



Shareholder Gov. Forum
Apr. 24





Meet The Team

- Róisín Brennan (SID & Chair of Remco)
- Neil Sorahan (Group CFO)
- Carol Sharkey (CRO)
- Neal McMahon (COO)
- Thomas Fowler (Dir. of Sust. & Fin.)
- Darrell Hughes (CPO)
- Tracy Kennedy (Dir. of Cust. Service)
- Thomas McNamara (Dir. of Legal)
- Tracey McCann (RYA DAC CFO & Chair of Diversity Committee)
- Peter Larkin (Head of IR)





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Welcome

Neil Sorahan

Group CFO





Europe's Lowest Cost Airline Group

- Lowest fare/lowest cost EU airline
- No. 1, Traffic: 183.7m (FY24)
- No. 1, OTP & reliability
- No. 1 EU ESG airline – Sustainalytics
- 300 MAX-10 order – Decade of Growth
- Fin. strength + lowest cost = L.T. winner





Europe's No. 1 Coverage & Choice – Platform For Growth

→ 95 bases

→ 232 apts, 37 countries

→ 584 aircraft – 364 on order

→ 3,600 daily flights

→ 300m pax p.a. FY34



Terceira
 Ponta Delgada
 Madeira
 Lanzarote
 Fuerteventura
 Tenerife (N)
 Tenerife (S)
 Gran Canaria





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CRO Update

Carol Sharkey

CRO



Safety – Our No. 1 Priority

- 39+ year safety record
- Comprehensive Safety Management System
- Ryanair Group Safety Strategy 2020 to 2024
 - Key Operational Risk Areas (KORAs)
 - Effective Management of Change
 - Continuous Improvement
- Robust independent control & supervision
- Extensive independent audit prog. – internal & external, subcontractors
- Safety & Security Committee reports to the Board each quarter





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Operations Update

Neal McMahon
COO



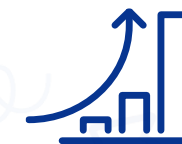


Calendar Yr 2023 – Summary

Top 10 aircraft operators - 2023 average daily flights, compared to 2022 and 2019

No.	Aircraft operator	Average daily flights	% 2022	% 2019
1.	Ryanair Group	2,813	↑ +11%	↑ +21%
2.	easyJet Group	1,477	↑ +11%	↓ -12%
3.	Turkish Airlines	1,443	↑ +16%	↑ +8%
4.	Lufthansa Airlines	1,134	↑ +7%	↓ -24%
5.	Air France Group	991	↑ +4%	↓ -17%
6.	Wizz Air Group	810	↑ +21%	↑ +37%
7.	KLM Group	796	↑ +13%	↓ -7%
8.	British Airways Group	789	↑ +23%	↓ -13%
9.	SAS Group	614	↑ +16%	↓ -24%
10.	Vueling	594	↑ +10%	↓ -1%

RYANAIR GROWTH



125% OF 2019

- 574 a/c at 31 Dec.
- Over 1m flights in cal. 2023
- Summer peak 3,300 flights
- Over 650k pax per day
- On Time Per. +10% vs S.22
- 67 days of ATC Strikes – 2m sign.
- Europe's most reliable airline – c.1% canx



Investing for Growth – Ops

→ Sig. invest in op. resilience:

- double size of DUB. / WAW. Ops. Cen. – cap. for 800 acft.
- modular layout allows for expansion
- “Bridge” Management Function
- using RYA Labs to accelerate efficiency
- improved Day of Travel app. & cust. comms

→ OTP improves

OPERATIONS CENTRE

Cologne airport update
Cancellations and delays due to airport security staff strikes

