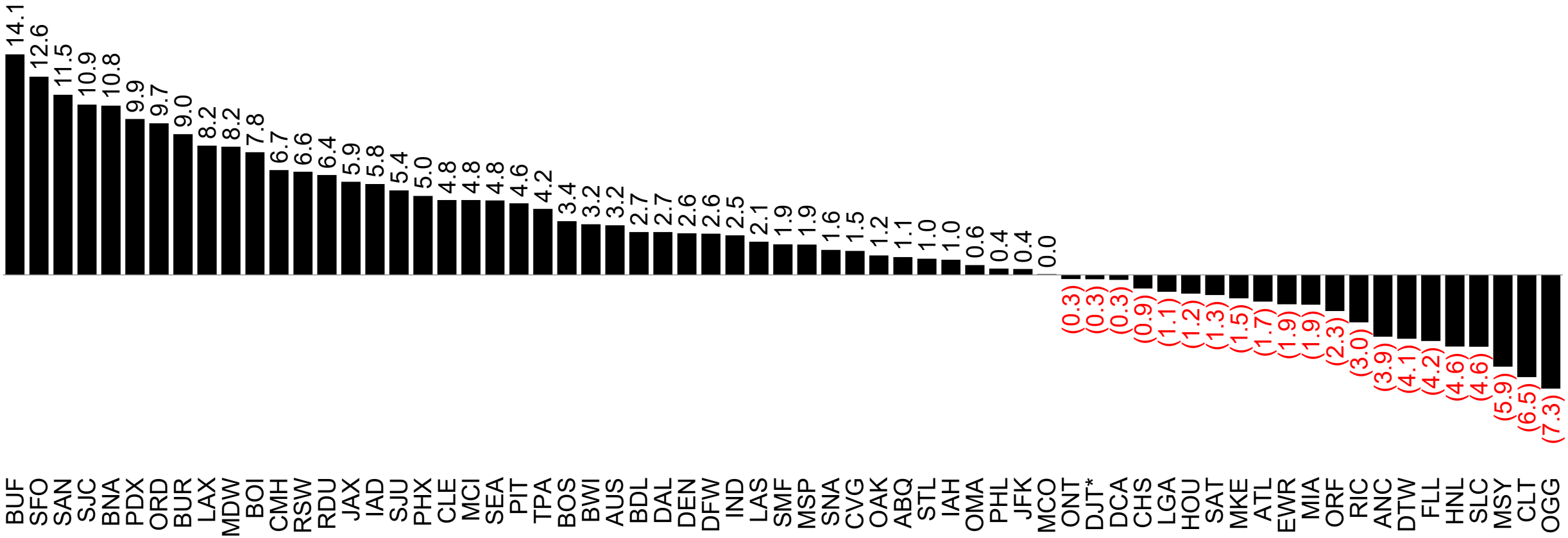
* U.S. and foreign-carrier customers (*excludes* Known Crewmember® personnel) traversing TSA checkpoints

1Q 2027: Schedules Show Seats Growing > 12% YOY at Buffalo and SFO

Among the Largest U.S. Airports, Maui and Charlotte Seeing the Deepest YOY Cuts

% Change in *Systemwide* Scheduled Seats*

1Q 2027 vs. 1Q 2026

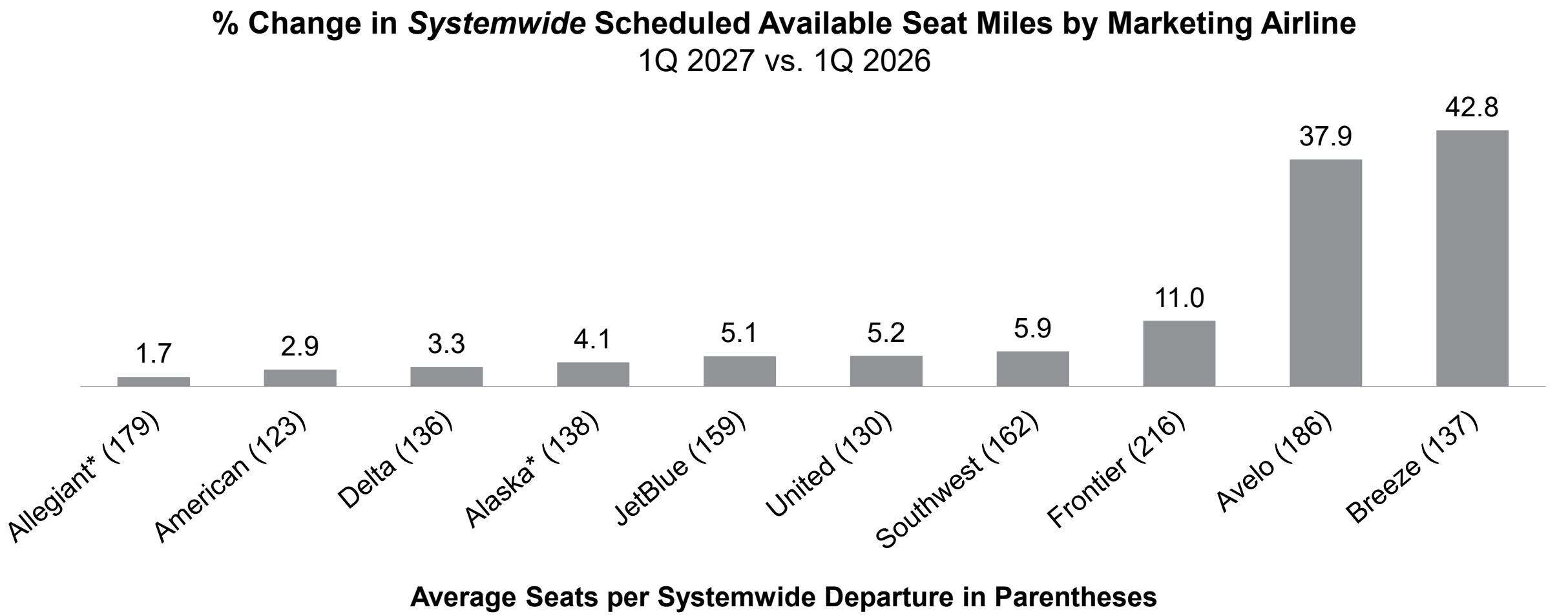


Source: Cirium published schedules (Nov. 7, 2026)

* All U.S. and non-U.S. airlines providing scheduled service to all U.S. and non-U.S. destinations; DJT includes ops performed under code PBI

1Q 2027 Schedules: Frontier Growing 11% Systemwide

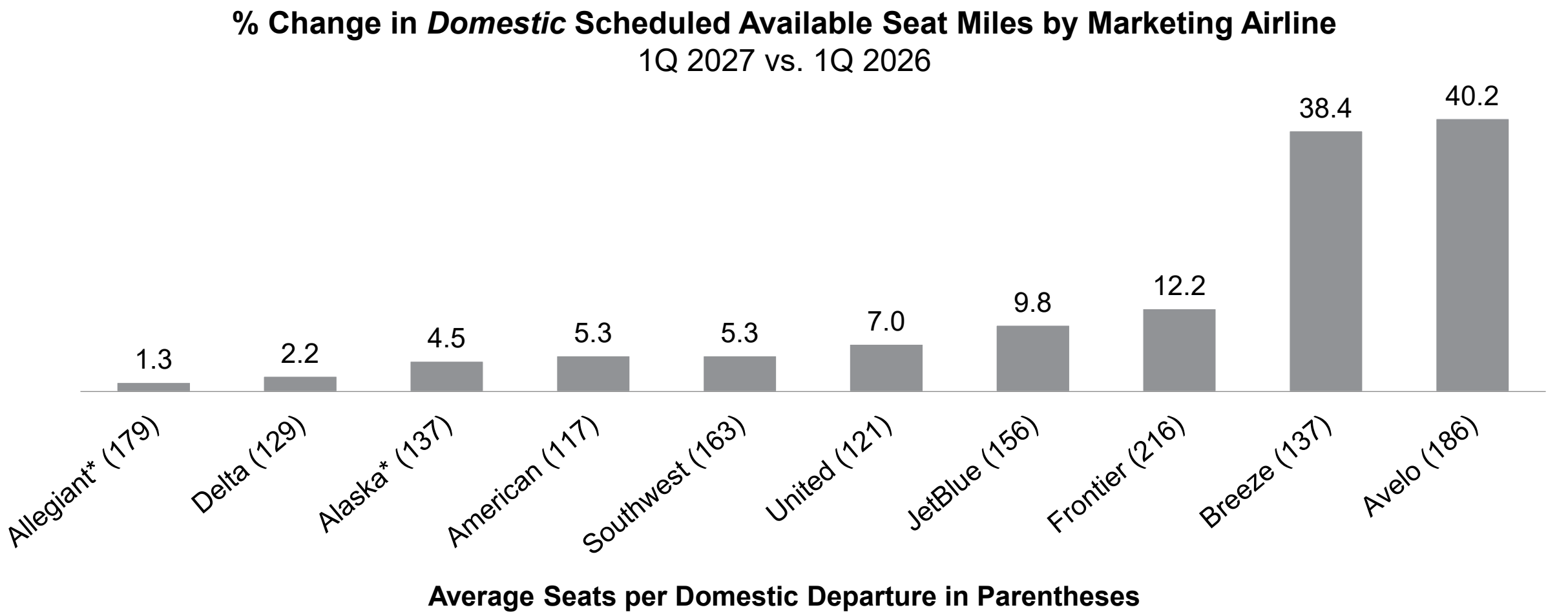
Southwest/United/JetBlue Growing 5-6%



Source: Cirium published schedules (Nov. 7, 2026) for selected marketing airlines (including regional affiliates)

