

# Size matters: finding the best seats in the sky

Routehappy Insights



# Better seats are out there: you just need to know where to look

## Highlights:

- Flyers don't always need to pay more for extra room: 13% of US domestic flights in Regular Economy have Roomier seats, the kind that feel less restricted and have enough space to open a laptop.
- There's more Extra Legroom Economy than ever before, and it's now offered on 40% of US domestic flights. If you're willing to pay with money or loyalty, you can fly more comfortably, even in economy.
- Comfort is coming back to international economy too: a full 47% of international flights from the US now have Extra Legroom Economy or Premium Economy.
- A real hidden gem: there are more than 100 flights within the United States in business and/or first that have international style flat seats.
- There's a record amount of flat seats in international business from the US: over 50% of flights.
- And on long haul flights over 5 hours, more than half of flights have the better kind of flat seats: full flat beds that recline 180° or full flat pods that recline 180° with direct aisle access for every flyer.

Routehappy differentiates air travel through happiness data. Our unique Happiness Scores reveal shorter flights with better planes, seats, amenities, and flyer ratings. Routehappy tracks a myriad of Happiness Factors that matter to flyers: 60 seat layouts, 25 seat types, 20 kinds of entertainment, 10 in-seat power types, Wi-Fi, and more. [Routehappy.com](https://routehappy.com)

Please attribute data to Routehappy, and quotes from this report to John Walton, Director of Data, who is also available for interview and further questions. Contact Kellie Pelletier, Director of PR & Communications, [kpelletier@routehappy.com](mailto:kpelletier@routehappy.com). For data methodology, see final page.

# In economy cabins, it's all about the legroom

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### Regular Economy

basic economy seats — what you get without having to pay extra.\*



#### Tight

These seats are really packed in, at a pitch\*\* of 30" or less.



#### Standard

Most economy seats have a 31" pitch. That's okay for most folks but it can feel a bit tight when the person in front reclines.



#### Roomier

More room than average, at 32–35" pitch or more — enough to open up a laptop even when the person in front reclines.



#### International Premium Economy

Similar to domestic first class recliner seats, in a separate cabin with upgraded service.

Extra Legroom Economy seating sections are given to frequent flyers or sold, offering more space and perks in the economy cabin.

Examples: Delta Economy Comfort, United Economy Plus, American Main Cabin Extra, JetBlue Even More Space, Virgin America Main Cabin Select\*\*\*

Premium Economy is a separate cabin with larger recliner seats and upgraded service.

Examples: Virgin Atlantic Premium Economy, British Airways World Traveller Plus

\* Some airlines charge extra to select seats in advance, or to select aisles and windows.

\*\* The industry standard for measuring economy seating is pitch, the distance from one point on a seat to the same point on the seat in front. Routehappy take it a step further, explaining which are more and less comfortable.

\*\*\* Routehappy counts Extra Legroom Economy sections if they're more than just bulkhead and exit row seating, requiring separate sections of economy or more amenities.

## If you look hard enough, 13% of US flights have Roomier seats in Regular Economy (without paying extra).

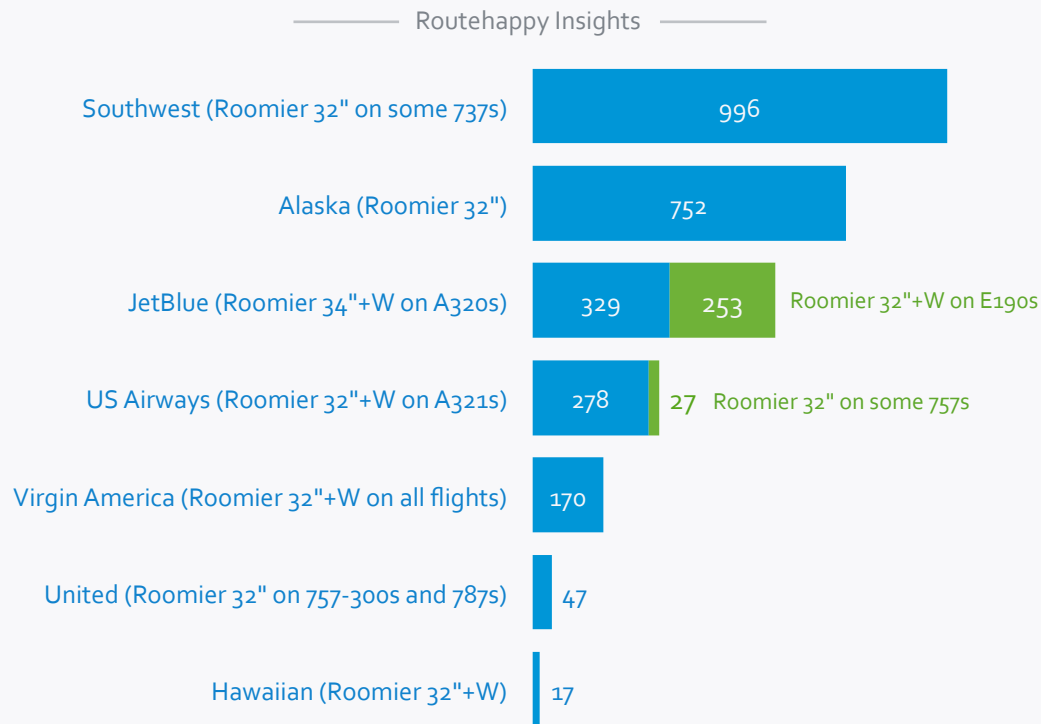
Routehappy analysis shows that 13% of domestic US economy flights have a seat pitch of 32" or more, enough to open and use a standard 13-inch laptop like a MacBook Air even when the person in front of you reclines.

Southwest has the most of these flights, followed by Alaska, JetBlue, US Airways and Virgin America.

Seats marked **+W** are up to an inch wider than average. They provide more elbow-room and feel less cramped.

