

*"Lisbon, exploring an emergent  
Atlantic business hub" conference*

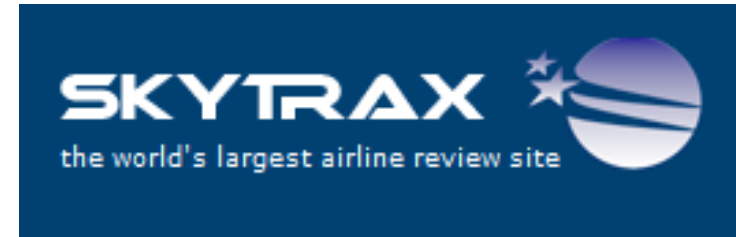
## **easyJet presentation**

London, 17 November 2011

europa by  
**easyJet**

Our aim: become Europe's preferred airline

**PUBLITURIS**



**easyJet awarded:**

2010 "Best Low Cost Airline in Europe"  
by 19m SkyTrax voters

2011 "Best Low Cost Airline in Portugal"  
by Publituris

# easyJet operates Europe's largest network

- Europe's No. 1 air transport network and 4th largest airline.
- UK's largest airline.
- Accessible network: Over 300m inhabitants within one hour drive on an easyJet airport.
- Increasing diversity: Pan European Network – 60% of passengers originate from outside the UK.
- Over a third of flying does not touch the UK.

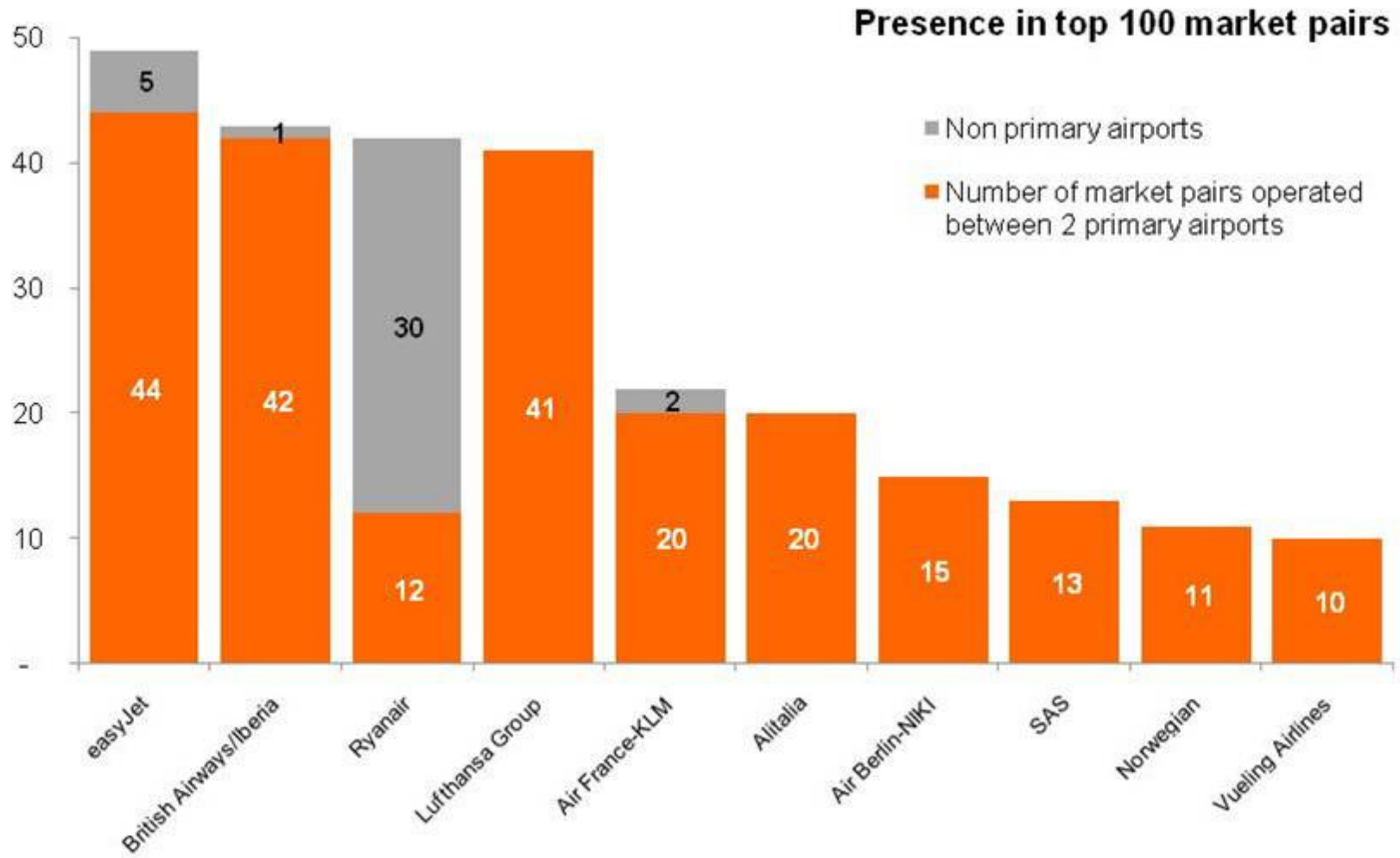


## → Vital Network Statistics:

54.5m passengers carried in the last 12 months  
129 airports  
Over 580 routes  
29 countries