* Alaska includes Hawaiian operations; Allegiant includes Sun Country operations

1Q 2027 Schedules: Frontier Growing 12% Domestically, JetBlue 10%, United 7%

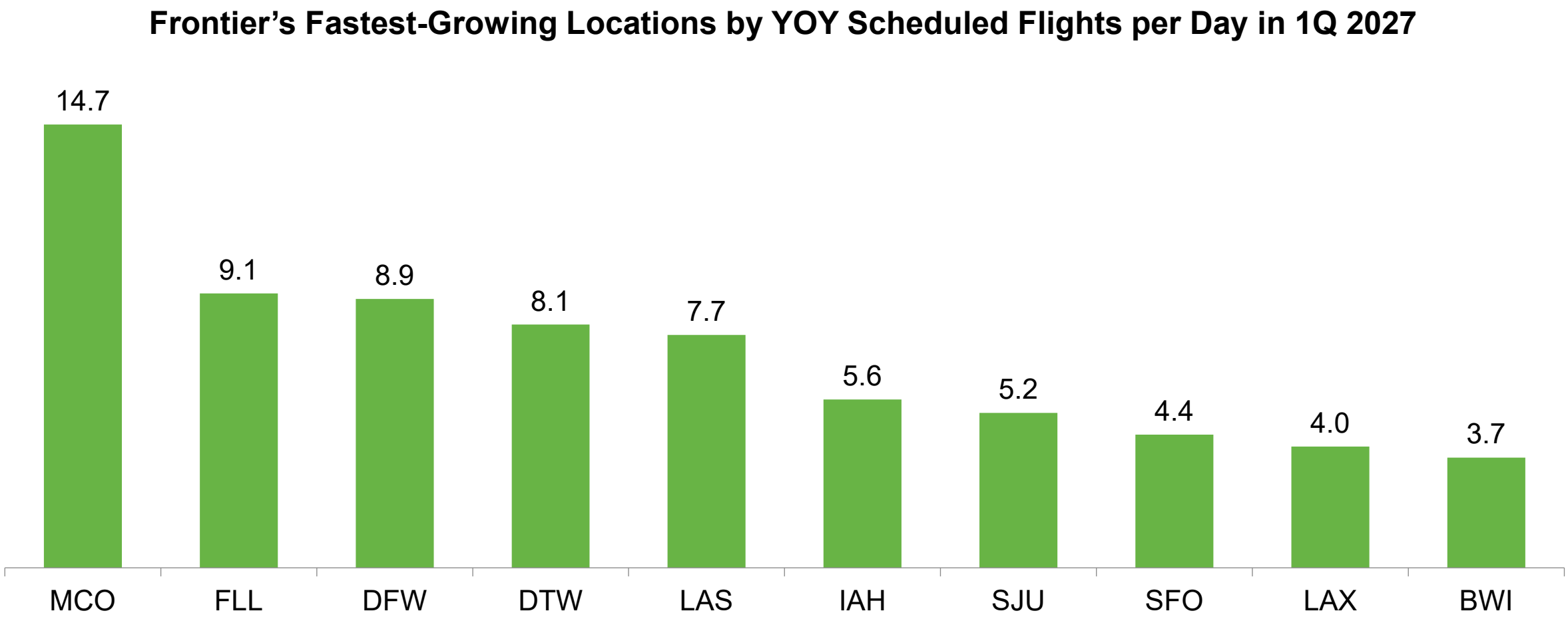


Source: Cirium published schedules (Nov. 7, 2026) for selected marketing airlines (including regional affiliates)

* Alaska includes Hawaiian operations; Allegiant includes Sun Country operations

In Spirit's Absence, Frontier Is Growing Materially in Numerous Markets

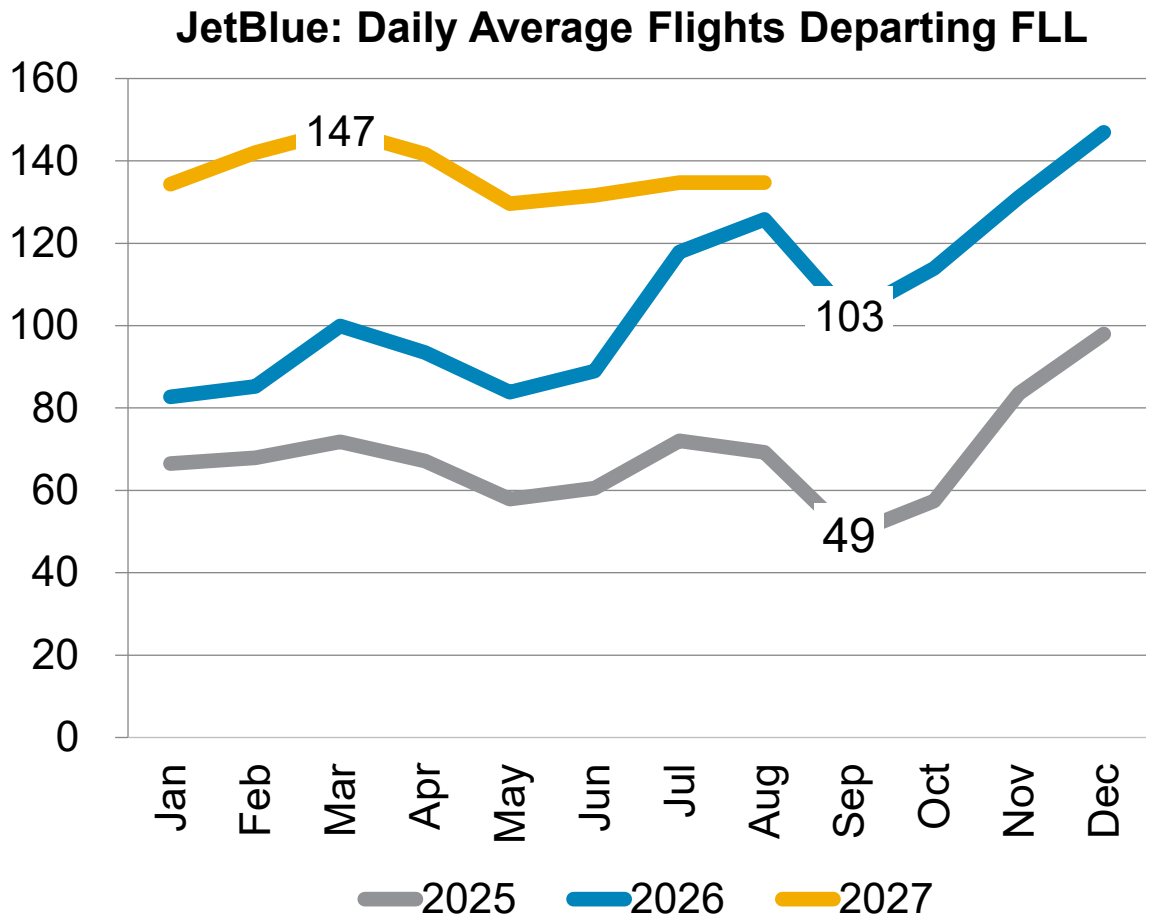
Features Double-Digit Daily Departure Growth YOY in Orlando



Source: Cirium published schedules (Nov. 7, 2026)

JetBlue Is Accelerating Its Growth in Fort Lauderdale

Spirit's Cessation Has Created Additional Opportunities to Bolster Position in South Florida



"**JetBlue** Airways is already the biggest airline in Fort Lauderdale, Florida, and it **wants to get even bigger**… Capitalizing on growth at the Broward County airport is key for JetBlue as it revamps its network… JetBlue says it's **planning for even more growth as additional gates become available after Spirit's demise**."