Standard seats (31") are okay for most people until the person in front reclines or when trying to get comfortable for a longer flight, at which point they can feel restricted.

### Number of US domestic flights with Regular Economy seating at 32" or better



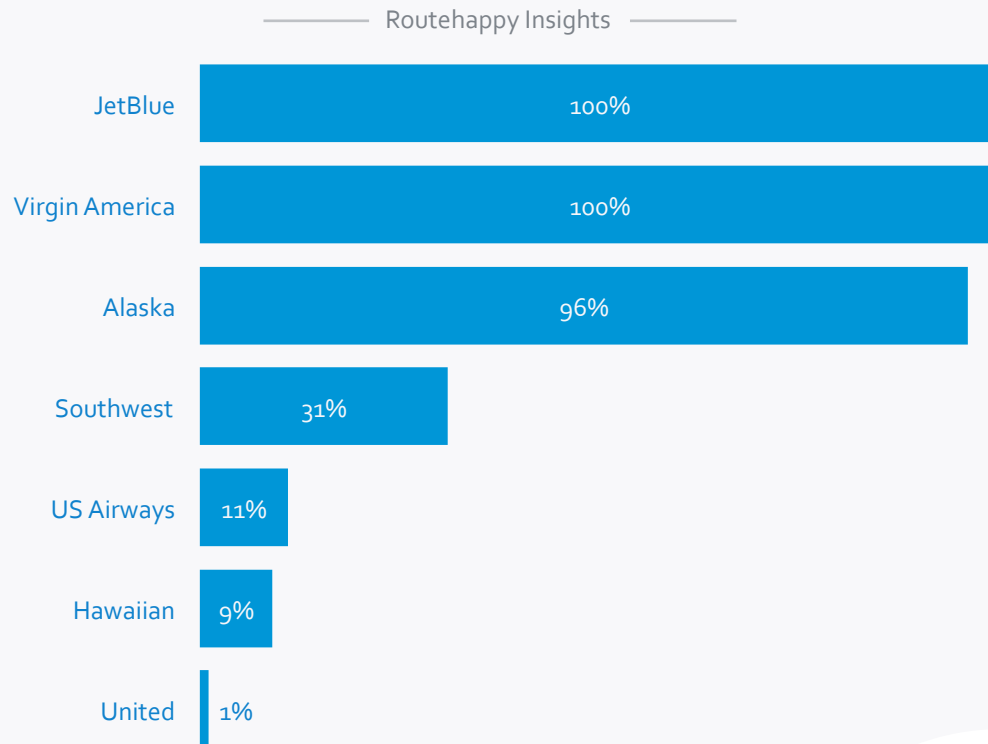
## Every Virgin America and JetBlue seat is Roomier, and virtually all Alaska Airlines seats are too.

If you like more space when you fly, you'll always find it in Regular Economy on JetBlue and Virgin America. Every seat on every one of their flights has at least 32" of pitch — and wider seats too.

Almost all Alaska Airlines flights have Roomier seats too — that's every flight except those on CRJs and Saab 340s.

If you're a Southwest, US Airways, Hawaiian or United flyer, choose wisely: some of your airline's flights have Roomier seats in Regular Economy.

### Percentage of US domestic flights with Regular Economy seating at 32" or better





Only one US domestic airline offers the productivity trifecta of Roomier seats, Wi-Fi & in-seat power in Regular Economy on any flight: Virgin America.

Virgin America is unique in offering this combination in Regular Economy. Flyers can find this combination on certain American, Delta and United flights too — but only if seated in the Extra Legroom Economy section.

## Extra-legroom economy is becoming the alternative to first class on US domestic flights — and it's on 40% of them.

Flyers will find Extra Legroom Economy available for frequent flyers or for sale on over 9,000 daily flights, an impressive proportion of the over 22,000 US departures each day.

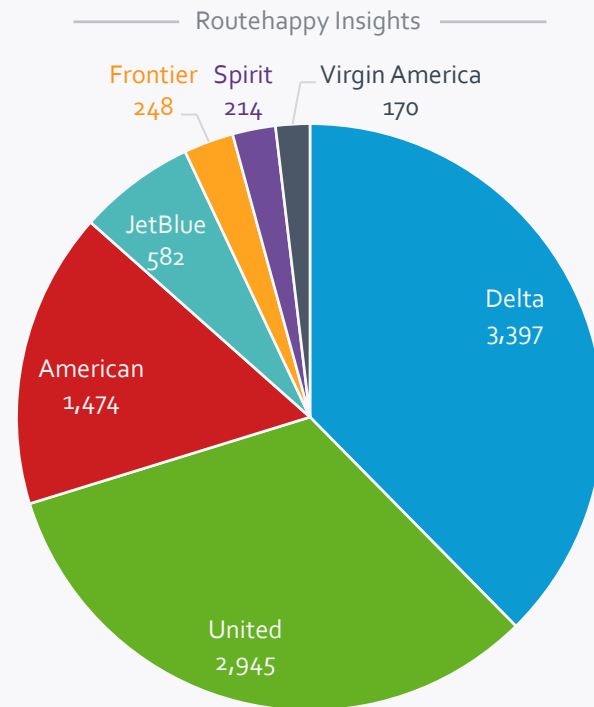
Delta has the most flights with Extra Legroom Economy, with United close behind.

Where won't you find it? Of the larger domestic airlines, Southwest, US Airways, Alaska, AirTran and Hawaiian do not have paid or earned Extra Legroom Economy products on their planes.

JetBlue offers Even More Space, its Extra Legroom Economy, on every flight. But its Regular Economy seats on A320s have similar space to other airlines' paid or earned Extra Legroom Economy.

Another hidden gem: Spirit's Extra Legroom Economy is "Big Front Seats", domestic first class recliners sold for Extra Legroom Economy prices.

