

# Benchmarking **Airline** CX Metrics in the **U.S., Q4 2025**

Comparing **key customer experience performance indicators**

## Overview

The following report evaluates the state of customer experiences in the United States during the fourth and final quarter of 2025 and compares it to past quarters of the year. The survey was conducted online with a sample of 1,001 participants, all of whom are involved in household purchasing decisions.

By analyzing seven key industries in the U.S., the report provides a clear picture of customer loyalty, satisfaction & purchase intent and highlight which brands are excelling in customer experience. To ensure reliable and accurate insights, only brands that met the minimum required number of responses were included in the analysis.

By year-end, a synchronized correction swept across all sectors, marking a universal reset that erased the record-high gains seen during the third quarter of 2025. This dramatic collapse was fueled by a combination of economic fatigue and the operational strain of the holiday season, which pushed customer tolerance to its lowest collective point of the year.

Hotel and Hospitality led the rankings with the highest Net Promoter Score (38) and Customer Satisfaction rating (80%). Conversely, the Automotive sector experienced the most severe volatility, ending with the lowest performance in both NPS (12) and CSAT (65%).

A universal "summer peak, winter crash" pattern emerged, as interest rate hikes and holiday operational pressures drove customer tolerance to yearly lows.

The report reveals a strong correlation between operational consistency and resilience; essential service providers like Banking and Grocery declined less severely than discretionary categories.

In Q4, consumers prioritized value maximization and reliability, rewarding brands like Costco while punishing those that faltered under economic fatigue.

## About the Key Performance Indicators

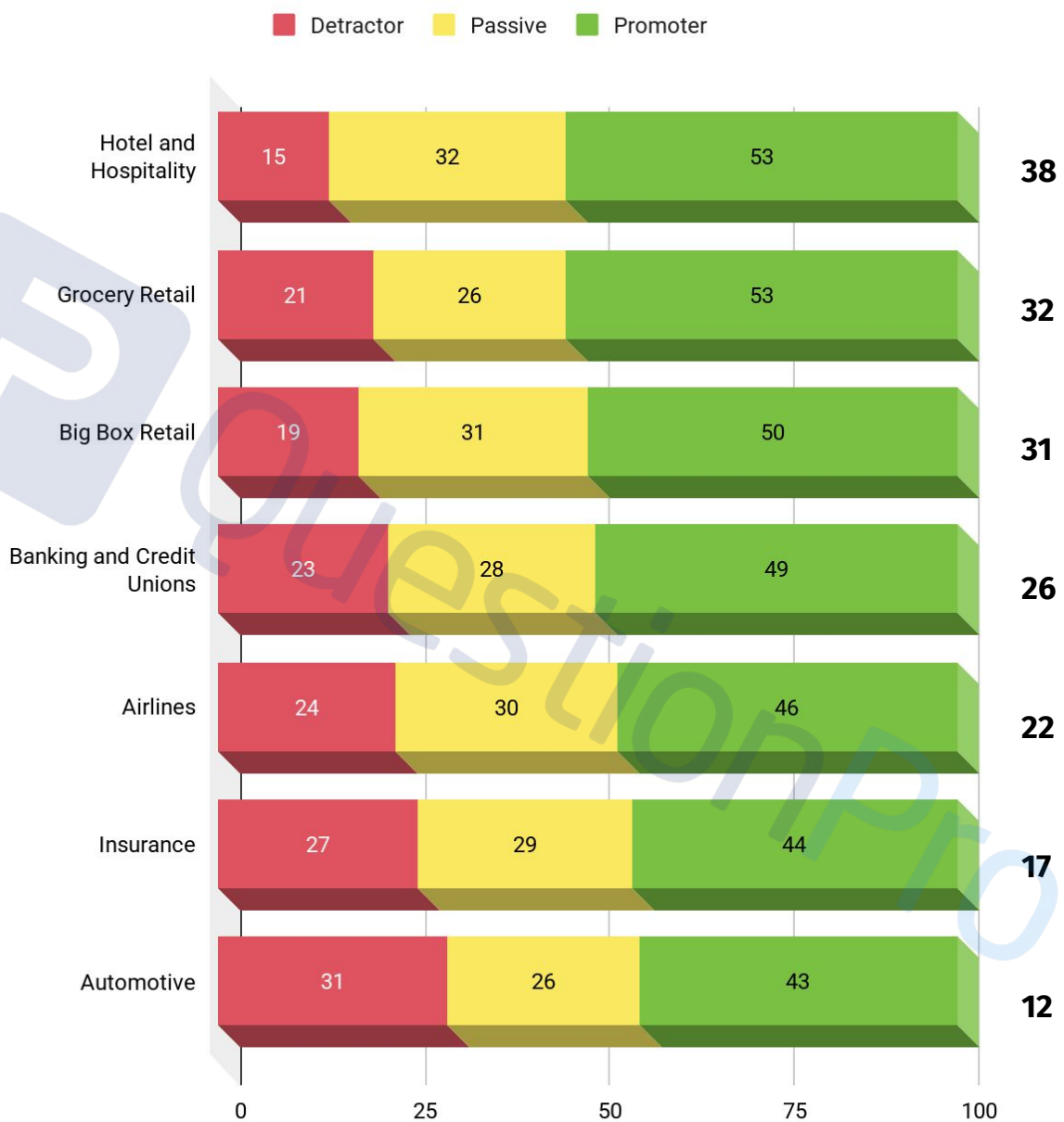
A Key Performance Indicator (KPI) is a measurable value that demonstrates how effectively an organization is achieving its key business objectives. In benchmarking, KPIs are used to compare an organization's performance against industry standards or best practices to identify areas for improvement.

