

Special Article

Low Cost Carrier Airfare
Analysis for selected Routes

Spring 2014



Low Cost Carrier Airfare Analysis in Spring 2014

In Germany, the air fares quoted by the major Low Cost Carriers vary according to destination and advance-booking period. In previous editions of this report extensive price analyses of all routes covered by Low Cost Carriers were performed, however, only taking the net fares into account. In contrast, this study is based upon the gross prices that are essentially relevant for air passengers. A major reason this modification of analyses is that lately the difference between gross and net prices has become more and more important and in some cases exceeds the net airfare. Therefore, on selected routes - corresponding to a representative sample of 10 per cent of all low-cost routes in Germany – we display the gross airfare that is paid by the customer (see Table 3). However, any further surcharges like e.g. additional luggage, credit card payment etc. are still excluded, but the air passenger can basically travel at the gross airfare that is taken as a basis in this study.

In almost all cases, routes of 500 to about 2,000 km travel distance have been analysed, however, a few routes were even longer than 2,000 km. April 8th 2014 has been chosen as the travel date the analyses are based upon. Prices for an advanced booking period of one day, one week, one month and more than 3 months have been surveyed. However, if there were no seats left for the planned travel date or the flight has been postponed, an alternative flight date as close as possible to the original travel date, but not earlier, has been selected. If there is more than one flight option for the same alternative flight date, the cheapest one has been chosen. For better comparability with earlier reports the sample of routes analysed has been kept almost constant.

According to these analyses, *Wizz* and *Ryanair* are the cheapest low-cost airlines on the German market (gross airfares). While *Wizz* offers only about 20 different routes from Germany, *Ryanair's* number of routes exceeds 120. For most airlines average gross fares are between 70 and 100 Euro for a one-way flight (see Table 1).

Average spring fares of most low cost carriers have increased compared to spring 2013 as well as fall 2013. Furthermore, more expensive airlines sometimes have better on-board service (e. g. free drinks or magazines).

	Average Gross Price (including Taxes / Fees / Surcharges) - for Selected Days -
Ryanair (FR)	78.78
Easyjet (U2)	97.44
Germanwings (4U)	144.33
Air Berlin (AB)	158.64
Wizz (W6)	69.99

Table 1: Average prices in spring 2014

Air fares depending on the booking period: The fares of low cost carriers vary greatly with the time between flight booking and actual flight date. Booking a flight one day before departure may cost many times more than booking a flight three months in advance. However, the difference is not as distinctive as a few years ago. The average gross fares of most low cost carriers at German airports vary between 70 EUR and more than 200 EUR for a flight booked one day in advance and between 60 EUR and 120 EUR for a flight booked three months in advance (see Table 2). However, these numbers do not say anything about the number of tickets actually sold at these prices, because there is no reliable information that link the fares offered to the number of seats that are sold at particular prices. Furthermore, holiday periods tend to have an effect on airfares, too.

Day of Booking 08.04.2014	Advance Booking 1 Day 09.04.2014	Advance Booking 1 Week 16.04.2014	Advance Booking 1 Month 06.05.2014	Advance Booking 3 Month (12 Weeks) 08.07.2014	
	Average Gross Price (including Taxes / Fees / Surcharges)	Average Gross Price (including Taxes / Fees / Surcharges)	Average Gross Price (including Taxes / Fees / Surcharges)	Average Base Price (Airfare only)	Average Gross Price (including Taxes / Fees / Surcharges)
Ryanair (FR)	112.48	112.70	31.01		58.92
Easyjet (U2)	108.13	125.13	86.40		70.13
Germanwings (4U)	214.08	164.00	85.49		113.74
Air Berlin (AB)	221.60	172.43	116.93		123.60
Wizz (W6)	69.99	69.99	59.99		79.99