## Number of US domestic daily flights with Extra Legroom Economy option



## Flyers can count on finding Extra Legroom Economy on board every flight with four US airlines.

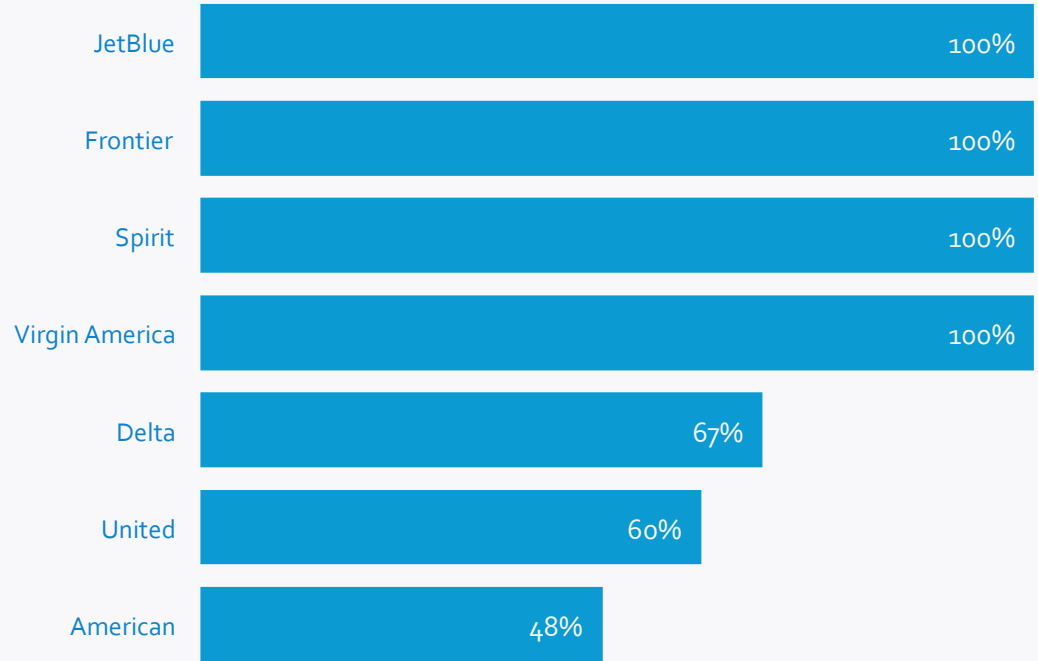
If it's consistency you're after, 100% of JetBlue, Frontier, Spirit and Virgin America flights offer Extra Legroom Economy on every single flight.

Flyers who want to count on being able to buy Extra Legroom Economy on all flights should steer towards those airlines.

Of the major US airlines, Delta offers the greatest percentage of flights with Extra Legroom Economy.

### Percent of US domestic daily flights with Extra Legroom Economy option

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## Nearly half of all international flights from the US offer Extra Legroom Economy or Premium Economy.

When it really matters on international flights, flyers have more options than ever before to fly more comfortably.

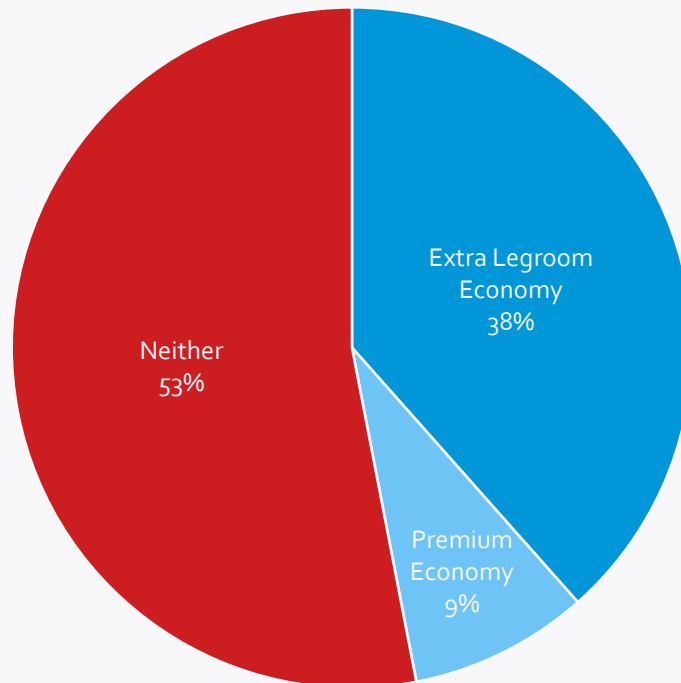
47% of the over 1,800 international flights from the US have either Extra Legroom Economy or Premium Economy.

Flyers can stretch out in Extra Legroom Economy on more than 700 flights, 38% of total flights from the US.

Premium Economy can be found on over 150 flights, 9% of total flights from the US.

## Daily international flights from the US with Extra Legroom Economy seats or Premium Economy cabins

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## From the US, JetBlue offers the most certainty of Extra Legroom Economy, but United & Delta have it on a lot more flights.

12 airlines provide Extra Legroom Economy on nearly 700 daily international flights from the US.

