

LOW COST AIRLINE MODEL

study

13 marzo 2005

Seconda parte

TABELLE e GRAFICI

Da ELFAA – European Low Fare Airline Association



***Liberalisation of European Air Transport:
The Benefits of Low Fares Airlines
to Consumers, Airports, Regions
and the Environment***

MEMBRI ELFAA

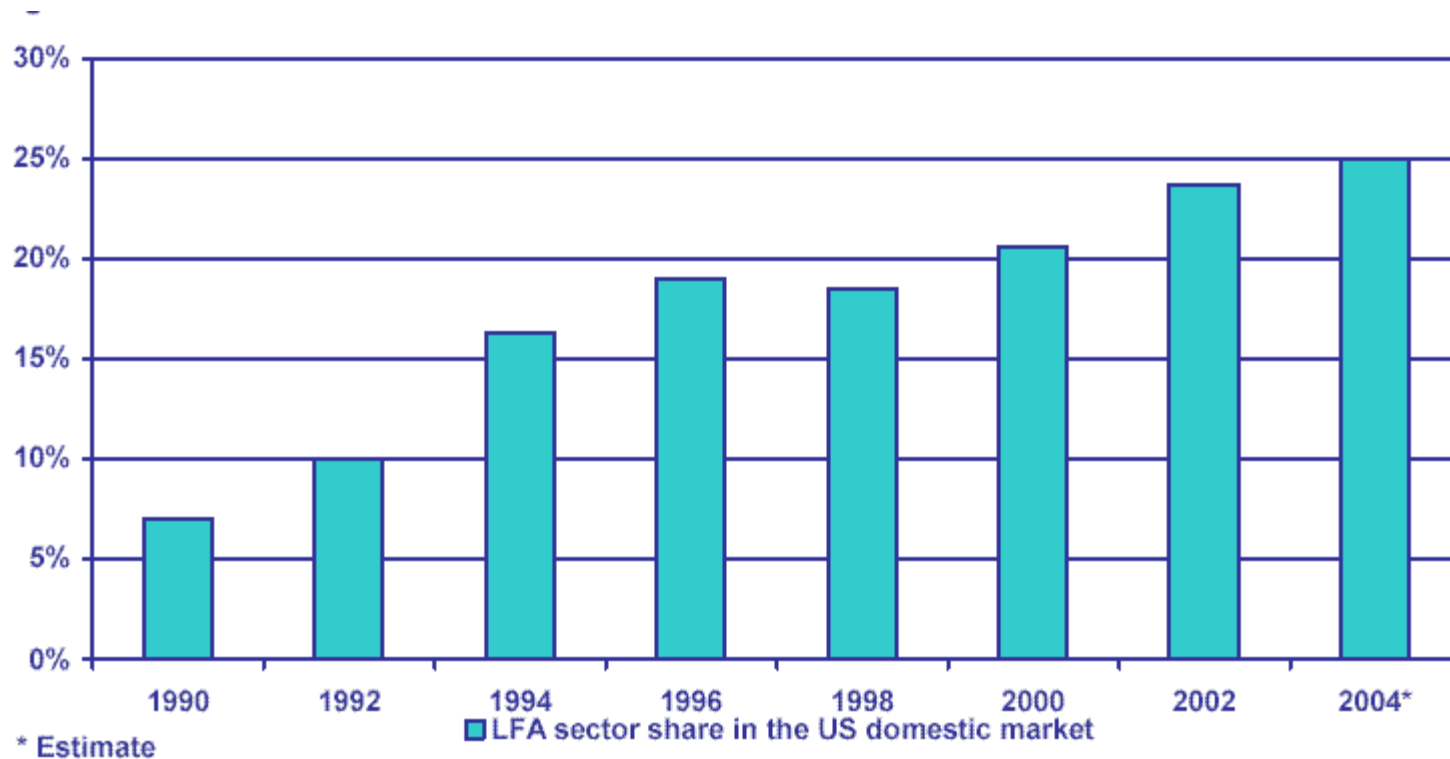


European Low Fares Airline Association

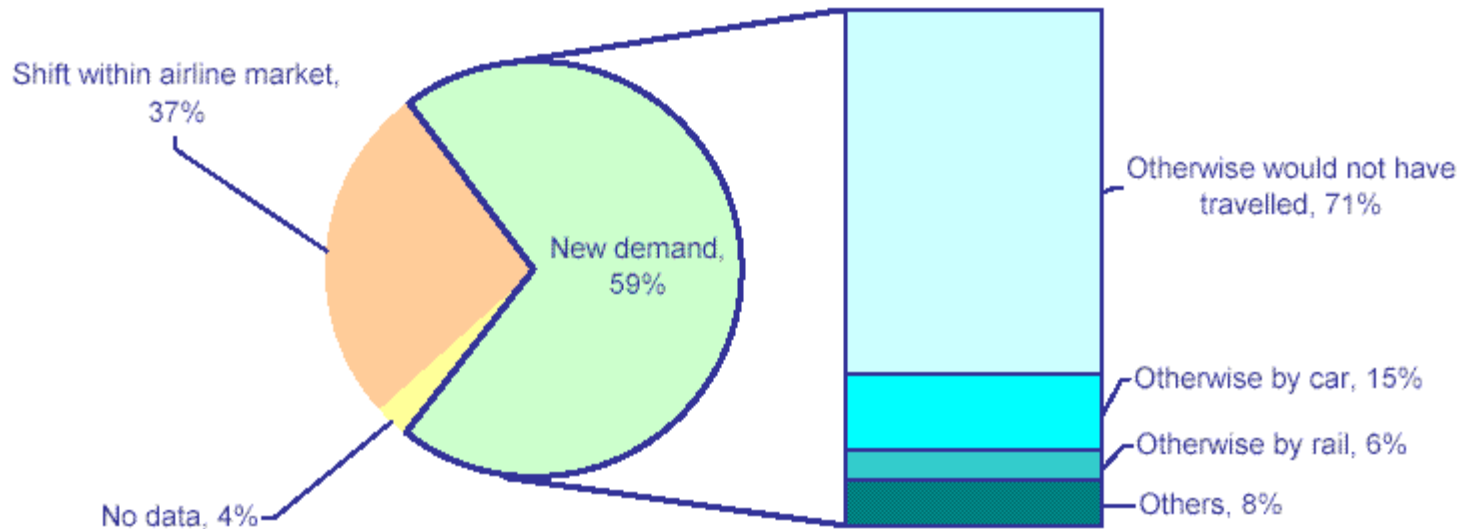
VANTAGGI LOW COST model

LFA	Traditional airlines	LFA advantages
Operate from mostly secondary, underutilised, regional airports	Operate from mostly primary international hub airports	Lower airport charges, faster turnaround times, less air traffic control-related delays
Fast turnarounds (25 min.)	Slow turnarounds due to use of congested hub airports	Better fleet utilisation
Direct point-to-point flights, no transfers, short-haul routes	Mix of long, medium and short haul routes with transfers ("connecting flights")	Lower complexity, higher capacity utilisation
Standardised fleet (only one aircraft type), higher seating density	Various aircraft types, low seating density	Cheaper aircraft financing; Lower maintenance and training costs; Simpler swapping around of flight and maintenance staff; Higher capacity utilisation
Distribution primarily through direct channels (internet, call centres)	Most tickets sold via travel agencies (high GDS costs, travel agent commissions, etc.)	Lower distribution costs, lower complexity
No "frills", extras paid for (e.g. catering, excess baggage)	Entertainment programmes, express check-in, VIP lounges, paper tickets, business class, "free" catering	Lower ancillary costs, less complexity; Additional revenues
Highly incentivised work force (variable proportion of salary up to 40%)	High basic salaries (variable proportion less than 10 %)	High employee productivity

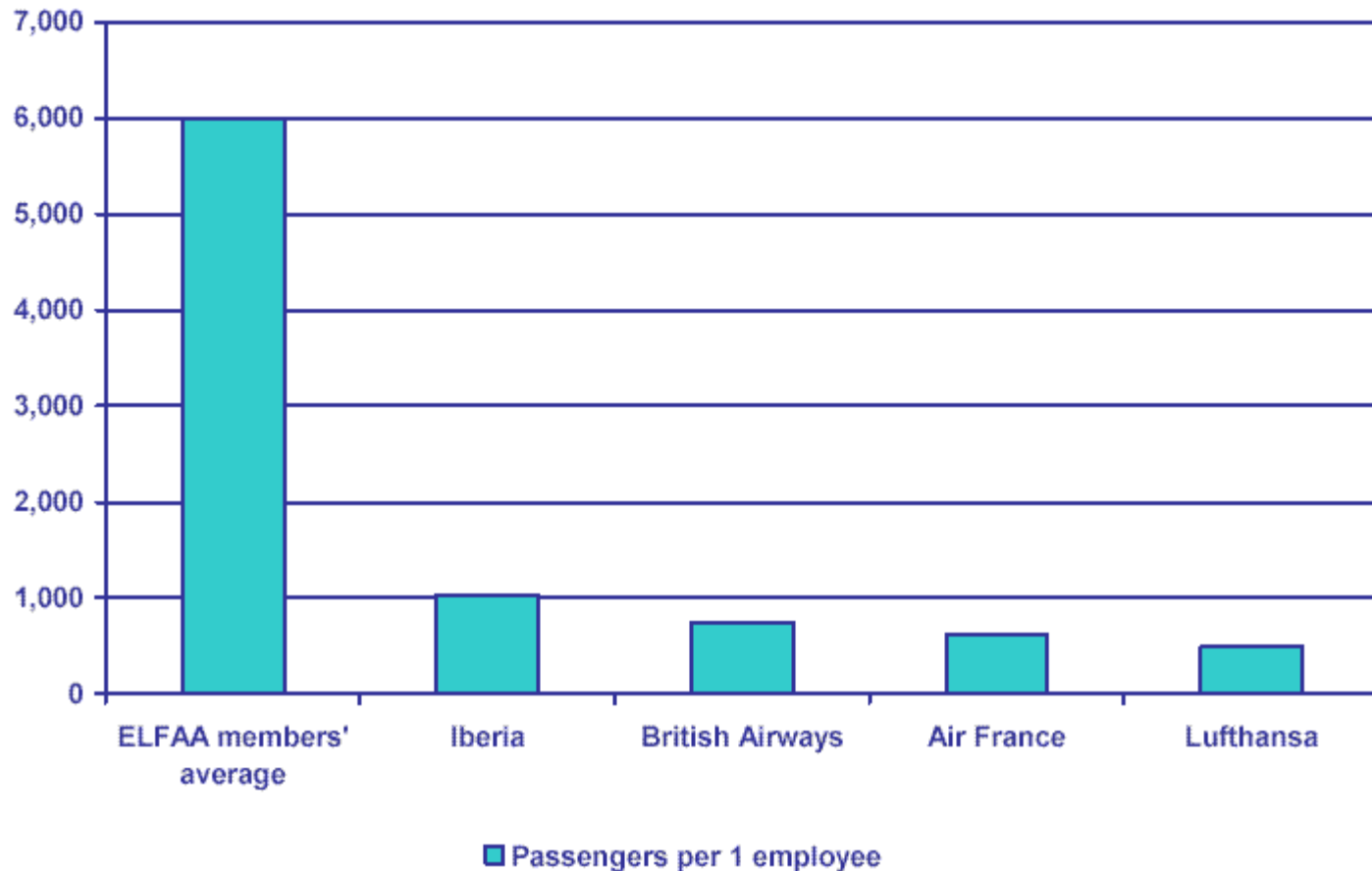
QUOTA LOW COST nel traffico domestico USA