Table 2: Average prices depending on advance booking period

Booking Day 08.04.2014	Distance (Km)	Advance Booking 1 Day 09.04.2014 Gross Price (including Taxes / Fees / Surcharges)	Advance Booking 1 Week 16.04.2014 Gross Price (including Taxes / Fees / Surcharges)	Advance Booking 1 Month 06.05.2014 Gross Price (including Taxes / Fees / Surcharges)	Advance Booking 3 Months (12 Weeks) 08.07.2014 Gross Price (including Taxes / Fees / Surcharges)
Ryanair (FR)					
Hahn-Montpellier	748	108.98	108.97	28.97	23.98
Hahn-London (Stansted)	536	80.98	164.98	19.98	39.98
Hahn-Girona	1085	87.97	105.98	29.98	29.97
Nürnberg - Alicante	1551		148.98	50.97	50.97
Hahn-Venedig (Treviso)	600	132.98	64.98	26.18	36.98
Hahn-Mailand (Bergamo)	507	108.98	42.97	19.98	28.98
Hahn-Tenerifa	3158	142.97	107.97	46.98	107.97
Dortmund - Krakau	875	83.97	101.97	39.97	39.98
Köln - Malaga	1825	206.98	175.98	42.98	148.98
Weeze-Rom (Ciampino)	1194	138.98	116.98	19.98	80.98
Hahn-Palma de Mallorca	1207	130.98	91.98	38.18	54.98
Lübeck-Mailand (Bergamo)	906	80.98	47.98	19.98	56.98
Karlsruhe-London (Stansted)	653	80.97	138.97	26.97	26.98
Karlsruhe-Porto	1553		188.98	37.98	95.97
Weeze-Porto	1609		161.97	38.17	76.98
Weeze-Lappenranta	1699	76.98	64.97		76.97
Leipzig-London (Stansted)	827	111.97	76.98	19.98	25.97
Weeze-Edinburgh	787		116.97	19.98	56.98
Easyjet (U2)					
Dortmund-London (Luton)	549	60.49	70.49	42.49	50.49
Berlin (Schönefeld)-Genf	866	83.49	109.49	86.49	45.49
Berlin (Schönefeld)-Barcelona	1503	100.49	166.49	86.49	86.49
Berlin (Schönefeld)-Rom (Fiumicino)	1178	114.49	119.49	81.49	61.49
Köln-London (Gatwick)	512	90.49	93.49	70.49	47.49
Berlin (Schönefeld)-Madrid	1851	133.49	132.49	60.49	119.49
Berlin (Schönefeld)-Budapest	684	105.49	133.49	90.49	51.49
Berlin (Schönefeld)-Neapel	1276	152.49	175.49	111.49	70.49
Berlin (Schönefeld)-Paris (Orly)	884	100.49	90.49	77.49	54.49
Berlin (Schönefeld)-Glasgow	1228	114.49	166.49	123.49	93.49
Berlin (Schönefeld)-Liverpool	1099	133.49	118.49	119.49	90.49
Germanwings (4U)					
Köln-Berlin (Tegel)	472	199	119	69.99	119
Köln-Rostock	486	99	99	49.99	59.99
Köln-London (Stansted)	491	229	99	39.99	69.99
Köln (Palma de Mallorca)	1302	79.99	139	59.99	219
Stuttgart-Wien	546	299	219	129	79.99
Köln-Lissabon	1848	239	239	119	199
Köln-Budapest	958	219	189	79.99	79.99
Köln-Barcelona	1131	149	149	79.99	129
Dortmund-München	460	299	149	149	199
Köln-Rom (Fiumicino)	1078	169	139	69.99	79.99
Stuttgart-Leipzig	372	309	309	119	49.99
Köln-Friedrichshafen	393	279	119	59.99	79.99
Air Berlin (AB)					
Düsseldorf-Zürich	444	215.54	215.54	180.54	180.54
Düsseldorf-Hamburg	340	133.04	88.04	48.04	48.04
Düsseldorf-London (Stansted)	454	175.54	220.54	49.54	109.54
Düsseldorf-München	484	418.97	138.97	138.97	88.97
Köln-Berlin (Tegel)	463	238.16	118.16	48.16	88.16
Köln-München	435	118.16	118.16	98.16	78.16
Köln-Palma de Mallorca	1302	349.26	349.26	119.26	209.26
Düsseldorf-Wien	787	269.54	179.54	179.54	179.54
Saarbrücken-Berlin (Tegel)	570	378.59	168.59	168.59	168.59
Berlin (Tegel)-Wien	546	103.78	103.78	103.78	103.78
Berlin (Tegel)-Barcelona	1510	109.78	169.78	89.78	139.78
Berlin (Tegel)-Rom Fiumicino	1197	148.78	198.78	178.78	88.78
Wizz (W6)					
Köln-Danzig	856	69.99	69.99	69.99	89.99
Hahn-Budapest	921		69.99	49.99	69.99

Table 3: Airfares for selected routes in spring 2014

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