

## Special Issue

Analysis of Low Cost Carrier  
Fares for selected Routes

Autumn 2010





## Analysis of Low Cost Carrier Fares in Autumn 2010

In Germany, the fares quoted by the major Low Cost Carriers vary considerably related to destination and booking period. In the past many price analyses of routes covered by Low Cost Carriers have been performed, however they only focus on net fares. The present price analysis deals with final prices, which are relevant for the consumer. The main reason is the current habit of adding more and more fees and charges to the net price, which in many cases exceed the actual air fare by fare. Therefore, the pure air fare – excluding taxes, fees and charges – is exemplarily analysed on 70 routes, which correspond to a representative 10% random sample of the routes covered by Low Cost Carriers in Germany. As a next step the final price – relevant for the customer - is identified. (refer to Table 3). There may be further surcharges in case of additional luggage to be carried, but at least it enables the passengers to undertake the journey at such a price without expecting additional costs.

In almost all cases routes of 500 to about 1,500 km distance, including some exceptions of some longer routes, have been analysed. The booking date - September 7<sup>th</sup>, 2010 - was chosen exemplarily. On this date the prices for a flight within a booking period of one day, one week, one month and more than 3 months have been identified. In case the flight would be overbooked and not be performed on this day, respectively, the next flight date is chosen. In case of several flights on this day, the cheapest is chosen. The average net prices roughly correspond to the present overall evaluation of all air fares quoted by the airlines considered.

According to this analysis the airline *Wizz* is the cheapest (inclusive all taxes and fees) Low Cost airline operating in the German market. However, they only cover a small number of routes, but they are still in the start-up phase. Whereas half of the number of the airlines considered quote average net air fares of roundly 30 Euro for a one way flight, the corresponding average final price amounts to 40 to 50 Euro and the remaining number of companies quote distinctly higher prices (refer to Table 1). This reveals that in autumn - like in every year – the average prices drop as opposed to spring. However, there are different tendencies as opposed to the preceding year. Whereas the average prices quoted by the cheaper Low Cost Carriers have slightly climbed, the more expensive Low Cost Carriers quote lower prices. Thus, the price margin has been slightly adjusted. Only *Intersky* quotes distinctly higher prices than in the preceding year. However, expensive Low Cost Carriers often provide better service – a fact, which should be taken into account.

	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)
	- for exemplary Days -	
Ryanair (FR)	30.48	41.50
Easyjet (U2)	k.A.	59.17
Germanwings (4U)	70.10	84.28
Air Berlin (AB)	55.62	95.36
Intersky (3L)	k.A.	144.08
Wizz (W6)	22.52	35.46

Table 1: Average Prices in Autumn 2010

**Air Fares related to Booking Period:** Low Cost Carrier air fares considerably vary according to the period between booking and flight. Thus, a trip starting the next day often costs much more compared to a trip to be started in 3 months. Whereas the air fare for a journey to be started the next day might amount to 200 Euro, for a trip to be taken in 3 months only about 20 Euros are quoted by most of the airlines. Then, the final price lies in a range between 20 and 50 Euro (refer to Table 2).

Booking Day 07.09.2010	Travel Day (1 Day later) 08.09.2010		Travel Day (1 Week later) 15.09.2010		Travel Day (1 Month later) 06.10.2010		Travel Day (3 Month later) 01.12.2010	
	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)
	Ryanair (FR)	57.24	81.36	34.94	44.95	19.17	25.65	10.57
Easyjet (U2)	k.A.	117.99	k.A.	57.39	k.A.	42.54	k.A.	18.74
Germanwings (4U)	143.13	163.57	72.24	87.42	38.85	50.56	26.17	35.56
Air Berlin (AB)	130.82	170.72	55.82	98.50	22.05	61.33	13.77	50.88
Intersky (3L)	k.A.	211.81	k.A.	190.56	k.A.	100.55	k.A.	73.41
Wizz (W6)	44.90	57.99	26.79	39.99	14.01	26.99	4.36	16.85

