Mobiles, Smartphones & Multi Channel Distribution

Threat or Opportunity for ancillary products
Digital disruption of travel industry

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Threats

Digital Platform

Revenue shift to OTAs

Holistic approach to customer journey

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Opportunities

Mobile share is growing

Mobile share is significantly lower in Europe

Smartphone share of online bookings by country

<table>
<thead>
<tr>
<th>Country</th>
<th>June 2016</th>
<th>June 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAPAN</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>TURKEY</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>UNITED STATES</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>AUSTRALIA</td>
<td>22%</td>
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<tr>
<td>CANADA</td>
<td>20%</td>
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<tr>
<td>SPAIN</td>
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<tr>
<td>SWEDEN</td>
<td>16%</td>
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<tr>
<td>ITALY</td>
<td>14%</td>
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<tr>
<td>FRANCE</td>
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<tr>
<td>UNITED KINGDOM</td>
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<tr>
<td>BRAZIL</td>
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<tr>
<td>DENMARK</td>
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<tr>
<td>NETHERLANDS</td>
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<td>BELGIUM</td>
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<td>AUSTRIA</td>
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<tr>
<td>GERMANY</td>
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</tbody>
</table>

Year-over-year growth:
- JAPAN: 33%
- TURKEY: 21%
- UNITED STATES: 18%
- AUSTRALIA: 81%
- CANADA: 35%
- SPAIN: 68%
- SWEDEN: 40%
- ITALY: 46%
- FRANCE: 43%
- UNITED KINGDOM: 50%
- BRAZIL: 63%
- DENMARK: 55%
- NETHERLANDS: 52%
- BELGIUM: 78%
- AUSTRIA: 35%
- GERMANY: 33%

Source: Criteo dataset June 2016 and June 2015, all travel subsectors, OTAs and suppliers, excluding apps
Opportunities

Airline becomes a platform

Ryanair as a digital travel leader which happens to have an airline attached.
Opportunities

Role of the ancillary will significantly increase
Key merchandising moments

Merchandising Moments

2 weeks before trip group

48h before trip

In Flight

Destination

Event

→ Book flight
→ Hotel
→ Insurance
→ Change reservation

→ Extra Luggage
→ Meals
→ Fast track

→ In Flight Shopping

→ Taxi
→ Shuttle
→ Restaurant
→ Discount

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Ancillary Opportunity
Mobile Advertising

Facebook's Growth Is Fueled by Mobile Ads
Facebook's quarterly revenue by source (in billion U.S. dollars)

- Blue: Desktop Advertising
- Black: Mobile Advertising
- Green: Payments

Source: Facebook
Target Advertising Platform for Airlines

- Golf
- Business
- Nightlife
- Vacation

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Target Advertising Platform for Airlines

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THANK YOU

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