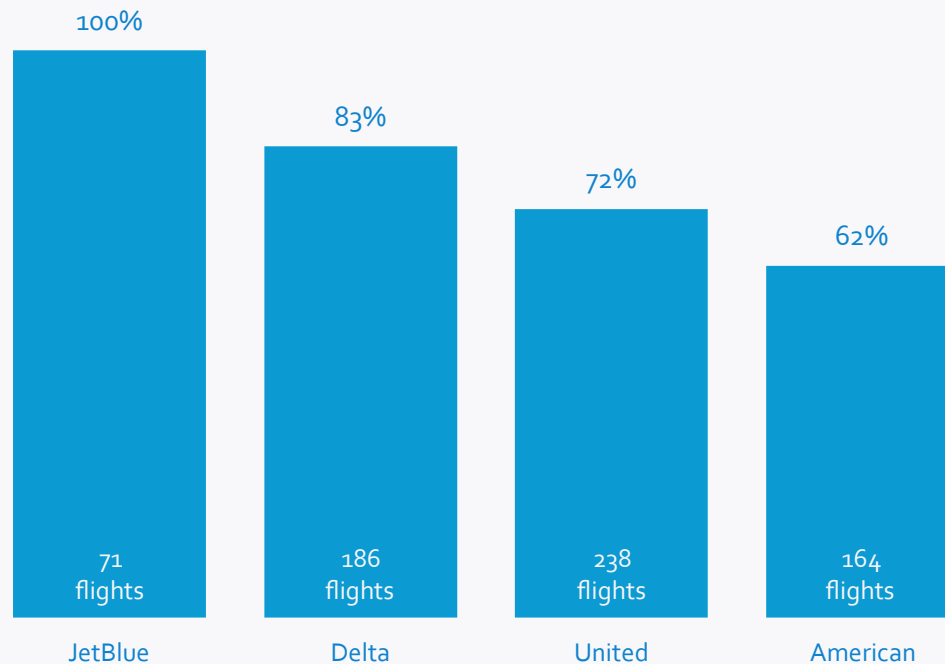
Flyers can also take advantage of Extra Legroom Economy on eight airlines with fewer than 20 international flights each:

- Aeromexico (15 flights, 38%)
- Spirit (12 flights, 100%)
- KLM (6 flights, 100%)
- Frontier (4 flights, 100%)
- El Al (3 flights, 80%)
- Air New Zealand (3 flights, 60%)
- Air France (1 flight, 5%)
- Virgin America (1 flight\*, 100%)

\*Virgin America has three international routes each offering Extra Legroom Economy, but only one operates on the day this report's data applies to.

## Percentage of daily international flights from the US with Extra Legroom Economy seats on largest airlines

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## Premium Economy is the next best thing to business. British Airways and Virgin Atlantic have the most of it.

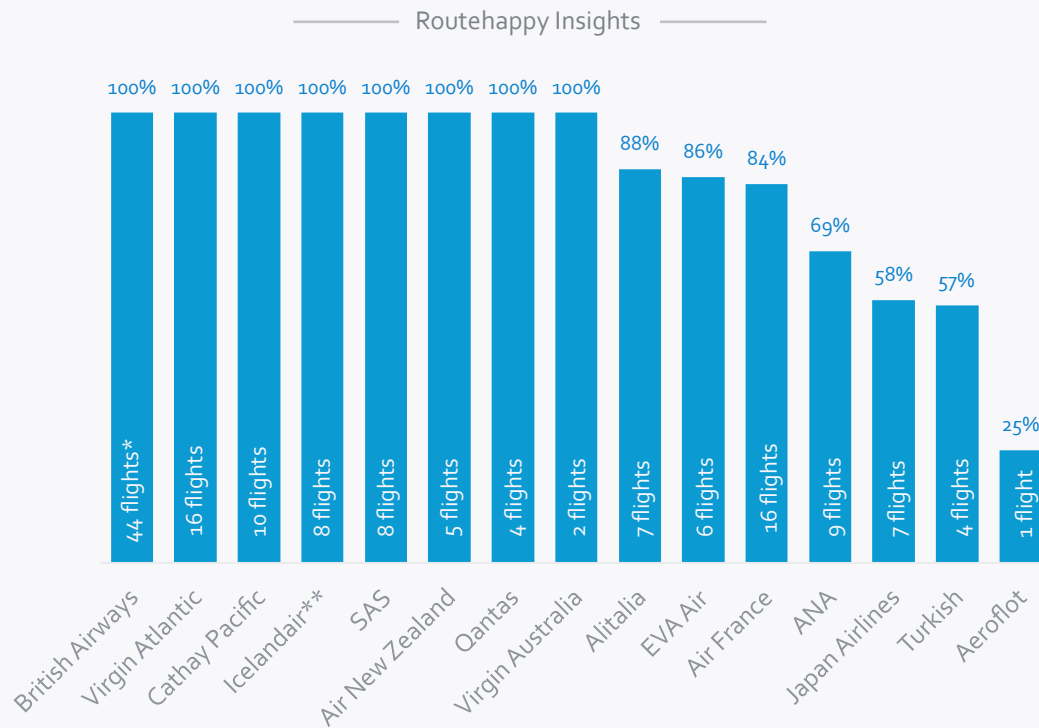
16 airlines offer Premium Economy on international flights, but only 7 offer it on every flight.

British Airways offers the most Premium Economy flights by far (44 flights), followed by Virgin Atlantic with 16 flights.

\* There are two daily BA flights without Premium Economy: the all-business-class flights from JFK to London City, not included in this total.

\*\* Icelandair's Premium Economy is a Roomier 33" economy seat with the middle seat free.

## Percentage of international flights from the US with Premium Economy



# In business and first cabins, it's all about the seat type

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### Recliner

Domestic first class recliner type seat: bigger than economy, like an armchair



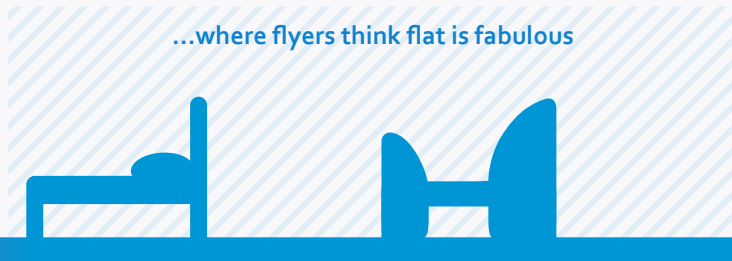
### Cradle sleeper

The old kind of international business class, like a La-Z-Boy chair



### Angle flat

The surface is flat, but the bed is at a 10-20° angle to the floor



...where flyers think flat is fabulous

### Full flat

Totally flat, parallel to the floor, like a bed

### Full flat pod

Totally flat, with no middle seats, plus every flyer has direct access to the aisle

Note: the relatively few international first class cabins flying from the US are outside of the scope of this report.