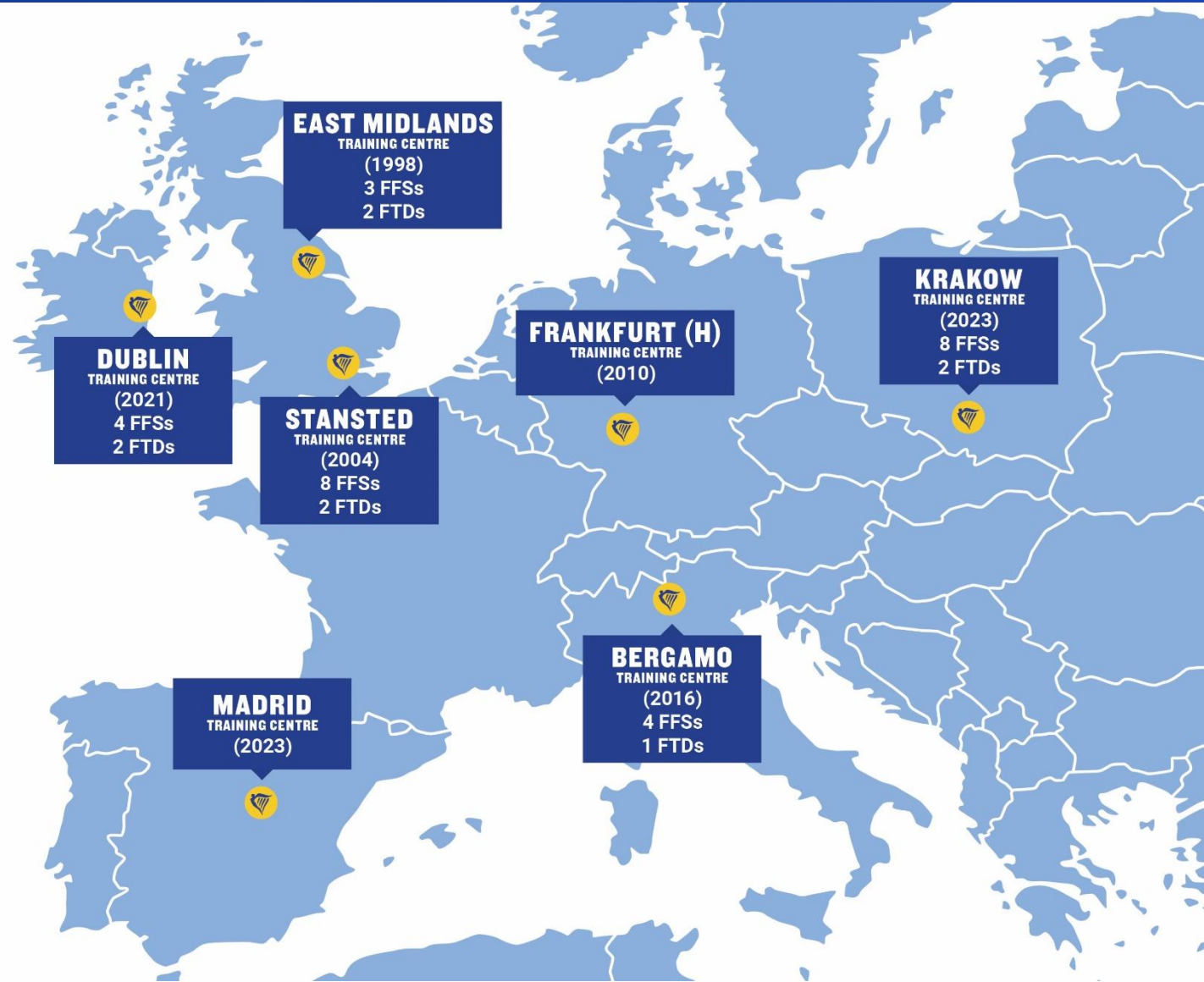
CLICK YOUR EMAIL AND TEXTS - DOWNLOAD OUR APP FOR THE MOST UP TO DATE INFORMATION - UPDATE FROM RYANAIR OPERATIONS - PLEASE REMEMBER TO CHECK YOUR EMAIL AND TEXTS

