



RYANAIR

TO LOW COST ENGINE ΑΠΛΟ

Thessaloniki - 16th July 2014





Europe's Favourite Airline

- ✈ Europe's Lowest Fares/Lowest Unit Costs
- ✈ Europe's No 1, Traffic
 - 84.6m (No.1 or 2 in most markets)
- ✈ Europe's No 1, Coverage
 - 69 Bases (Glasgow)
- ✈ Europe's No 1, Customer Service
 - Low Fares\On-time\Bags\Canx
 - Always getting better programme
 - Digital plan rollout
- ✈ Forward bookings & LF rising since Sept 13
- ✈ Unblemished 30 year Safety Record
- ✈ Aircraft order rises to 180 to deliver over 110mpa (+40%) by FY19

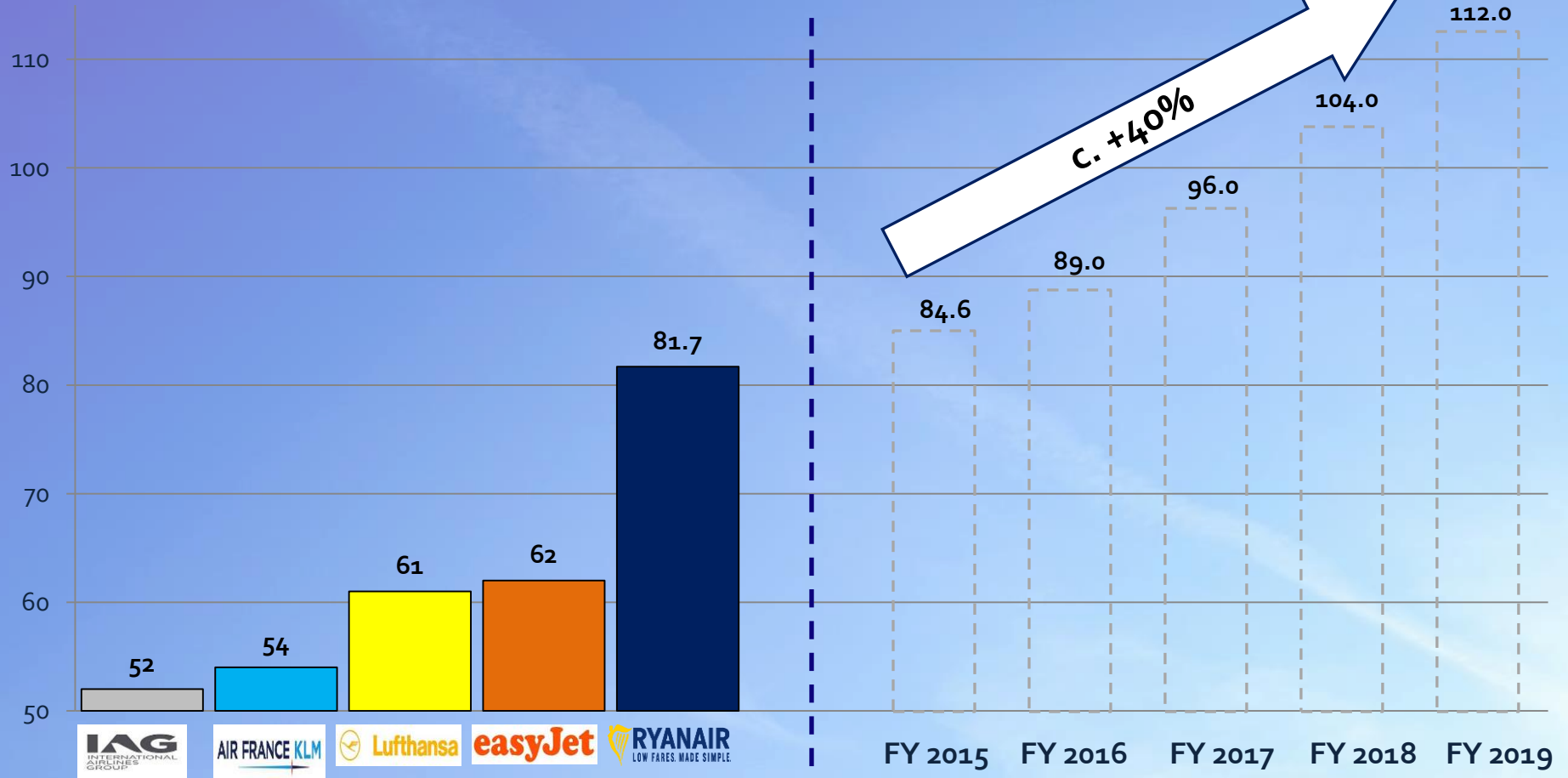


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No 1 For Traffic

Customers (m's)