Leslie Josephs, CNBC, "JetBlue bets big on Fort Lauderdale, from a new airport lounge to an international gateway" (June 14, 2026)

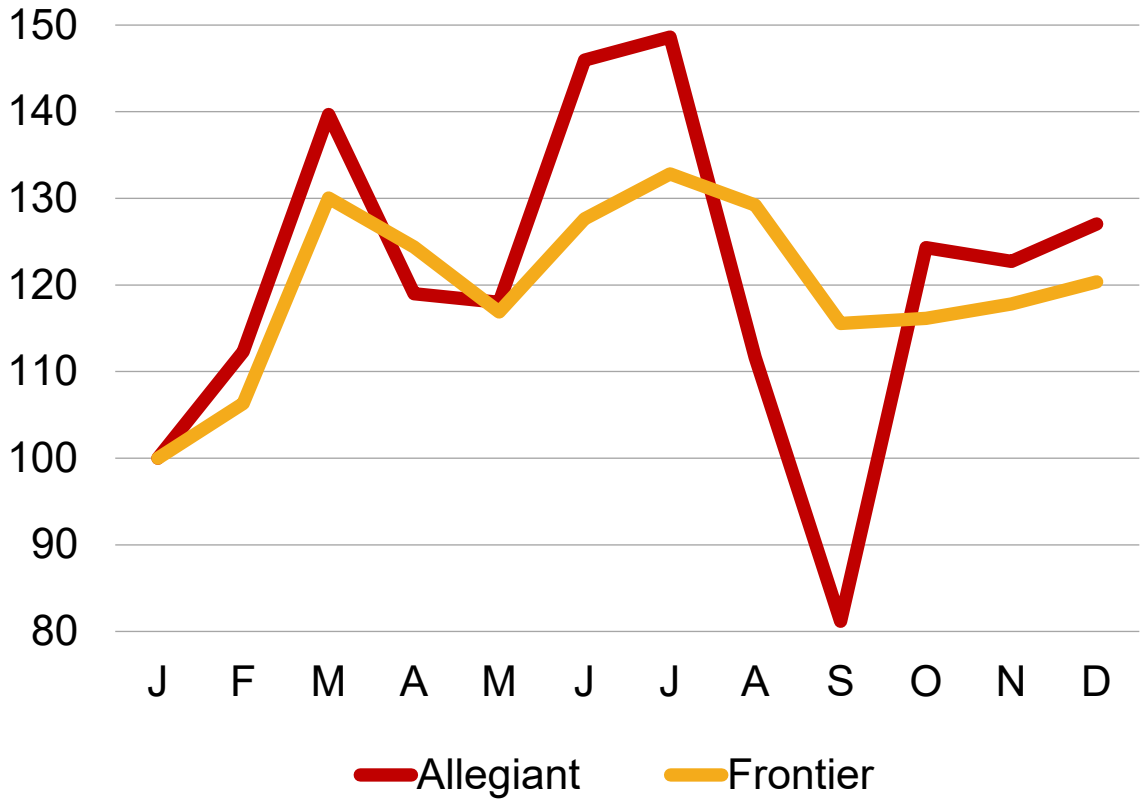
"**We're in a very competitive marketplace**, and the ability to take a market like South Florida, which is a very big metro area with a great combination of leisure, business, and VFR demand, and **to be an unequivocal No. 1 in that part of South Florida, I think is an incredible opportunity for us**."

JetBlue President Marty St. George, interview with The Airline Observer (June 25, 2026)

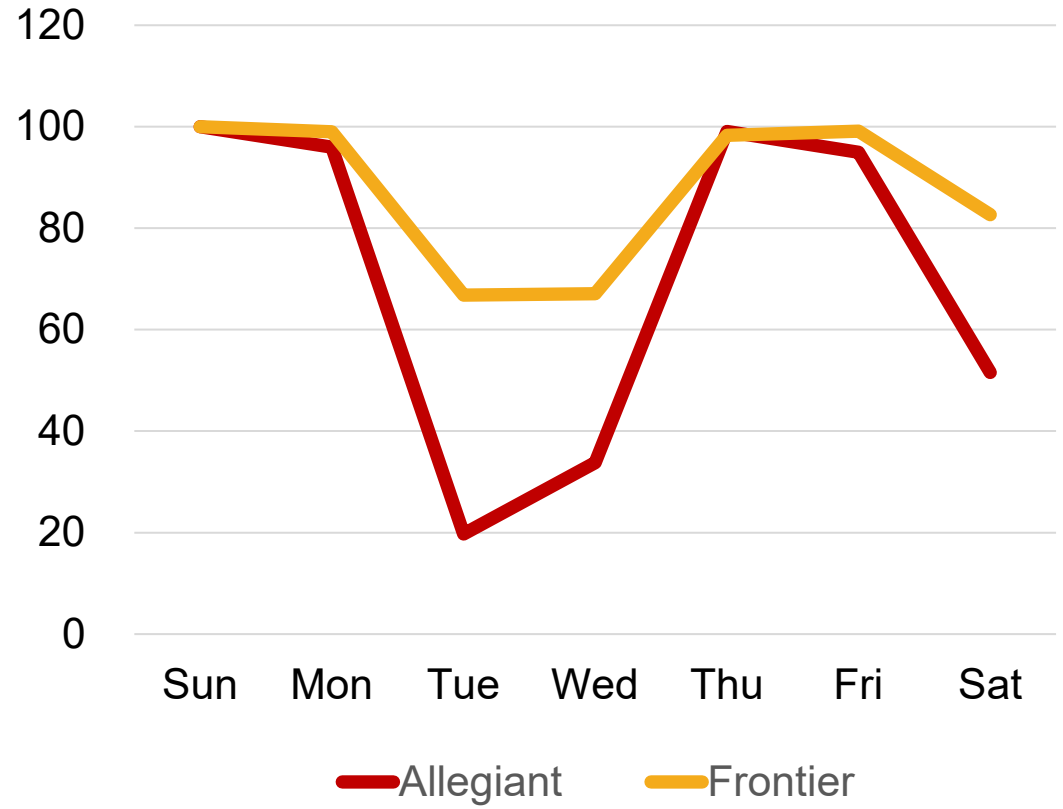
Source: Cirium published schedules (Nov. 7, 2026) and https://www.cnbc.com/2026/06/14/jetblue-fort-lauderdale-airport.html

Allegiant Is More Aggressive Than Frontier in Varying Flights by Month and by Day of Week

Scheduled Flights by Month, 2026
Index: January = 100



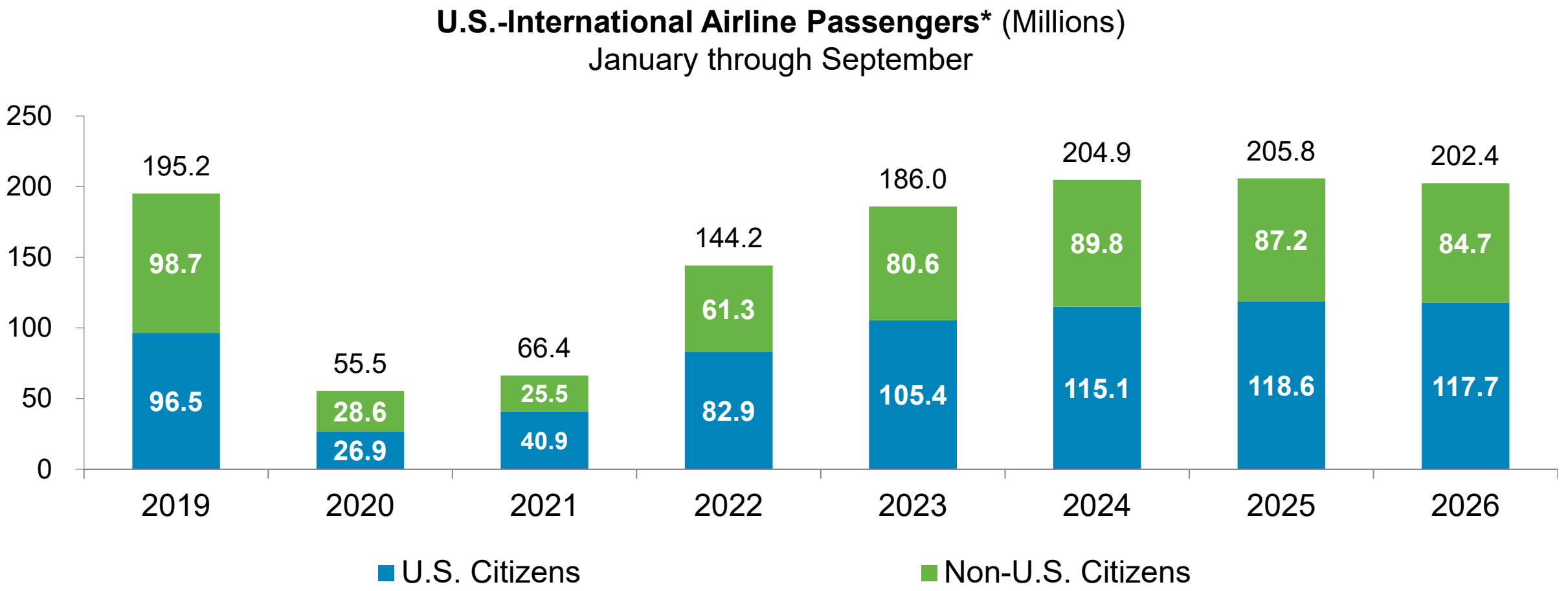
Scheduled Flights by Day, 2026
Index: Sunday = 100



Source: Cirium published schedules (Oct. 23, 2026)

U.S.-International Air Passengers Subsided 1.7% in the First Nine Months of 2026

U.S. Citizen Volumes Down 0.8%, Non-U.S. Citizen Passengers Down 2.9%



Source: DHS I-92 / APIS data compiled by U.S. Department of Commerce National Travel and Tourism Office