Legalities Tomorrow		Last Refresh: 2023-08-09 14:07:05
Checks	8	SNY
MaxFDP	0	No PU or more than 2 New JU
Flight Time Hours	12	Duty Time Hours
Location Inconsistencies	1	Time Inconsistencies
Crew Must Not Fly Together	0	Eighteen Hours Awake Rule
More Than Seven Consecutive Working Days	0	Sufficient Rest
One Local Night Between Late Finish and Early Start	0	Extended Rest
Sixty Hours Rest	0	



Investing for Growth – Training Centres

- 5x Training Centres (2 in progress)
 - DUB / STN / EMA / BGY / HHN
- Krakow & Madrid in dev
- 28 SIMs + 16 on order
- Capac. for 2.5k pilots & 6k c. crew p.a.
- Contin. upgrading existing centres





Investing for Growth – Engineering

- 45x Maint. Bays (in-house)
 - 4 CEE (WRO)
 - 11 x UK (STN & PIK)
 - 5 x IE (DUB & SNN)
 - 6 x ES (MAD & SVQ)
 - 20 Other: HNN, BGY, MLA, VIE, KUN
- Planned expansion (more to follow)
 - KUN +2 Bays
 - DUB +2 Bays
- Consid. engine shops for 2030s
- 95 spare engines (and growing)





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Enviro. Update

Thomas Fowler

Dir. of Sustainability & Finance





Best in class ESG

Ratings:



Member of:



- CDP upgrade to ind. leading 'A-' (from 'B')
- MSCI upgrade to 'A' (from 'BBB')
- Sig. inv. in fuel effic. acft. ("*G'changers*" & MAX-10)
- NG winglets (1.5% fuel & 6% noise red.) – 409 acft. by 2026
- SAF MOUs: Neste, OMV, Repsol, Shell, ENI (12.5% 2030)
 - 10% already secure
- SAF uplift agreement in STN – 1,000 tonnes



RYA uplifts SAF from OMV at Vienna airport.



RYA receives first SAF uplift at STN airport.

- CSRD Preparation Underway
 - Double Materiality & Gap Analysis
 - Getting audit ready
- SBTi development & submission
- Contd. deliv. of Pathway to Net Zero
 - More deliv. of fuel efficient “G-Changers”
 - Incr. number of SAF agreements
 - Further engagement on SESAR
- ESG Ratings
 - CDP, Sustainalytics & MSCI





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Social Update

Darrell Hughes

CPO





Social Update

- Post Covid CLAs – early pay restoration, new L/T deals. 100% covered.
- Fully crewed for S.24 growth = best reliability
- Additional W.23 productivity pay improvements
- Record levels of applications, hires & promotions
- New Engineering Academy, modelled on pilot success
- MAX-10 order creates 10,000 new Aviation Professional jobs
- 95 bases = investing in regions and delivering local jobs.
- Great pay, best rosters, best promotions





Social Update (cont.)

- Diversity Committee Initiatives – Pride, IWD, Uniforms
- Fleethub social network, 20k+ posts & 74k+ comments in 2023
- Mix of business updates & social content. Fits culture.
- Direct staff feedback – “Ask Eddie”, Idea Zone
- New Employee App – Ryanair Connect
- Continue to invest in talent & training



RYA's Diversity Committee



- Activity Feed
- DARRELL HUGH... Profile
- Spotlight
- Spaces



LET'S GO!
AS FARRIED

DARRELL HUGHES
Chief People Officer

223 Followers 0 Following

- LINKS
- Purchasing and Facilities
 - IT Helpdesk
 - Web Expenses
 - Staff Travel
 - Discount Car Hire
 - SAP(Employee Central)
 - BI SQL Reporting
 - Information Security and Awar...
 - Vendor Risk Management
 - Safety Reporting System
 - E-Learning

