

# We Connect the World



**Airlines for America**

A4A airlines and their affiliates transport more than 90 percent of all U.S. airline passenger and cargo traffic.

# Airlines for America®

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### Members:



U.S. AIRWAYS®



Associate Member:



### Report Content

Unless otherwise noted, the data provided in this report reflects the worldwide operations of all U.S. passenger and cargo airlines as recorded by the Bureau of Transportation Statistics (BTS) in 2010, under Chapter 411 of Title 49 of the U.S. Code. Due to rounding, in some cases, the sum of numbers in this report may not match the printed total. Also, certain historical data has been restated to reflect the most current information available. For a glossary of terms and other information regarding this report and previous editions, visit [www.airlines.org](http://www.airlines.org).



# U.S. Airline Industry Operating and Financial Results 2000-2010

Commercial aviation helps drive more than \$1 trillion per year in U.S. economic activity and nearly 10 million well-paying U.S. jobs.



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
<b>Traffic and Capacity<sup>1</sup></b>											
Passengers Enplaned (Millions)	666.1	622.1	614.3	647.5	703.7	738.6	744.7	769.6	743.3	703.9	720.5
Revenue Passenger Miles (Millions)	692,757	651,700	642,374	657,290	733,956	779,014	797,414	829,422	812,360	769,397	798,008
Available Seat Miles (Millions)	956,950	930,511	894,455	894,555	971,935	1,003,334	1,006,324	1,037,667	1,021,308	957,087	972,562
Freight Ton Miles (Millions)	21,443	22,684	25,163	25,363	26,682	26,842	28,233	28,588	26,982	24,039	26,953
Mail Ton Miles (Millions)	2,445	1,885	1,347	1,372	1,296	1,196	1,106	982	1,136	929	930
Cargo Revenue Ton Miles (Millions)	23,888	24,569	26,510	26,735	27,978	28,037	29,339	29,570	28,118	24,969	27,884
Aircraft Departures (Thousands)	9,035	8,888	9,307	10,896	11,429	11,564	11,268	11,399	10,897	10,145	10,094
Aircraft Miles (Millions)	6,574	6,597	6,626	7,090	7,668	7,920	7,923	8,116	7,886	7,316	7,415
<b>Operating Statistics</b>											
Passenger Load Factor (%) <sup>1</sup>	72.4	70.0	71.8	73.5	75.5	77.6	79.2	79.9	79.5	80.4	82.1
On-Flight Trip Length (Miles) <sup>1</sup>	1,040	1,048	1,046	1,015	1,043	1,055	1,071	1,078	1,093	1,093	1,108
Flight Stage Length (Miles) <sup>1</sup>	728	742	712	651	671	685	703	712	724	721	735
Gallons Consumed (Billions)	20.6	19.5	18.2	18.2	19.9	20.4	20.2	20.4	19.4	17.9	18.4
<b>Earnings</b>											
Operating Revenues (\$Millions)	130,248	115,227	107,125	117,768	134,660	151,544	165,532	174,696	186,087	155,050	174,676
Operating Expenses (\$Millions)	123,234	125,546	115,690	119,861	136,150	151,097	157,892	165,353	189,437	152,719	164,160
Operating Profit (\$Millions)	7,014	(10,319)	(8,566)	(2,093)	(1,490)	448	7,640	9,344	(3,350)	2,331	10,516
Net Profit (\$Millions)	2,533	(8,267)	(11,365)	(1,715)	(9,104)	(27,220)	18,186	7,691	(23,750)	(2,612)	3,665
Net Profit Margin (%)	1.9	(7.2)	(10.6)	(1.5)	(6.8)	(18.0)	11.0	4.4	(12.8)	(1.7)	2.1
<b>Employment (Thousand FTEs)</b>											
Total Industry	673.9	671.5	601.7	574.8	570.9	562.2	545.1	556.7	553.3	522.8	514.2
Scheduled Passenger Airlines	520.6	520.1	471.6	441.2	438.7	421.2	404.3	413.1	407.6	385.9	378.1
Other Airlines	153.3	151.4	130.1	133.7	132.2	141.1	140.8	143.7	145.7	136.9	136.1
<b>Safety<sup>1,2</sup></b>											
Accidents (Total/Fatal)	49/2	41/6	34/0	51/2	23/1	34/3	26/2	26/0	20/0	26/1	27/0
Fatal Accidents per 100,000 Departures <sup>3</sup>	0.018	0.019	0.000	0.020	0.009	0.028	0.019	0.000	0.000	0.011	0.000
Fatalities (Total/Aboard)	89/89	531/525	0/0	22/21	13/13	22/20	50/49	0/0	0/0	50/49	0/0

<sup>1</sup> Scheduled service only.

<sup>2</sup> Data from the National Transportation Safety Board reflecting scheduled operations under 14 CFR 121.

<sup>3</sup> Excludes incidents resulting from illegal acts.

Source: A4A, Bureau of Transportation Statistics and National Transportation Safety Board



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**Aviation is in its safest period in history.** Safety remains the airlines' number-one priority and underpins every aspect of airline operations.

Further enhancements, including modernizing the aviation infrastructure, should be a key component of a U.S. National Airline Policy.