## Nearly 120 daily flights in the US have international style flat seats in business/first, a real luxury for domestic travel.

Nearly 10,500 US daily flights offer business and/or first, but 117 have what frequent flyers covet most: international style flat seating.

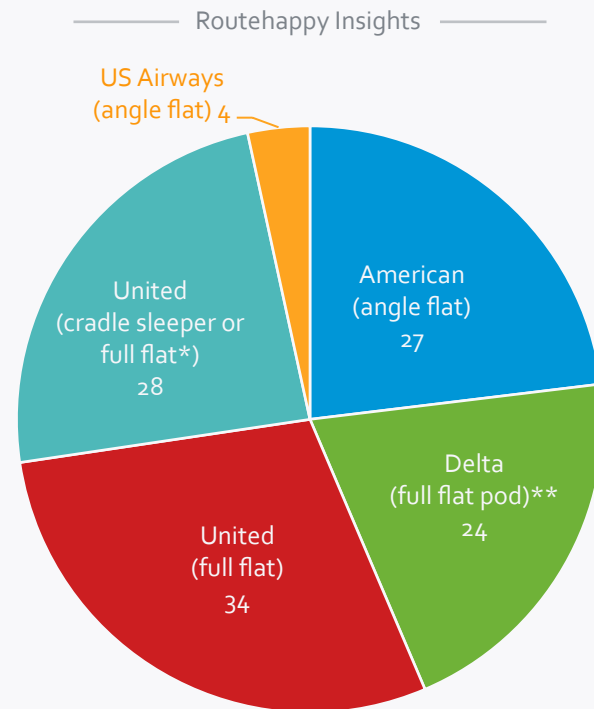
Of the rest, over 9,400 flights offer a recliner seat. 240 flights provide better cradle sleepers. And over 520 flights just have standard economy seats in business/first.

Domestically, United has the most flights with full flat beds, while Delta's full flat pods provide an even more spacious product. American & US Airways offer angle flat seats.

\* 28 United p.s. flights from JFK to SFO or LAX are being upgraded from cradle sleeper seats to full flat beds. As of the end of August, 12 of 19 planes flying this route were refitted with full flat beds.

\*\* Of this number, Delta has two daily flights with angle flat seating: Atlanta to Honolulu and return.

## US domestic flights with angle flat, full flat or full flat pod seats in business/first, by airline



## 10 domestic routes offer international style flat seats on more than one daily roundtrip flight.

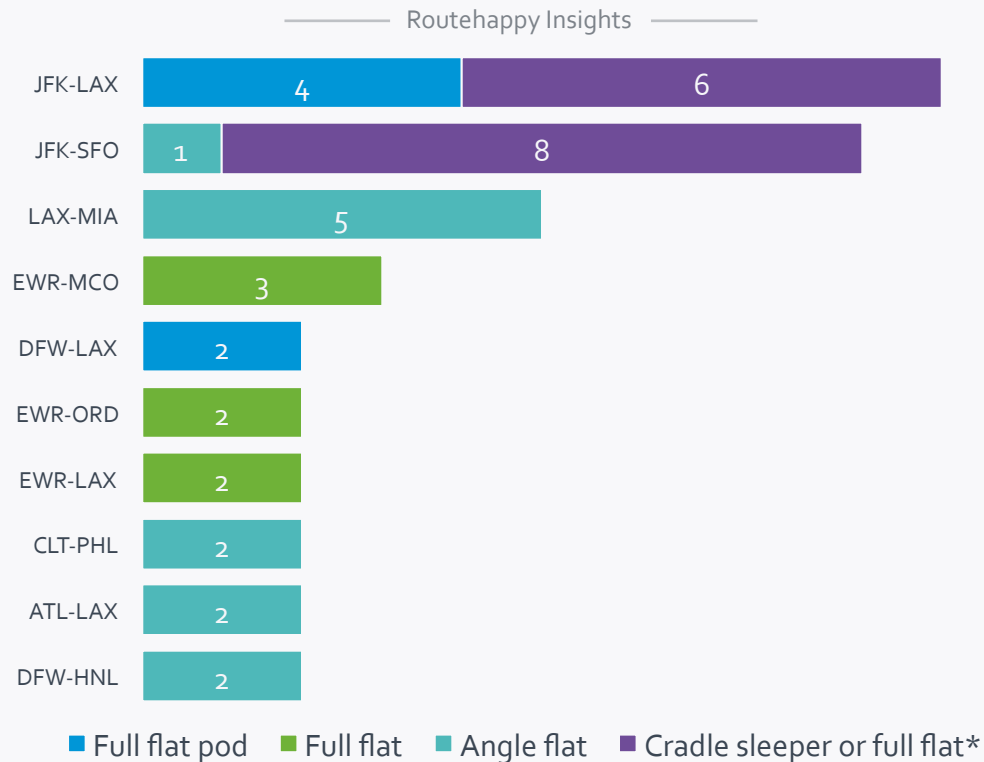
Transcontinental flyers get the comfiest ride in the US, when upgrading or buying a premium ticket — without having to pay a premium for flat seats. Between JFK and LAX/SFO, the best are Delta’s full flat pods and United’s p.s. service\*.

But the real surprise hidden gems are on routes like Newark-Orlando (United full flat beds), Dallas or Miami to LAX (American angle flat seats) and Newark-LAX (United full flat beds).

And flyers can look forward to American and JetBlue starting to fly new Airbus A321 planes with great new flat seats on domestic transcontinental flights next year.

\* 28 United p.s. flights from JFK to SFO or LAX are being upgraded from cradle sleeper seats to full flat beds. As of end August, 12 of 19 planes were refitted with full flat beds.

## Number of US domestic daily flights with international style flat seats



## A further 26 domestic routes have a daily roundtrip flight with international style flat seats.

From short routes like Chicago to Washington, to long hauls like Honolulu to Newark, flyers in the know have the chance to fly international style when upgrading or buying a ticket, again without having to pay a premium for the best kind of seats.

