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Global Surge in Airline Fees and Charges Captured in 2011 Amadeus Yearbook of Ancillary Revenue by IdeaWorks

Results from 47 airlines worldwide depict huge scope of ancillary revenue.

August 1, 2011, Shorewood, Wisconsin – Receipts surpassing €15.11 billion (\$21.46 billion), double-digit annual growth, growing acceptance on every continent and in every travel region—ancillary revenues have become the new decade's money tree for the world's airlines. Not surprisingly, they have also earned widespread public consternation and global media coverage. The new **2011 Amadeus Yearbook of Ancillary Revenue by IdeaWorks**, now available free online, provides the most comprehensive and exacting portrait of this global phenomenon.

The full 64-page report examines 47 airlines that disclose revenue from a la carte features, commission-based products, frequent flier activities, or the sale of advertising. The complete alphabetical list of carriers is provided on the next page in a carrier-by-carrier graph of ancillary revenue expressed as a percent of total revenue.

The Yearbook's individual airline listings clarify the type of ancillary revenue activity for each carrier. Some airlines are vague in their descriptions and merely provide an "ancillary revenue" line on the income statement without further details. Some of the carriers don't specifically list ancillary revenue, but describe qualifying activities such as "revenue from the sale of frequent flier miles to partners" or "revenue from duty-free sales." Other airlines provide robust details and seem very proud of their ancillary revenue accomplishments.

The following is a sampling of the ancillary revenue details found in the Yearbook:

- **Air Berlin.** The carrier realized more than €38 million from inflight and duty free sales during 2010.
- **Allegiant Airlines.** Receipts from third party sources, such as hotel accommodations and rental cars, produced net revenue of \$24 million (€16.9 million) in 2010 with a pre-tax margin of 24%.
- **Emirates.** Excess baggage charges delivered AED 293 million (€56 million) for the fiscal year ended 31 March 2011.
- **Hainan Airways.** The sale of frequent flier miles in its Fortune Wings Club provided more than C¥38.9 million (€4.2 million) for 2010.
- **JetBlue.** The "Even More Legroom" a la carte seating feature generated more than \$85 million (€60 million) of revenue in 2010.
- **South African Airways.** Its Voyager frequent flier program contributed R362 million (€36.9 million) during the fiscal year ended 31 March 2010.
- **US Airways.** Choice Seats, where consumers pay more to get a better seat in coach, provided \$30 to \$40 million (€21 to €28 million) in revenue during 2010. The carrier estimates this could be \$200 to \$300 million (€141 to €211 million) once it's sold through all distribution channels.