What's going on, DARRELL? Go Live

Give a Shout-out Post a Goal Update Ask a Question



Retail Team posted an update. 4 hours ago Retail

Happy St.Patrick's Day from the Retail Team

All eyes are on our Irish products onboard today 🍷🍀
Sláinte/Cheers 🍀

#Retail #StPatricksDay #Jameson #Teeling #Drumshanbo

FEATURED STORY
Ryanair Announces Record S24 Katowice Schedule

Posted 11 days ago
Everyone

News

FEATURED PAGE
IT Guides


Pages

Internal Communications posted a shout-out. 13 days ago

IWD Shoot: Behind the Scenes

We spoke to some of the best in the business to see how it's done in Prestwick, Stansted & our Dublin HQ - here's the behind the scenes!

Our International Women's Day video celebrates a handful of the talented women in our Engineering team, while inspiring more young women to choose a career in Engineering through our Ryanair Engineering Training Academy!



Internal Communications posted a shout-out. 13 days ago

On the Ground: Colmar

We spoke with Mae Gsell to discover Colmar's best hidden gems!

Check out Mae's suggestions and add your own recommendations in the comments down below!



Shout-out to: MAE GSELL


57 likes • 0 comments

THOMAS MCLOUGHLIN posted a shout-out. 5 days ago

Order to Seat Update (OTS)

Please see some of your colleague's testimonials included in the video and some important updates below;

Nearly 100% of flights have OTS available onboard



Shout-out to: ANDREI MOT, GIAMMARCO PINNO, MARIA DE MOURA DUARTE MARQUES NEVES, HILLARY MARTILLO GUARANDA

376 likes • 135 comments

Jason Whiteside posted an update. 8 hours ago

Captain's Corner - NCL Base

We recently caught up with our newly appointed NCL Base Captain, **KUDZANAI CHIKOHOORA** in Dublin HQ during the Base Captains Training Day!

Congratulations on your appointment and welcome to the NCL team Kudzii!



38 likes • 1 comment

Today: CRL Base visit

Tuesday 19th March 2024, 10:00 am - 2:00 pm

CRL Base!

I will be holding a virtual base visit for your base next week!

Wednesday, March 19th

11:00-15:00

Please Scan QR code and comment below what time you would like to book (example: 11:30-11:45).

Note: you cannot choose the same timeslot as a crew member that has commented before you.

Thank you and see you...
Read more

Base visit form

0 Attended

Internal Communications posted an update. 11 days ago

Let's Go Girls!

It's time for the Weekly Roundup - International Women's Day Edition!

Behind every Ryanair base and Fleet Hub space, there are a team of Ryanair women who make sure it all takes place!



311 likes • 9 comments


JAMES CHRISTOPHER HARDING posted a shout-out. 4 hours ago

MAN BASE

Hi Everyone

We are here until 5pm at the Clayton Hotel. Come down and meet our amazing suppliers.

Remember the uniform shop is open!



Shout-out to: DIANA FERNANDEZ ALONSO, LUIS EDUARDO MORLANS GOMEZ, LEE JAMES RATCLIFFE, MARTINA ATTINA, SARA PEREZ MARTINEZ, JOANNE MULLALLY

17 likes • 2 comments

DARRELL HUGHES posted an update. 2 months ago

Throwback Thursday - It's 8 years today since we launched the new uniform onboard. It's amazing how dated the old uniform looks. Here's a few pics from the archive and a video with the uniform designer. Anyone else have any old uniform pics? Post in comments below and let's see who gets the most likes!



MEET THE SNER

243 likes • 180 comments

Agostinho Moreira posted an update. 9 hours ago

Sales Updates, Incentives and Training + 1 more

Tip of the week from the suppliers

Sometimes it is all about the alternatives, know how to jiggle it sideways. Sarah from Heinemann tells us all we need to know on this week's short video.



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CRL BASE

Scan me!

Timothy Del Mirani




Internal Communications posted an update. 16 days ago

It's time for the Monthly Roundup!

We had a fun-filled February, but it has finally come to an end even after gifting us an extra day to enjoy!