Many of these services are “repositioning” flights, where airlines move planes between their domestic hubs (like United’s Boeing 787 Dreamliners between Houston and Denver) ready for an international flight.

## US domestic routes with one daily round-trip flight with international style flat seats

————— Routehappy Insights —————

<b>ATL – DTW</b>	<b>DFW – OGG</b>
<b>DEN – EWR</b>	<b>EWR – ORD</b>
<b>ATL – HNL</b>	<b>IAD – ORD</b>
<b>EWR – HNL</b>	<b>IAH – ORD</b>
<b>DEN – IAH</b>	<b>LAX – ORD</b>
<b>EWR – IAH</b>	<b>MIA – ORD</b>
<b>HNL – IAH</b>	<b>ATL – SEA</b>
<b>IAD – IAH</b>	<b>JFK – SEA</b>
<b>ATL – JFK</b>	<b>DFW – SFO</b>
<b>HNL – LAX</b>	<b>HNL – SFO</b>
<b>IAH – LAX</b>	<b>IAH – SFO</b>
<b>DFW – MIA</b>	<b>JFK – SFO</b>
<b>JFK – MIA</b>	<b>MIA – SFO</b>

## For the first time, more than half of international flights from the US have flat seats in business class.

Airlines have been investing in better seats for their best customers, and it shows. But only 30% have the best kind: full flat and full flat pod.

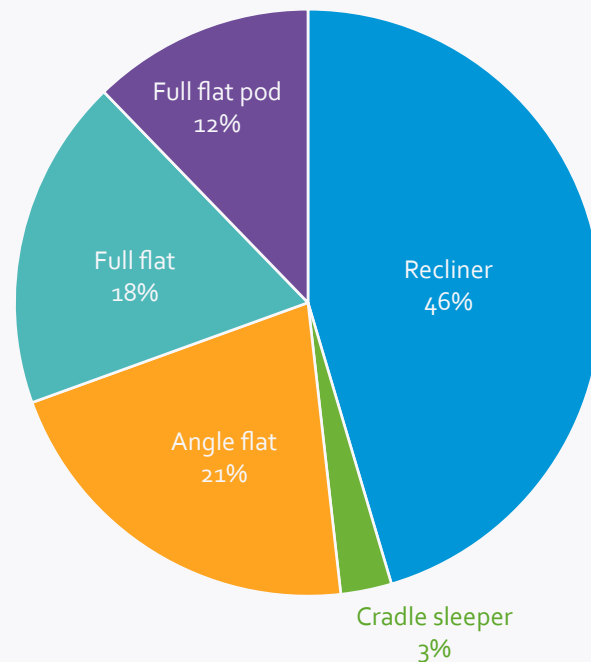
Of the more than 1,800 international flights departing the US, less than half have recliner seats (like domestic first class) in their premium cabins\*. These are mostly found on international flights within the Americas.

Flyers get full flat beds on 18% of flights. Full flat pods, where every passenger has aisle access, are found on 12% of the 1,822 daily flights departing the US.

\* The relatively few international first class cabins flying from the US are outside of the scope of this report.

## Type of business class seat\* on flights departing the US

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And on the longest flights, seats are even more comfortable: full flat beds or full flat pods more than 50% of the time.

On flights more than 5 hours, it's even more important that you can go full flat for sleeping.

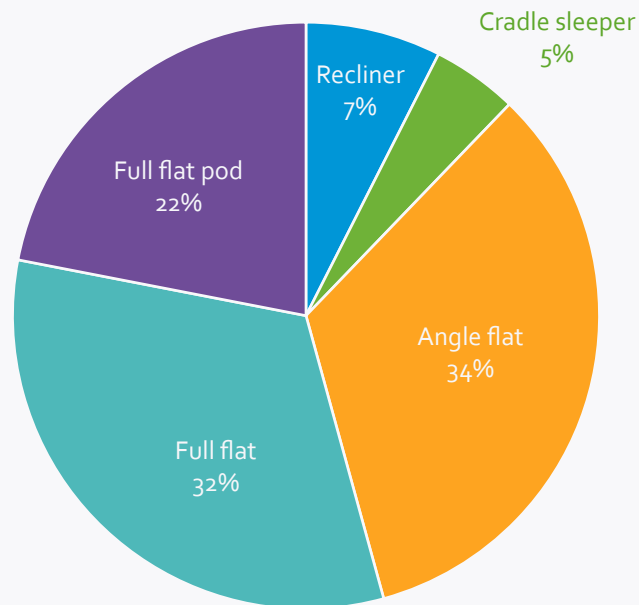
Airlines know this, so they make a point of scheduling full flat and full flat pod seats on long haul flights.

Full flat pods mean that flyers in middle or window seats don't have to clamber over their aisle neighbors in the middle of the night.

At the other end of the comfort scale, just 40 flights have recliner seats on flights over 5 hours, mainly Pacific flights from Honolulu or services from the northeast US to northern South America.

## Type of business class seat on flights over 5 hours departing the US

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## Speaking of full flat pods, Delta offers them on the most flights from the US, followed by Virgin Atlantic & US Airways.

Delta and Virgin Atlantic's new partnership gives flyers the most flights with full flat pods in business class from the US.