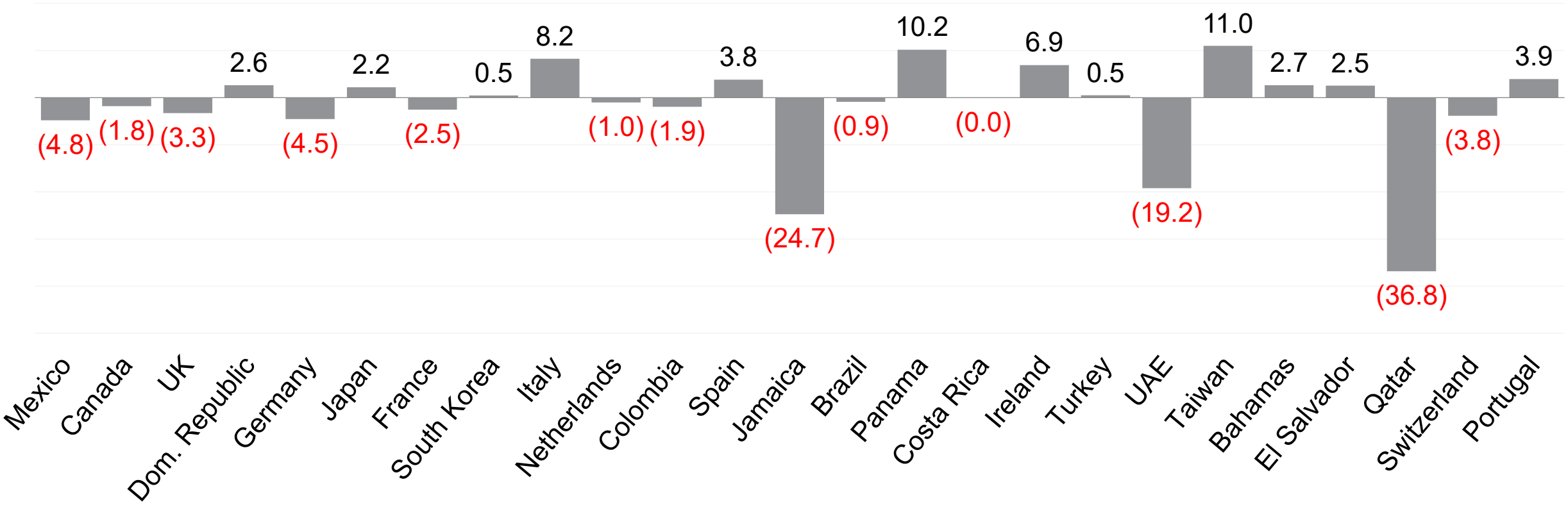
* Gateway-to-gateway passengers on U.S. and foreign scheduled and charter airlines

In Jan-Sep 2026, The Three Largest U.S.-International Markets Saw Fewer Passengers YOY

But Volumes Between U.S.-Dominican Republic/Japan/South Korea/Italy/Spain Rose YOY

Change (%) YOY in Passengers* for Top 25 U.S. Gateway-Foreign Gateway Markets — Jan-Sep 2026

Sorted Left to Right by YTD 2025 Market Size

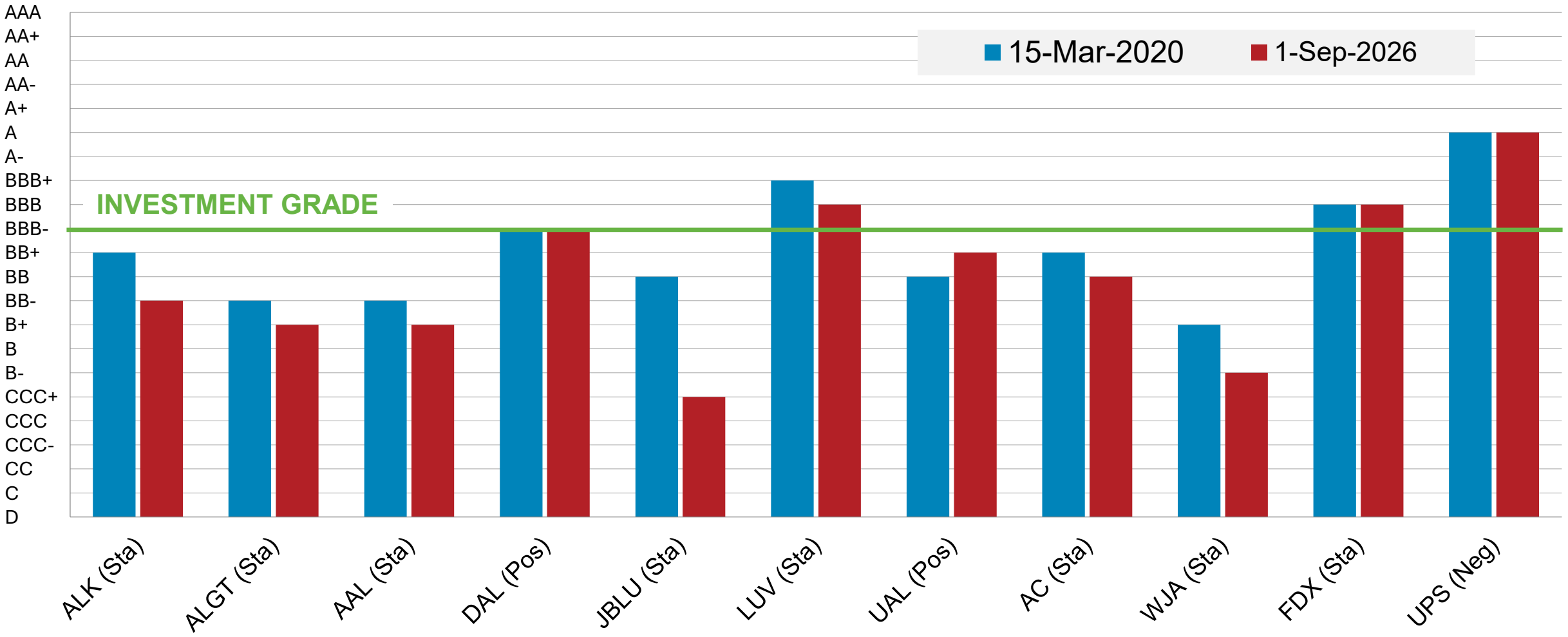


Source: DHS I-92 / APIS data compiled by U.S. Department of Commerce National Travel and Tourism Office

* Gateway-to-gateway passengers on U.S. and foreign scheduled and charter airlines

For Most North American Passenger Airlines, Balance Sheet Quality Remains Depressed

Ratings Reflect Assessment of Financial Condition and Risk

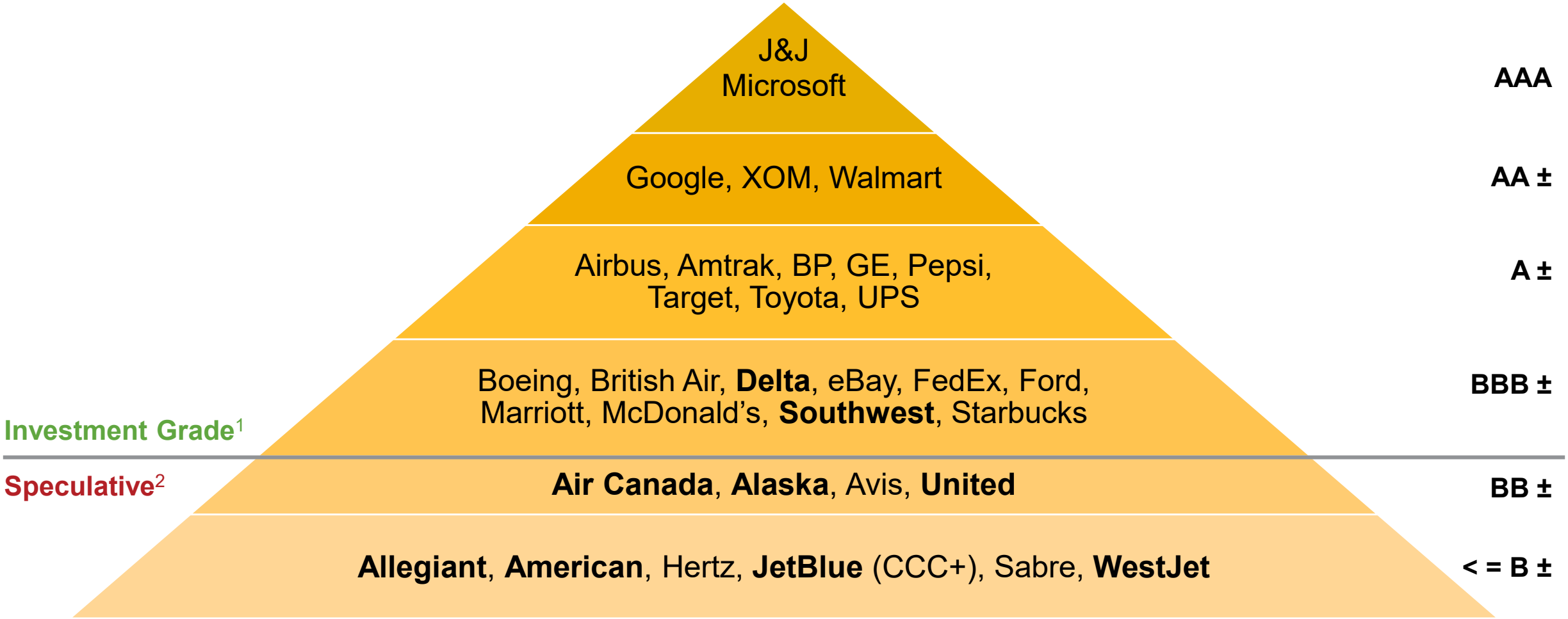


Source: Standard & Poor's issuer ratings and outlook (in parentheses) for publicly traded U.S. and Canadian carriers in the S&P coverage universe

