

Special Article

Low Cost Carrier Fare
Analysis for selected Routes

Spring 2011



Low Cost Carrier Fare Analysis in Spring 2011

In Germany, the air fares quoted by the major Low Cost Carriers vary according to destination and booking period. Whereas, in previous issues of the *Low Cost Monitor* extensive price analyses of all routes covered by Low Cost Carriers have been performed, only considering the pure net prices, in this analysis the price analyses are extended by the final prices which are relevant for the consumers. A major reason is that lately more additional cost and fees – which sometimes significantly exceed the actual fare - have been charged to the net air fare. Thus, on 65 routes – corresponding to a representative random sample of more than 10% of all Low Cost routes in Germany – the pure air fare excluding taxes, fees and charges, is analysed. As further step the final fare – to be paid by the customer - is identified (s. Table 3). Also here further charges would be levied if apart from hand luggage additional luggage were to be carried, but the passenger is at least able to accomplish the voyage without facing further cost.

In almost every case, routes of 500 to roundly 1,500 km - in a few exceptional cases also longer routes - have been analysed. The booking date, April 4th, 2011, exemplarily has been chosen. The prices for a flight booked one day, one week one month or more than 3 months ahead have been identified. When on the day chosen the flights were already booked respectively were postponed to another day, the earliest possible date has been chosen. In case of several flight options on the same day, the cheapest flight has been chosen. The average net fares roughly correspond to the current extensive overall evaluation of all flight fares quoted by the airlines considered.

According to this analysis, in the German market, the airline *Ryanair* represents the cheapest Low Cost airline including all taxes and charges. Whereas, the average net fares amount to 50 and 60 Euro for a one way flight, the corresponding average final prices amount to 60 and 110 Euro; *Ryanair* and *Wizz* are ranging in the lower area (s. Tab. 1). This again reveals slightly rising average prices in spring as opposed to autumn. As opposed to spring 2010 in most cases there are no major changes, although since this year a route-dependent air traffic tax is levied. It becomes obvious that the average prices have partly dropped, but the gross prices stayed relatively constant. In some cases it is seen that tariffs booked long time in advance - usually the lowest ones - have been raised.

Solely for *Wizzair* a considerable increase of the average prices is seen in almost all areas. Furthermore, the better service provided by more expensive Low Cost Carriers should be taken into account.

	Durchschnittsbasistarif	Durchschnittsbruttopreis
	(Nur Flugpreis)	(inkl. Steuern/ Gebühren/Zuschläge)
- für ausgewählte Tage -		
Ryanair (FR)	31,73	45,67
Easyjet (U2)	k.A.	66,96
Germanwings (4U)	66,50	87,34
Air Berlin (AB)	62,90	110,16
Intersky (3L)	30,43	96,59
Wizz (W6)	50,74	53,23

Table 1: Average Fares in Spring 2011

Air fares depending on the booking period: Low Cost Carrier fares considerably vary according to the booking period. Thus, a flight to be taken on the next day might cost much more than one to be taken in 3 months. Whereas, the final air fare for a journey to be started on the next day might cost more than 170 Euro, most airlines only quote about 20 Euro for a flight to be started in 3 months. Thus, the final price amounts to 22 to 80 Euro (s. Tab. 2).

Buchungstag 04.04.2011	Vorausbuchung 1 Tag 05.04.2011		Vorausbuchung 1 Woche 12.04.2011		Vorausbuchung 1 Monat 03.05.2011		Vorausbuchung 3 Monate (12 Wochen) 28.06.2011	
	Durchschnittsbasistarif (Nur Flugpreis)	Durchschnittsbruttopreis (inkl. Steuern/ Gebühren/Zuschläge)	Durchschnittsbasistarif (Nur Flugpreis)	Durchschnittsbruttopreis (inkl. Steuern/ Gebühren/Zuschläge)	Durchschnittsbasistarif (Nur Flugpreis)	Durchschnittsbruttopreis (inkl. Steuern/ Gebühren/Zuschläge)	Durchschnittsbasistarif (Nur Flugpreis)	Durchschnittsbruttopreis (inkl. Steuern/ Gebühren/Zuschläge)
	Ryanair (FR)	58,24	89,52	27,02	43,06	20,73	21,42	20,94
Easyjet (U2)	k.A.	95,69	k.A.	69,67	k.A.	56,09	k.A.	46,39
Germanwings (4U)	130,61	155,15	64,22	86,29	38,77	58,25	32,40	49,67
Air Berlin (AB)	120,07	169,83	80,32	130,08	30,74	78,83	20,48	61,91
Intersky (3L)	45,78	111,93	45,78	111,93	18,84	84,99	11,34	77,49
Wizz (W6)	65,99	68,49	65,99	68,49	51,99	54,45	18,99	21,49