- Net Promoter Score (NPS): Measures customer loyalty by gauging their likelihood to recommend a brand.
- Customer Satisfaction (CSAT): Evaluates overall customer satisfaction with products and services.
- Repurchase intent: Assesses whether customers are likely to continue buying from a brand.

# Q4 2025

## Net promoter score (NPS) by industry

Hotel and Hospitality (38), Grocery Retail (32), and Big Box Retail (31) top the NPS rankings, signaling strong customer loyalty, while Insurance (17) and Automotive (12) lag behind for the final quarter of the year.



## Q4. Net promoter score (NPS) by industry

### NPS Quarterly Comparison

2025 was defined by a dramatic "rise and fall" trajectory across all sectors. A steady first half gave way to a universal Q3 surge, where industries like Hospitality and Insurance hit record highs. However, this momentum proved fragile, crashing in a synchronized Q4 correction that erased all mid-year gains and dragged every major industry back to its lowest satisfaction levels of the year due to economic and operational pressures.

Industry	Q1	Q2	Q3	Q4
Hotel and Hospitality	44	38	56	38
Grocery Retail	37	34	49	32
Big Box Retail	37	32	42	31
Banking and Credit Unions	41	33	51	26
Airlines	33	37	50	22
Insurance	23	22	54	17
Automotive	41	30	44	12

### Insights

In Q4, Hotel & Hospitality (38) and Grocery Retail (32) proved the most resilient, returning to their early-year baselines despite significant drops. This suggests consumers remained more forgiving of essential and experiential services. Big Box Retail also held steady above 30, cushioned by its bulk-value proposition.

Conversely, Automotive (12) and Insurance (17) suffered collapses, ending as the lowest-rated sectors. Insurance saw the most extreme volatility, plummeting from a Q3 high of 54. This massive correction likely indicates that high-ticket bore the brunt of end-of-year consumer frustration.

In Automotive, a drop from 44 to 12 in Q4 2025 is a clear red flag and reflects a broader industry correction. The decline was likely driven by the loss of EV purchase incentives, tariff-related price increases on vehicles and parts, and growing frustration with EV infrastructure and software reliability.

Overall, the synchronized Q4 crash confirms the "Q3 Boom" was a temporary anomaly. By year-end, economic fatigue caused a universal reset in customer tolerance, punishing every sector regardless of prior performance.

Question: "How likely are you to recommend X to your friends or colleague?"

Scale: From "0 = not at all likely" to "10 = extremely likely"