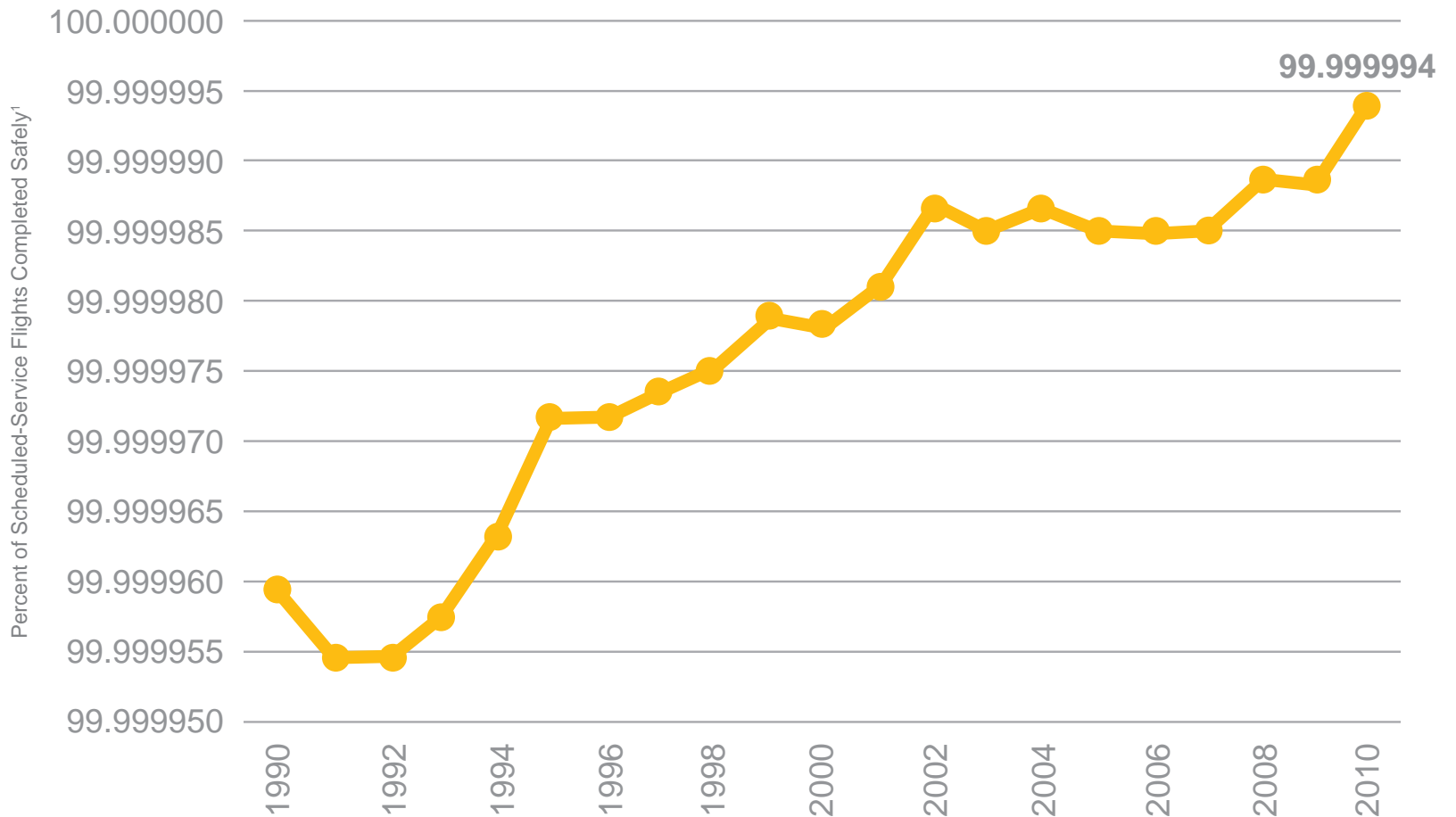




The U.S. airline industry has a proven record of enhancing safety. The industry is operating at a higher level of safety because it continues to improve its ability to identify and manage risk.

# U.S. Safety Trend

## 1990-2010



1 Five-year moving average.

Source: A4A analysis of data from National Transportation Safety Board



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**Airline rankings in 2010** reflected the diversity of business models across the industry.



# U.S. Airlines 2010

Ranked by employees and operating revenues

## Fast Facts

### Most Employees

FedEx

### Highest Revenues

United

### Employees (Year-End)

		Thousands
1	FedEx	119.2
2	United	77.1
3	Delta	76.5
4	American	65.7
5	Southwest	34.9
6	US Airways	29.6
7	JetBlue	11.3
8	American Eagle	9.5
9	SkyWest	9.1
10	Alaska	9.0
11	AirTran	8.0
12	UPS	5.6
13	ExpressJet	5.4
14	Frontier	4.9
15	Atlantic Southeast	3.7
16	Hawaiian	3.6
17	Pinnacle	3.4
18	Horizon	2.9
19	Air Wisconsin	2.5
20	Comair	2.4
21	Spirit	2.2
22	Mesaba	2.2
23	Republic	2.1
24	Mesa	2.0
25	Executive	1.8

### Operating Revenues

		Millions
1	United	34,201
2	Delta	31,894
3	FedEx	22,910
4	American	22,151
5	US Airways	12,196
6	Southwest	12,104
7	UPS	4,910
8	JetBlue	3,781
9	Alaska	3,427
10	AirTran	2,619
11	American Eagle	1,992
12	SkyWest	1,904
13	Frontier	1,317
14	Hawaiian	1,312
15	Atlas	1,236
16	Kalitta	1,074
17	World	825
18	ExpressJet	808
19	Spirit	779
20	Republic	748
21	Atlantic Southeast	746
22	Mesa	732
23	Virgin America	725
24	Horizon	680
25	Pinnacle	656

Source: Bureau of Transportation Statistics



# U.S. Airlines 2010

Ranked by aircraft departures and passengers enplaned

## Fast Facts

### Most Aircraft Departures

Southwest

### Most Passengers Enplaned

Delta

### Aircraft Departures<sup>1</sup>

		Thousands
1	Southwest	1,115
2	Delta	848
3	United	743
4	American	679
5	SkyWest	626
6	American Eagle	462
7	US Airways	451
8	ExpressJet	427
9	FedEx	340
10	Atlantic Southeast	322
11	Pinnacle	273
12	Frontier	257
13	AirTran	253
14	JetBlue	226
15	Mesa	175
16	Republic	167
17	Air Wisconsin	165
18	Mesaba	158
19	Comair	153
20	Alaska	152
21	UPS	134
22	Horizon	132
23	Cape	131
24	PSA	121
25	Piedmont	116

### Passengers Enplaned<sup>2</sup>

		Millions
1	Delta	110.9
2	Southwest	106.2
3	United	98.9
4	American	86.1
5	US Airways	51.8
6	SkyWest	24.2
7	JetBlue	24.2
8	AirTran	24.1
9	Alaska	16.5
10	ExpressJet	16.3
11	American Eagle	16.2
12	Atlantic Southeast	13.9
13	Republic	11.0
14	Pinnacle	10.9
15	Frontier	9.2
16	Mesa	9.0
17	Hawaiian	8.4
18	Horizon	6.8
19	Spirit	6.8
20	Comair	6.4
21	Mesaba	6.2
22	Air Wisconsin	5.9
23	Allegiant	5.6
24	Shuttle America	5.0
25	PSA	5.0

<sup>1</sup> All services.