Note: Pos = positive outlook; Neg = negative outlook; Sta = stable

Airline Balance Sheets Continue to Lag Those of Many Fortune 500s and Amtrak

S&P Credit Ratings Reflect Assessment of Financial Condition and Risk for Selected Companies

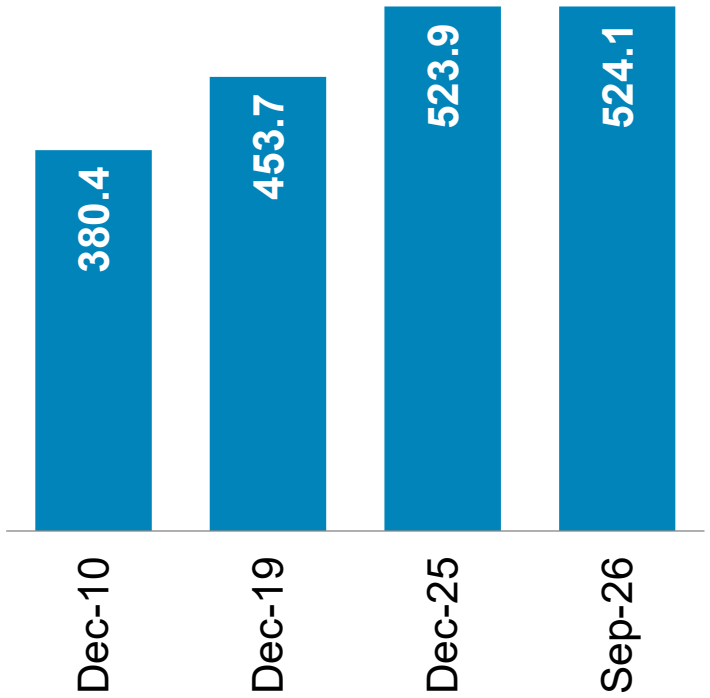


Source: Standard & Poor's (**bold** = air-only companies) as of May 1, 2026

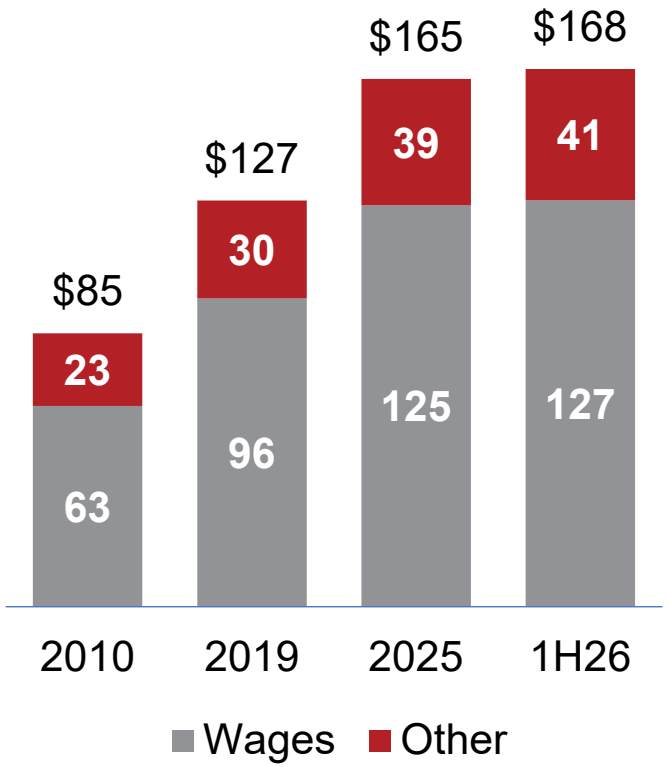
[1] Issuers with relatively high levels of creditworthiness and credit quality
[2] Issuers with ability to repay but facing significant uncertainties, such as adverse business or financial circumstances that could affect credit risk

Firmer Financial Footing Has Enabled Airlines to Reinvest in Employees, Whose Average Wage Rose 100% from 2010-2025 (vs. 48% U.S. CPI) and Who Now Garner a Third of Airline Revenues

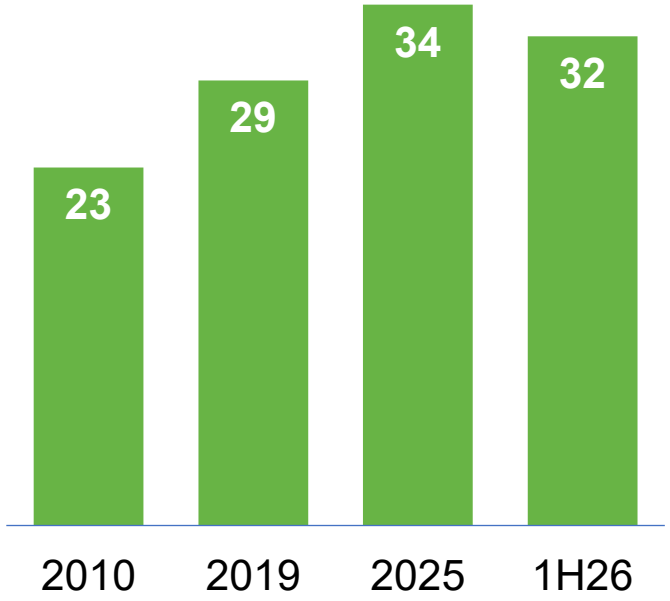
Employees (000 FTEs*)



Average Compensation (000)



Wages and Benefits as % of Operating Revenues

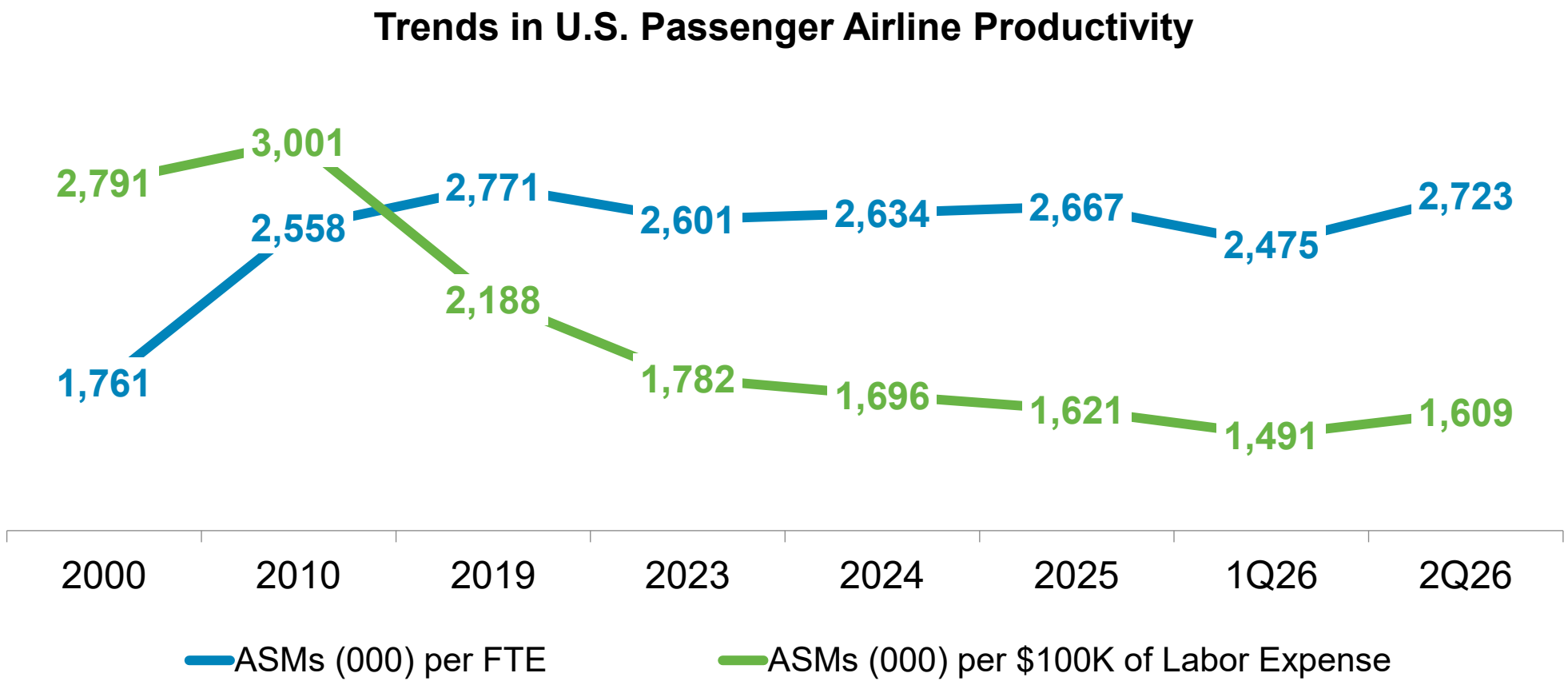


Source: U.S. Bureau of Transportation Statistics for scheduled U.S. passenger airlines and A4A Passenger Airline Cost Index