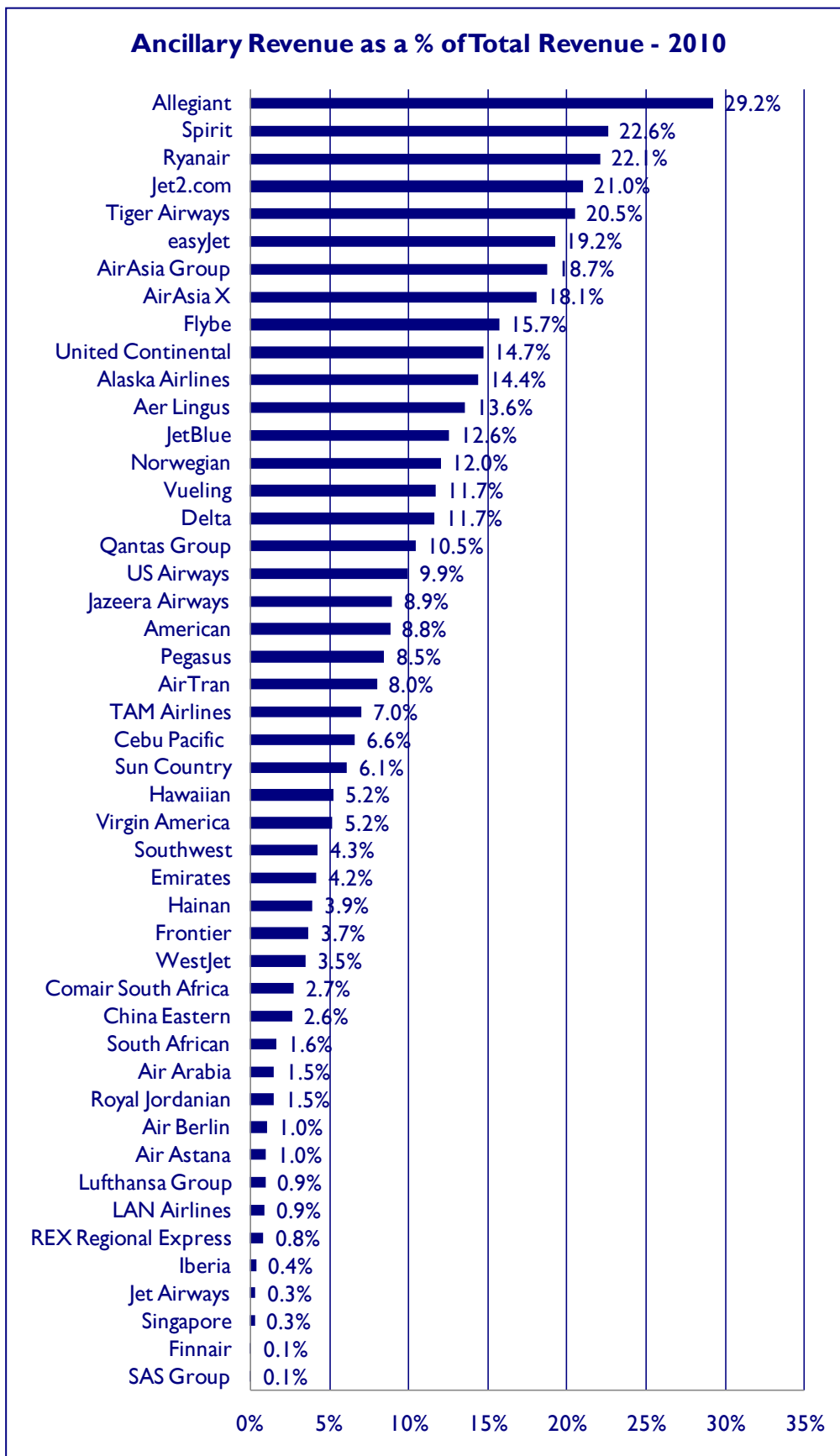
The **2011 Amadeus Yearbook of Ancillary Revenue by IdeaWorks** was released today as a free-of-charge report sponsored by Amadeus. The full report is available at the IdeaWorks web site: www.IdeaworksCompany.com/news.

Airlines Posting Ancillary Revenue Results

For most recent full-year period, listed in alphabetical order.