Table 2: Average Prices related to the Booking Period

Booking Day 07.09.2010	Distance (Km)	Travel Day (1 Day later) 08.09.2010		Travel Day (1 Week later) 15.09.2010		Travel Day (1 Month later) 06.10.2010		Travel Day (3 Month later) 01.12.2010	
		Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)	Average Fare (without Tax)	Average Fare (incl. Tax, Fees and Charges)
		Ryanair (FR)							
Hahn-Berlin (Schönefeld)	513	44.99	74.47	21.99	32.12	6.72	8	7.59	14.98
Hahn-London (Stansted)	536	49.99	78.48	24.99	29.99	8	8	9.99	14.99
Hahn-Girona	1085	59.99	81.78	29.99	34.99	13.49	18.49	8	8
Hahn-Madrid	1345	69.99	91.78	33.99	38.99	21.24	26.24	9.99	14.99
Hahn-Göteborg (Saeve)	921	39.99	61.78	19.99	24.99	8	8	8.99	13.99
Hahn-Venedig (Treviso)	600	59.99	81.78	27.99	32.99	17.99	22.99	8	8
Hahn-Mailand (Bergamo)	507	49.99	71.78	24.99	29.99	8	8	8	8
Hahn-Teneriffa	3158	79.99	101.78	104.99	126.78	63.99	85.78	24.99	29.99
Hahn-Danzig	906	39.99	61.78	19	24.99	8.09	13.09	8	8
Weeze-Berlin (Schönefeld)	511	44.99	79.61	21.99	32.12	6.72	8	7.59	14.98
Weeze-Rom (Ciampino)	1194	69.99	91.9	49.99	71.9	39.99	61.9	9.99	14.99
Hahn-Palma de Mallorca	1207	79.99	101.78	79.99	101.78	33.74	55.53	8	8
Lübeck-Mailand (Bergamo)	906	79.99	104.07	27.99	32.99	23.79	28.79	8	8
Karlsruhe-London (Stansted)	653	59.99	82.44	27.99	32.99	8	8	12.99	17.99
Karlsruhe-Porto	1553	39.99	62.44	24.99	47.44	16.99	20.29	10.99	15.99
Weeze-Porto	1609	99.99	121.9	27.99	48.9	29.99	51.99	12.99	17.99
Weeze-Lappenranta	1699	54.99	76.9	33.99	38.99	33.99	38.99	16.99	21.99
Altenburg-London (Stansted)	855	39.99	61.99	36.99	41.99	19.99	24.99		
Berlin (Schönefeld)-Bremen	327	19.99	56.76	21.99	32.12	6.72	8	6.72	8
Weeze-Birmingham	546	59.99	81.9	36.99	41.99	8	8	12.99	17.99
Easyjet (U2)									
Dortmund-London (Luton)	549		89.99		33.99		16.99		11.99
Dortmund-Krakau	869		102.99		31.99		15.99		10.99
Dortmund-Barcelona	1212		114.99		58.99		70.99		14.99
Berlin (Schönefeld)-Rom (Ciampino)	1178		133.99		77.99		53.49		15.49
Köln-London (Gatwick)	512		58.99		31.99		17.49		13.49
Berlin (Schönefeld)-Olbia	1312				77.99		71.99		11.99
Berlin (Schönefeld)-Budapest	684		102.99		64.99		29.49		20.49
Berlin (Schönefeld)-Neapel	1276		164.99		77.99		83.99		29.99
Berlin (Schönefeld)-Paris (Orly)	884		177.99		58.99		34.99		21.99
Berlin (Schönefeld)-Glasgow	1228		114.99		58.99		29.99		35.99
Germanwings (4U)									
Köln-Berlin (Schönefeld)	472	70.08	89.99	36.47	49.99	36.47	49.99	19.66	29.99
Köln-München	435	70.08	89.99	36.47	49.99	19.66	29.99	15.46	24.99
Köln-Rostock	486	75.75	99.99	42.97	59.99	15.46	24.99	15.46	24.99
Köln-London (Stansted)	491	153.46	159.99	93.46	99	24.45	29.99	19.45	24.99
Köln (Palma de Mallorca)	1302	123.46	129	74.45	79.99	54.45	59.99	19.45	24.99
Stuttgart-Wien	546	116.35	129	67.34	79.99	17.34	29.99	17.34	29.99