* Full-time equivalents (FTE) = full-time workers plus 0.5 * part-time workers

U.S. Airline FTE Productivity Rose in 2025, But Labor-Dollar Productivity Was ~25% Below 2019

Greater Labor Expense Needed to Generate Pre-Pandemic Levels of Capacity

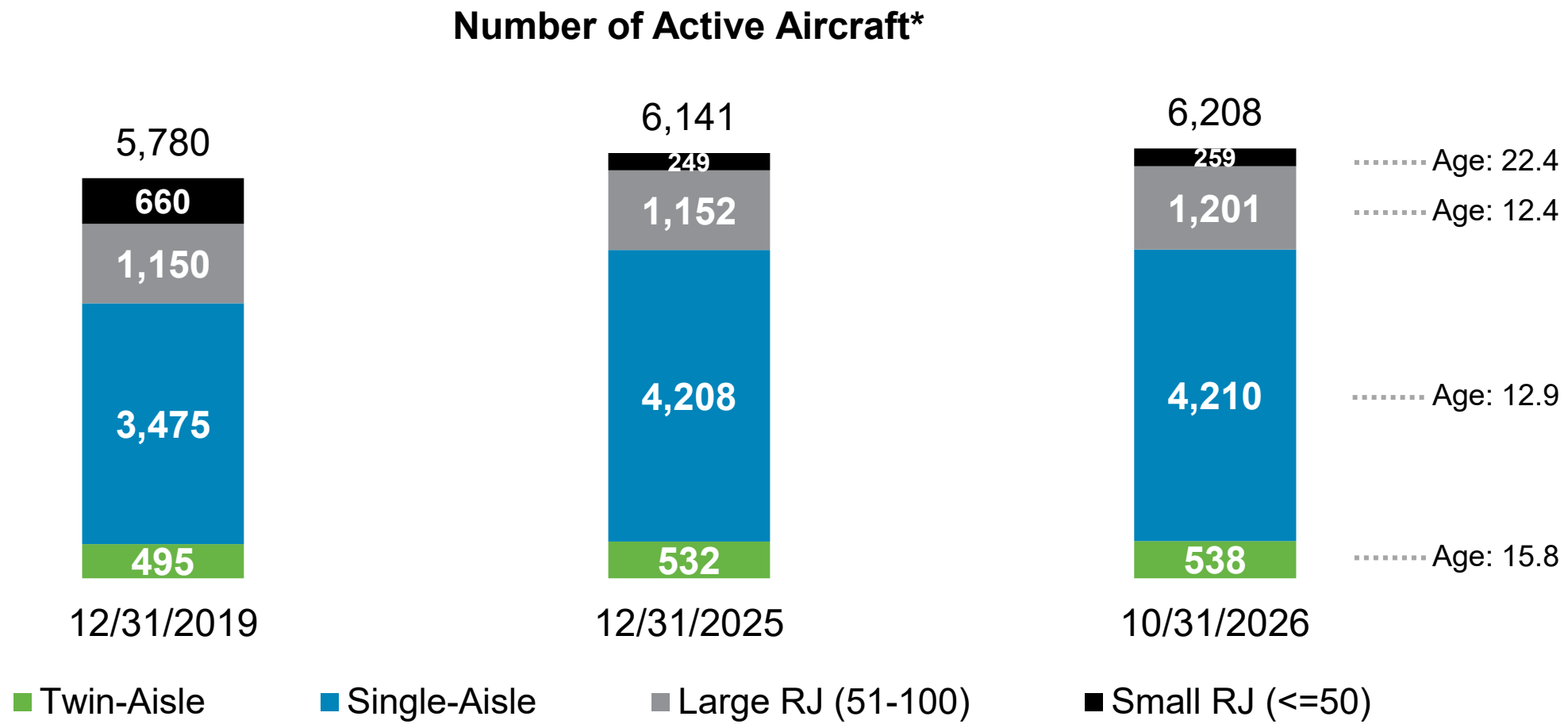


Source: A4A Passenger Airline Cost Index

Note: ASM = available seat mile (basic unit of passenger airline capacity)

U.S. Passenger Airlines Are Operating ~20% More Single-Aisle Aircraft Than at Year-End 2019

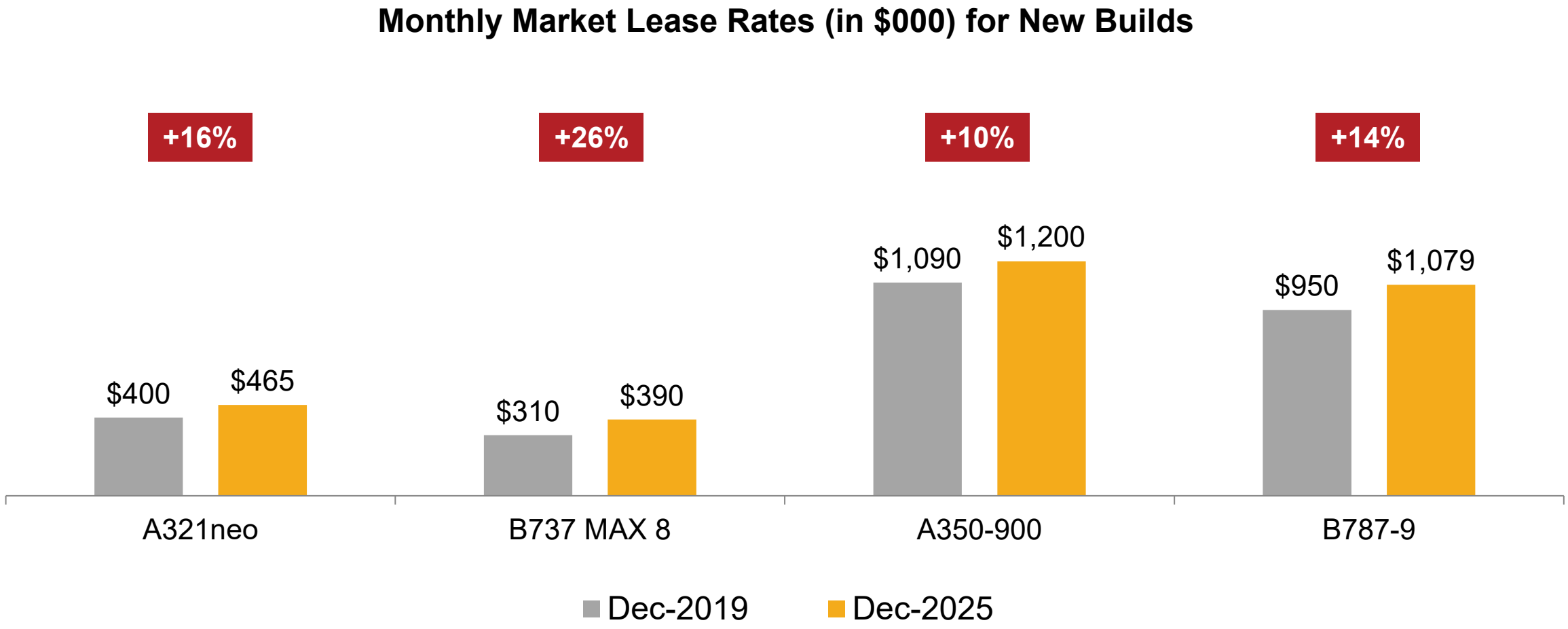
But the Aging Fleet of *Small* Regional Aircraft Is ~60% Smaller



Source: Anuvu (ages as of 6/30/2026)

* Operated by or on behalf of Alaska/Allegiant/American/Avelo/Breeze/Delta/Frontier/Hawaiian/JetBlue/Southwest/Spirit/Sun Country/United in any of the previous seven days

Airplanes Have Gotten Significantly More Expensive, Reflecting Elevated Interest Rates, General Inflation and Supply Chain Tightness, Among Other Factors



Source: Cirium and Deutsche Bank

U.S. Airlines Are Investing Heavily in Aircraft, Ground Equipment, Facilities and Technology

Financial Recovery Has Enabled Record Rates of Reinvestment, Exceeding $21B Annually