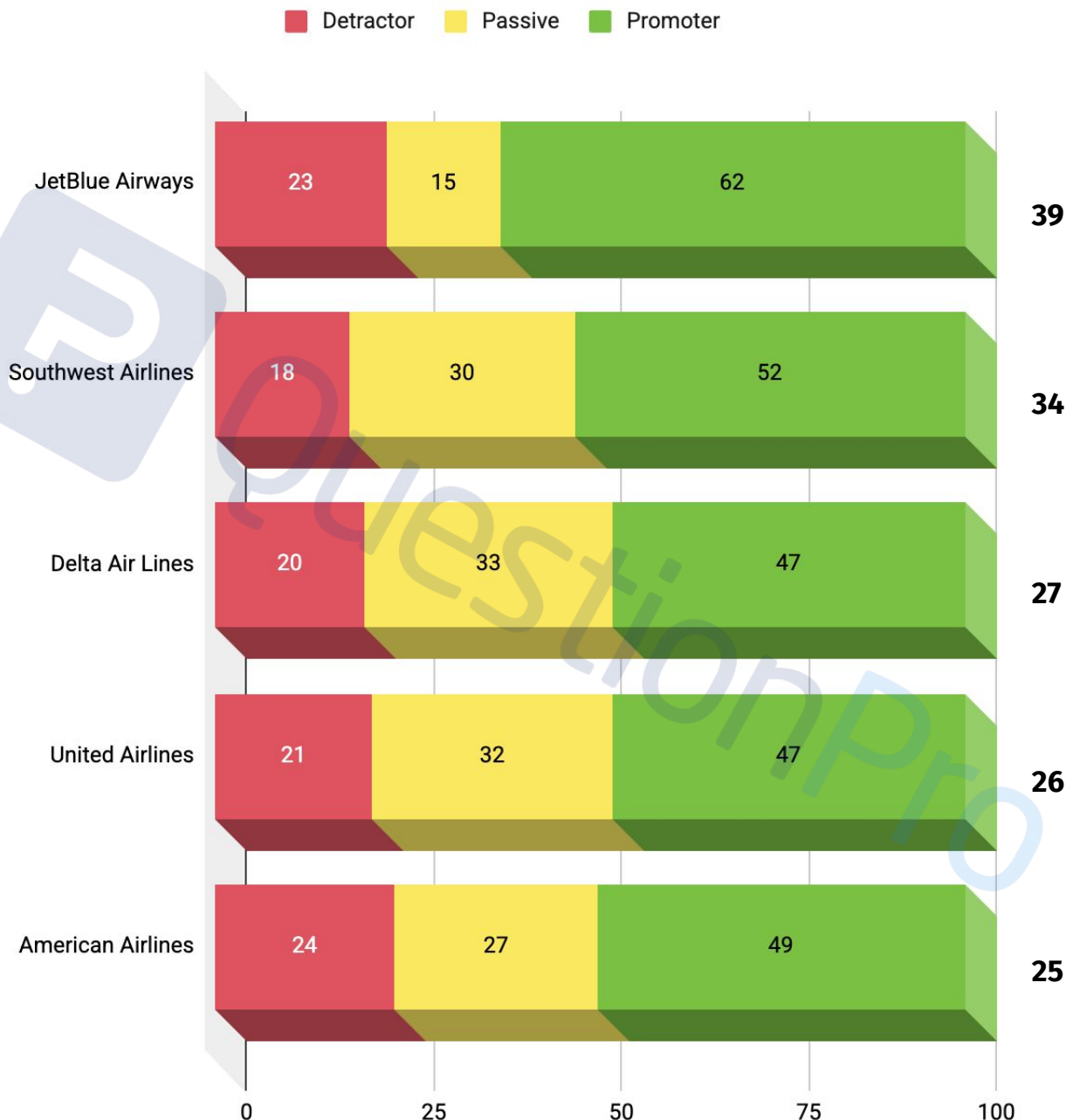
Promoters = 10 and 9, Passives = 8 and 7, Detractors = 6 to 0 | NPS = % share promoters - % share detractors



# Q4 2025

## Net promoter score (NPS) by brands in the **airline** industry

JetBlue Airways takes the top spot with an NPS of 39, followed closely by Southwest Airlines at 34, both demonstrating superior customer loyalty compared to the rest of the field. Meanwhile, the "Big Three"—Delta (27), United (26), and American (25)—are virtually indistinguishable in their performance, all hovering in the mid-20s range.



## Q4. Net promoter score (NPS) by brands in the **airline** industry

### NPS Quarterly Comparison

In Q4, the top-rated carriers JetBlue Airways (39) and Southwest Airlines (34) faced significant turbulence, surrendering the momentum they had built or maintained through Q3. JetBlue, after peaking at 52 in Q3, saw a sharp 13-point drop, while Southwest continued a steady year-long decline to finish at its lowest point.

Airlines	Q1	Q2	Q3	Q4
JetBlue Airways	50	43	52	39
Southwest Airlines	48	45	43	34
Delta Air Lines	43	52	61	27
United Airlines	25	40	45	26
American Airlines	30	33	50	25

### Insights

The Q4 travel environment likely marred by holiday operational meltdowns, rising ticket prices, or weather disruptions overwhelmed their usual customer-first goodwill. The legacy "Big Three" carriers Delta (27), United (26), and American (25) experienced a dramatic market correction, effectively erasing massive mid-year gains.