To sum it all up...



324 likes • 5 comments

IZAR PARRONDO posted a shout-out. 4 hours ago

BCN BASE


Massive Congratulations and Well done to **CLAUDIA PASTORE** and the crew operating this morning NAP flight!!

You guys smashed the targets, keep it up!

Claudia share your secret with us below @ #letsgetitBZ #BCNTeam



Internal Communications published an article. 8 hours ago



Ryanair Adds Over 4,000 Extra Seats for England Football Fans Ahead of the Euros in Germany

SINEAD QUINN posted a Goal update. 23 days ago

Malta Air Cabin Crew + 4 more

Great Scratch Card Incentive

MARCH PRODUCT OF MONTH

POTM will be scratch cards, the reason I am personally driving is I want to showcase when our crew and Inflight team work together on a focused product we can achieve amazing results.

We have now hit the milestone of €500k to children's charities. If we want to hit that again or



535 likes • 206 comments

MARK DUFFY posted a shout-out. 19 days ago

Ryanair Idea Zone

And the winner is...delighted to announce the winner of our inaugural Idea Zone prize, massive well done to Maria & a huge thank you to each and everyone of you who has contributed an idea, they are all read and flagged with the managers throughout the business, please keep them coming in...click in the video to find out more ;)



Shout-out to: MARIA PINAU



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Cust. Serv. Update

Tracy Kennedy

Dir. of Customer Service



Ryanair Customer Operations Bases:

165 INTERNAL STAFF
950 CS STAFF
6 SITES
7 LANGUAGES
CHAT
PHONE
EMAIL
ONLINE CONTACT FORMS

9.55M
TOTAL CONTACTS

4.88M VOICE
3.16M CHAT
92% VOICE CSAT
109.9K SOCIAL
1.25M BACKOFFICE
77% CHAT CSAT



Our focus for the next 5 years is to continue to deliver excellent customer service whilst growing to 300M passengers.



Customer Service Update

- ➔ No.1 op. resil. / reliab. / OTP / choice despite FRATC & NATS issues
- ➔ CSAT for FY24: 85%
- ➔ NPS is currently at +14
- ➔ Cust. panel meets twice p.a. – validating cust. experience
- ➔ New initiatives this year include:
 - More self-service web & app
 - New cust. portal providing updates on claims, refunds & complaints
- ➔ Agreements with OTAs having a pos. impact on dist. channels
- ➔ 25% of wallet credit re-used to buy RYA tickets/services

Delay Comms Satisfaction Results



Results have been tracked since April 2023 till February 2024. Averaging a 14% increase in all areas. Extremely satisfied option has increased 13% since first tracked in June 2023.

+ 14% Improvement in **QUALITY**
Resulting in 73% satisfaction for February 2024.

+ 13% Improvement in **RELEVANCE**
73% of disrupted pax find the content relevant.

+ 15% Improvement in **TIMELY** updates
61% of disrupted pax feel that communication arrived at the right time.

+ 13% Improvement in **Overall Satisfaction** with Delay Handling resulting in 65% satisfaction.

32% of affected pax said that they are extremely satisfied overall with the communications they received from us