Carriers	Ancillary Revenue in Euros	% of Total Revenue	Euros per Passenger	US\$ per Passenger	Region
Aer Lingus	€ 165,127,000	13.6%	€ 17.67	\$24.91	Europe and Russia
Air Arabia	€ 5,980,224	1.5%	€ 1.34	\$1.90	Middle East and Africa
Air Astana	€ 4,507,810	1.0%	€ 1.75	\$2.48	Asia / South Pacific
Air Berlin	€ 38,204,000	1.0%	€ 1.14	\$1.61	Europe and Russia
AirAsia Group	€ 247,427,095	18.7%	€ 9.63	\$13.65	Asia / South Pacific
AirAsia X	€ 56,564,500	18.1%	€ 29.45	\$41.60	Asia / South Pacific
AirTran	€ 147,554,000	8.0%	€ 5.97	\$8.45	The Americas
Alaska Airlines	€ 390,065,000	14.4%	€ 16.72	\$23.68	The Americas
Allegiant	€ 136,964,000	29.2%	€ 23.20	\$32.86	The Americas
American	€ 1,379,524,000	8.8%	€ 13.12	\$18.58	The Americas
Cebu Pacific	€ 30,619,383	6.6%	€ 2.93	\$4.15	Asia / South Pacific
China Eastern	€ 210,643,590	2.6%	€ 3.24	\$4.60	Asia / South Pacific
Comair South Africa	€ 916,470	2.7%	€ 0.26	\$0.37	Middle East and Africa
Delta	€ 2,612,200,000	11.7%	€ 16.06	\$22.75	The Americas
easyJet	€ 654,824,400	19.2%	€ 13.42	\$18.98	Europe and Russia
Emirates	€ 426,240,000	4.2%	€ 13.57	\$19.22	Middle East and Africa
Finnair	€ 1,600,000	0.1%	€ 0.22	\$0.32	Europe and Russia
Flybe	€ 106,048,319	15.7%	€ 14.84	\$20.99	Europe and Russia
Frontier	€ 41,807,202	3.7%	€ 2.86	\$4.05	The Americas
Hainan	€ 92,536,749	3.9%	€ 4.97	\$7.04	Asia / South Pacific
Hawaiian	€ 48,396,300	5.2%	€ 5.75	\$8.14	The Americas
Iberia	€ 17,750,000	0.4%	€ 0.70	\$0.99	Europe and Russia
Jazeera Airways	€ 9,749,251	8.9%	€ 7.50	\$10.62	Middle East and Africa
Jet Airways	€ 5,638,400	0.3%	€ 0.47	\$0.66	Asia / South Pacific
Jet2.com	€ 75,030,912	21.0%	€ 24.20	\$34.24	Europe and Russia
JetBlue	€ 335,350,000	12.6%	€ 13.83	\$19.58	The Americas
LAN Airlines	€ 28,380,494	0.9%	€ 1.64	\$2.32	The Americas
Lufthansa Group	€ 258,000,000	0.9%	€ 2.83	\$4.01	Europe and Russia
Norwegian	€ 132,352,000	12.0%	€ 10.16	\$14.39	Europe and Russia
Pegasus	€ 47,387,527	8.5%	€ 5.53	\$7.83	Europe and Russia
Qantas Group	€ 1,087,268,000	10.5%	€ 26.24	\$37.00	Asia / South Pacific
REX Regional Express	€ 1,442,402	0.8%	€ 1.16	\$1.65	Asia / South Pacific
Royal Jordanian	€ 7,470,000	1.5%	€ 2.49	\$3.53	Middle East and Africa
Ryanair	€ 801,600,000	22.1%	€ 10.90	\$15.37	Europe and Russia
SAS Group	€ 3,360,000	0.1%	€ 0.13	\$0.19	Europe and Russia
Singapore	€ 14,586,000	0.26%	€ 0.89	\$1.25	Asia / South Pacific
South African	€ 36,924,000	1.6%	€ 5.48	\$7.77	Middle East and Africa
Southwest	€ 345,940,000	4.3%	€ 3.92	\$5.56	The Americas
Spirit	€ 112,790,560	22.6%	€ 17.76	\$25.16	The Americas
Sun Country	€ 9,711,736	6.1%	€ 10.47	\$14.82	The Americas
TAM Airlines	€ 359,489,220	7.0%	€ 10.40	\$14.73	The Americas
Tiger Airways	€ 71,583,600	20.5%	€ 11.99	\$16.99	Asia / South Pacific
United Continental	€ 3,530,000,000	14.7%	€ 24.23	\$34.32	The Americas
US Airways	€ 834,492,000	9.9%	€ 10.49	\$14.86	The Americas
Virgin America	€ 26,567,486	5.2%	€ 6.83	\$9.67	The Americas
Vueling	€ 93,400,000	11.7%	€ 8.46	\$11.99	Europe and Russia
WestJet	€ 66,047,500	3.5%	€ 4.35	\$6.17	The Americas

Data source: Research conducted during May 2011 by IdeaWorks of the financial statements filed by 47 airlines worldwide.



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About IdeaWorks: IdeaWorks was founded in 1996 as a consulting organization building brands through innovation in product, partnership and marketing, and building profits through financial improvement and restructuring. Its international client list includes airlines and other travel industry firms in Asia, Europe, the Middle East, and the Americas. IdeaWorks specializes in ancillary revenue improvement, brand development, customer research, competitive analysis, frequent flier programs and on-site executive workshops. Learn more at IdeaWorksCompany.com.

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