FY 2014

Ryanair Growth

Source: Latest traffic stats for 12 mths to Mar14 and company forecasts.





No 1 For Coverage

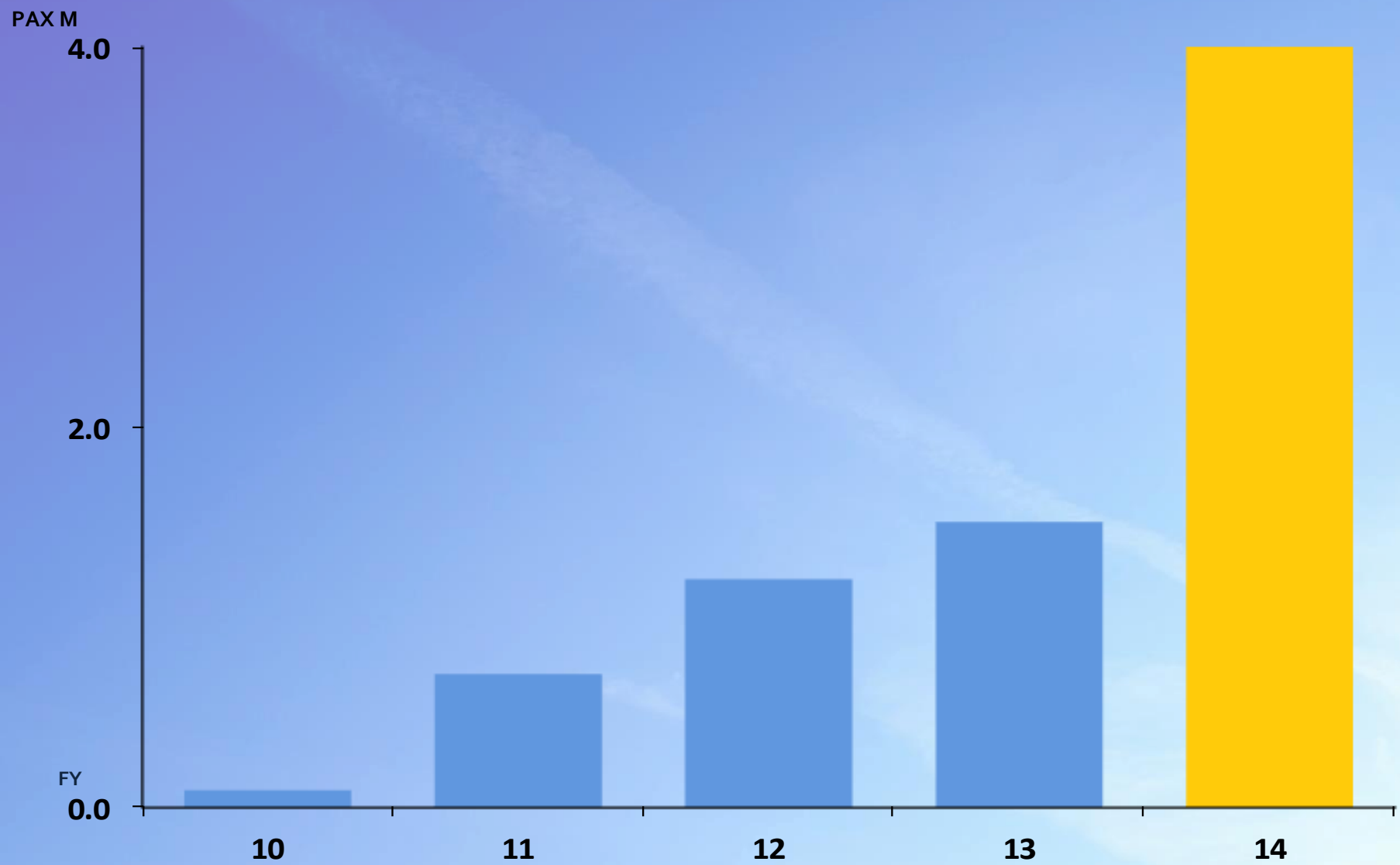
- 69 bases
- 187 airports
- 30 countries
- 1,600+ routes
- 84.6m c'mers p.a.
- 297 a/c – all 737-800's
- Newest fleet (< 5 Yrs)
- 180 a/c order