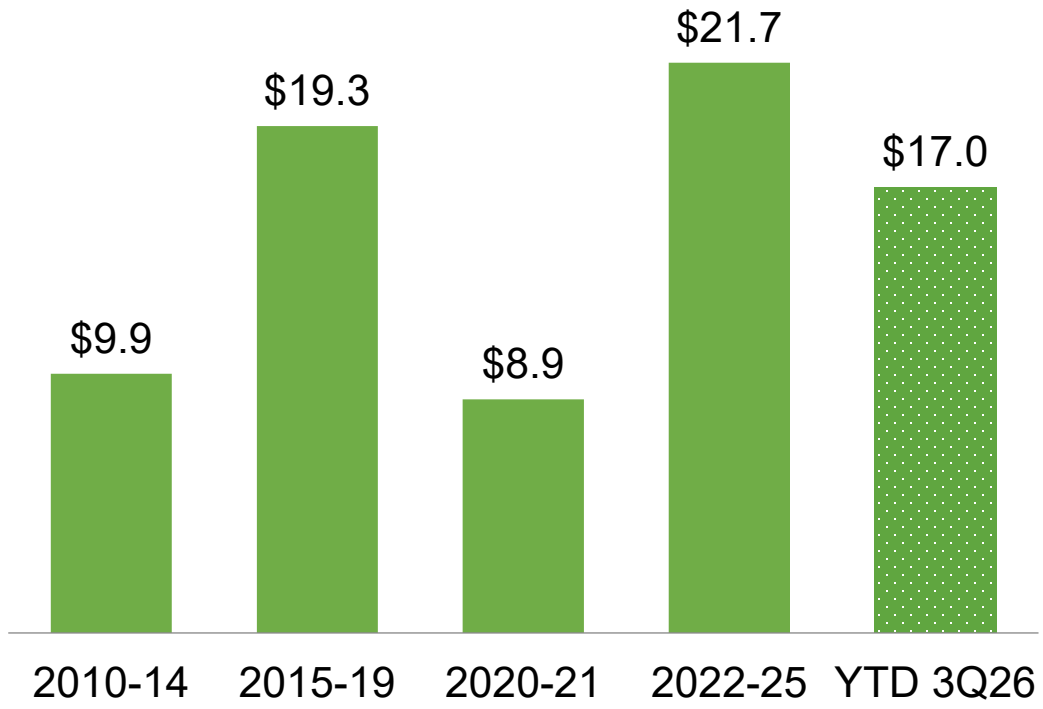








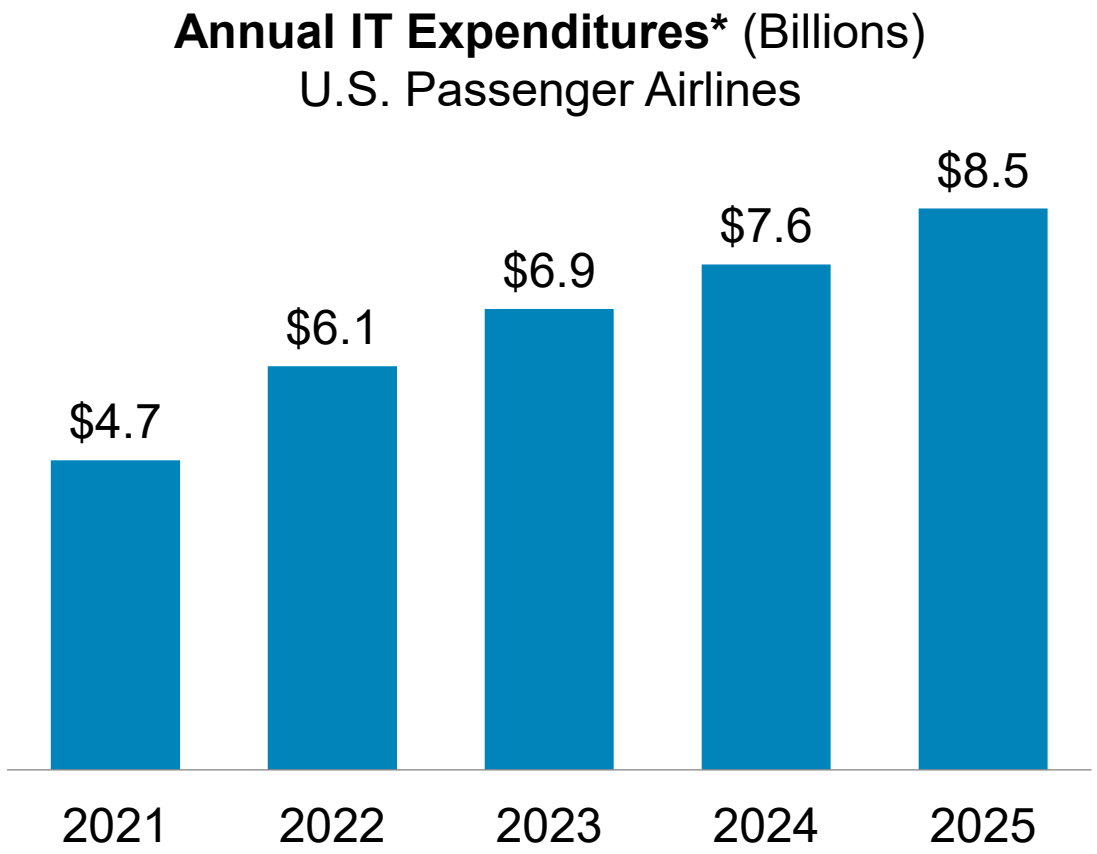
Average Annual Capital Expenditures* (Bils)
U.S. Passenger Airlines



* Includes payments made for aircraft and other flight equipment, ground and other property and equipment (e.g., baggage carts, lavatory trucks, deicing vehicles), airport and other facility construction and technology
Sources: CapEx from SEC filings of Alaska/Hawaiian, Allegiant, American, Delta, Frontier, Hawaiian, JetBlue, Southwest, Spirit, Sun Country, United and predecessors plus Republic/Mesa and SkyWest

U.S. Passenger Airlines Have Steadily Increased IT Expenditures, Reaching ~$8.5B in 2025

Goal: Boost Operational Resiliency/Redundancy/Security and Customer Self-Service Functionality



Making it easier for travelers to:

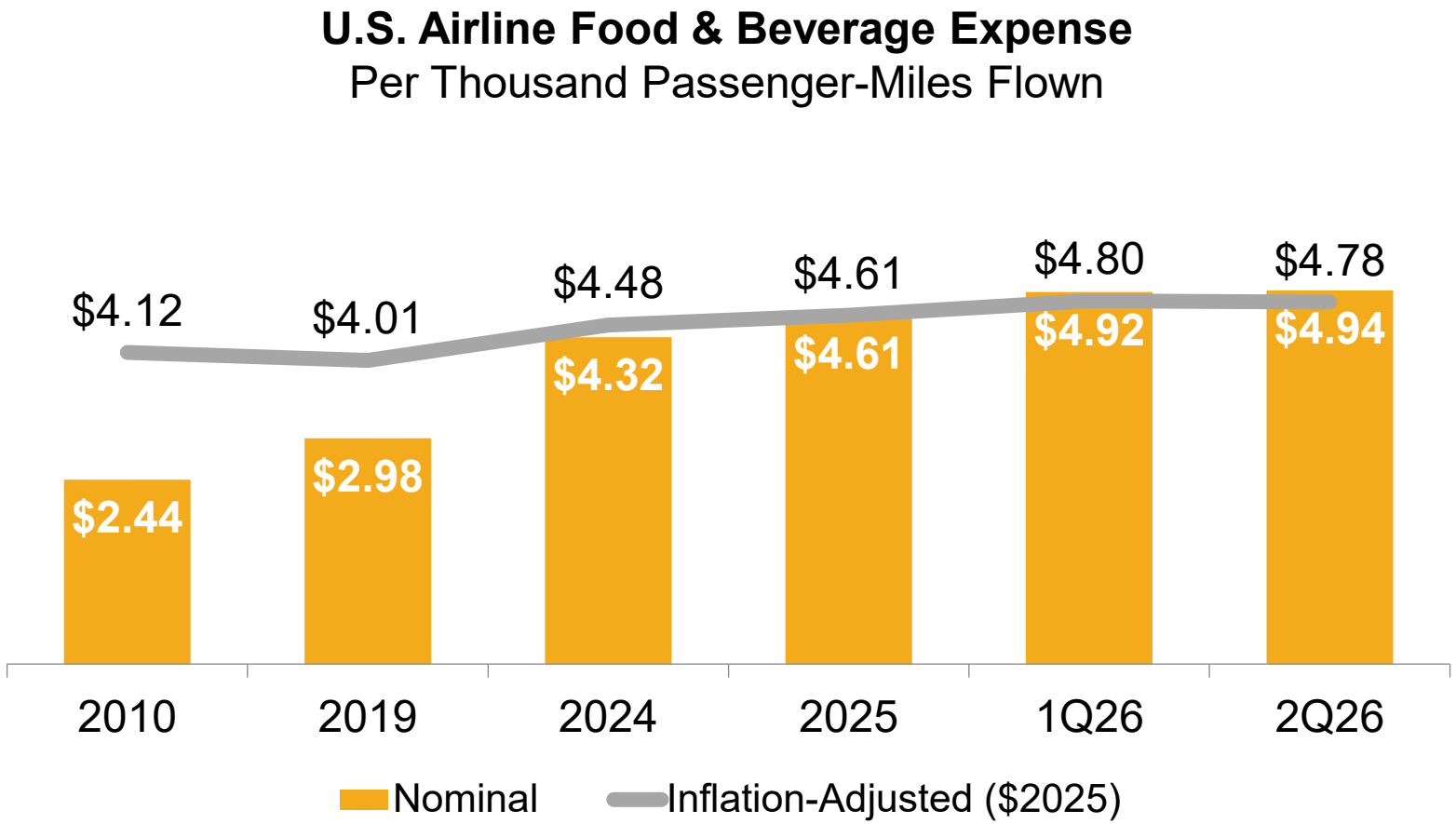
- Shop for tickets
- Modify itineraries
- Check in for flights
- Navigate airports
- Check and/or track bags
- Stay apprised of flight status
- Redeem vouchers/loyalty points

Sources: Alaska/Hawaiian, Allegiant, American, Avelo, Breeze, Delta, Frontier, JetBlue, Southwest, Spirit, Sun Country, United

* IT operating expenses plus capital expenditures, net of depreciation (where available)

