

2025 ALMANAC OF AIRLINE RETAIL

A global review of booking paths for 25 airlines reveals a highly diverse array of retailing methods.

by IdeaWorksCompany



The 2025 Almanac of Airline Retail by IdeaWorksCompany

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About Jay Sorensen, Writer of the Report

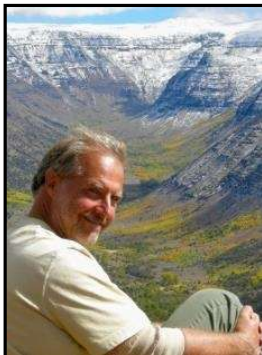
Jay Sorensen's research and reports have made him a leading authority on frequent flyer programs and the ancillary revenue movement. He is a regular keynote speaker at ancillary revenue and airline retail conferences and has testified to the US Congress on ancillary revenue issues. His published works are relied upon by airline executives throughout the world and include first-ever guides on the topics of ancillary revenue and loyalty marketing.



Jay with sons Anton and Aleksei at Artist Point in Yellowstone National Park.

Mr. Sorensen has 41 years experience in product, partnership, and marketing development in the airline business and travel industry. As president of the IdeaWorksCompany consulting firm, he has helped boost airline revenue, started loyalty programs and co-branded credit cards, developed products in the service sector, and helped start an airline and other travel companies. His career includes 13 years at Midwest Airlines where he was responsible for marketing, sales, customer service, product development, operations, planning, financial analysis and budgeting. His favorite activities are hiking, exploring and camping in US national parks with his family.

About Eric Lucas, Editor of the Report



Eric Lucas is an international journalist whose work has appeared in Michelin travel guides, Alaska Airlines *Beyond Magazine*, *American Essence*, *Epoch Times*, *Westways* and many other publications. Founding editor of *Midwest Airlines Magazine*, he is the author of eight books. Eric has followed and written about the travel industry for more than 35 years. He lives on San Juan Island, Washington, where he grows organic garlic, apples, beans and hay; visit him online at TrailNot4Sissies.com.

Eric, at his favorite summer retreat, Steens Mountain, Oregon.



INTRODUCTION TO THE ALMANAC

The Almanac of Airline Retail is a first-ever resource providing a concise review of booking paths for global network airlines and low cost carriers from all over the world. The following 25 airlines are key airlines within their categories:

- **Low cost carriers:** AirAsia, easyJet, Frontier Airlines, IndiGo, JetBlue, Ryanair, and Spirit Airlines.
- **Traditional airlines:** Air Canada, Air France, Alaska Airlines, American, Avianca, British Airways, Cathay Pacific, Delta, Emirates, Korean Air, LATAM Airlines, Lufthansa, Qantas, Qatar Airways, Singapore Airlines, Southwest Airlines, Turkish Airlines, and United.

The designation of Southwest as a traditional airline merits further explanation. Southwest is often considered a low cost or hybrid carrier, but the provision of two checked bags for every passenger and long-tenured cost structure makes it more appropriate for the traditional airline category.

The listing for each airline is limited to a single page. The top of the listing provides an image of a screen shot of fare selection at the beginning of the booking path. The details for each listing rely upon a lowest fare query using the carrier's largest market for a single traveler using the same date for all 25 carriers, and a 2-month advance booking window.

The largest markets were selected based upon the total number of seats offered by the airline during calendar year 2023. Seats reflect the capacity of all flights operated by an airline between two city pairs. Cirium provided the largest market data used in this Almanac. You can learn more about Cirium on page 3 of the Almanac.



Economy fare types for the top market are described for each airline and are presented using these key features: 1) assigned seat, 2) medium carry-on bag, 3) checked bag, and 4) flight changes. The latter refers to a benefit providing more flexibility for flight changes and/or booking cancellations. The appearance of an "X" in a box indicates the benefit is unavailable for the fare type. The economy fares listed for each airline are limited to travel in the coach cabin. Fares for separate premium economy, business, and first class cabins were not evaluated.