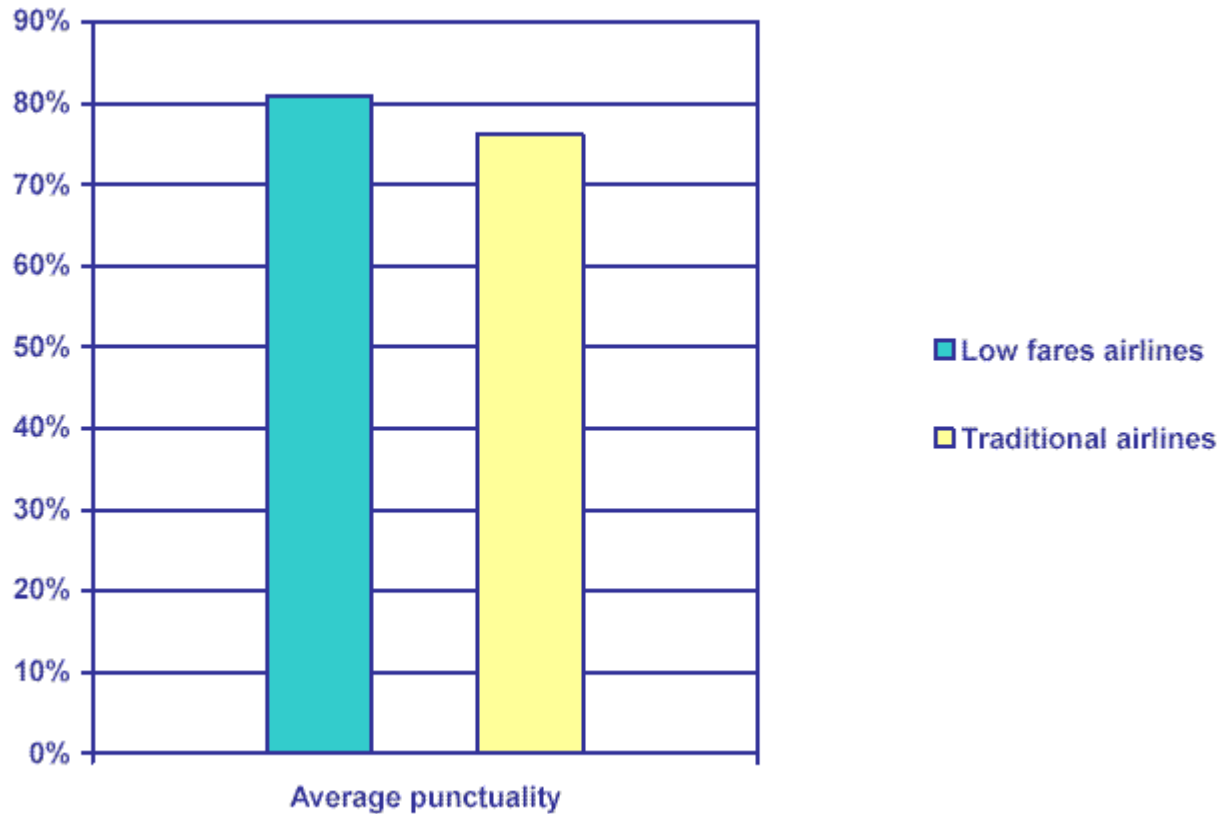
QUOTA DOMANDA LOW COST e breakdown new demand



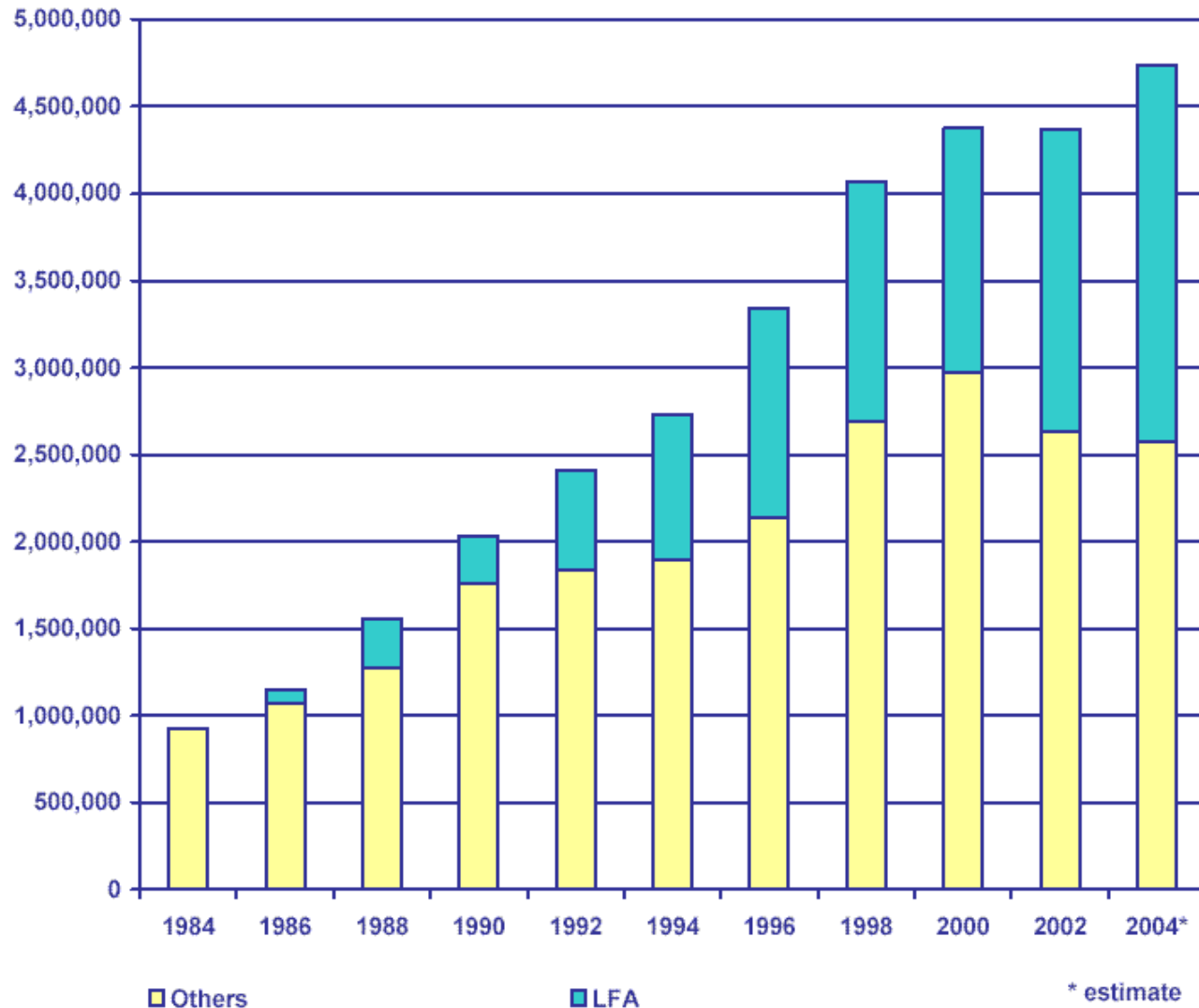
Produttività addetti ELFAA e flag airline