<sup>2</sup> Scheduled services only.

Source: Bureau of Transportation Statistics





# U.S. Airlines 2010

Ranked by cargo traffic, passenger traffic and seating capacity

## Fast Facts

### Most Cargo RTMs

FedEx

### Most RPMs

United

### Most ASMs

United

### Cargo RTMs<sup>1</sup>

		Millions
1	FedEx	10,920
2	UPS	7,207
3	United	3,009
4	Atlas	2,911
5	Delta	2,272
6	American	1,893
7	Southern	1,610
8	Polar	1,409
9	Kalitta	1,141
10	Evergreen Int'l	915
11	World	848
12	ABX	465
13	US Airways	389
14	Air Transport Int'l	224
15	Centurion Cargo	210
16	Arrow	199
17	Florida West	133
18	Southwest	110
19	Tradewinds	109
20	Capital Cargo	103
21	Hawaiian	84
22	Amerijet	73
23	Alaska	62
24	ASTAR	41
25	JetBlue	28

### Revenue Passenger Miles<sup>2</sup>

		Billions
1	United	184.6
2	Delta	167.7
3	American	125.4
4	Southwest	78.0
5	US Airways	58.9
6	JetBlue	28.3
7	Alaska	20.3
8	AirTran	19.3
9	Frontier	15.2
10	SkyWest	13.3
11	ExpressJet	9.3
12	Hawaiian	8.7
13	American Eagle	8.0
14	Spirit	6.6
15	Virgin America	6.2
16	Atlantic Southeast	5.8
17	Allegiant	5.2
18	Pinnacle	4.7
19	Mesa	4.1
20	Mesaba	3.6
21	Shuttle America	3.2
22	Comair	3.1
23	Horizon	2.5
24	Compass	2.3
25	Republic	2.1

### Available Seat Miles<sup>2</sup>

		Billions
1	United	220.1
2	Delta	199.8
3	American	153.2
4	Southwest	98.4
5	US Airways	71.6
6	JetBlue	34.7
7	Alaska	24.4
8	AirTran	23.8
9	Frontier	18.7
10	SkyWest	16.7
11	ExpressJet	11.8
12	American Eagle	10.8
13	Hawaiian	10.1
14	Spirit	8.1
15	Virgin America	7.6
16	Atlantic Southeast	7.2
17	Pinnacle	6.0
18	Allegiant	5.7
19	Mesa	5.2
20	Mesaba	4.6
21	Shuttle America	4.4
22	Comair	4.1
23	Horizon	3.2
24	Compass	3.0
25	Republic	2.9

<sup>1</sup> All services.

<sup>2</sup> Scheduled services only.

Source: Bureau of Transportation Statistics



## America's airlines connect the world.

The U.S. airline industry is the physical Internet of the U.S. economy, safely and efficiently moving people and products to and from every corner of the world, connecting businesses and communities of all sizes and types with each other and with a rapidly expanding global marketplace.



**Busiest U.S. City Pair**  
Los Angeles–New York

Airfares remain a true bargain. On average, from 2000 to 2010, adjusted for inflation, fares on domestic routes fell 21 percent overall and 23 percent on the most heavily traveled city pairs.

# Top U.S. City Pairs by O&D Passengers 2010



## Origin-Destination Market<sup>1</sup>

Origin-Destination Market <sup>1</sup>	Daily Passengers Average, Each Way	Average One-Way Airfare Constant 2010 Dollars		Change (Percent) Inflation-Adjusted
		2000	2010	
1 Los Angeles–New York	4,376	\$372.01	\$264.71	(28.8)
2 Chicago–New York	4,288	275.90	146.37	(46.9)
3 Ft. Lauderdale–New York	4,144	142.05	119.55	(15.8)
4 New York–Orlando	3,824	134.58	119.06	(11.5)
5 New York–San Francisco	3,309	476.63	271.77	(43.0)
6 Atlanta–New York	2,910	186.00	156.07	(16.1)
7 Los Angeles–San Francisco	2,596	112.31	81.37	(27.6)
8 Miami–New York	2,405	203.50	142.78	(29.8)
9 Las Vegas–New York	2,115	217.79	200.31	(8.0)
10 New York–West Palm Beach	1,924	158.35	132.99	(16.0)
11 Honolulu–Maui	1,895	46.62	59.89	28.5
12 Dallas–New York	1,790	366.94	249.61	(32.0)
13 Chicago–Los Angeles	1,766	254.61	193.70	(23.9)
14 New York–Tampa	1,744	149.49	130.35	(12.8)
15 Chicago–Washington	1,738	212.89	140.23	(34.1)
16 Boston–New York	1,698	162.43	168.16	3.5
17 Chicago–Orlando	1,695	160.15	121.31	(24.3)
18 Las Vegas–San Francisco	1,690	101.46	95.01	(6.4)
19 Dallas–Houston	1,622	93.62	111.39	19.0
20 Boston–Washington	1,607	161.54	138.57	(14.2)
21 New York–San Juan	1,538	205.23	166.28	(19.0)
22 Orlando–Philadelphia	1,535	146.59	109.94	(25.0)
23 Chicago–Las Vegas	1,533	162.67	166.41	2.3
24 Los Angeles–Washington	1,500	362.29	212.24	(41.4)
25 San Francisco–San Diego	1,496	91.37	81.71	(10.6)
<b>Subtotal</b>	<b>56,738</b>	<b>\$202.91</b>	<b>\$156.39</b>	<b>(22.9)</b>
<b>Other</b>	<b>529,572</b>	<b>\$198.67</b>	<b>\$158.31</b>	<b>(20.3)</b>
<b>Total</b>	<b>586,309</b>	<b>\$199.09</b>	<b>\$158.12</b>	<b>(20.6)</b>

<sup>1</sup> Chicago (MDW/ORD), Dallas (DAL/DFW), Houston (HOU/IAH), New York (EWR/JFK/LGA), Tampa (PIE/TPA) and Washington (DCA/IAD) include multiple airports.