ANAYSIS OF THE RESULTS

The five graphs on the following pages summarize statistics regarding fare methods, booking path elements, and seat map design. Each airline page summarizes a carrier's approach to its retailing methods. When ancillary revenue first became a feature of low cost carriers 20 years ago, IdeaWorksCompany offered the first-ever definition back in 2006. The current definition appears at the end of this document, but let's start with a history of the evolution of ancillary revenue and online booking.

The earliest ancillary retail method relied upon the sale of a single fare followed by choices for baggage and assigned seats in the booking path. The rest of the website was a virtual shopping mall of other goodies. Back in 2006 Ryanair promoted car insurance, personal loans, pre-arranged airport parking, airport motor coach transfers, airport lounge access, co-branded credit cards, holiday packages, bed & breakfast stays, and golfing in Ireland.¹

Delta tested complexity in the booking path in 2007 with its "Your One-Stop-Convenient-Shop" brand.² The carrier added hotels and car rentals to the booking path along with airport lounge access, airport parking, airport transportation, tour activities, travel insurance, and even donations to pay for planting trees to offset carbon emissions. The experiment didn't last long, as undoubtedly this early attempt was fraught with fulfillment issues and a complexity that bewildered consumers.

Featured Trip Activities		
Delta Crown Room Club One-Visit Pass at Fort Lauderdale/Hollywood International Airport		
	<p>Special Offer! Get access to the Delta Crown Room at an exclusive online discounted rate of \$15. Save \$10 off the regular rate.</p> <p>Start your holiday or business trip in style and experience a more civilized way to travel with an airport lounge pass to the Delta Crown Room Club®. Add an extra touch of luxury to your next trip and experience a serene environment with a complimentary, fully stocked bar where you can relax, check your emails, make phone calls or catch up on business.</p>	<p>From \$15.00 (USD)</p> <p>→ Learn more</p>
Plant Trees to Offset Carbon Emissions		
	<p>To help protect the special places that Delta flies throughout the world, Delta's Force for Global Good has partnered with The Conservation Fund to plant trees that will help offset carbon emissions.</p>	<p>From \$5.50 (USD)</p> <p>→ Learn more</p>

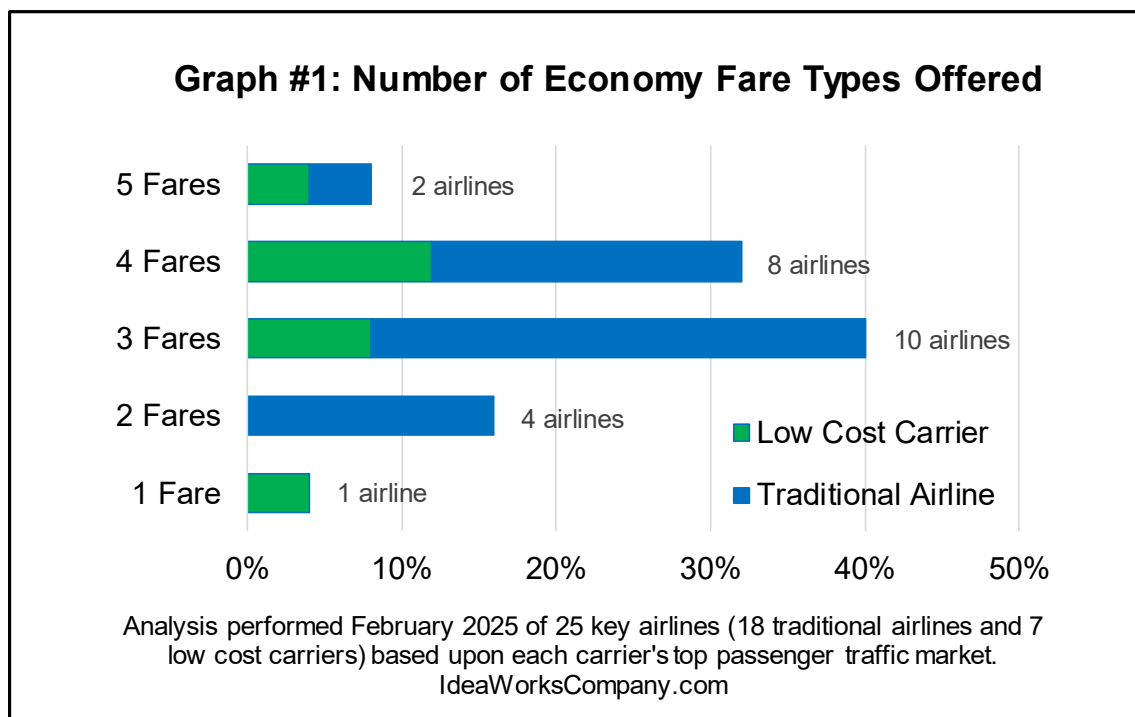
October 2007 somewhat blurry screenshot from Delta.com. An example of early efforts by a global network carrier to insert airport lounge access and carbon offsets into the booking path.

