

Special Article

Low Cost Carrier Airfare
Analysis for selected Routes

Autumn 2013



Low-Cost Carrier Airfare Analysis in Autumn 2013

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 perform a two-step analysis: first, the net airfare, excluding taxes, fees and charges, is surveyed. Then, as a second step, the gross airfare that is paid by the air passenger is calculated (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. November 18th 2013 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 200. For most airlines average net fares are between 30 and 80 Euro and average gross fares are between 50 and 130 Euro for a one-way flight. For average gross fares, Ryanair is marginally below 50 Euro (see Table 1). Average fall fares of most low cost carriers have declined compared to fall 2012, however, we have to take note of the fact that average fares tend to be higher in spring. Furthermore, more expensive airlines sometimes have better on-board service (e. g. free drinks or magazines).

	Average Base Price (Airfare only)	Average Gross Price (including Taxes / Fees / Surcharges)
- for Selected Days -		
Ryanair (FR)	34.64	49.81
Easyjet (U2)	-	78.94
Germanwings (4U)	74.97	97.47
Air Berlin (AB)	57.04	129.69
Wizz (W6)	54.24	61.24

Table 1: Average prices in autumn 2013

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 60 EUR and 160 EUR for a flight booked one day in advance and between 20 EUR and 110 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 18.11.2013	Advance Booking 1 Day 19.11.2013		Advance Booking 1 Week 25.11.2013		Advance Booking 1 Month 16.12.2013		Advance Booking 3 Month (12 Weeks) 10.02.2014	
	Average Base Price (Airfare only)	Average Gross Price (Including Taxes / Fees / Surcharges)	Average Base Price (Airfare only)	Average Gross Price (Including Taxes / Fees / Surcharges)	Average Base Price (Airfare only)	Average Gross Price (Including Taxes / Fees / Surcharges)	Average Base Price (Airfare only)	Average Gross Price (Including Taxes / Fees / Surcharges)
Ryanair (FR)	58.49	75.24	31.29	48.04	30.87	44.20	17.91	31.74
Easyjet (U2)	-	92.13	-	86.58	-	90.76	-	46.30
Germanwings (4U)	128.42	155.97	88.60	109.48	46.13	67.97	36.72	56.44
Air Berlin (AB)	84.07	161.83	51.08	125.39	50.61	125.09	42.38	106.44
Wizz (W6)	50.99	57.99	48.99	55.99	104.99	111.99	11.99	18.99