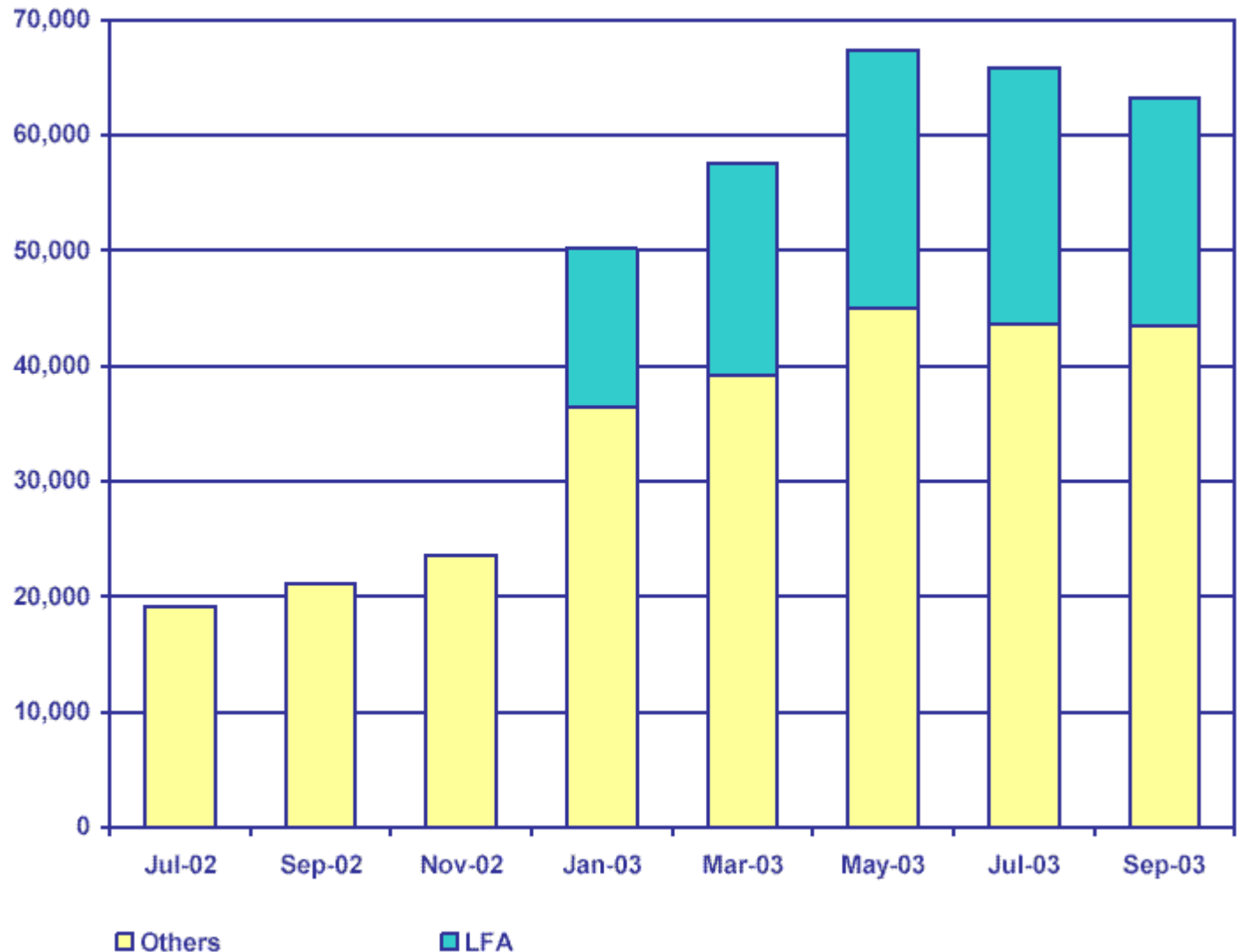
Puntualità Low Fare Airlines e Home Carrier



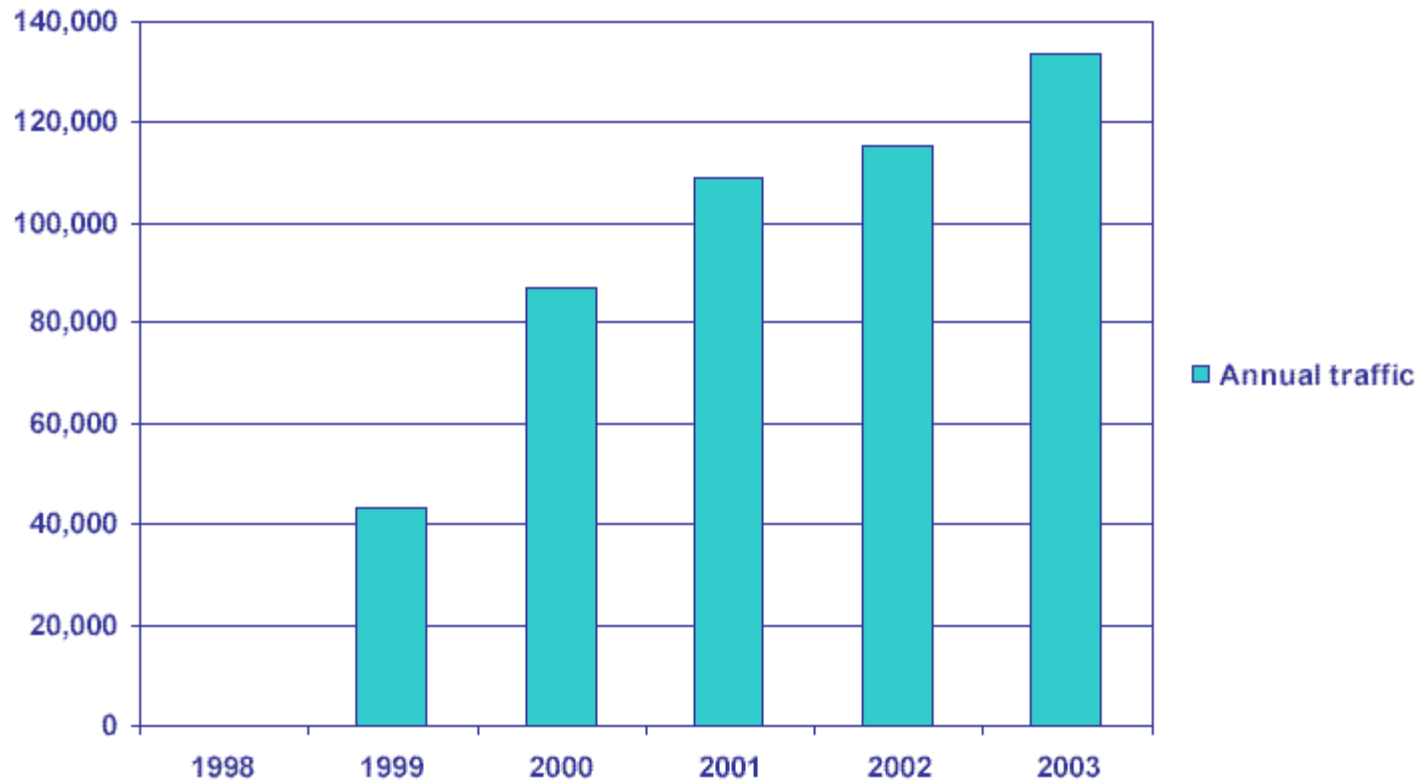
Incremento del traffico dall'avvento low cost: Dublino - Londra



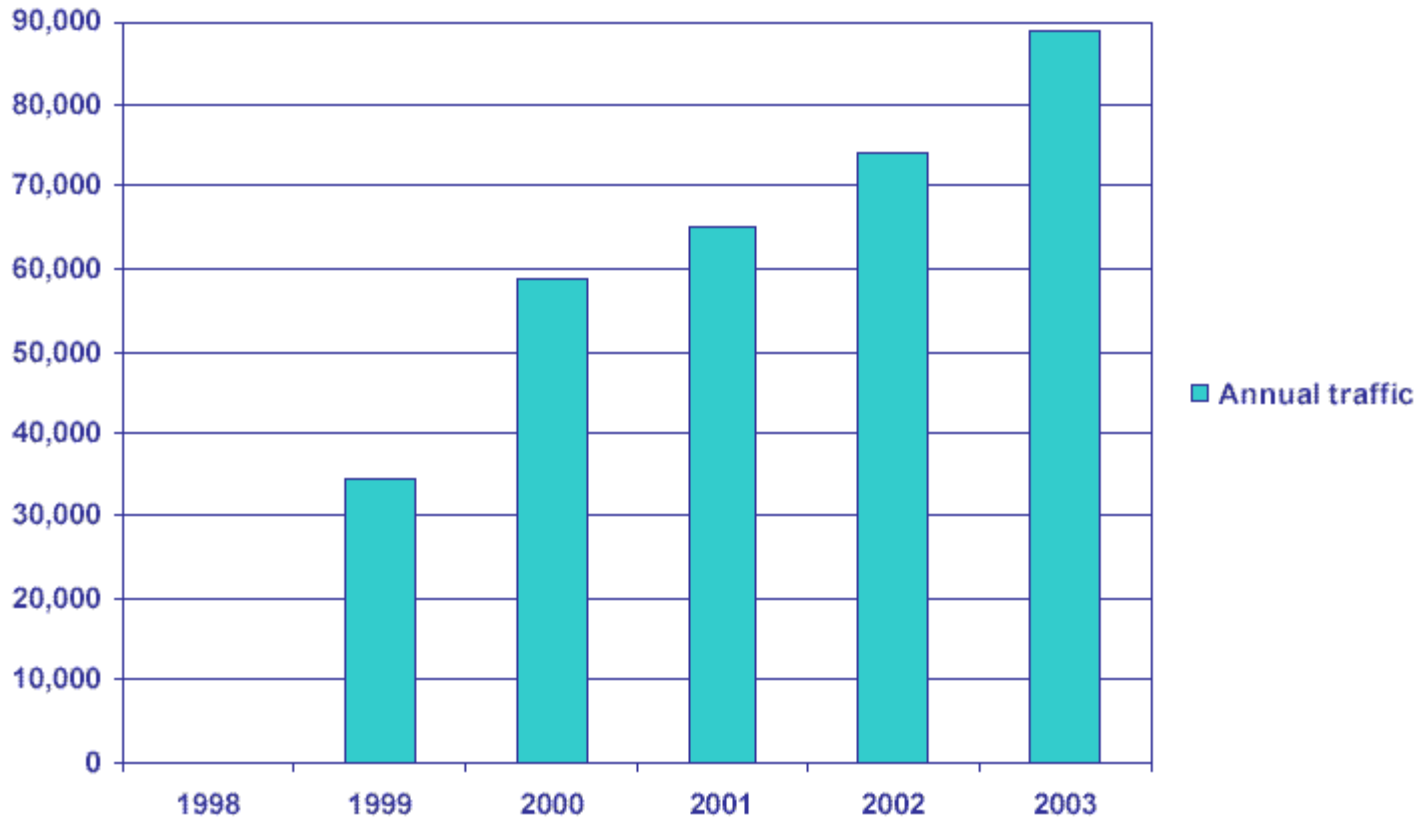
Incremento del traffico dall'avvento low cost: Colonia - Amburgo