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Ryanair Effect – Greece





Ryanair Effect – Greece

- Launch '10
- 3 bases
- 5 based aircraft
- 11 airports
- 99 routes
- 4m pax p.a.
- 4,000 jobs (ACI)



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Ryanair – Thessaloniki

- Start ops 2011
- Base launch Apr '14
- 1 based a/c
- 16 routes S'14
- 1 new summer route
- 212 S weekly flights
- 10 routes W'14
- 1 new winter route: **Paris (B)**
- 180 weekly flights
- 1.5m pax this year
- 150 jobs (ACI)

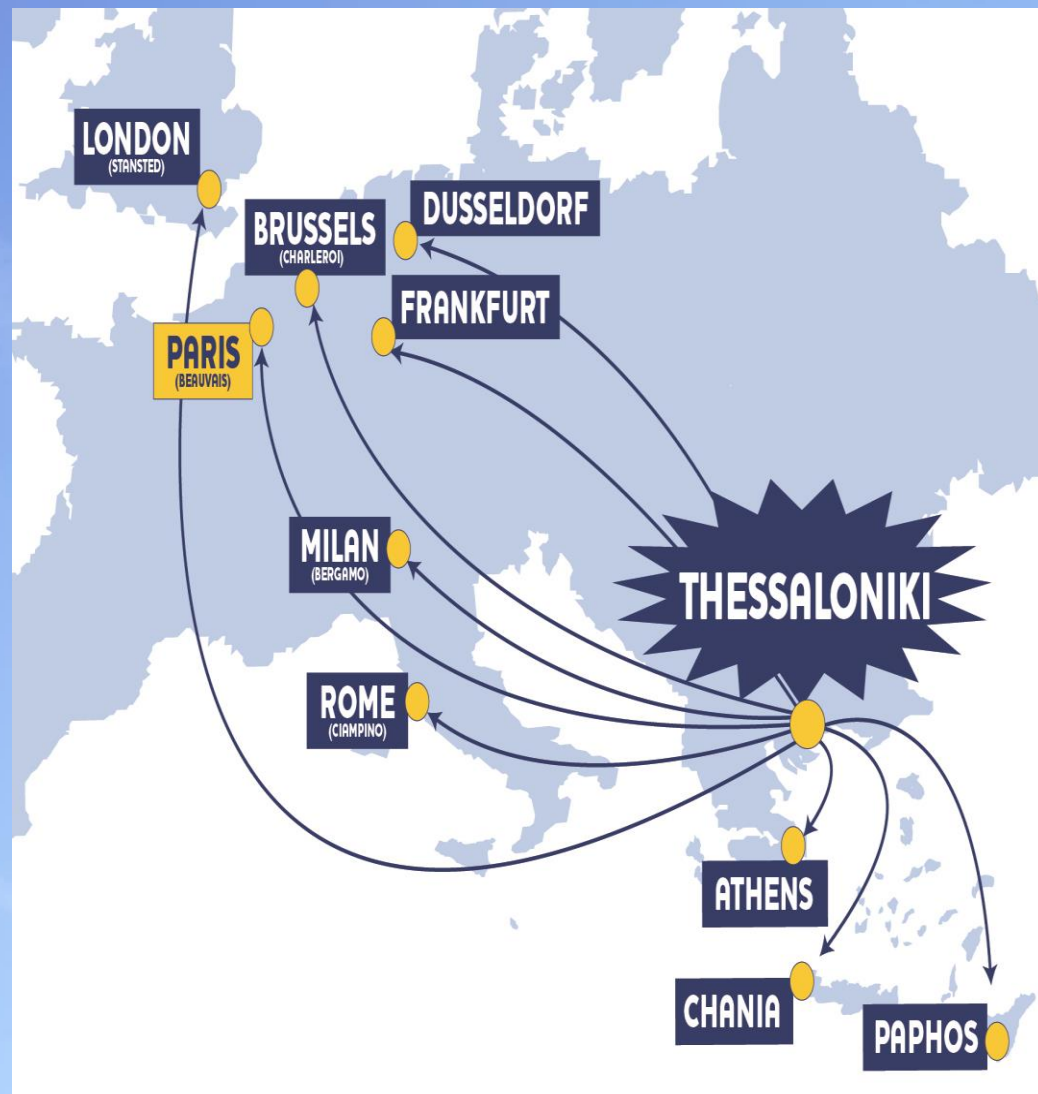


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Ryanair – Thessaloniki Winter 2014 Frequencies

Paris (B) NEW	3 per week
Athens	42 per week
Paphos	7 per week
Chania	6 per week
Milan (Bergamo)	4 per week
London (Stansted)	7 per week
Rome (Ciampino)	9 per week
Dusseldorf (Weeze)	3 per week
Frankfurt (Hahn)	2 per week
Brussels (Charleroi)	7 per week
TOTAL	90 per week



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Customer Experience Improving

- ✈ RECAPTCHA scrapped for individuals – Oct
- ✈ 24hr grace period to correct minor booking errors – Nov
- ✈ Quiet flights (early AM, late PM) – Nov
- ✈ 2nd free small carry on bag – Dec
- ✈ Boarding card reissue & bag fees cut – Dec
- ✈ New Groups & Corp. Travel Dept. – Jan
- ✈ Allocated seating – Feb
- ✈ Improving experience supported by advertising



RYANAIR.COM

INTRODUCING
ALLOCATED
SEATING

Plan your holiday.
Not your queuing
strategy.

 **RYANAIR**
LOW FARES. MADE SIMPLE.



Digital Experience Improving

- ✈️ Simpler website (17 to 5 clicks) – Nov
- ✈️ “My Ryanair”, customer registration – Dec
- ✈️ New website also in Greek – Apr (“fare finder section”)
- ✈️ GDS partnership (Galileo/Worldspan) for business agents – April
- ✈️ New mobile app for smart phones & tablets – July
- ✈️ New business product in pipeline
- ✈️ Programme of continuous IT & digital improvement



- 50% allocated seating discounts on children's seats*