Source: Bureau of Transportation Statistics



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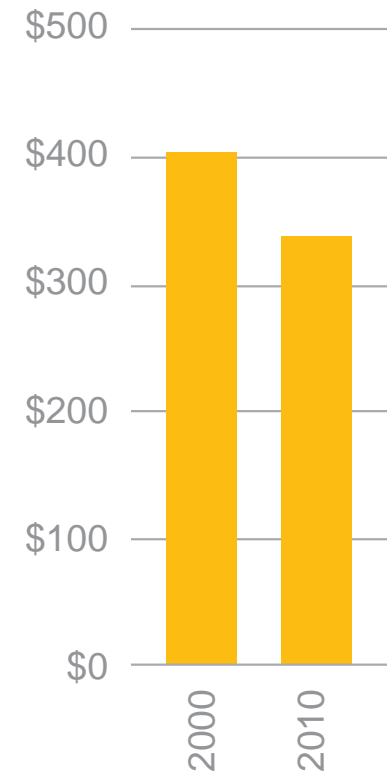
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# Average Revenue Collected per Round-Trip Domestic Passenger

2000-2010



Including ancillary services, inflation-adjusted revenue collected per round-trip domestic passenger fell 16 percent from 2000 to 2010.



Source: A4A analysis of data from Bureau of Transportation Statistics



U.S. airlines and airports continue to meet the demands of passengers and shippers and enable the United States to compete in today's global economy. In 2010, the busiest airport saw more than 43 million airline passengers depart on 465,000 flights. At the busiest air-cargo facility, departing flights carried nearly 2.6 million tons of freight and mail.



## Fast Facts

### Most Passengers

Hartsfield-Jackson Atlanta International

### Most Cargo

Ted Stevens Anchorage International

### Most Flights

Hartsfield-Jackson Atlanta International

# U.S. Airports 2010

Ranked by passengers, cargo and aircraft departures

## Onboard Passengers<sup>1</sup>

			Thousands
1	ATL	Hartsfield-Jackson Atlanta Int'l	43,342
2	ORD	Chicago O'Hare Int'l	32,467
3	LAX	Los Angeles Int'l	29,602
4	DFW	Dallas/Fort Worth Int'l	27,391
5	DEN	Denver Int'l	25,799
6	JFK	John F. Kennedy Int'l	23,070
7	PHX	Phoenix Sky Harbor Int'l	19,664
8	IAH	George Bush Intercontinental	19,590
9	SFO	San Francisco Int'l	19,590
10	LAS	Las Vegas McCarran Int'l	19,442
11	CLT	Charlotte Douglas Int'l	18,947
12	MIA	Miami Int'l	17,214
13	MCO	Orlando Int'l	17,207
14	EWR	Newark Liberty Int'l	16,662
15	DTW	Detroit Metro. Wayne County	15,744
16	MSP	Minneapolis-Saint Paul Int'l	15,681
17	SEA	Seattle-Tacoma Int'l	15,515
18	PHL	Philadelphia Int'l	15,164
19	BOS	Boston Logan Int'l	13,576
20	LGA	LaGuardia	12,013
21	IAD	Washington Dulles Int'l	11,456
22	BWI	Baltimore/Washington Int'l	11,234
23	FLL	Fort Lauderdale-Hollywood Int'l	10,837
24	SLC	Salt Lake City Int'l	10,156
25	MDW	Chicago Midway	9,080

## Onboard Tons of Cargo<sup>1</sup>

			Thousands
1	ANC	Ted Stevens Anchorage Int'l	2,558.5
2	MEM	Memphis Int'l	2,199.0
3	SDF	Louisville Standiford Field	1,230.2
4	LAX	Los Angeles Int'l	837.8
5	MIA	Miami Int'l	818.5
6	ORD	Chicago O'Hare Int'l	728.5
7	JFK	John F. Kennedy Int'l	669.1
8	IND	Indianapolis Int'l	534.0
9	EWR	Newark Liberty Int'l	442.9
10	DFW	Dallas/Fort Worth Int'l	390.9
11	ATL	Hartsfield-Jackson Atlanta Int'l	369.1
12	OAK	Metropolitan Oakland Int'l	285.5
13	SFO	San Francisco Int'l	283.6
14	HNL	Honolulu Int'l	272.6
15	PHL	Philadelphia Int'l	255.1
16	IAH	George Bush Intercontinental	243.3
17	ONT	Ontario Int'l	238.8
18	CVG	Cincinnati/Northern Kentucky	212.3
19	SEA	Seattle-Tacoma Int'l	196.0
20	IAD	Washington Dulles Int'l	161.6
21	BOS	Boston Logan Int'l	141.1
22	PHX	Phoenix Sky Harbor Int'l	136.6
23	DEN	Denver Int'l	134.4
24	MSP	Minneapolis-Saint Paul Int'l	121.1
25	TOL	Toledo Express	101.9

## Aircraft Departures<sup>1</sup>

			Thousands
1	ATL	Hartsfield-Jackson Atlanta Int'l	465.0
2	ORD	Chicago O'Hare Int'l	426.6
3	DFW	Dallas/Fort Worth Int'l	315.1
4	DEN	Denver Int'l	306.3
5	LAX	Los Angeles Int'l	270.3
6	IAH	George Bush Intercontinental	254.8
7	CLT	Charlotte Douglas Int'l	241.2
8	DTW	Detroit Metro. Wayne County	219.2
9	PHL	Philadelphia Int'l	211.0
10	MSP	Minneapolis-Saint Paul Int'l	201.0
11	PHX	Phoenix Sky Harbor Int'l	197.4
12	EWR	Newark Liberty Int'l	195.8
13	JFK	John F. Kennedy Int'l	193.2
14	SFO	San Francisco Int'l	177.7
15	LGA	LaGuardia	176.5
16	BOS	Boston Logan Int'l	167.4
17	LAS	Las Vegas McCarran Int'l	166.9
18	MIA	Miami Int'l	164.7
19	MEM	Memphis Int'l	154.8
20	SEA	Seattle-Tacoma Int'l	153.3
21	MCO	Orlando Int'l	144.0
22	IAD	Washington Dulles Int'l	142.3
23	SLC	Salt Lake City Int'l	139.7
24	DCA	Ronald Reagan Wash. Nat'l	132.0
25	BWI	Baltimore/Washington Int'l	119.1

<sup>1</sup> All services (scheduled and nonscheduled) by U.S. and non-U.S. airlines.