Delta suffered the most staggering collapse, plummeting from an industry-leading high of 61 in Q3 down to just 27 in Q4. Similarly, American Airlines dropped by half (50 to 25) and United fell back to near its Q1 baseline (45 to 26). This synchronized crash indicates a systemic failure in Q4 operations across the major networks, likely driven by widespread cancellations or staffing shortages that turned a summer of recovery (Q3) into a winter of discontent.

These contrasts suggest that airline loyalty in 2025 was incredibly fragile and performance-dependent. The massive Q3 spikes for legacy carriers prove that passengers will reward reliability and service improvements instantly. However, the equally massive Q4 drops confirm that this trust is not sticky, as one bad holiday season reset the entire industry's reputation back to or below Q1 levels, underscoring that for airlines, you are only as good as your last flight.





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"Understand customer journeys, drive **meaningful action**" —Ken Peterson

Learn more at:  
[questionpro.com/cx](https://questionpro.com/cx)

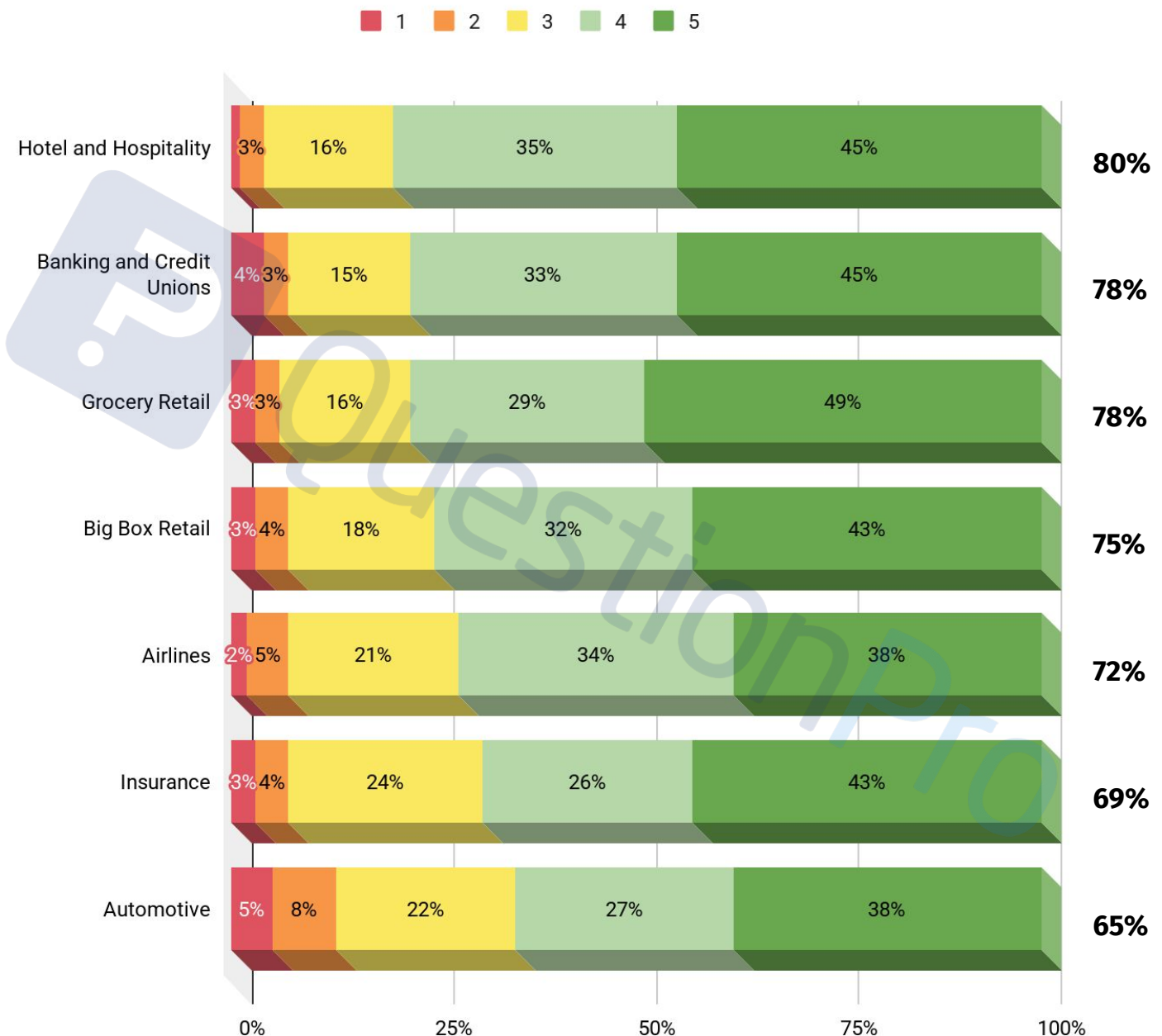


# Customer satisfaction score (CSAT)

# Q4 2025

## Customer satisfaction score (CSAT) by industry

Hotel and Hospitality leads in customer satisfaction with a top-box score of 80%, closely followed by Banking and Grocery Retail at 78%. In contrast, the Automotive sector shows the lowest performance at 65%, indicating significantly weaker customer sentiment compared to the other industries.



## Q4. Customer satisfaction score (CSAT) by industry

### CSAT Quarterly Comparison

Customer satisfaction scores in 2025 followed a nearly universal "summer peak, winter crash" pattern. While Q3 served as a high-water mark for customer satisfaction across all sectors—likely driven by summer optimism and seasonal promotions—Q4 brought a sharp reality check, with every major industry posting declines as operational pressures and end-of-year financial fatigue probably weighed heavily on consumer sentiment.