Incremento del traffico dall'avvento low cost: Londra - Biarritz

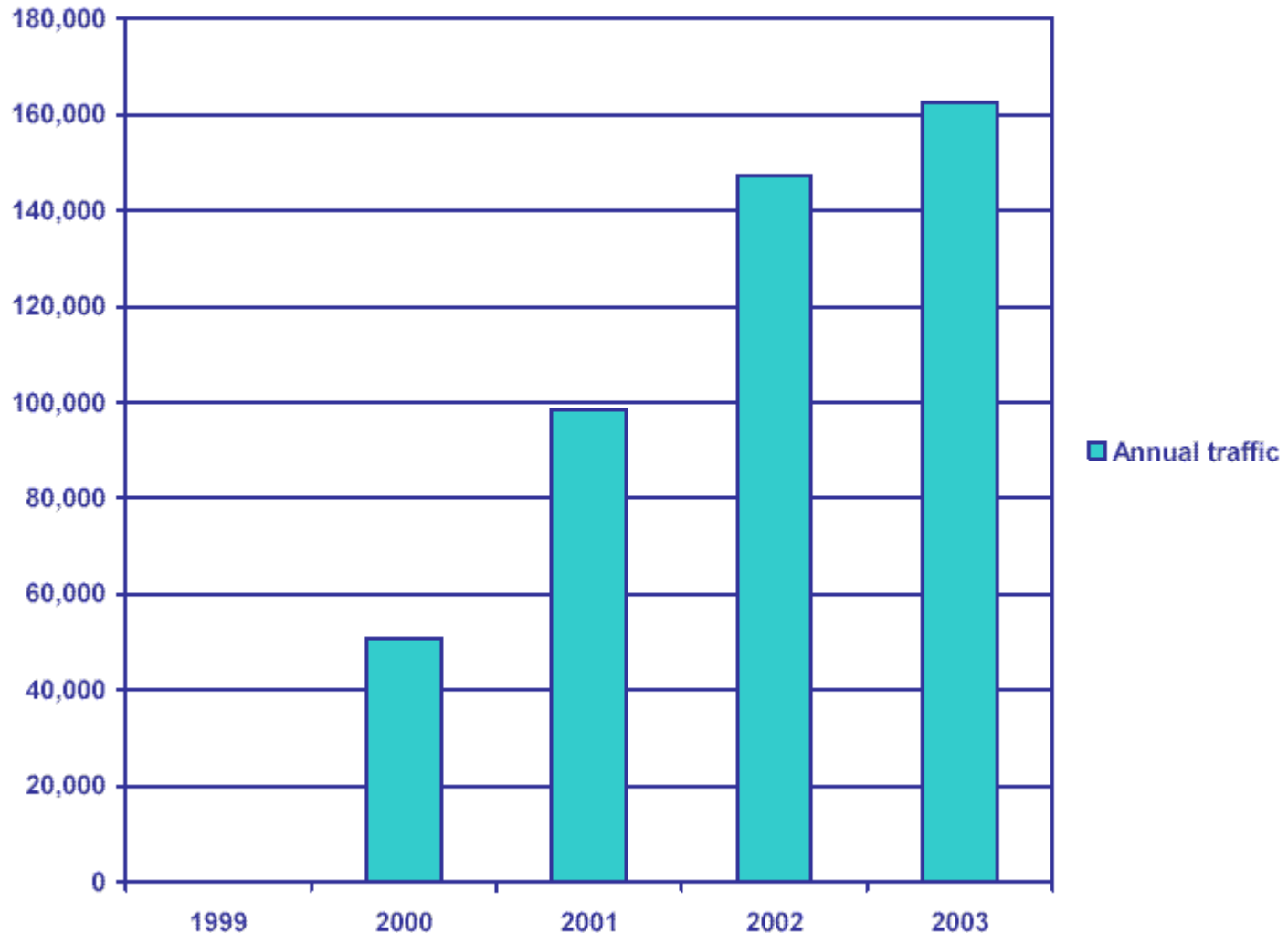


Incremento del traffico dall'avvento low cost: Londra - Dinard



Incremento del traffico dall'avvento

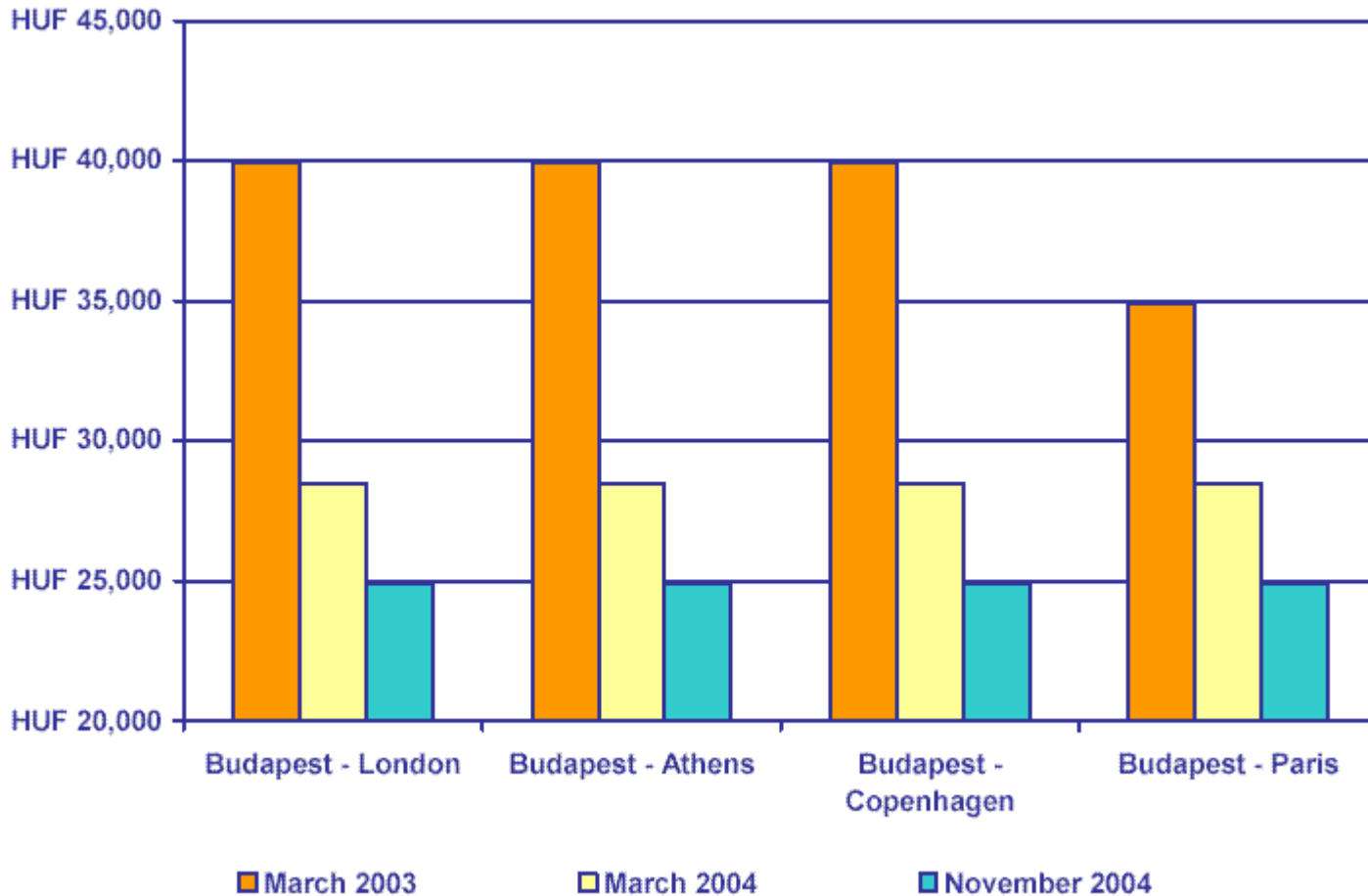
low cost: Londra - Alghero



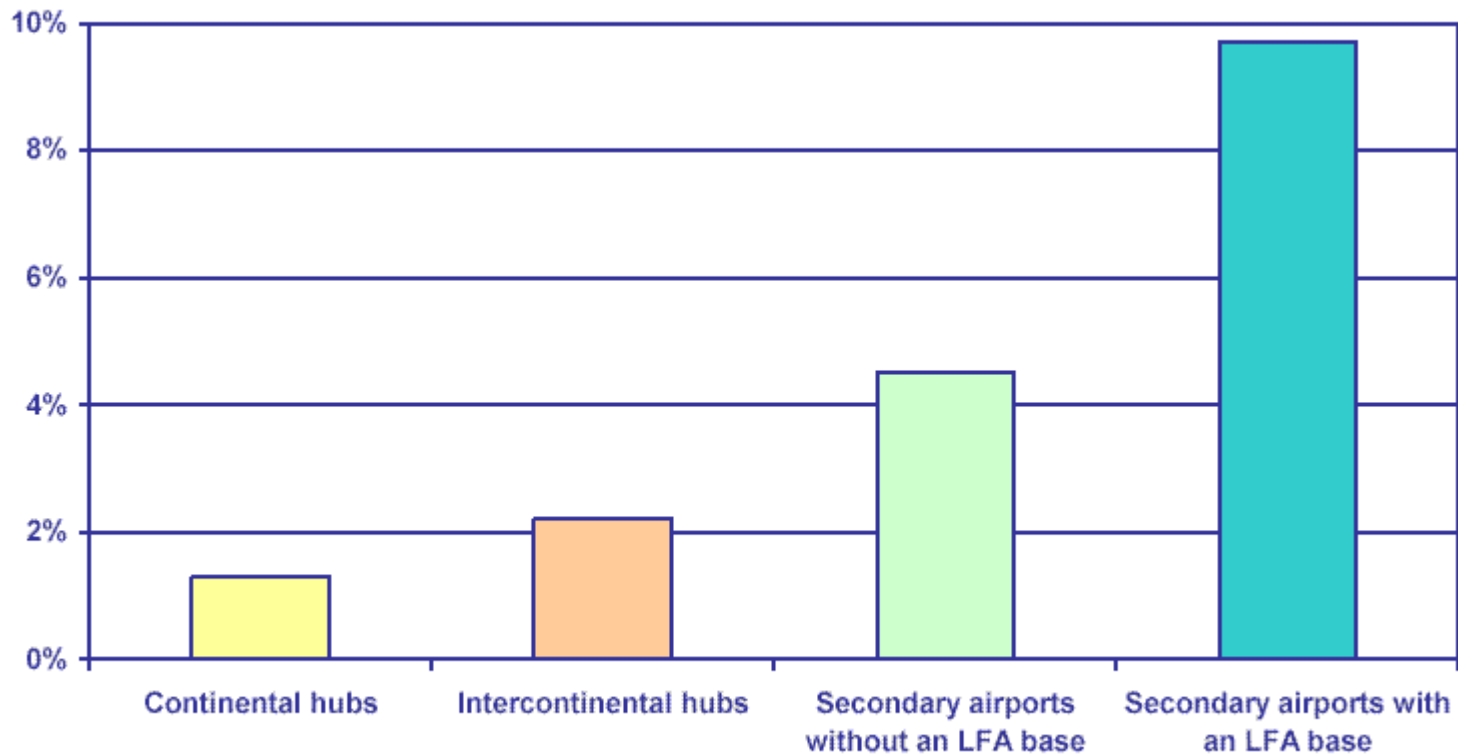
TARIFFE MINIME MALEV

pre – post

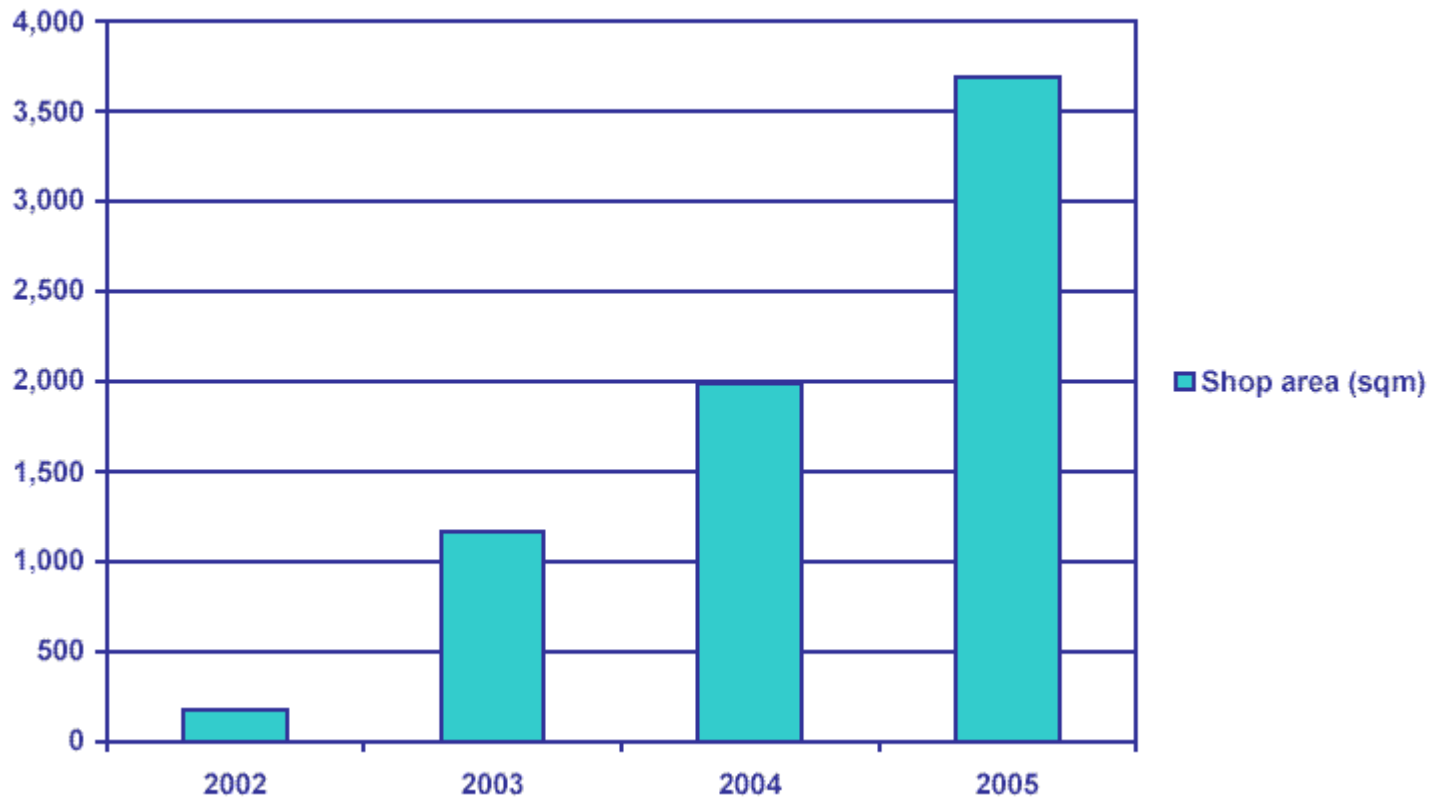
LOW FARE AIRLINES entry



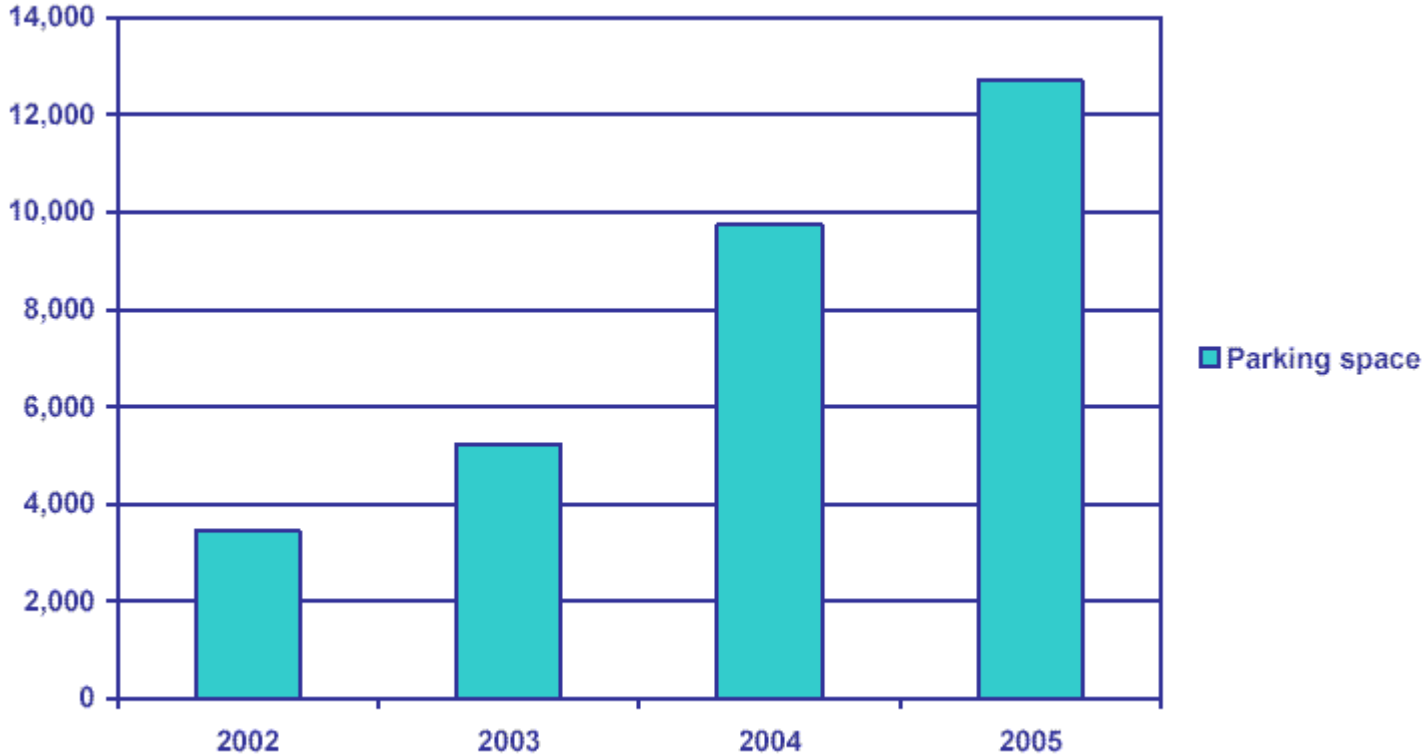