Table 2: Average Prices depending on the Booking Period

Buchungstag	04.04.2011	Vorausbuchung 1 Tag		Vorausbuchung 1 Woche		Vorausbuchung 1 Monat		Vorausbuchung 3 Monate (12 Wochen)		
		05.04.2011	12.04.2011	03.05.2011	28.06.2011	Distanz (km)	Basistarif (Nur Flugpreis)	Bruttopreis (inkl. Steuern/ Gebühren/Zuschläge)	Basistarif (Nur Flugpreis)	Bruttopreis (inkl. Steuern/ Gebühren/Zuschläge)
Ryanair (FR)										
Hahn-Montpellier	748	39,99	70,78	20,99	26,99	12	12	12,99	18,99	
Hahn-London (Stansted)	536	59,99	90,78	20,24	51,03	20,99	26,99	12,99	18,99	
Hahn-Girona	1085	64,99	95,78	26,24	57,03	26,24	32,24	19,99	25,99	
Hahn-Madrid	1345	39,99	70,78	20,24	51,03	27,74	33,74	19,99	25,99	
Hahn-Dublin	1006	59,99	90,78	27,74	33,74	39,99	70,78	27,99	33,99	
Hahn-Venedig (Treviso)	600	59,99	90,78	27,74	33,74	12	12	12,99	18,99	
Hahn-Mailand (Bergamo)	507	159,99	190,78	20,99	26,99	6	6	6	12	
Hahn-Tenerifa	3158	104,99	135,78	29,99	60,78	18,74	24,74	54,99	60,99	
Hahn-Riga	1345	26,99	57,78	27,74	33,74	9,74	15,74	19,99	25,99	
Weeze-Leeds	579	39,99	70,78	20,99	26,99	6	6	6	12	
Weeze-Rom (Ciampino)	1194	39,99	70,9	59,99	90,9	39,99	70,90	19,99	25,99	
Hahn-Palma de Mallorca	1207	64,99	95,78	26,24	57,03	17,99	17,99	34,99	65,78	
Lübeck-Mailand (Bergamo)	906	39,99	73,07	39,99	73,07	12	12	36,99	42,99	
Karlsruhe-London (Stansted)	653	59,99	91,79	20,99	26,99	20,99	26,99	12,99	18,99	
Karlsruhe-Porto	1553	64,99	96,79	26,24	32,24	14,99	20,99	34,99	40,99	
Weeze-Porto	1609	64,99	95,9	26,24	57,15	33,74	39,74	24,99	30,99	
Weeze-Lappananta	1699	42,99	73,9	26,99	32,99	42,99	73,90	25,99	41,99	
Magdeburg (Cochstedt)-Alicante	1775	29,99	56,4	21,99	27,99	16,49	22,49	14,99	20,99	
Berlin (Schönefeld)-Stockholm	744	39,99	80,2	20,99	26,99	20,99	26,99	6	12	
Weeze-Edinburg	787	59,99	90,9	27,74	33,74	14,99	20,99	12,99	18,99	
Easyjet (U2)										
Dortmund-London (Luton)	549	k.A.	81,99	k.A.	30,99	k.A.	23,99	k.A.	21,99	
Dortmund-Budapest	954	k.A.	81,99	k.A.	60,99	k.A.	37,99	k.A.	31,99	
Dortmund-Barcelona	1212	k.A.	100,99	k.A.	77,99	k.A.	66,99	k.A.	62,99	
Berlin (Schönefeld)-Rom (Ciampino)	1178	k.A.	133,99	k.A.	77,99	k.A.	55,99	k.A.	29,99	
Köln-London (Gatwick)	512	k.A.	75,99	k.A.	33,99	k.A.	26,99	k.A.	23,99	
Berlin (Schönefeld)-Olbia	1312	k.A.	87,99	k.A.	67,99	k.A.	43,99	k.A.	67,99	
Berlin (Schönefeld)-Budapest	684	k.A.	95,99	k.A.	58,99	k.A.	47,99	k.A.	42,99	
Berlin (Schönefeld)-Neapel	1276	k.A.	100,99	k.A.	120,99	k.A.	105,99	k.A.	64,99	
Berlin (Schönefeld)-Paris (Orly)	884	k.A.	93,99	k.A.	68,99	k.A.	56,99	k.A.	38,99	
Berlin (Schönefeld)-Glasgow	1228	k.A.	102,99	k.A.	97,99	k.A.	93,99	k.A.	77,99	
Germanwings (4U)										
Köln-Berlin (Schönefeld)	472	61,38	89,51	28,07	49,51	19,66	39,51	11,26	29,51	
Köln-München	435	61,68	89,51	28,07	49,51	15,46	34,51	11,26	29,51	
Köln-Rostock	486	42,97	69,51	51,38	79,51	34,57	59,51	30,57	59,51	