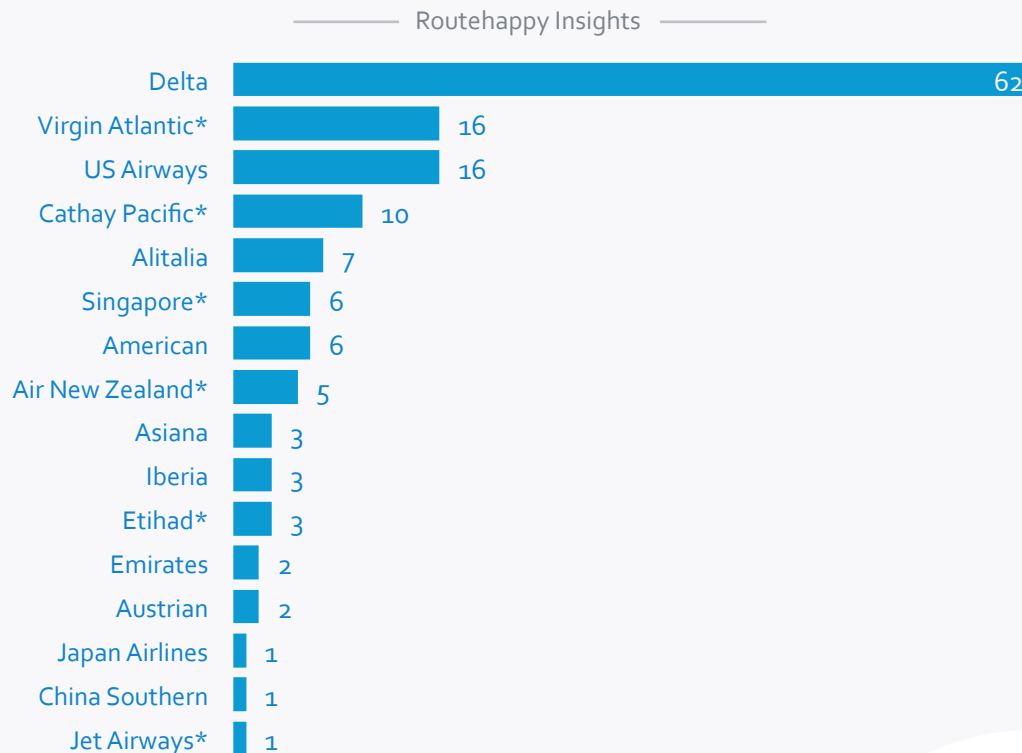
Delta has nearly half of the 144 flights with full flat pods, with Virgin Atlantic, US Airways and Cathay Pacific all in the double-digits.

US Airways was the first US airline to install full flat pods, in its Envoy business/first class.

In total, 16 airlines offer full flat pods on flights from the US.

\*Flyers who love full flat pods can be confident on Virgin Atlantic, Cathay Pacific, Singapore Airlines, Air New Zealand, Etihad and Jet Airways, which have full flat pods on all their flights from the US.

### Number of daily international flights from the US with full flat pod seating in business



## But in terms of regular full flat beds, United and British Airways have the most on flights from the US.

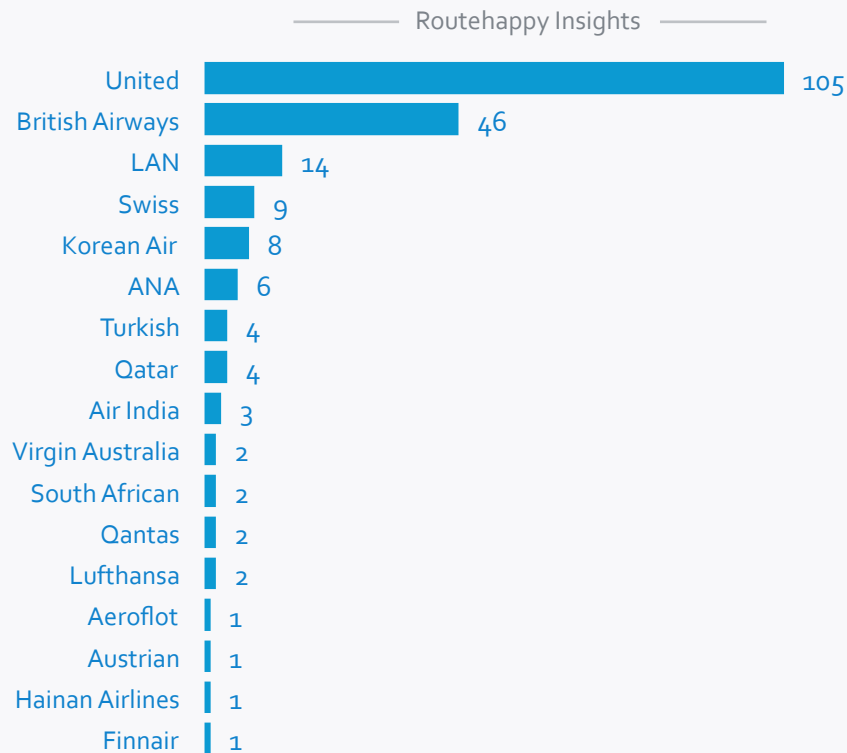
17 airlines offer full flat beds in business class\* on over 200 international flights from the US.

Full flat beds are quickly becoming the new must-have for international business class.

They're a big improvement on older business class options, like cradle sleepers or angle flat seats.

\* The relatively few international first class cabins flying from the US are outside of the scope of this report.

## Flights with full flat beds in international business departing the US



## Thanks to American, BA, Delta and Virgin Atlantic, New York to London flights have the best business class seats.

Pick JFK rather than Newark if you want a full flat pod, though.

Delighting AA flyers across the Atlantic, American's new Boeing 777-300ER planes have the most spacious and comfortable business class full flat pod in the sky, also seen on Cathay Pacific.