Source: Bureau of Transportation Statistics



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Soaring energy prices, economic recession and other external factors impacted airline profitability. To reduce costs and improve margins, U.S. airlines reduced capacity to match demand.



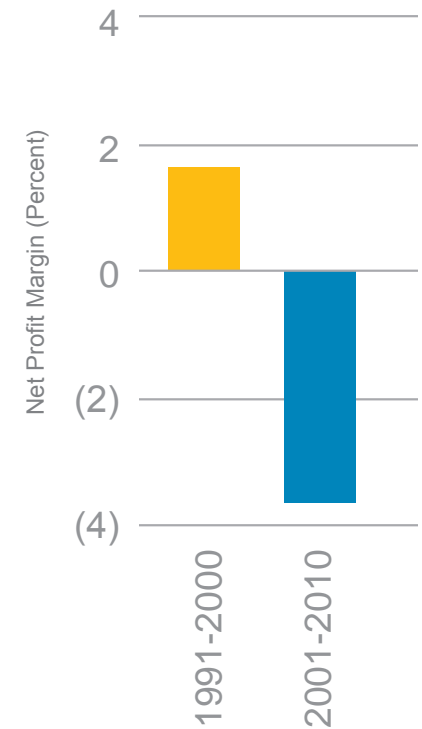


# Profitability

1991-2010



U.S. airlines lost nearly four pennies for every dollar in revenue collected during the 2001-2010 period.



Source: Bureau of Transportation Statistics



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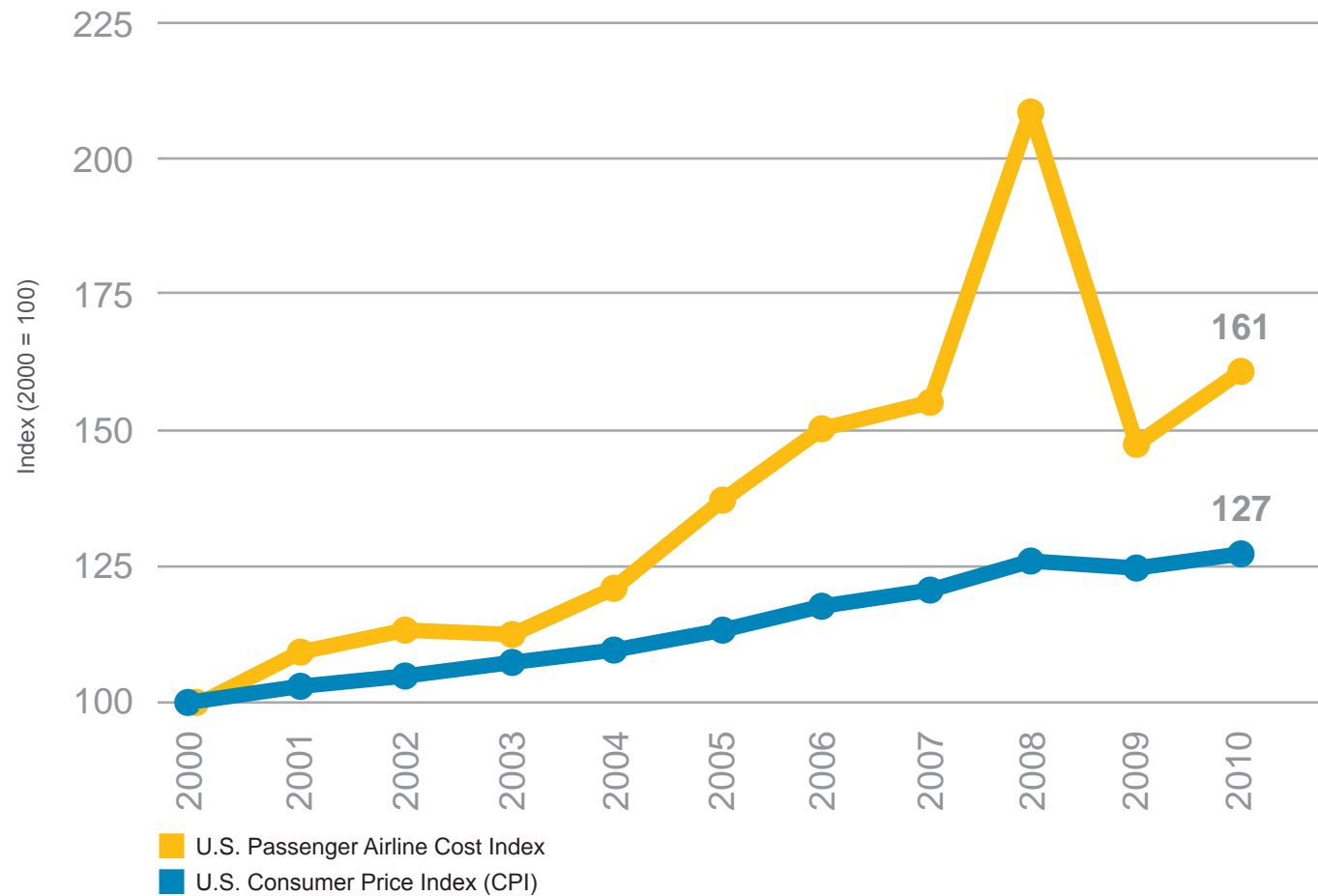




Costs for U.S. airlines rose more than twice the rate of inflation from 2000 to 2010, driven by the higher cost of fuel, labor and airport landing fees.