- 50% off checked-in bags for children*
- Discounted priority boarding*
- 50% off travel insurance for children

**(when booked by an adult)*





Big Changes For Our Smallest People

- Reduced infant fees (now just €20/£20)
- A free 5kg infant bag allowance
- Bottle warming & baby changing facilities on board
- Two free pieces of infant equipment
(buggy, booster seat, car seat or travel cot, carried in the hold)
- Bring an approved car seat on board when a seat is booked





Fly & Save



→ New Fly & Save bonus

→ Book two Ryanair Family Extra flights

→ Get 20% off your third family flight



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Dedicated Family eXtra Web Section



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FAMILY EXTRA

Check out our great **new** family discounts and services today

Kids get 50% discount off:

- ✓ Travel insurance
- ✓ Allocating seating
- ✓ Checked baggage
- ✓ Priority Boarding

FIND CHEAP FLIGHTS

[Family Extra terms and conditions](#)

Improved inflight service:

- ✓ Reduced infant fee
- ✓ Free 5kg cabin baggage allowance for infants
- ✓ 2 free pieces of infant equipment
- ✓ Car seats accepted on-board
- ✓ Bottle warming

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Get 20% off your third flight this year

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Family eXtra



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TO LOW COST ΕΓΓΙΝΕ ΑΠΛΟ

- ✈️ Lowest fares, lowest costs in Europe
- ✈️ No 1 or 2 share in major EU markets – platform for growth
- ✈️ 180 a/c order + improving c'mer experience driving growth
- ✈️ GDS & digital strategy opens new business markets
- ✈️ Europe's customers save over €10bn by choosing Ryanair
- ✈️ Family eXtra product – savings & improved for families
- ✈️ “Always getting better” delivers for customers, people & shareholders



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