U.S. Airlines Have Greatly Increased Spending on Inflight Food and Beverage

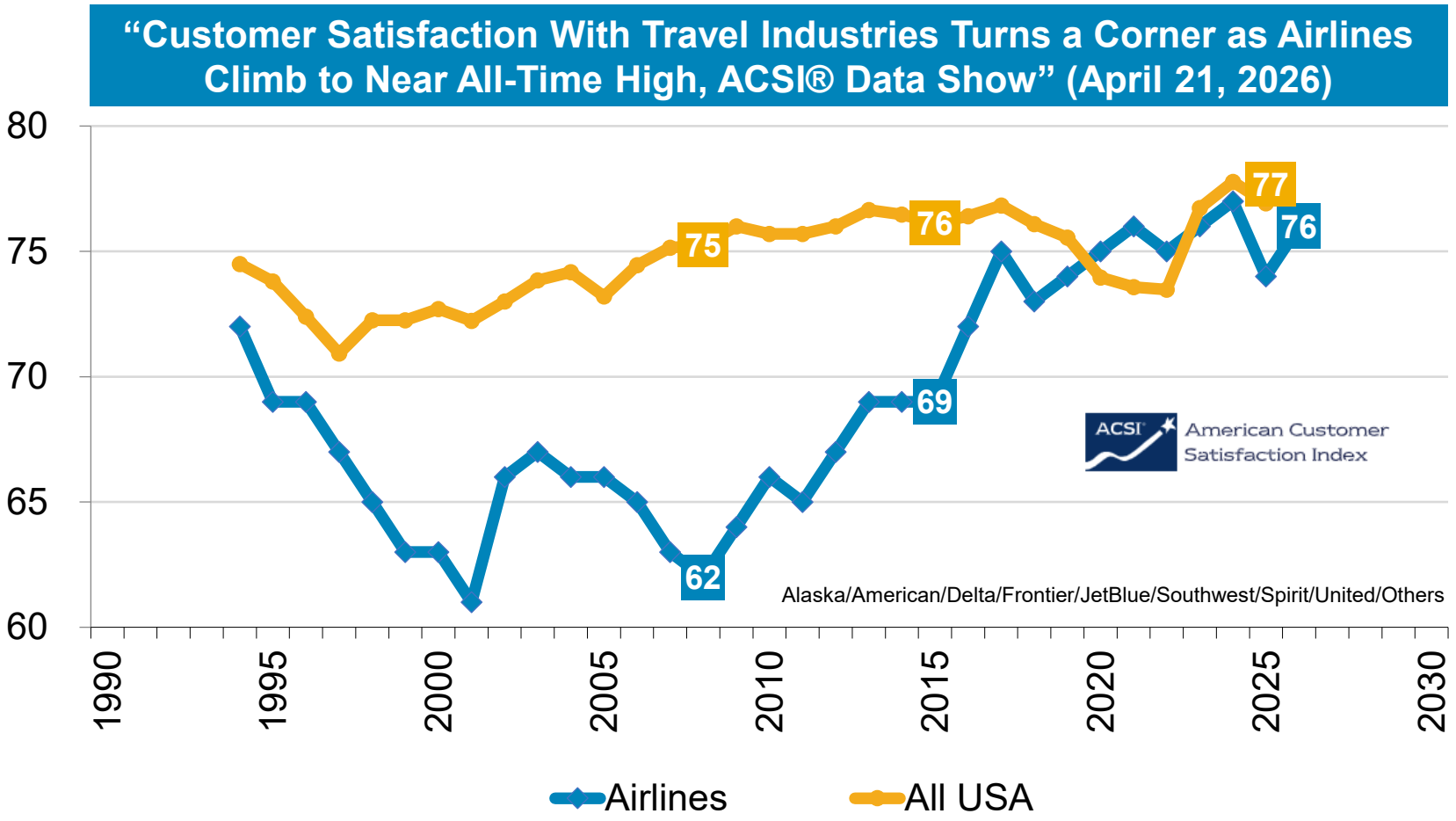
Drivers Include the Pursuit of Brand-Loyal and Premium Customers



Sources: A4A Passenger Airline Cost Index and Consumer Price Index for All Urban Consumers: Food Away from Home in U.S. City Average (CUUR0000SEFV)

ACSI Airline Customer Satisfaction Index Now at 76, Up From 62 in 2008 and 69 in 2015

In 2026, Airlines Scored 80+ on 15 of the 21 Benchmarks

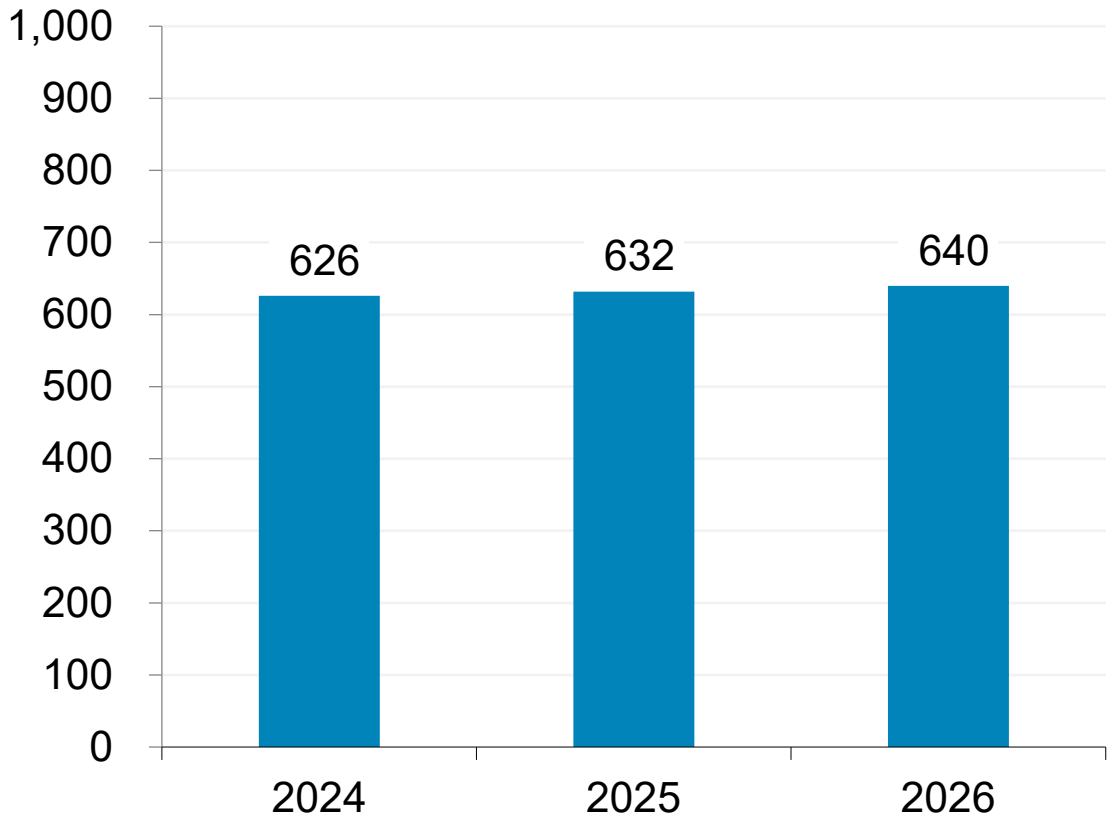


Satisfaction Benchmark	2026
Mobile app reliability	85
Mobile app quality	84
Website satisfaction	84
Ease of making a reservation	84
Ease of check-in process	82
Cleanliness of cabin and lavatory	82
Courtesy/helpfulness of gate staff	82
Courtesy/helpfulness of flight crew	82
Boarding experience	82
Timeliness of arrival	82
Usefulness of flight information	82
Baggage handling	81
Call center satisfaction	81
Loyalty program	81
Range of flight schedules	80
Availability/size of overhead storage	79
Quality of purchased food/beverage	79
Quality of comped food/beverage	79
Quality of in-flight Wi-Fi	79
Quality of in-flight entertainment	78
Seat comfort	76

Source: The American Customer Satisfaction Index (ACSI®), the only national cross-industry measure of customer satisfaction, measures the satisfaction of U.S. household consumers with the quality of products and services offered by firms with significant share in U.S. markets. The ACSI Travel Study 2026 is based on 14,910 completed surveys. Customers were chosen at random and contacted via email between April 2025 and March 2026.

JD Power: North America Airline Customer Satisfaction Rose Eight Points in 2026

"Airlines Deliver Strong Passenger Experience, Despite Industry Challenges, JD Power Finds" (May 6, 2026)



The North America Airline Satisfaction Study measures passenger satisfaction with airline carriers in North America based on performance in **seven core dimensions** on a poor-to-perfect 6-point rating scale. Individual dimensions measured are (in alphabetical order): airline staff; digital tools; ease of travel; level of trust; on-board experience; pre/post-flight experience; and value for price paid. The study measures passenger satisfaction in **three segments**—first/business; premium economy; and economy/basic economy.

Note: JD Power study methodology changed in 2024.

Note: The 2026 study reflected responses from 10,914 passengers who flew on a major North America airline within the past month of completing a survey. The study was fielded from March 2025 through March 2026.
Source: JD Power North America Airline Satisfaction Study℠



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