# U.S. Passenger Airline Costs vs. U.S. Inflation

## 2000-2010



Source: A4A and Bureau of Labor Statistics

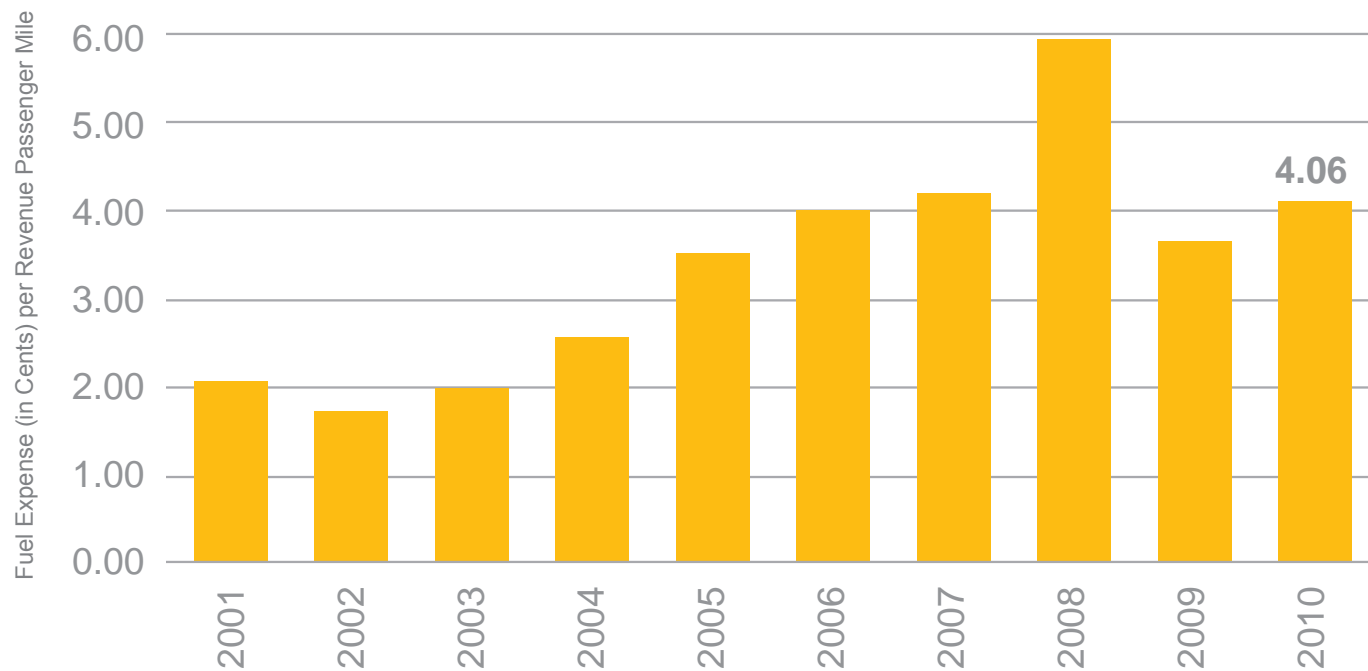




Fuel is the largest expense for U.S. passenger airlines. The cost of fuel to fly one passenger one mile more than doubled from 2001 to 2010.

# Fuel Expense per Passenger Mile

## 2001-2010

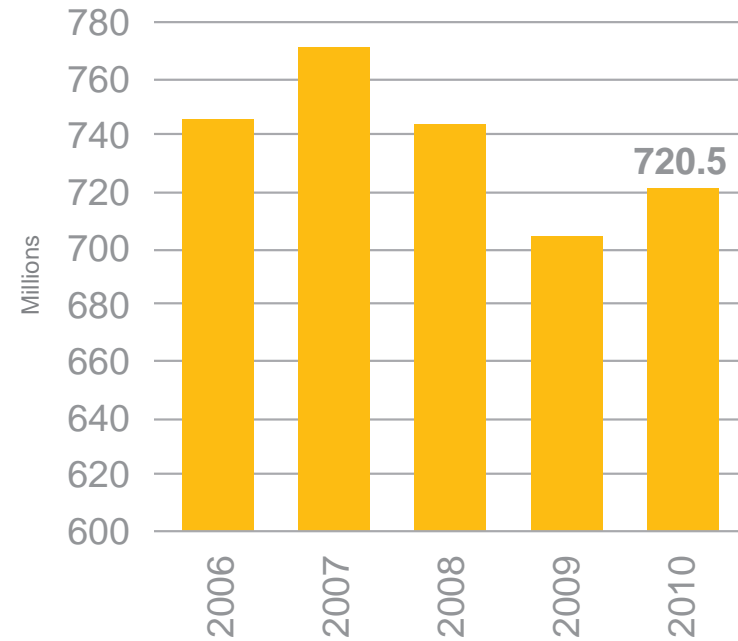


Source: A4A and Bureau of Transportation Statistics



# Passengers Enplaned in Scheduled Service 2006-2010

Fewer people flew in 2009-2010, largely due to economic recession, with travel well below 2006-2008 levels.