19 bases + 4 in 2012 to open in Europe mainland  
204 aircraft

# Clear leadership in primary airports



# We will drive business travel harder

## Valuable market:

- easyJet has a 4% share of the business travel market in Europe
- easyJet gets a yield premium of c.20% from business customers

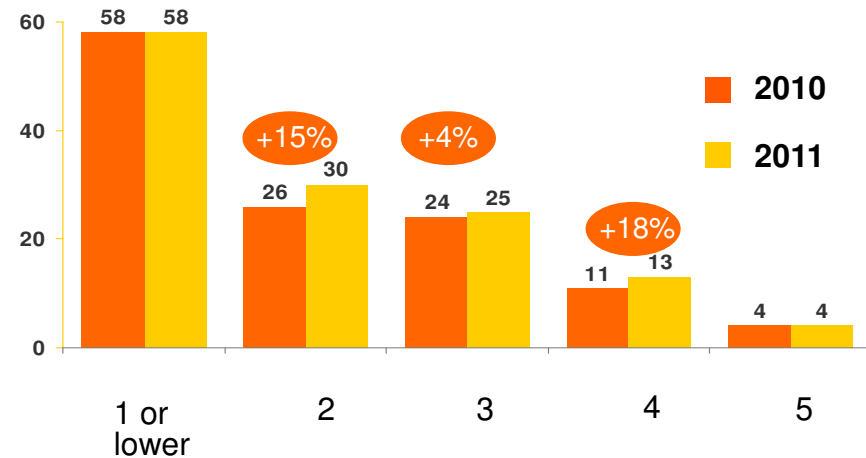
## We will drive volume and yield:

- Invest in new routes and improve frequency
- easyJet lean style corporate sales force
- Drive GDS harder (+ 35%)

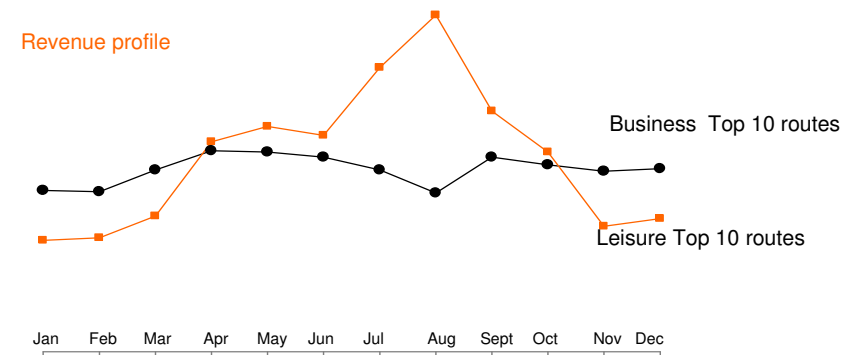
## A robust OTP

More than 80% average throughout the network since beginning of 2011

## Improving average frequencies of business routes<sup>1</sup>



## Growing business routes will stabilise revenue volatility



1. A/B routes classified by easyJet according to the yield profile by time of day. Broadly, A/B are "business" biased while C are leisure biased

# easyJet serves the Business Market

Flexi Fare now available to all on [www.easyjet.com](http://www.easyjet.com)

## Business benefits flying with us

1



### Online Check-in

You can check in online from the comfort of your office or home any time you like from 60 days to two hours before the scheduled departure of your business flight. You can now also check in any luggage you have online. Please remember that you'll need to drop this at the luggage drop off point.

2



### Your Plus card

With our easyJet Plus! card paying the annual fee means that you automatically qualify to be among the first through the boarding gate for every flight you take. You'll never need to remember to buy Speedy Boarding or Speedy Boarding Plus again.

3



### Speedy Boarding

For a small fee you'll be called to board your flight first, giving you the best choice of seats and a better chance to get some work done before departure.

4



### Speedy Boarding Plus

Speedy Boarding Plus combines Speedy Boarding with a dedicated check-in service, perfect for those passengers who still need to check baggage in to the hold but don't want to hang about in a line. This is available at many airports across the airline's growing network.