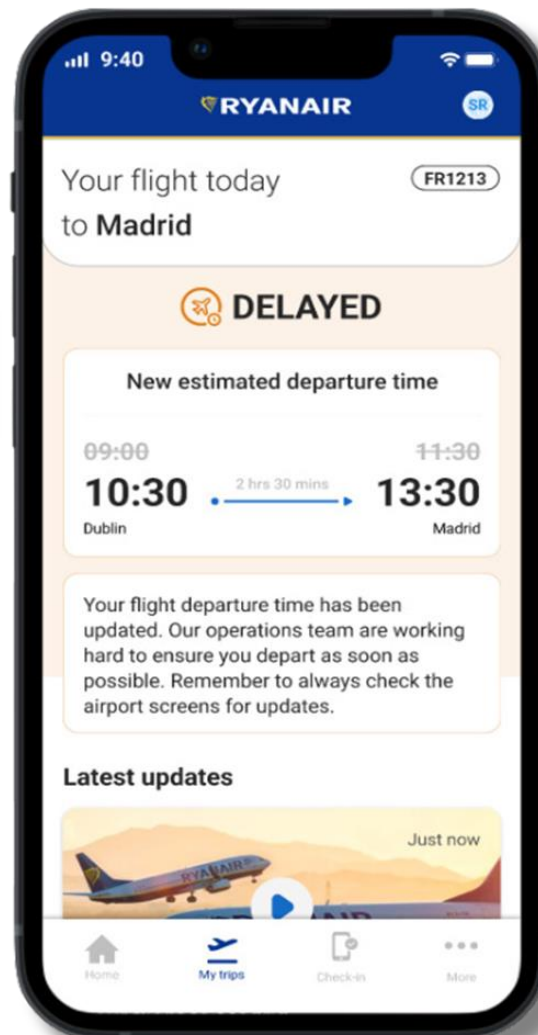
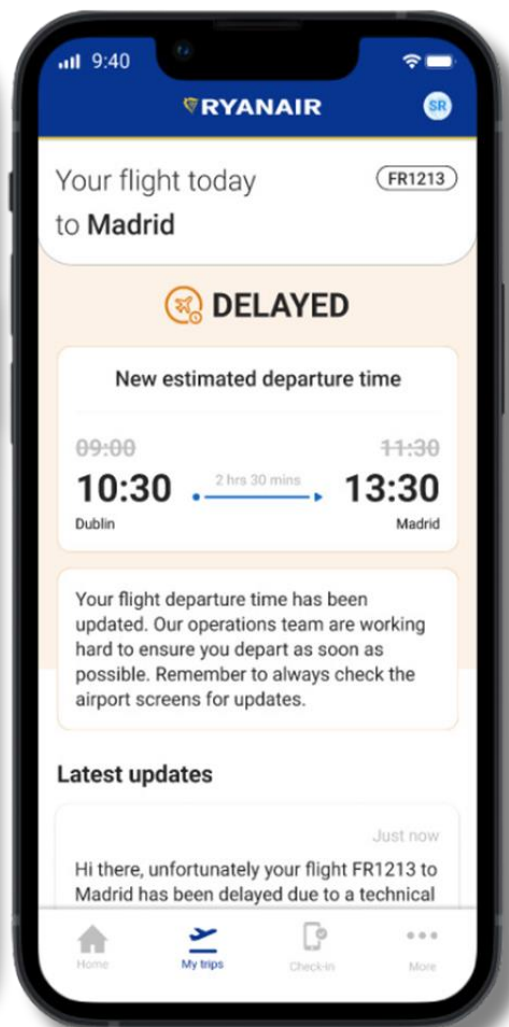
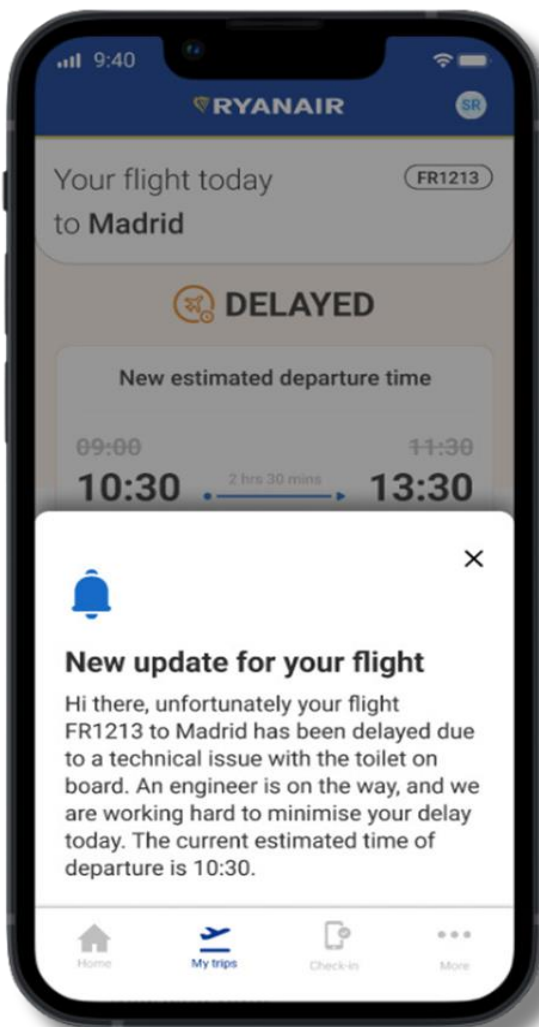
Customer Service Update – Automation