Source: Bureau of Transportation Statistics



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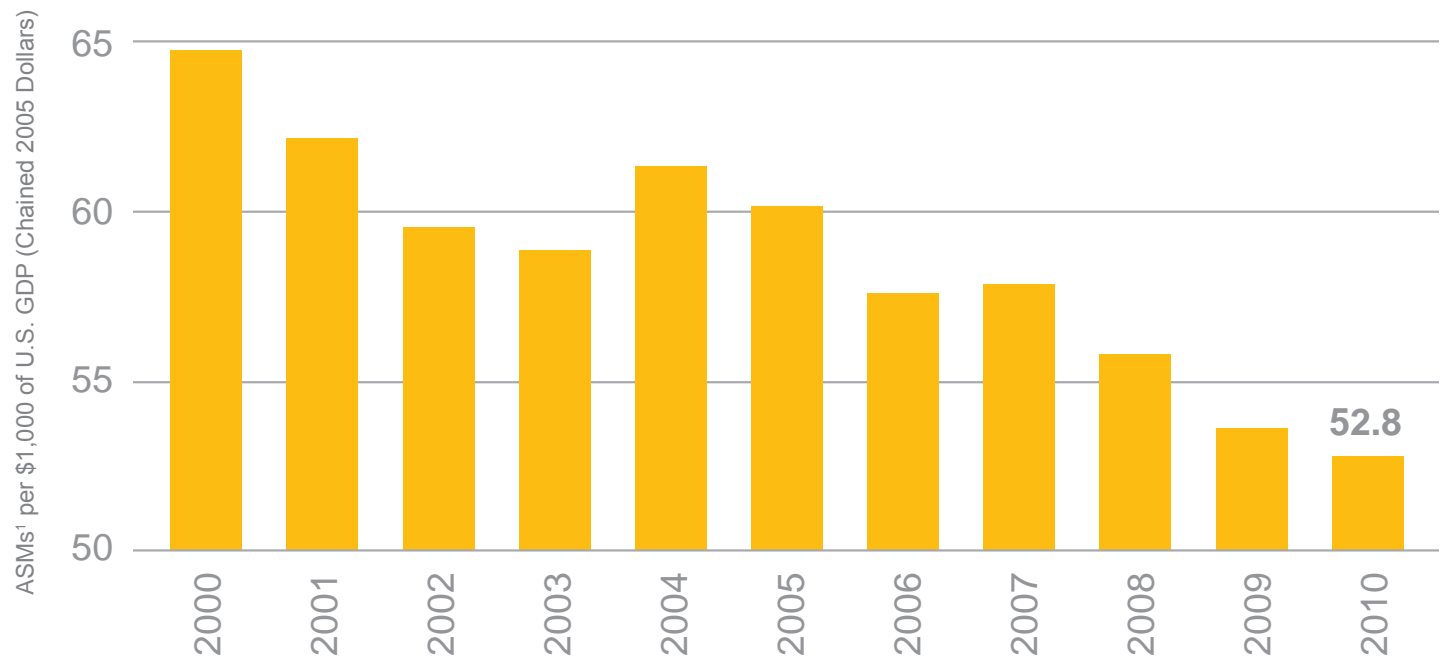
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Responding to high and volatile fuel prices as well as depressed demand, U.S. airlines reduced domestic seating capacity in 2010.

# Domestic Capacity Trend

## 2000-2010



1 Scheduled and nonscheduled domestic services.

Source: A4A and Bureau of Transportation Statistics



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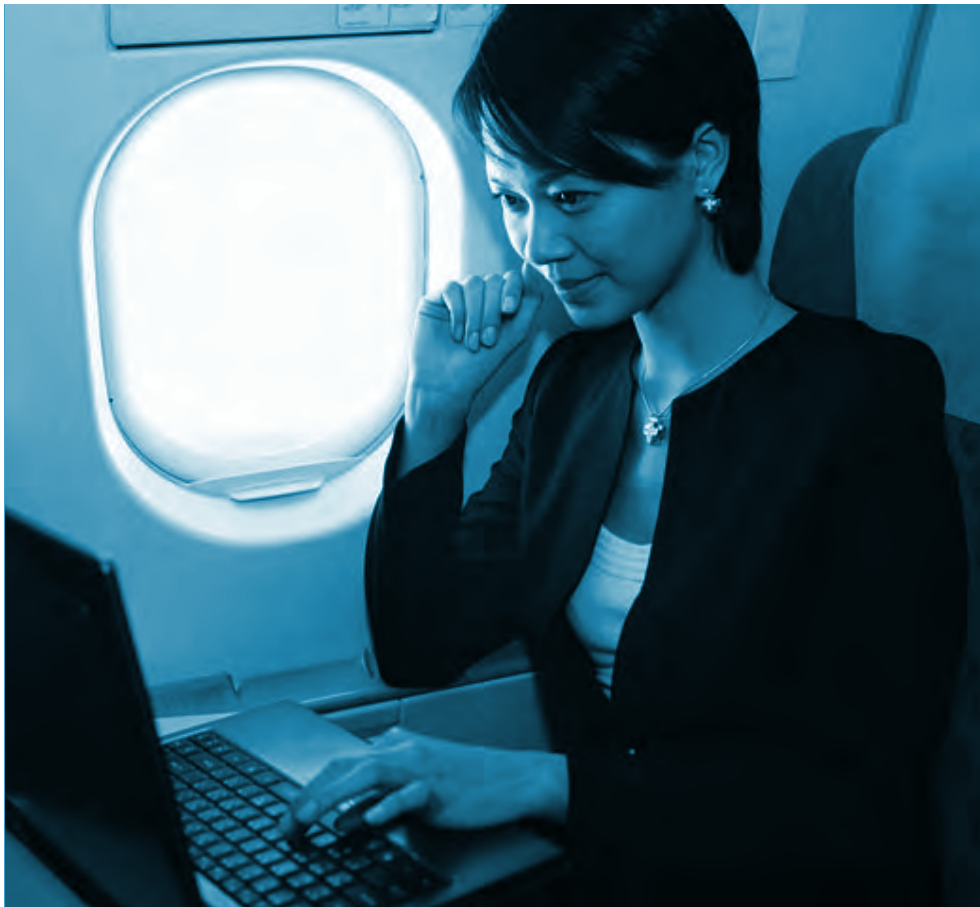
**U.S. airlines worked to continuously improve their operations,** demonstrating their commitment to an enhanced customer experience, built on a foundation of getting passengers and products to their destinations safely and on time.





From 2000 to 2010, the U.S. airline industry improved its performance on core customer service metrics.

# Customer Service 2010



## **On-Time Performance**

The 2010 on-time arrival rate was 79.8 percent – the second year in a row that the industry achieved an on-time rate of nearly 80 percent.

## **Baggage Delivery**

In 2010, 99.6 percent of U.S. airline passengers had their bags properly handled. There were only 3.57 reports of mishandled bags per 1,000 passengers, an all-time low for the metric.