5



### No weight limit on hand baggage

For extra speed and convenience easyJet has no weight restrictions on hand baggage. Our only stipulation is that the maximum dimensions do not exceed 55x40x20cm and you must be able to lift your bag into the overhead lockers yourself.

6



### Flexible bookings

We know your day can change. That's why you can alter your itinerary or transfer your ticket to a business colleague up to two hours before the scheduled departure of your flight - just pay a small fee and any fare difference (if applicable) and that's it.

7



### Missed your flight?

Business meetings often over run, that's why you can catch the next available flight for a small fee if you turn up at the airport within two hours of your original flight's scheduled departure time.

8



### Business meeting finished early?

We know you've got a busy schedule, so if you get to the airport early you can hop onto an earlier flight free of charge, as long as we've got a seat available.

9



### Airport Lounges

Relax in 1st class comfort and make use of the great facilities, including wifi access, phones for making free calls to UK landlines, fax machines, printers, scanners and international newspapers. With prices starting from only £12.50 per person, you can spend up to three hours in the airport lounge before your flight.

These lounges also offer free snacks plus soft and alcoholic drinks - some even offer full meals. With one or two exceptions, such as champagne and cocktails, everything's included in the price. So don't neglect to look after yourself while you're away, looking after your business. [Book your Airport lounge here.](#)

10



### Have a pleasant journey

Our aim is to make your flight as comfortable as possible. That's why all of our seats have the same or better legroom as other economy flights. And if you didn't have time to catch a bite in a departure lounge why not try something from our bistro? We serve a range of hot, cold, and alcoholic drinks, snacks, and sandwiches at really competitive prices. And on all flights you can now enjoy a freshly brewed Starbucks coffee.

# Why Lisbon?

- **Where do we establish bases?**

- Only at primary locations.
  - Portela Airport: an improved customer experience at T2.
- A place with significant traffic potential.
  - There is a room to grow as LCC penetration in Portugal is only 34%.

- **Why a base?**

- Lisbon is one of Europe's most attractive capital city:
  - 3.6m leisure and 4m business travellers a year.
- To boost inbound and outbound traffic:
  - + 250,000 passengers in the first year of operation.
  - + 1m passengers at full base operation to 2.5m passengers to/ from Lisbon per year.
- To consolidate our position as Lisbon's second largest airline and to become Portugal's No. 2 carrier:
  - YOY +12% travellers carried at Lisbon (2011) to more 1.7m passengers - 2m passengers expected in the first year of the base operation.
  - YOY +8% overall travellers carried at Portugal (2011) to more than 3.7m - 4m passengers expected in the first year of the base operation.

- **In Lisbon, easyJet provides choice:**

- There is a gap to fill along side competitors with a different positioning, making travel easy and affordable for consumers.
  - easyJet to open Lisbon's first ever low-fares base offering 36 appealing destinations from Lisbon at full operation and propose morning's first flights.

# Lisbon: a place to make business

- easyJet, a key and long term strategic partner of the Portuguese economy with a €300m investment in a base, up to 7 aircraft stationed, a potential of 2,000 direct & indirect jobs creation.
- Governance: working in partnership.
- Portugal has identified the need to improve its connectedness with Europe top cities.
- An international, business-minded city.
- Quality of the local employment.
- One of the most appealing city in Europe.

# Lisbon in the heart of Europe with easyJet

## easyJet in LISBON

- Operation launch: 1998.
- Base opening: S12.
- Airport: Portela T2.
- Aircraft on base: 7 (2 A319 at S12).
- Routes portfolio: 16 (+5 at S12: Amsterdam, Copenhagen, Venice, Asturias and Bordeaux) – Total with the base: 26.
- Operated flights per week at S12 : up to 150 (+13%).
- Passenger traffic grow with the base: + 1m per year to 2.5m (+225,000 to 2m in the first year).

### Key Milestones:

- No. 2 airline (9.7% MS in 2011).
- easyJet to open the first ever low-fares base in Lisbon at S12.



## easyJet IN PORTUGAL

- Number of airports served: 4 (Lisbon, Faro, Funchal, Porto)
- European connection: 7 markets.
- Total destinations portfolio: 46 with the base (41 at S12).
- Operated flights per week at S12 : up to 330.
- Passenger traffic grow from S12: 4m in the first year.

### Key Milestone:

- With its Lisbon base, easyJet to be the second largest airline (10.4% MS in 2011).

# easyJet in Lisbon grants access at low fares to all key EU regions in two hours or so

- **easyJet: a tool of competitiveness**
  - 16 routes today/ 21 at S12/ 26 at the full base operation, low fares, no excuse not to visit your customers as we serve major cities.
- **easyJet base at Lisbon/ Portela:**
  - Meaning more choice, more opportunities for your holidays as well.

**Thank you!**

europa by  
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