¹ "Europe's Top 4 Low Cost Carriers Generated 470 Million Euros (US\$593 Million) From Non-Ticket Sources in 2005" report dated 10 October 2006 by IdeaWorksCompany.

² "Delta.com Takes a Major Approach to Online Travel Sales" report dated 21 June 2007 by IdeaWorksCompany.

Branded fares arrived as an ideal method to move individual items from the booking path to a bundled offer at the point of flight selection. This has the consumer make a key purchase decision which combines the fare with baggage, assigned seats, and reservation flexibility. Airlines can follow this with a select number of a la carte features, such as accommodations, car rental, and early boarding. Branded fares disproved the long-held belief that consumers only seek the lowest fare. When presented a well-designed branded fare display, the majority of consumers will spend above the lowest price point.

Graph #1 summarizes how many fare types are offered by the survey of 25 airlines. The majority offer 3 fares, which aligns with the method recommended by IdeaWorksCompany. This “good, better, and best” display quickly conveys a value message to the consumer, with half making the middle choice. In general, four fares tend to overwhelm consumers with an overabundance of choice. This can result in consumers booking the cheapest fare. Two fares yield a similar outcome; a binary choice has most taking the cheapest price.



The recommended method relies upon other elements to produce the best revenue results. The price difference between the three fares should be logical and modest; big price jumps encourage consumers to revert to the lowest fare. The number of features for each fare should gradually increase for the middle and top choices. Here again, too many “bullet point” benefits can overwhelm consumers, with the same result – they will revert to the lowest price. The survey results reveal how traditional airlines have embraced branded fares.

AIR CANADA

07:00 Vancouver	Non-stop - 4hr32m	14:32 Toronto	US \$97		US \$640
Seats Details					
08:00 Vancouver	Non-stop - 4hr26m	15:26 Toronto	US \$221	US \$602	US \$1112 Includes lie-flat seats
Seats Details					

Market used for queries	Vancouver, YVR – Toronto, YYZ			
Economy fare types <i>Website booking</i>	Assigned seat	Medium carry-on bag	Checked bag	Flight changes
Basic	\$	X	\$	X
Standard	\$	●	\$	\$
Flex	●	●	●	●
Comfort	●	●	●	●
Latitude	●	●	●	●

● = Feature is included in fare. \$ = Fee is charged. X = Not permitted.

Booking paths <i>A la carte items offered when selecting lowest fare.</i>	Fare lock	Bundle offers	Flexibility	Checked bag	Carry-on bag	Paid seating	Car rental	Hotels	Trip Insurance	Airport park	Fast track	Early boarding	Subscription	Prepay cafe	Lounge	Pay later
	- AirCanada.com (US)						✓								✓	
- Apple App (4.7 stars)																
- Android App (4.5 stars)																
Notes and other services	Other in-path offers: carbon offset/SAF, FFP credit card, and FFP signup. Strangely, the option to display Latitude fares must be selected to display the higher-price fare.															
Economy seat types	2 types: Standard Seat, and Preferred Seat.															
Seat map type	Seat price range displayed on legend, individual seat prices displayed after selecting seat.															