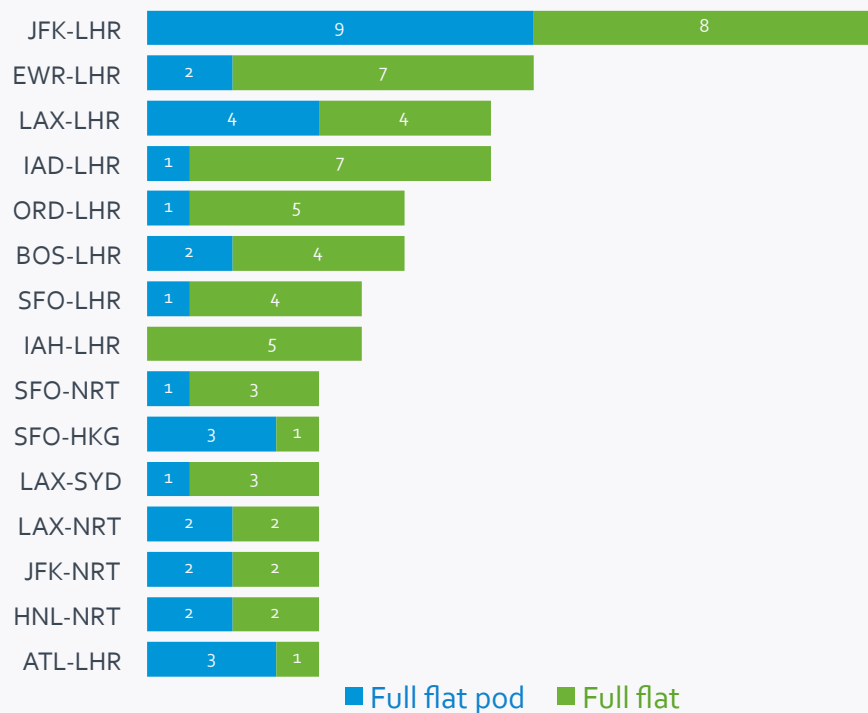
228 international routes from the US have at least one flight with a full flat bed or a full flat pod (with direct aisle access).

15 routes (see chart) have more than four flights with full flat or full flat pod seating.

11 additional routes have three or more flights with full flat or full flat pod seats, while 32 routes have two or more flights with these kinds of seats.

### Daily flights with full flat or full flat pod seating departing the US

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# Quotes from Routehappy

*Attribute to John Walton, Director of Data, Routehappy*

“Without paying any more, flyers who choose their flights wisely can find Roomier seats in Regular Economy. It’s just a matter of finding the hidden gems on every airline.”

“Airlines are investing in the features flyers want — like Wi-Fi, plugs and the option of Extra Legroom Economy.”

“Extra Legroom Economy seating is the most cost-effective way to get extra space on the plane, and Premium Economy is a hidden gem for bigger seats and better service.”

“Many flyers are confused by the difference between these ‘better-than-regular-economy’ options, especially as more of them are introduced. Routehappy helps flyers figure out the differences quickly and easily.”

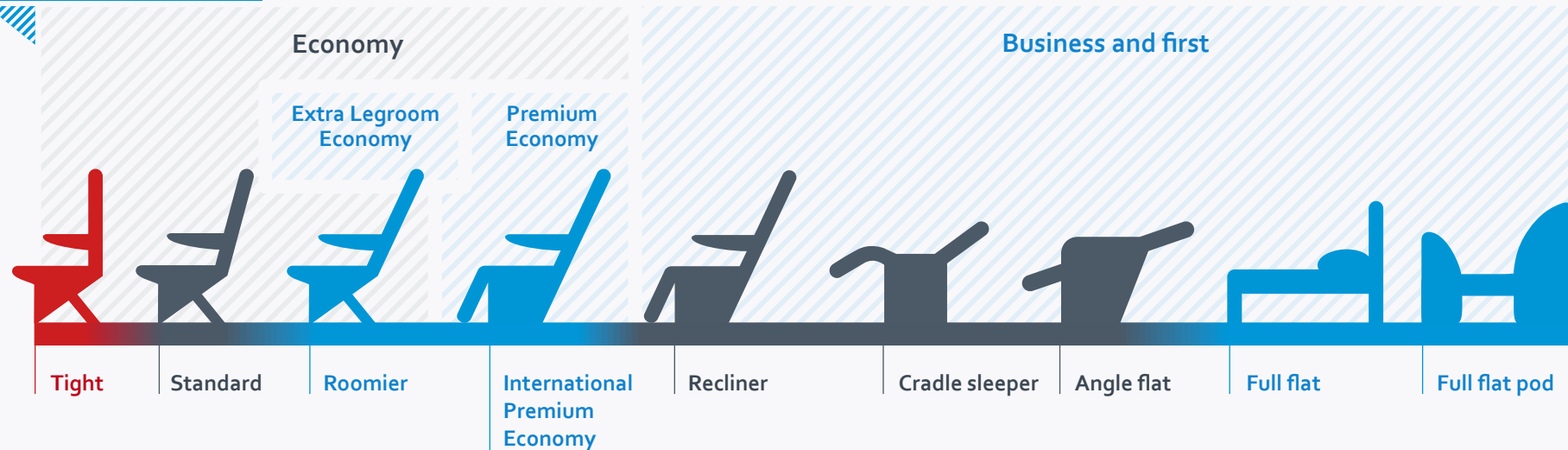
“For day flights or shorter trips, flyers who want to fly in comfort can use services like Routehappy to decide whether to buy up to a flat bed — or, conversely, whether an older angle flat seat, cradle sleeper or recliner is worth it.”

“Flyers are coming to expect better seats, and by and large airlines are delivering. On longer flights in particular, full flat beds are the new standard.”

“But increasingly, flyers experience the benefits of full flat pods, where there are no middle seats and every person has direct access to the aisle.”

# Find flights with the best seats on Routehappy

## Routehappy Insights



# More information, data sources and media requests

Analysis was based on US domestic and international flight schedules for travel Monday, September 9, 2013, as of Tuesday, August 27, 2013, combined with the data every flyer can see on Routehappy.com.

The Routehappy Flight Genius team is pleased to discuss its methodologies and data with media, airlines, and other interested parties. We can also provide further and deeper analysis, expert commentary, horizon-scanning, trend information, travel tips and much more for media and analysts. Wi-Fi availability is also displayed on every flight search at [Routehappy.com](http://Routehappy.com).

For more information, to schedule interviews, or to request specific data for your market/segment, contact Kellie Pelletier, Director of PR & Communications, [kpelletier@routehappy.com](mailto:kpelletier@routehappy.com), 917-514-5851.