Industry	Q1	Q2	Q3	Q4
Banking and Credit Unions	82	78	87	80
Hotel and Hospitality	79	74	85	78
Grocery Retail	78	79	84	78
Big Box Retail	76	77	83	75
Insurance	77	79	85	72
Airlines	70	65	82	69
Automotive	76	67	84	65

### Insights

In Q4, the Automotive sector experienced the most severe volatility, plummeting to 65 (down from a Q3 peak of 84). This massive 19-point drop suggests that the "tariff bump" enthusiasm likely evaporated, leaving buyers to face high interest rates and dealer markups that probably soured the purchase experience. Similarly, Airlines (69 down from 82) and Insurance (72 down from 85) saw double-digit corrections, implying that operational strains during holiday travel and end-of-year premium adjustments likely eroded the goodwill built up during the summer.

Conversely, Banking and Credit Unions (80) and Grocery Retail (78) demonstrated the most resilience, declining less severely than discretionary categories. This relative stability suggests that essential service providers likely maintained better operational consistency than retail or hospitality sectors, which probably struggled with seasonal staffing shortages.

The data indicates a clear seasonal psychology where customers rewarded industries that could maintain "business as usual" during the chaotic Q4 window, while heavily penalizing those that allowed service levels to slip.

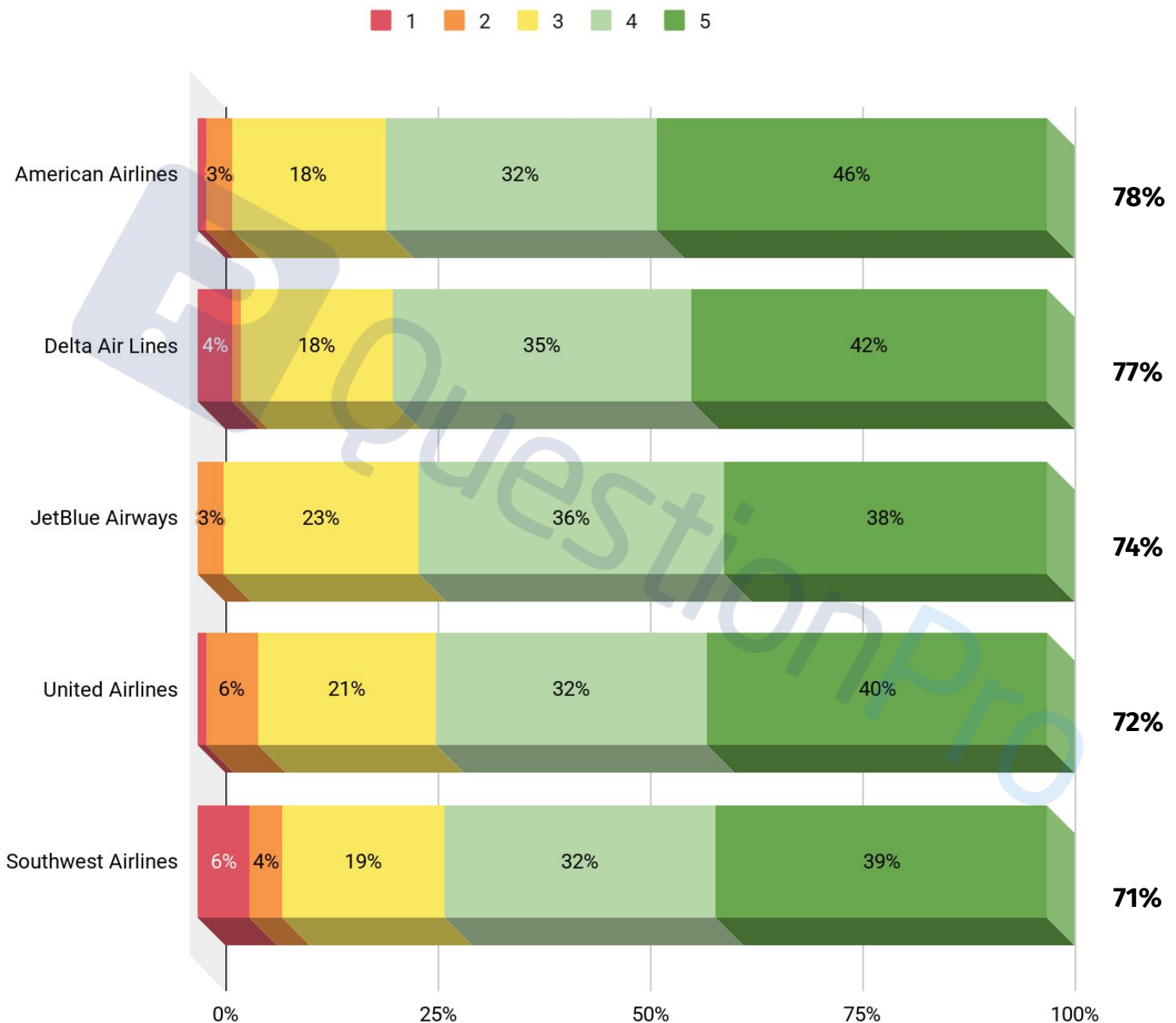
Question: "How satisfied are you with X?"  
 Scale: From "1 = very dissatisfied" to "5 = very satisfied"  
 CSAT Score = (% of responses rated 4 or 5) × 100