RATEO DI CRESCITA AEROPORTI 2002 - 2003



SVILUPPO SHOPPING AREA FRANCOFORTE HAHN



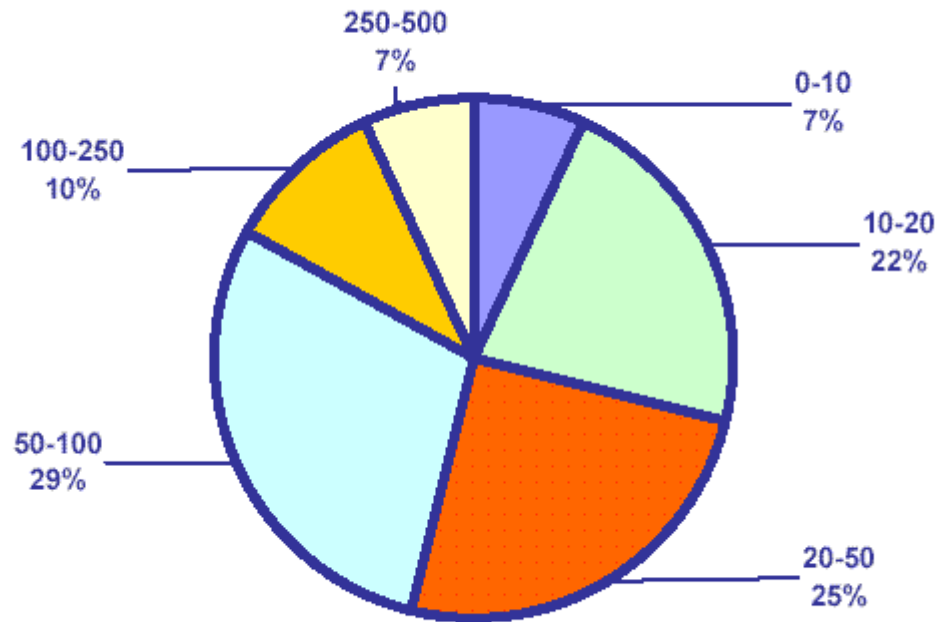
SVILUPPO PARKING AREA FRANCOFORTE HAHN



BACINO DI TRAFFICO (KM)

CATCHMENT AREA - LOW COST

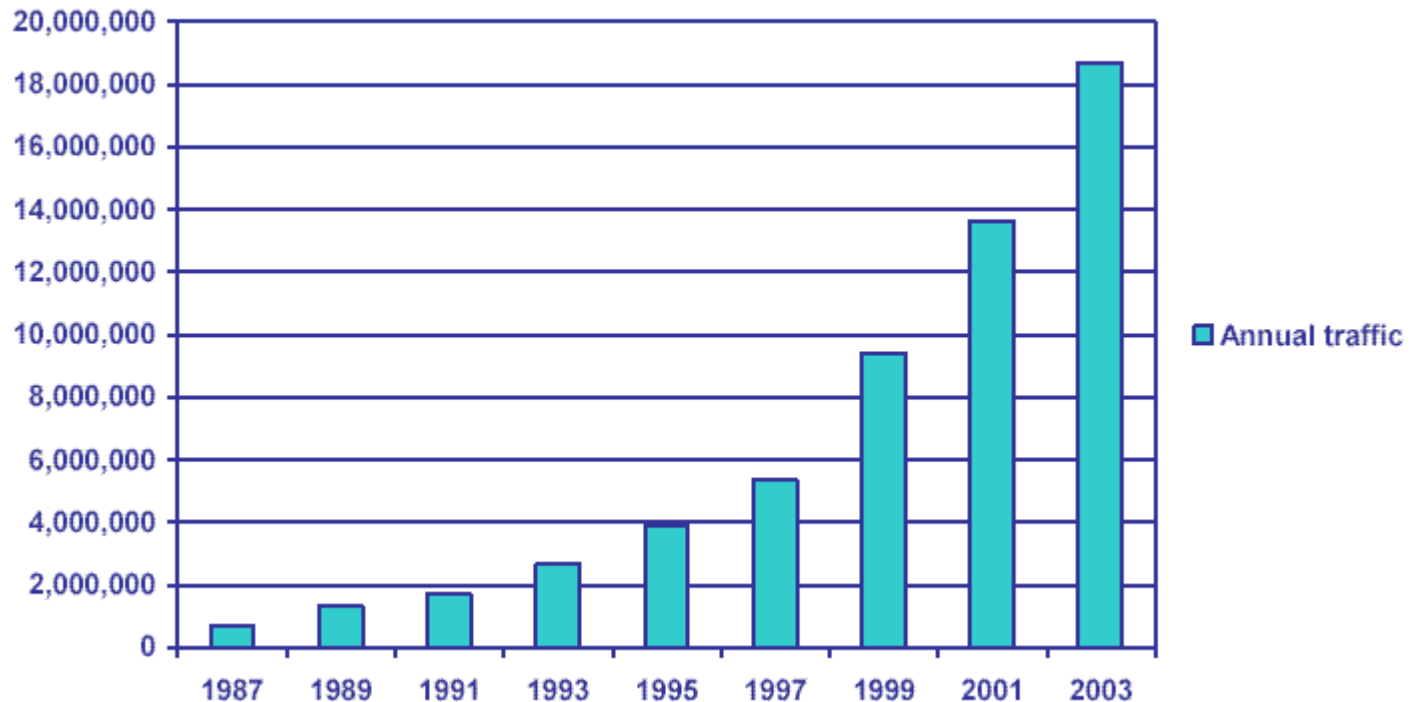
COLOGNE BONN - VENICE



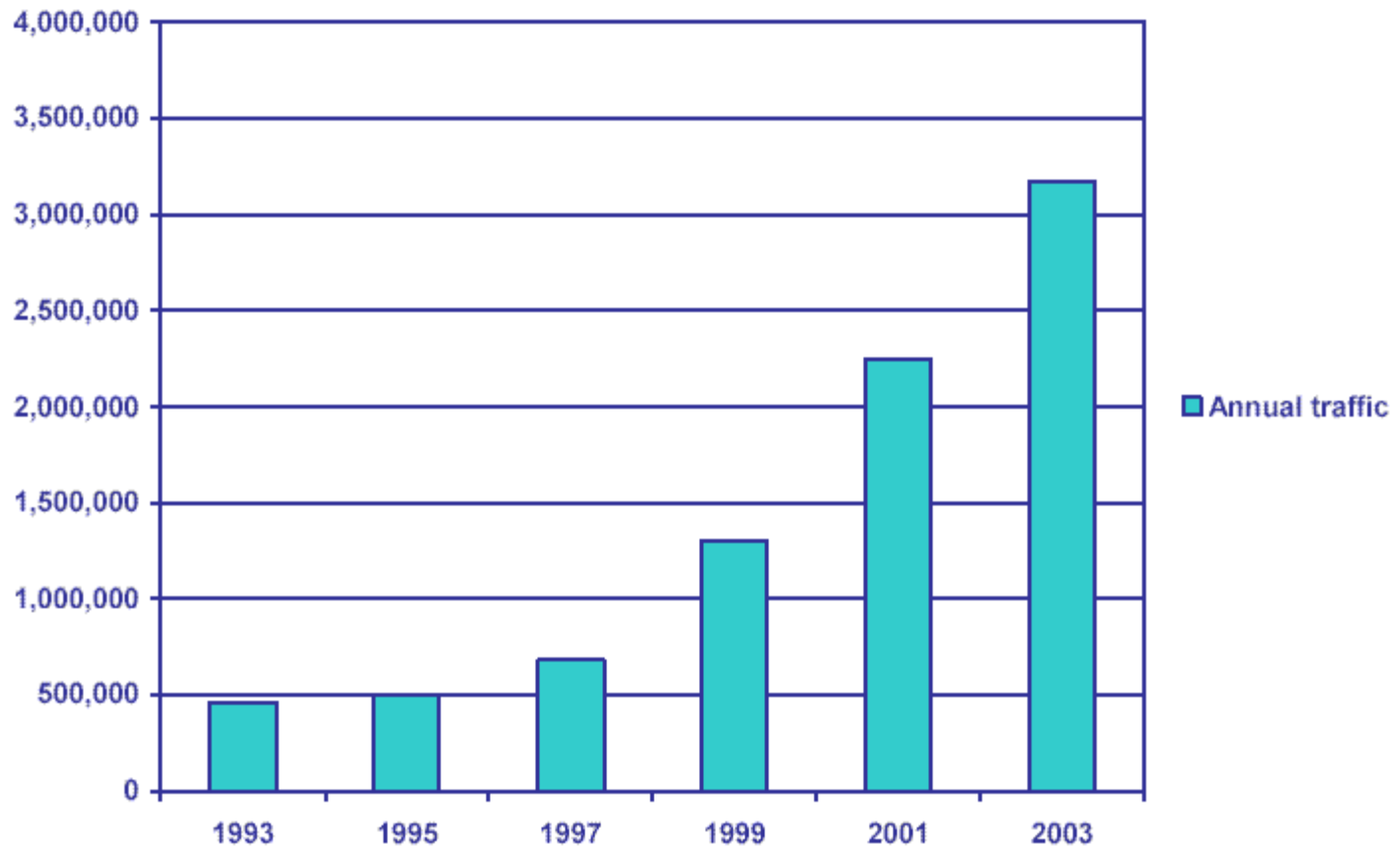
AEROPORTI SECONDARI ELFAA

City	Primary airport(s)	Secondary airport(s)
Amsterdam	Schiphol	Rotterdam
Barcelona	Aeroport del Prat	Girona, Reus
Berlin	Tegel	Schönefeld
Brussels	Zaventem	Charleroi
Copenhagen	Kastrup	Malmö
Cracow	Balice	Katowice
Düsseldorf	Düsseldorf International	Cologne/Bonn, Weeze
Frankfurt	Main	Hahn
Glasgow	Abbotsinch	Prestwick
Hamburg	Hamburg Airport	Lübeck
London	Heathrow, Gatwick	Stansted, Luton
Milan	Malpensa	Bergamo
Paris	Charles de Gaulle, Orly	Beauvais
Rome	Fiumicino	Ciampino
Stockholm	Arlanda	Skavsta, Västerås
Vienna	Vienna International	Bratislava

