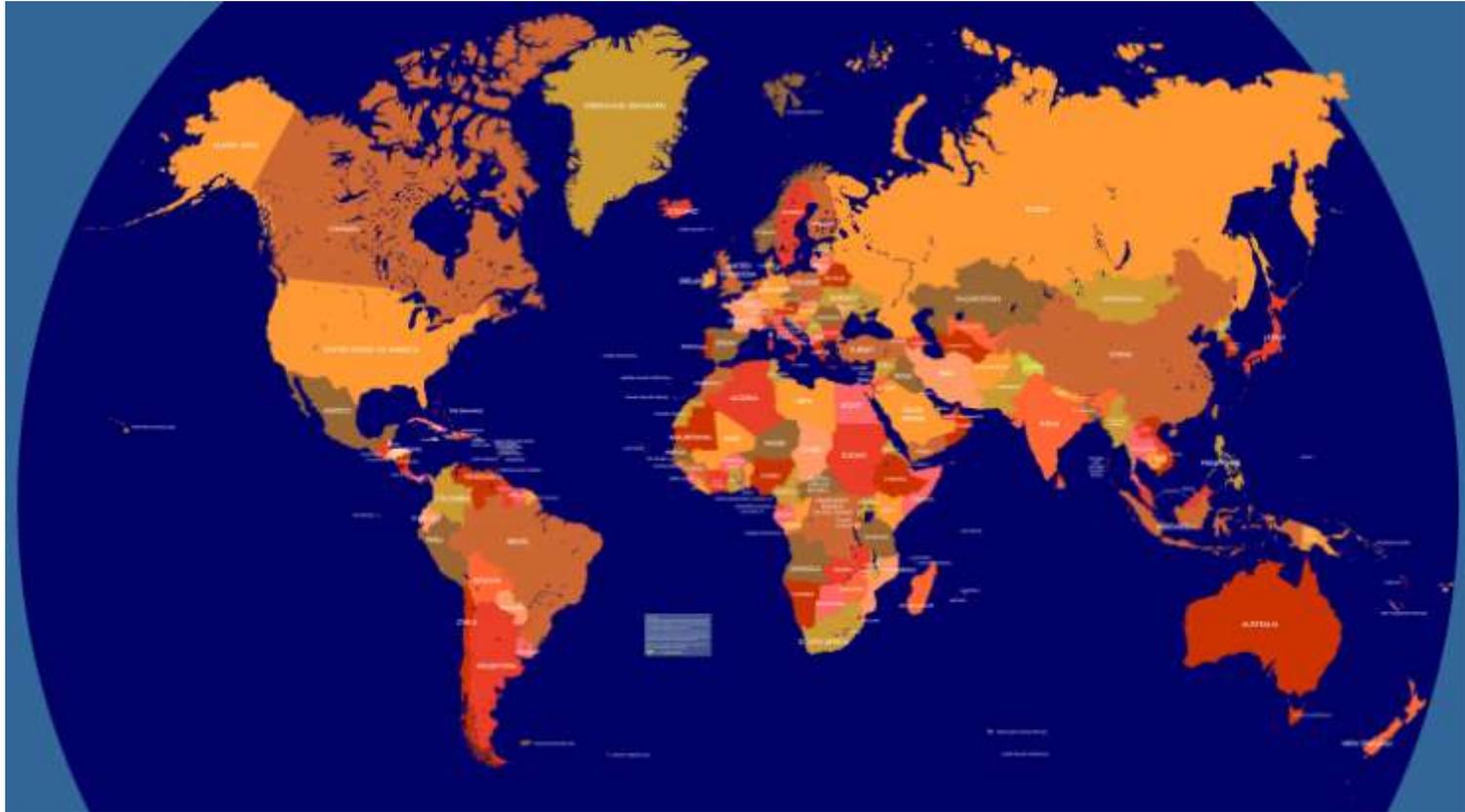


Ireland goes on holidays



- **Irish travel 4 times European average**
- **116th in size (32,000 square miles)**
- **105th in population (6.4m)**
- **37th biggest market in International Travel**

Ireland goes on holidays



- 33.5m journeys to & from Ireland
- 85pc of Irish travelled abroad in 2014
- Second most travel friendly nation after Norway

Where we go

- England 1,800,000
- Spain 1,270,038
- France 540,000
- USA 367,110
- Italy 345,000
- Portugal 219,100



Quarter market decimated

Quarter market was 12pc now 1pc



Low Cost Carriers

- 
- A photograph showing three men in business suits seated at a table. The man on the right is smiling and looking towards the other two. The man in the middle is looking down at something on the table. The man on the left has his hand raised. In the background, there is a banner with the Ryanair logo and the word 'RYANAIR' repeated on a purple and yellow checkered pattern.
- Ireland one of first markets to be affected
 - Ryanair cut commission in 1997
 - Cut out travel agent altogether in 2001
 - Aer Lingus reduced commission to zero in 2002
 - Irish consumers adapted quickly

Ryanair



Home Flights Hotel

Flights > Airlines > Ryanair



Airline Rating 3.6/5 Reviews: 652

Fly Ryanair and book cheap flights from €8

Discover great deals with eDreams

Return One-Way

From

To



CHEAP RYANAIR FLIGHTS

DUBLIN

LONDON

BRUSSELS

BARCELONA

MADRID

Dublin → London

€28

Direct



Dublin → Manchester

€12

Direct



•Legal actions against scrapers

Purchasing mindset

A photograph of a Ryanair airplane on a tarmac. The plane is white with a blue and yellow livery. The word 'RYANAIR' is visible on the side of the fuselage. In the background, there is an airport terminal building with a sign that reads '108L'. A group of people is standing near the plane, and a yellow ground support vehicle is visible in the distance.

- Consumers trained to book online
- Happened faster in Ireland than ANY market
- Agents lost 50-60pc of consumer market lost
- Never to come back

And then...

- The Tiger took a bath
- VERY high attrition rate





Recession hits Tour Ops

16/09/2009 Slattery Travel

25/11/2009 Budget Travel

15/1/2014 Thomas Cook

Bedbank collapses



11/1/2010 1800hotels
01/11/2010 Chase Travel
10/3/2014 OHG

Charter Market



• 1992 263,000	• 2000 973,000	• 2008 782,000
• 1993 325,000	• 2001 1087,000	• 2009 420,000
• 1994 328,000	• 2002 1177,000	• 2010 270,000
• 1995 363,000	• 2003 1107,000	• 2012 220,000
• 1996 449,000	• 2004 991,000	• 2013 200,000
• 1997 641,000	• 2005 969,000	• 2014 183,000
• 1998 958,000	• 2006 918,000	
• 1999 829,000	• 2007 890,000	

Back to GDS

Travelport 

Unparalleled content.

Your workflow,

your way

•But NOT back to commission

A contradiction



Departures

Aer Lingus 

04:05 LOS ANGELES CALIFORNIA

NEWARK NEW JERSEY

HARTFORD CONNECTI

IT FLIES AER LINGUS

- Aer Lingus on GDS in Europe
- NOT in Ireland

Repositioning



- Repositioned ourselves and our offering
- Look to cruise, honeymoon, DP



Web savvy

- Web savvy consumer
- Turning it to our advantage

Changing the default



- Change to default option
- Challenge to the trade in Ireland