# Q4 2025

## Customer satisfaction score (CSAT) by brands in the **airline** industry

American Airlines secures the top position with a 78% customer satisfaction rating, narrowly edging out Delta Air Lines at 77%. While the sector remains competitive with all major carriers scoring above 70%, Southwest Airlines ranks lowest at 71%, showing the highest proportion of negative ratings (6% in the lowest category) among the group.



## Q4. Customer satisfaction score (CSAT) by brands in the **airline** industry

### CSAT Quarterly Comparison

The airline industry saw dramatic volatility in 2025, with record-high satisfaction in Q3 (averaging ~87) crashing by 13 points in Q4. This sharp "winter correction" suggests that the operational strains of holiday travel and renewed price sensitivity likely snapped the "revenge travel" patience that had buoyed scores during the summer.

Airlines	Q1	Q2	Q3	Q4
American Airlines	77	73	87	78
Delta Air Lines	82	88	88	77
JetBlue Airways	87	88	92	74
United Airlines	74	79	82	72
Southwest Airlines	88	86	88	71

### Insights

In Q4, the sector experienced broad double-digit declines, with JetBlue Airways (74 down from 92) and Southwest Airlines (71 down from 88) posting the steepest drops. This volatility implies that leisure-focused providers probably struggled most to maintain their service promise under winter operational pressure.

Meanwhile, American Airlines (78) and Delta Air Lines (77) retained the top spots, suggesting that legacy providers' infrastructure likely offered the reliability travelers prioritized over perks during the chaotic end-of-year season.

The lowest-rated brands, Southwest (71) and United (72), likely suffered from specific policy or service friction points that alienated loyalists. The data indicates a clear shift where customers probably rewarded predictability in Q4, punishing the inconsistency of value carriers more severely than the higher fares of premium competitors.