- Launched a range of new support services to drive efficiency & improve CSAT
- Chat bots:
 - Moli handles 250k+ queries per month
 - Arthur (back office) handles 70k+ emails / forms per month
 - Lex (voice bot) helps cust. on help centre & in their my Ryanair account
- Automation for all claim types, reduce headcount & speeding up processing
- As grow, deliver more support using less CC agents – substituting with automation





Customer Service Update (cont.)



- Huge advances in the mgmt. of day of travel disruption
- Launched a new comms platform (Raven) which revolutionises how RYA communicates with custs.
- Even with a 90% OTP, c.75k pax per day delayed / disrupted.
- Next phase is detailed information on inbound flight arrival time (flight radar)





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Legal & Reg. Update

Thomas McNamara

Dir. of Legal



→ EU airline licences protected

- Since 2002 non-EU nationals not allowed to buy Ryanair Ord. Shares
- Since 2021 UK investors covered by the above prohibition
- EU shareholding increased to 46% at 31 Mar '23 and continued to grow during FY24
- Voting rights of non-EU (incl. UK) shareholders restricted **until EU > 50%**

→ Traffic rights preserved

- EU-UK routes
 - Ryanair
 - Buzz
 - Malta Air
 - Lauda
 - Ryanair UK
- UK domestic & UK-third country routes
 - Ryanair UK





- Ryanair's pro-consumer stance vs OTAs' claims of abuse of dominance
 - Paris CoA (May 22) – Lastminute cannot “free-ride”
 - Irish HC (Nov. 23) – Flightbox bound by Terms of Use of Ryanair.com
 - Milan CoA (Jan. 24) – refusal to work with Lastminute not an abuse of dominance
 - DDAs (Jan. 24) – first Direct Distribution Agreement with an OTA signed (the consumer wins)
 - Italian AGCM case based on travel agent complaints – pending
 - US case against Booking.com (Computer Fraud Act) – pending
 - EU law to regulate OTAs – pending





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Corp. Gov. Update

Róisín Brennan

SID & Chair of Remco



- Strong, independent, Board (UK Corp. Gov. Code)
- R. Brennan appointed SID from 01 Apr.
- 5 NEDs appointed since Dec. 22 – AN; EK; EB; BG; RN
- EK (Austrian); BG (French), RN (Italian) strengthening geographic diversity
- Strong gender balance on Board (43% women / 57% men)
- Avg. NED tenure 5 yrs
- L. Phelan & M. Cawley not seeking re-election
- Dir. of Sustainability updates Audit Co. & Board quarterly
- Board & snr. mgmt. succession plans in place (Nomco) – strong “Bench”



WF Engagement Update

- E. Brennan NED responsible for WF engagement
- Engaged with multiple employee groups in FY24
 - incl: C/crew, ENG, Gops, LABS, Office (HQ) & Pilots
- Structured panels give employees a voice
- Examples of initiatives implemented incl. improvements to benefits, staff travel & facilities
- Great feedback & shared with Board – Qtr. Agenda item



E. Brennan & D. Hughes meet RYA DUB Ground Ops. in Mar. 24

Questions?



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