Table 2: Average prices depending on advance booking period

Booking Day 18.11.2013	Distance (km)	Advance Booking 1 Day 19.11.2013		Advance Booking 1 Week 25.11.2013		Advance Booking 1 Month 16.12.2013		Advance Booking 3 Months (12 Weeks) 10.02.2014	
		Base Price (Airfare only)	Gross Price (Including Taxes / Fees / Surcharges)	Base Price (Airfare only)	Gross Price (Including Taxes / Fees / Surcharges)	Base Price (Airfare only)	Gross Price (Including Taxes / Fees / Surcharges)	Base Price (Airfare only)	Gross Price (Including Taxes / Fees / Surcharges)
Ryanair (FR)									
Hahn-Montpellier	748	57.24	73.99	18.24	34.99	7.99	14.99	7.99	14.99
Hahn-London (Stansted)	536	51.24	67.99	40.24	56.99	10.24	26.99	10.24	26.99
Hahn-Girona	1085	71.24	87.99	26.24	42.99	13.24	29.99	9.99	16.99
Nürnberg - Alicante	1551	44.24	60.99	26.24	42.99	27.39	44.14	26.24	42.99
Hahn-Dublin	1006	71.24	87.99	26.24	42.99	18.37	35.12	19.24	35.99
Hahn-Venedig (Treviso)	600	48.24	64.99	28.24	44.99	7.99	14.99	9.25	25.99
Hahn-Mailand (Bergamo)	507	45.24	61.99	26.24	42.99	7.99	14.99	7.24	23.99
Hahn-Tenerifa	3158	105.24	121.99	48.24	64.99	46.59	63.34	48.24	64.99
Dortmund - Krakau	875	41.24	57.99	31.24	47.99	11.37	28.12	31.24	47.99
Köln - Malaga	1825	56.24	72.99	44.24	60.99	27.39	44.14	12.99	19.99
Weeze-Rom (Ciampino)	1194	51.24	67.99	31.24	47.99	11.37	28.12	10.24	26.99
Hahn-Palma de Mallorca	1207	75.24	91.99	48.24	64.99	7.99	14.99	15.24	31.99
Lübeck-Mailand (Bergamo)	906	51.24	67.99	31.24	47.99	16.27	33.02	16.24	32.99
Karlsruhe-London (Stansted)	653	51.24	67.99	31.24	47.99	7.99	14.99	31.24	47.99
Karlsruhe-Porto	1553	60.24	76.99	38.24	54.99	203.24	219.99	15.24	31.99
Weeze-Porto	1609	93.24	109.99	38.24	54.99	137.24	153.99	12.99	19.99
Weeze-Lappenranta	1699	48.24	64.99	20.24	36.99	22.59	39.34	12.99	19.99
Leipzig-London (Stansted)	827	48.24	64.99	28.24	44.99	14.17	30.92	28.24	44.99
Berlin (Schönefeld)-Stockholm	744	48.24	64.99	20.24	36.99	7.99	14.99	9.99	16.99
Weeze-Edinburgh	787	51.24	67.99	23.24	39.99	9.99	16.99	23.24	39.99
Easyjet (U2)									
Dortmund-London (Luton)	549	-	77.49	-	56.49	-	50.49	-	40.49
Berlin (Schönefeld)-Genf	866	-	77.49	-	103.49	-	61.49	-	33.49
Berlin (Schönefeld)-Barcelona	1503	-	117.49	-	88.49	-	79.49	-	43.49
Berlin (Schönefeld)-Rom (Fiumicino)	1178	-	88.49	-	81.49	-	103.49	-	40.49
Köln-London (Gatwick)	512	-	88.49	-	77.49	-	85.49	-	40.49
Berlin (Schönefeld)-Madrid	1851	-	117.49	-	92.49	-	113.49	-	46.49
Berlin (Schönefeld)-Budapest	684	-	71.49	-	81.49	-	69.49	-	40.49
Berlin (Schönefeld)-Neapel	1276	-	85.49	-	98.49	-	146.49	-	43.49
Berlin (Schönefeld)-Paris (Orly)	884	-	88.49	-	68.49	-	59.49	-	43.49
Berlin (Schönefeld)-Glasgow	1228	-	67.49	-	110.49	-	122.49	-	67.49
Berlin (Schönefeld)-Liverpool	1099	-	133.49	-	93.49	-	106.49	-	69.49
Germanwings (4U)									
Köln-Berlin (Tegel)	472	69.84	99.99	99.99	79.99	36.23	59.99	30.70	53.00
Köln-München	435	126.00	174.62	66.00	102.81	66.00	102.81	66.00	102.81
Köln-Rostock	486	92.31	129.00	51.13	79.99	34.32	59.99	17.52	39.99
Köln-London (Stansted)	491	134.81	149.00	84.81	99.00	65.80	79.99	19.16	33.00
Köln (Palma de Mallorca)	1302	65.80	69.99	45.80	59.99	45.80	59.99	104.81	119.00
Stuttgart-Wien	546	138.87	159.00	78.87	99.00	29.86	49.99	29.86	49.99
Stuttgart-Moskau (Vnukovo)	2042	122.87	149.00	102.87	129.00	72.87	99.00	-	-
Köln-Lissabon	1848	144.81	159.00	84.81	99.00	65.80	79.99	36.15	49.99
Köln-Budapest	958	204.81	219.00	144.81	159.00	45.80	59.99	25.80	39.99
Köln-Barcelona	1131	134.81	149.00	114.81	129.00	26.15	39.99	45.80	59.99
Dortmund-München	460	108.97	149.00	66.95	99.00	42.58	69.99	13.89	33.00
Köln-Rom (Fiumicino)	1078	124.81	139.00	104.81	119.00	35.80	49.99	25.80	39.99
Stuttgart-Leipzig	372	164.35	219.00	113.93	159.00	30.73	59.99	13.89	33.00
Köln-Friedrichshafen	393	164.89	219.00	80.86	119.00	48.08	79.99	48.08	79.99
Air Berlin (AB)									
Düsseldorf-Zürich	444	113.00	190.32	113.00	190.32	113.00	190.32	113.00	190.69
Düsseldorf-Hamburg	340	55.00	137.68	11.00	77.78	5.00	48.18	5.00	48.62
Düsseldorf-London (Stansted)	454	57.00	134.32	17.00	84.32	17.00	84.32	11.00	49.19
Düsseldorf-München	484	125.00	207.61	45.00	127.61	15.00	97.61	15.00	98.05
Köln-Berlin (Tegel)	463	41.00	108.12	11.00	78.12	5.00	48.62	5.00	48.81
Köln-München	435	71.00	138.12	41.00	108.12	7.00	87.52	7.00	88.61
Köln-Palma de Mallorca	1302	33.00	99.31	13.00	69.81	123.00	245.58	43.00	109.47
Düsseldorf-Wien	787	141.00	218.32	111.00	188.32	111.00	188.32	111.00	188.69
Saarbrücken-Berlin (Tegel)	570	199.00	267.86	109.00	207.86	109.00	177.86	109.00	177.86
Berlin (Tegel)-Wien	546	72.00	148.21	37.00	113.21	17.00	93.21	12.00	48.83
Berlin (Tegel)-Barcelona	1510	43.00	158.61	13.00	89.21	13.00	89.21	13.00	89.33
Berlin (Tegel)-Rom Fiumicino	1197	42.00	118.21	42.00	118.21	22.00	98.21	6.00	68.33
Berlin (Tegel)-Zürich	660	101.00	177.21	101.00	177.21	101.00	177.21	101.00	177.33
Wizz (W6)									
Dortmund-Danzig	919	82.99	89.99	42.99	49.99	152.99	159.99	7.99	14.99
Köln-Kattowitz	840	22.99	29.99	32.99	39.99	102.99	109.99	12.99	19.99
Köln-Danzig	856	52.99	59.99	32.99	39.99	52.99	59.99	7.99	14.99
Hahn-Budapest	921	32.99	39.99	52.99	59.99	62.99	69.99	12.99	19.99
Dortmund-Bukarest (Baneasa)	1574	62.99	69.99	82.99	89.99	152.99	159.99	17.99	24.99

Table 3: Airfares for selected routes in autumn 2013

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