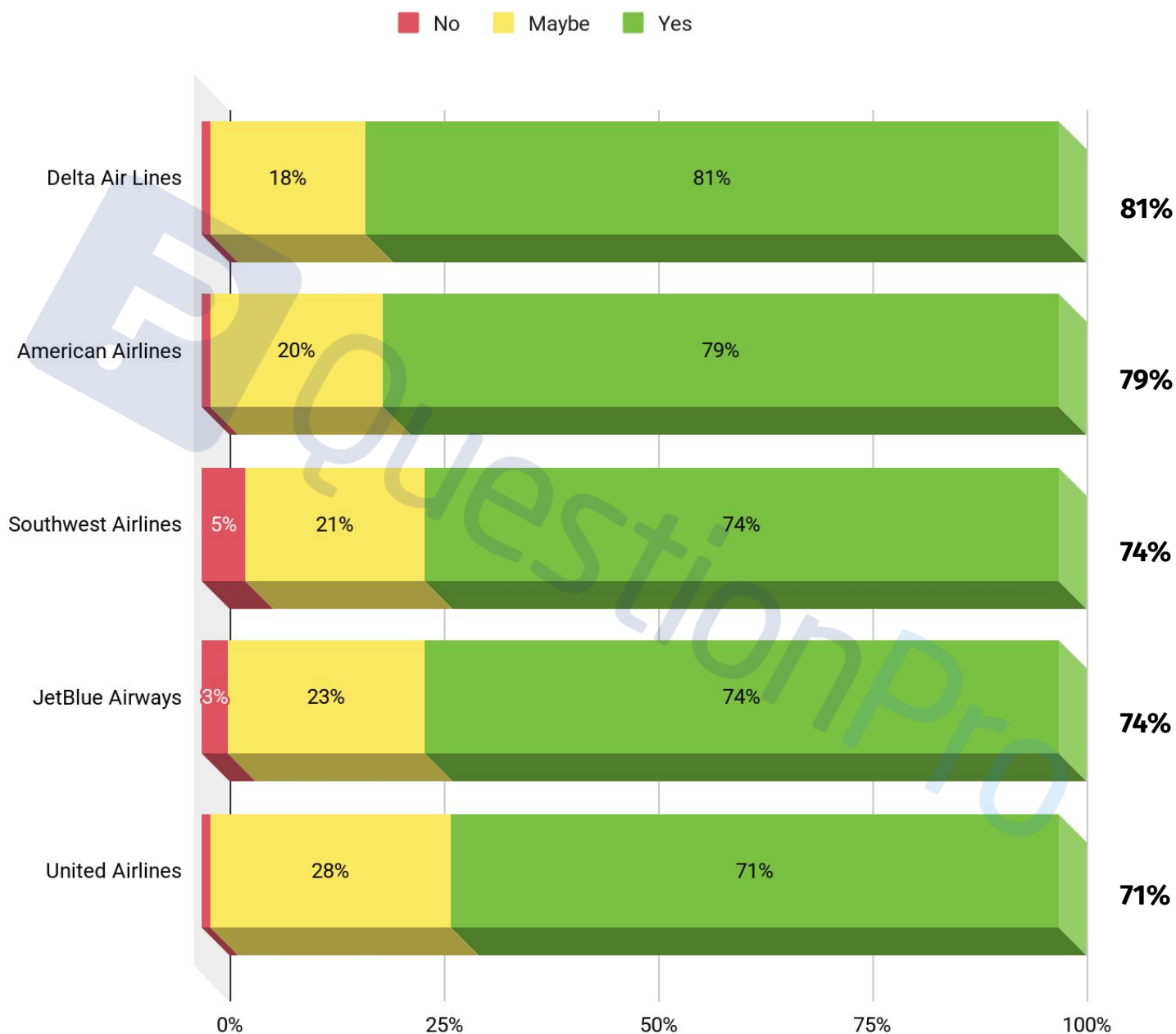


# Future purchase intent

# Q4 2025

## Future purchase intent by brands in the **airline** industry

Delta Air Lines and American Airlines lead the airline category with strong purchase intent, securing 81% and 79% "Yes" responses respectively. Southwest and JetBlue follow with identical 74% definitive interest scores, while United Airlines shows the lowest commitment at 71%, driven by a category-high 28% of undecided "Maybe" customers.



## Q4. Future purchase intent by brands in the airlines industry

### Purchase Intent Quarterly Comparison

In Q4, the airline industry experienced a universal decline in Purchase Intent; United Airlines posted the steepest drop (71 from 83) and Southwest fell significantly (74 from 85), while Delta (81 from 91) and American (79 from 88) maintained the lead despite the downturn.

Airlines	Q1	Q2	Q3	Q4
Delta Air Lines	84	85	91	81
American Airlines	81	86	88	79
Southwest Airlines	88	81	85	74
JetBlue Airways	88	86	80	74
United Airlines	76	78	83	71

### Insights

In Q4 the top-rated brands, Delta (81) and American (79), leveraged their operational reliability and premium positioning to mitigate industry-wide frustrations, with Delta successfully minimizing disruptions during the critical holiday travel window. Their ability to maintain relatively higher intent scores suggests that high-value travelers prioritized consistency over price in a constrained market.