Köln-London (Stansted)	491	153,46	167	74,45	87,99	34,45	47,99	16,45	29,99	
Köln-Palma de Mallorca	1302	203,46	217	123,46	137	34,45	47,99	74,45	87,99	
Stuttgart-Wien	546	86,35	107	47,34	67,99	27,34	47,99	16,45	29,99	
Stuttgart-Moskau (Vnukovo)	2042	180,35	207	140,35	167	80,35	107	80,35	107	
Köln-Lissabon	1848	213,46	227	93,46	117	84,45	97,99	84,45	97,99	
Köln-Bukarest	956	193,46	207	74,45	87,99	54,45	67,99	34,45	47,99	
Berlin (Schönefeld)-Maastricht	557	103,89	127	24,88	47,99	14,88	37,99	14,45	27,99	
Dortmund-München	460	116,82	158,52	33,62	59,51	16,81	39,51	11,66	29,99	
Köln-Rom (Fiumicino)	1078	183,46	197	84,45	97,99	84,45	97,99	44,45	57,99	
Stuttgart-Leipzig	372	138,22	180,52	46,62	79,51	29,81	59,51	11,66	29,99	
Köln-Friedrichshafen	393	89,61	128,52	48,43	79,51	11,66	29,99	11,66	29,99	
Air Berlin (AB)										
Düsseldorf-Zürich	444	143,99	192,99	28,99	77,99	18,99	67,99	5,99	44,99	
Düsseldorf-Hamburg	340	129,99	180,51	58,99	109,51	18,99	69,51	4,47	44,99	
Düsseldorf-London (Stansted)	454	123,99	172,99	53,99	102,99	38,99	87,99	18,99	67,99	
Paderborn-London (Stansted)	576	142,99	191,99	102,99	151,99	52,99	101,99	22,99	71,99	
Köln-Berlin (Tegel)	463	103,99	154,51	58,99	109,51	4,47	44,99	4,47	44,99	
Köln-München	435	58,99	109,51	34,99	85,51	4,47	44,99	4,47	44,99	
Köln-Palma de Mallorca	1302	38,99	140,99	128,99	180,99	43,99	95,99	58,99	110,99	
Düsseldorf-Wien	787	123,99	172,99	68,99	117,99	28,99	77,99	20,99	29,99	
Saarbrücken-Berlin (Tegel)	570	123,99	174,51	103,99	154,51	18,99	69,51	4,47	44,99	
Berlin (Tegel)-Wien	546	143,99	192,99	73,99	122,99	23,99	72,99	20,99	29,99	
Berlin (Tegel)-Barcelona	1510	128,99	177,99	81,99	130,99	71,99	120,99	51,99	130,99	
Berlin (Tegel)-Rom Fiumicino	1197	126,99	175,99	166,99	215,99	41,99	90,99	26,99	75,99	
Intersky (3L)										
Friedrichshafen-Münster	512	21,11	89,99	21,11	89,99	11,11	79,99	11,11	79,99	
Friedrichshafen-Wien	528	22,01	79,99	22,01	79,99	22,01	79,99	12,01	69,99	
Friedrichshafen-Hamburg	661	69,99	138,87	69,99	138,87	21,11	89,99	11,11	79,99	
Friedrichshafen-Düsseldorf	447	69,99	138,87	69,99	138,87	21,11	89,99	11,11	79,99	
Wizz (W6)										
Dortmund-Danzig	919	49,99	52,49	39,99	42,49	49,99	52,49	19,99	22,49	
Köln-Kattowitz	840	79,99	82,49	79,99	82,49	59,99	62,49	19,99	22,49	
Köln-Danzig	856	49,99	52,49	39,99	42,49	19,99	22,29	19,99	22,49	
Weeze-Budapest	1051	49,99	52,49	49,99	52,49	49,99	52,49	14,99	17,49	
Dortmund-Bukarest (Baneasa)	1574	99,99	102,49	119,99	122,49	79,99	82,49	19,99	22,49	

Flug kann von Datum geringfügig abweichen, falls ausgebaut oder kein Angebot (dann nächstmöglicher Termin)

Quelle: Internetadresse der jeweiligen Fluggesellschaft

Table 3: Air Fares quoted for the selected Routes in Spring 2011

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