## **Passenger Accommodation**

In 2010, U.S. airlines reported 1.09 involuntary denied boardings per 10,000 passengers, meaning that only one in 9,000 passengers was bumped from a flight.

## **Customer Satisfaction**

The number of complaints recorded by DOT dropped nearly 60 percent from a decade ago to a level of about one complaint per 100,000 passengers.

Source: A4A and Department of Transportation (DOT)



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U.S. airlines delivered on their goals to become more efficient and contain costs within their **control** but numerous factors, including a patchwork of irrational taxation, have undermined this progress.



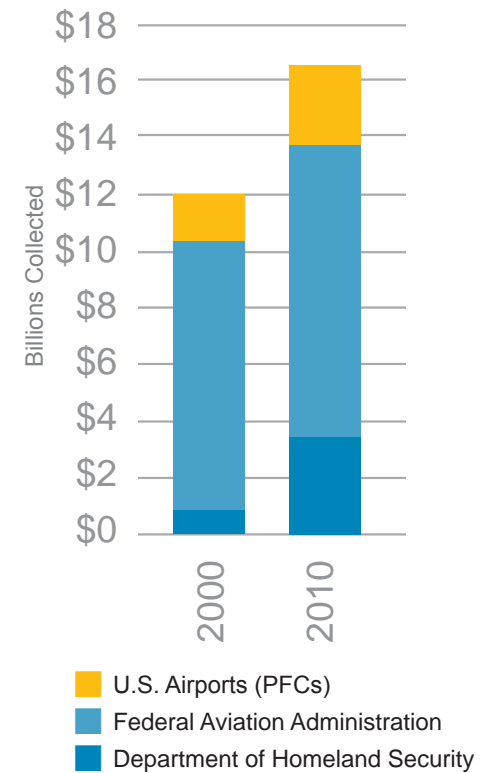




# Federal Aviation Taxes

## 2000-2010

From 2000 to 2010, the amount of taxes paid by airlines and their customers increased \$4.6 billion or 39 percent. Taxes now represent 20 percent of the total price of a typical round-trip domestic ticket.



Source: Federal Aviation Administration and Department of Homeland Security



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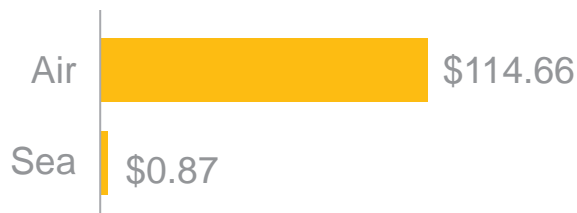
Airlines are a critical enabler of commerce, essential for U.S. and global trade, safely and efficiently moving high-value, time-sensitive goods and ensuring the stability and prosperity of our local, national and global economies.



# U.S. Export Value by Transport Mode

Dollars per kilogram

U.S. airlines are carrying more valuable cargo than any other mode of transportation – a reflection of the critical importance of moving time-sensitive products by air. In 2010, the average value of one kilogram of U.S. exports transported by air was 131 times that of one kilogram of exports transported by sea.



Source: A4A and Census Bureau



**U.S. airlines are committed to continuous environmental improvements,** leveraging technology, operations and infrastructure to achieve additional reductions in aircraft noise and emissions. A4A and its member airlines are working hard to further enhance fuel efficiency.

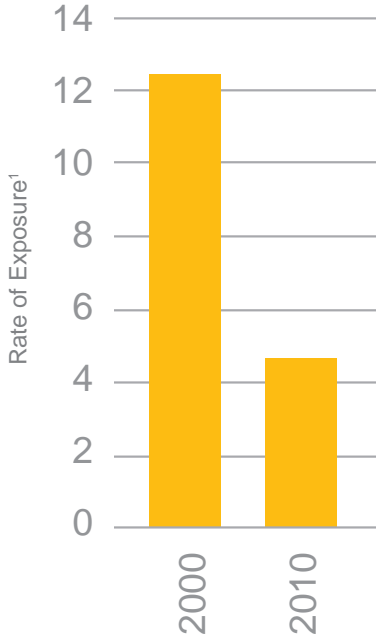


U.S. airlines have reduced their aircraft noise levels significantly in the past decade. As a result, the number of U.S. residents exposed to significant aircraft noise fell 63 percent from 2000 to 2010.



# Noise Reduction

2000-2010



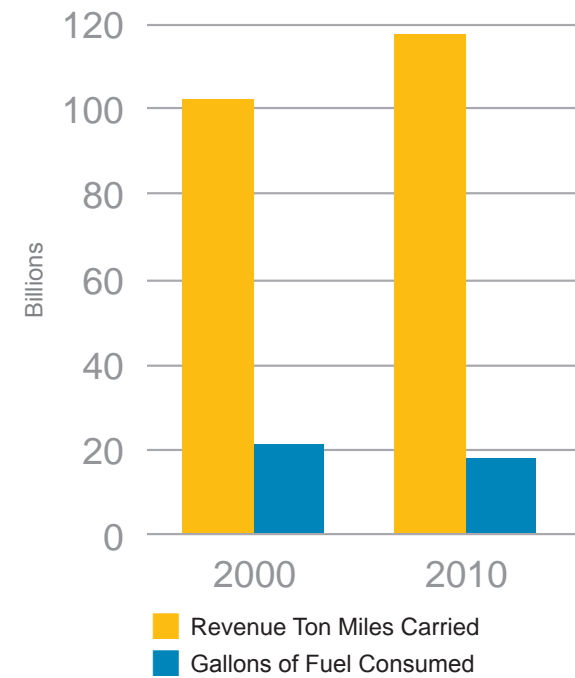
1 Number of U.S. residents exposed to significant noise levels per 10,000 passengers enplaned on U.S. airlines.

Source: A4A and Federal Aviation Administration

# Fuel Efficiency Gains

2000-2010

During the past decade, airlines continued to make impressive gains in fuel efficiency. From 2000 to 2010, U.S. airlines carried 15 percent more traffic using 10 percent less fuel.



Source: A4A and Bureau of Transportation Statistics



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