CRESCITA TRAFFICO STANSTED By LFAs dal 1991

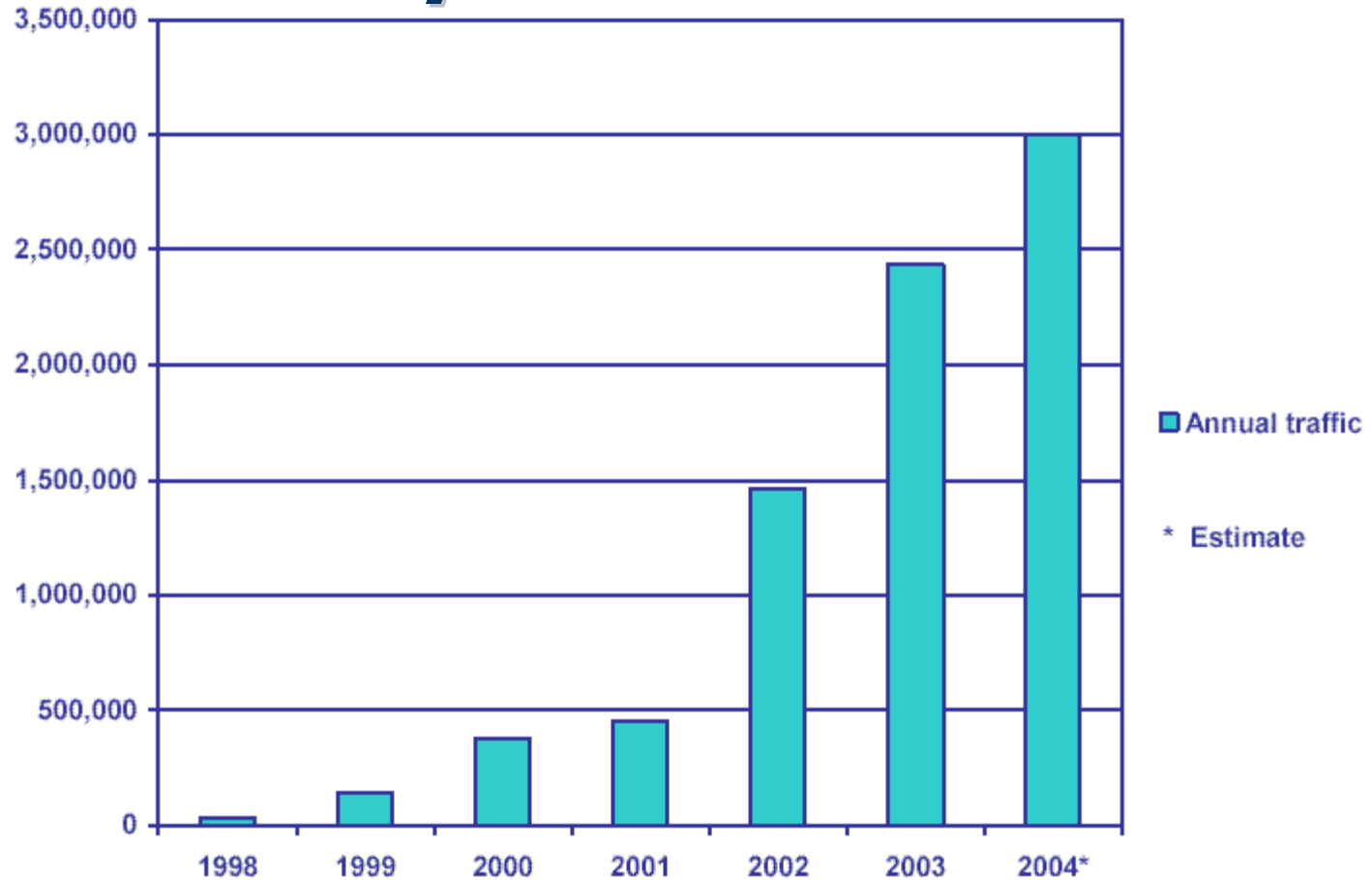


CRESCITA TRAFFICO LIVERPOOL By LFA dal 1996



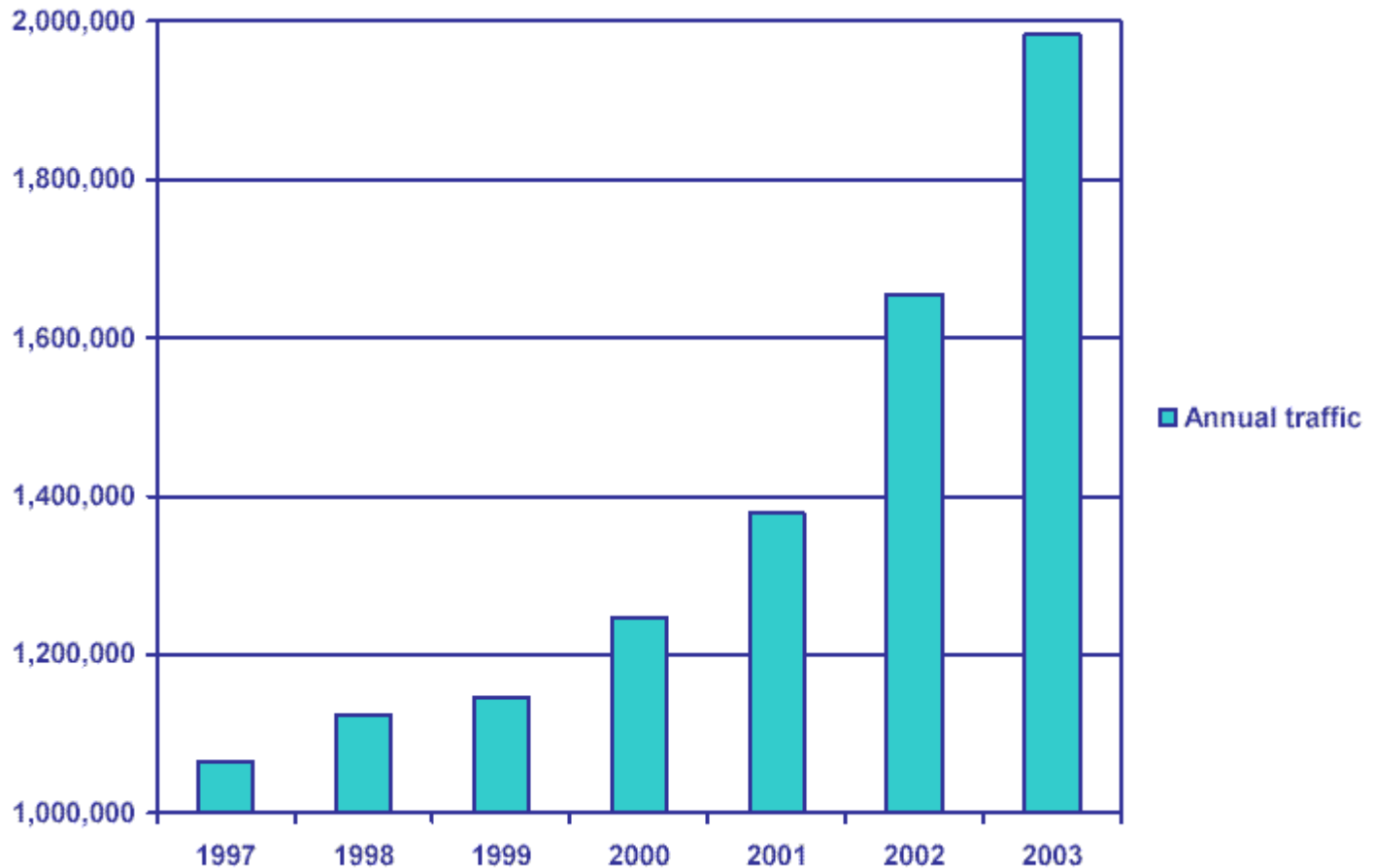
CRESCITA TRAFFICO FRANCOFORTE HAHN

By LFA dal 1999

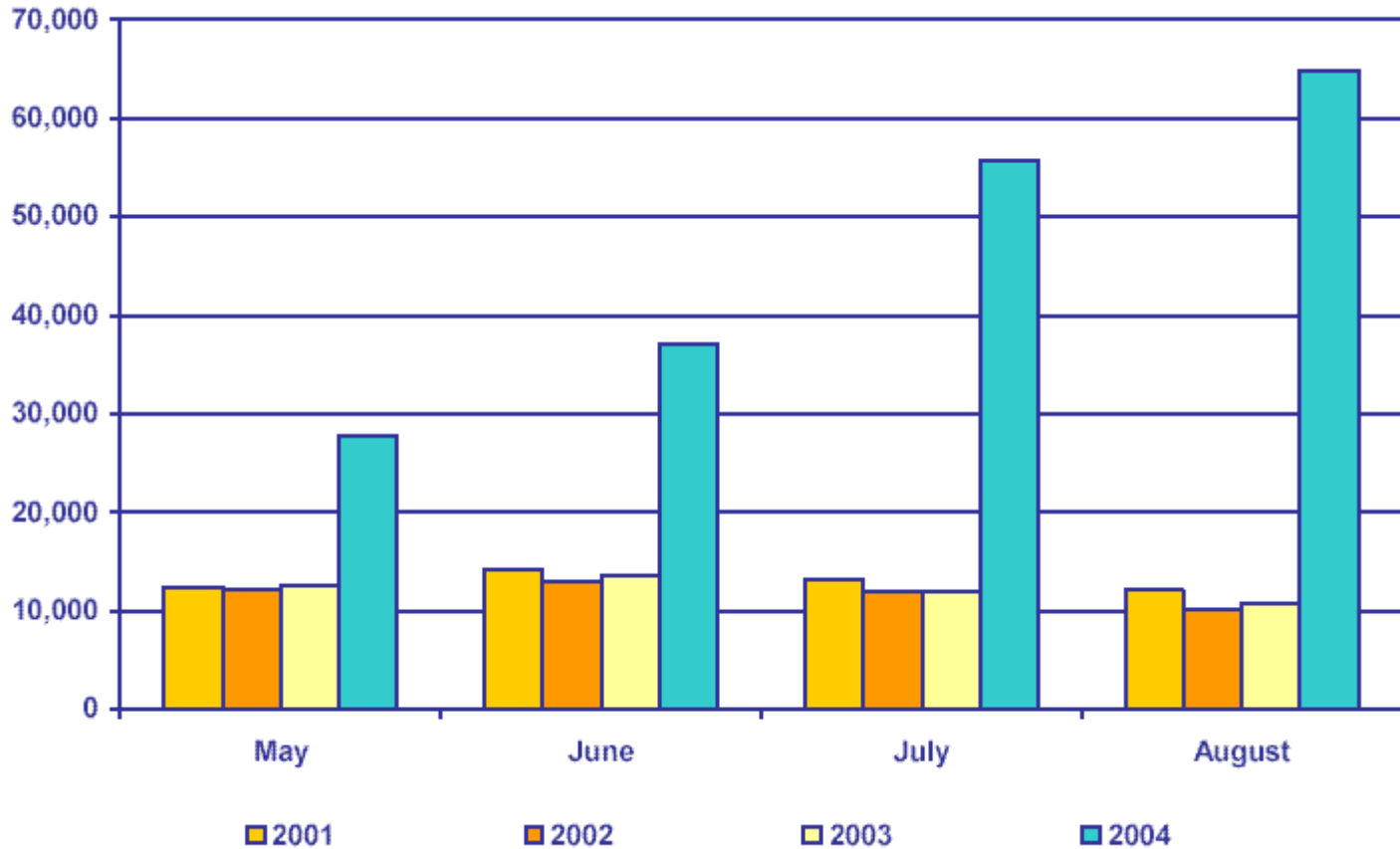


CRESCITA TRAFFICO PISA

By LFA dal 1998



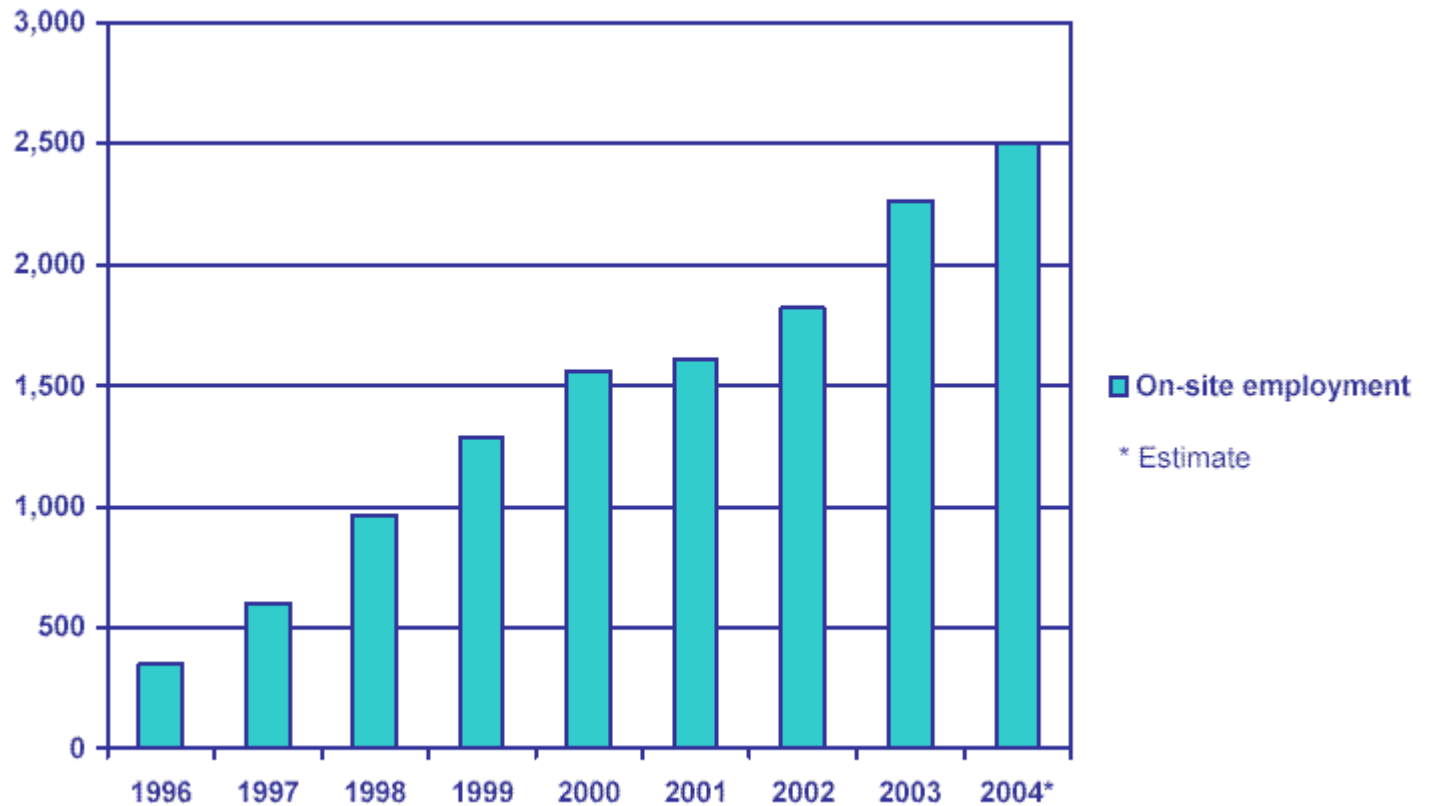
CRESCITA TRAFFICO KATOWICE



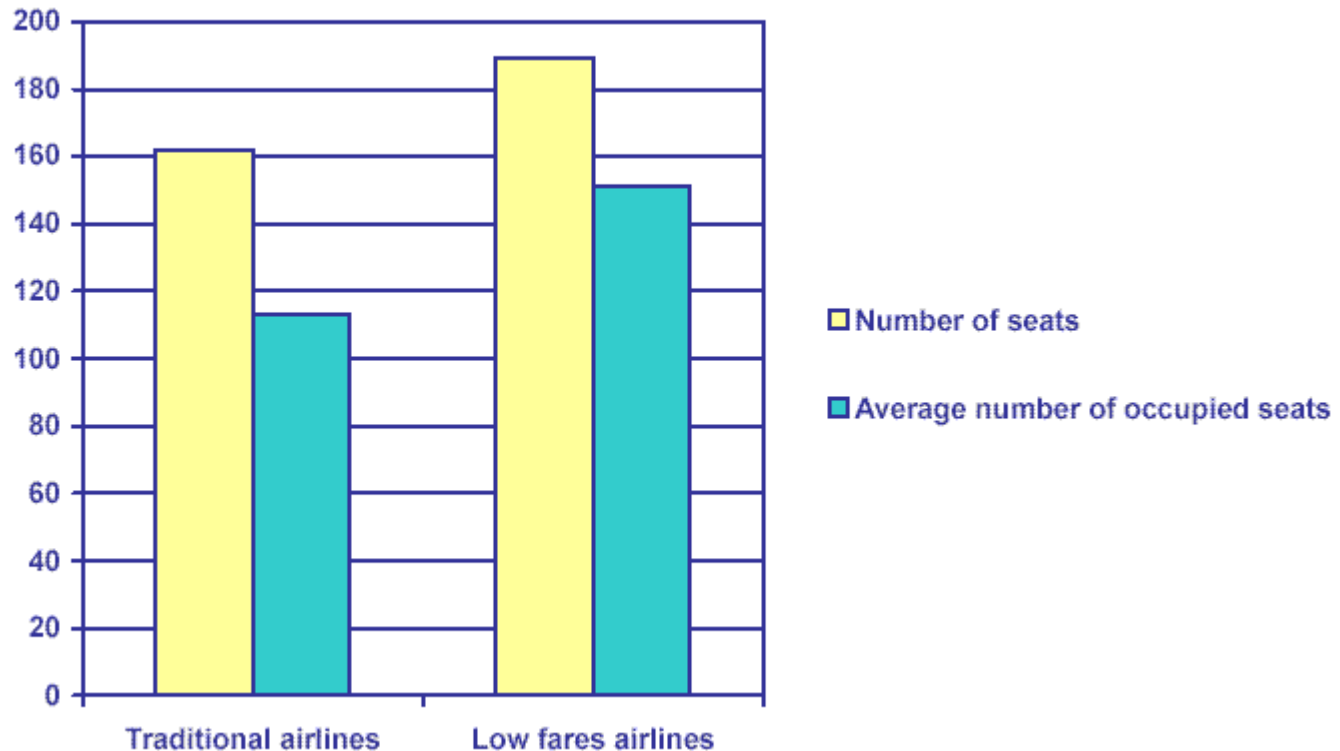
ZONE – TURISMO ALIMENTATO DALLE LFAs

Country	New international tourism destinations
Austria	Graz, Linz, Klagenfurt
Belgium	Charleroi
Denmark	Esbjerg
Finland	Tampere
France	Bergerac, Rodez, Limoges, Carcassonne, Pau, La Rochelle, Nimes, St. Etienne, Tours, Poitiers, Dinard,
Germany	Karlsruhe-Baden, Altenburg, Hahn, Tempelhof, Münster (Osnabrück), Erfurt
Ireland	Knock, Derry, Kerry
Italy	Bari, Pescara, Ancona, Brindisi, Palermo, Alghero, Trieste
Norway	Haugesund
Poland	Gdańsk, Poznań
Slovakia	Košice
Spain	Bilbao, Girona, Jerez, Murcia, Santander, Valladolid, Zaragoza
Sweden	Malmo, Nyköping
United Kingdom	Blackpool, Bournemouth, Newquay

INCREMENTO ADDETTI AEROPORTUALI FRANCOFORTE HAHN



COMPARAZIONE CONFIGURAZIONE CABINA – FATTORI DI CARICO BOEING 737 - 800





LOW COST VS MAJOR AIRLINE MODEL

(SECOND PART)

13 marzo 2005