The brands with the largest declines, United (71) and Southwest (74), faced distinct headwinds. United's 12-point drop aligns with customer confusion and friction regarding the initial implementation of its "Blue Sky" strategic partnership with JetBlue, which introduced new booking complexities. Southwest was impacted by the broader "normalization" of leisure travel, where budget-conscious consumers pulled back on discretionary spending due to rising costs.

These contrasts suggest that in the final quarter of 2025, passengers penalized complexity and uncertainty, favoring established stability as they navigated a high-cost and operationally volatile travel environment.

The Future Purchase Intent follow-up metric captures post-purchase loyalty by asking recent buyers, "How likely are you to purchase again from [Brand]?" Responses are reported as:  
 % Likely to Repurchase (Yes): Strong future intent  
 % At Risk (No): Potential churn signal  
 % Undecided (Maybe): Opportunity for brand reinforcement



# Study profile

# Study profile

## Objective of the study

Benchmarking data for NPS, CSAT, and future purchase intent across seven industries and their top brands.

## Survey method

Structured online interviews in the QuestionPro Audience platform.

## Target group

Participants aged 18 and over who live in the United States and are involved in purchasing decisions for products and services on their own or with others.

## Sample

1,001 participants

## Survey period

November 2025

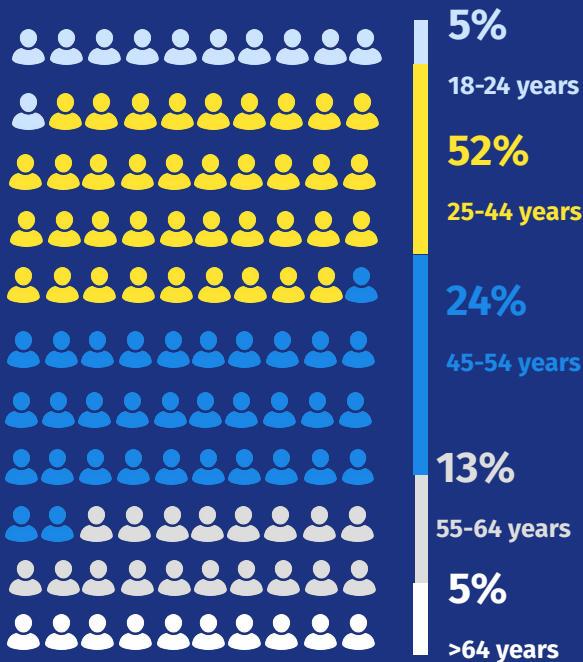
## Gender



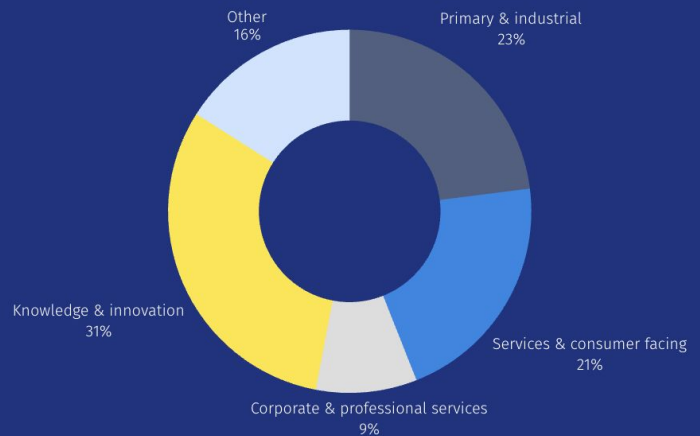
## Job status



## Age



## Working industry by type and function



# About QuestionPro

Acknowledged as a pivotal Customer Experience management platform by industry leaders such as Gartner, Forrester, and Quadrant Knowledge Solutions, QuestionPro CX is a customer-centric survey, analytics, and customer journey management platform.

**We help you turn CX initiatives into competitive advantages, provide clear ROI and experiences that consistently exceed customer expectations.**

With more than 5 million customers in over 100 countries, QuestionPro's main areas of activity are Customer Experience, Employee Experience and Market Research.

We are the only solution in the market to have all 3 components of the CX ecosystem:

- Customer journey management
- CX & VoC measurement and live tracking
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More than that, we have an amazing team of experts who can partner with you from vision to execution.



**Let's connect!**

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President, Customer Experience

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## Got 30 Seconds?

Take a 3-question survey, your feedback guides our next CX Metrics Benchmarking Report—topics, depth, and brands to cover.

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