Stuttgart-Moskau (Vnukovo)	2042	210.25	229	170.35	189	80.35	99	61.35	79.99
Köln-Lissabon	1848	273.46	279	93.46	99	54.45	59.99	54.45	59.99
Köln-Bukarest	956	258.35	279	108.35	129	108.35	129	47.44	52.98
Berlin (Schönefeld)-Zweibrücken	554	82.74	119	33.15	59.99	15.46	24.99	15.46	24.99
Dortmund-München	460	116.82	149	58.83	79.99	25.22	39.99	15.46	24.99
Köln-Rom (Fiumicino)	1078	183.46	189	93.46	99	64.45	69.99	34.45	39.99
Stuttgart-Leipzig	372	180	229	70.99	99	13	29.99	15.46	29.99
Köln-Friedrichshafen	393	89.61	119	31.62	49.99	14.81	29.99	15.46	24.99
Air Berlin (AB)									
Düsseldorf-Paris (Orly)	422	148.95	186.95	34.95	72.95	13.95	51.95	11	39
Düsseldorf-Hamburg	340	58.98	96.96	11.95	49.95	1	29	11	39
Düsseldorf-London (Stansted)	454	123.95	161.95	17.95	55.95	3.95	41.95	11	39
Paderborn-London (Stansted)	576	103.95	141.95	103.95	141.95	53.95	91.95	23.95	61.95
Köln-Berlin (Tegel)	463	83.95	121.95	48.95	86.95	11.95	49.95	11	39
Köln-München	435	113.95	151.95	58.95	96.95	11.95	49.95	11	39
Köln-Palma de Mallorca	1302	98.95	139.95	63.95	104.95	43.95	84.95	38.95	79.95
Düsseldorf-Wien	787	148.95	186.95	38.95	76.95	3.95	41.95	18.95	56.95
Saarbrücken-Berlin (Tegel)	570	83.95	121.95	58.95	96.95	11.95	49.95	11	39
Berlin (Tegel)-Wien	546	163.95	201.95	42.95	107.97	18.95	56.95	1	29
Berlin (Tegel)-Barcelona	1510	271.95	309.95	163.95	228.95	78.95	116.95	11	39
Berlin (Tegel)-Rom Fiumicino	1197	183.95	221.95	68.95	133.95	18.95	83.95	6.95	44.95
Köln-Falerno	834	93.95	131.95	34.95	72.95	27.95	65.95		
Köln-Olbia	1122	223.95	264.95	183.95	224.95	18	49	31.95	99.95
Köln-Klagenfurt	705	138.95	176.95	24.95	62.95	13.95	78.95	4.95	69.95
Köln-Rimini	863	68.95	109.95	38	69	38	69		
Düsseldorf-Mailand	660	181.95	219.95	71.95	109.95	1	29	1	39
Manningen-Berlin (Tegel)	550	48.95	86.95	17.95	55.95	3.95	41.95		
Stuttgart-Neapel	953	93.95	134.95	73.95	114.95	38.95	106.95	18	49
Köln-Hamburg	472	103.95	141.95	1	29	1	29	11	39
Köln-Neapel	1236	203.95	244.95	33.95	74.95	18	49	18	49
Stuttgart-Rom	804	133.98	198.95	32.95	97.95	50.95	80.95	9.95	74.95
Intersky (3L)									
Friedrichshafen-Köln	393		188.86		188.86		59.99		59.99
Friedrichshafen-Wien	528		161		141		78.99		59.99
Friedrichshafen-Hamburg	661		228.86		188.86		128.86		59.99
Düsseldorf-Friedrichshafen	447		268.53		243.53		134.37		113.66
Wizz (W6)									
Dortmund-Warschau	919	48.28	59.99	38.28	49.99	8.28	19.99	0	9.99
Köln-Kattowitz	840	36.74	49.99	26.74	39.99	26.74	39.99	1.79	14.99
Köln-Danzig	856	26.74	39.99	26.74	39.99	16.74	29.99	1.74	14.99
Weeze-Budapest	1051	23.92	39.99	3.92	19.99	0	14.99	0	14.99
Dortmund-Bukarest (Banseasa)	1574	88.82	99.99	38.28	49.99	18.28	29.99	18.28	29.29

Source: Airlines

Table 3: Air Fares quoted for selected Routes in Autumn 2010

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