# RYANAIR GROUP

## AVIATION WITH PURPOSE
## 2021 SUSTAINABILITY REPORT

# RYANAIR FACT SHEET

**149m guests**
pre-Covid-19
(27.5m FY21)
225m p.a. by FY26

**17,000 +**
aviation professionals

## Choice & Coverage

**2,500 +**
daily flights

**89**
bases
across Europe

Service over
**230**
airports

## Unrivalled Performance

Operating in
**37**
countries

**90%**
on-time performance

**36-year**
safety record

- 438 Boeing 737-800s
- 210 Gamechangers delivered/ on order
- 29 A320s
- c.90% unencumbered fleet

- 83g $CO_2$ emissions pax/km
- 66g (pre-Covid-19) FY20 due to high load factor

**B-**
**CDP**
climate protection rating

**BBB**
**S&P and Fitch**
credit ratings

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# RYANAIR'S APPROACH TO **SUSTAINABILITY**

At Ryanair, we support the 2015 Paris Agreement, Destination 2050, the United Nations Global Compact and the 17 UN Sustainable Development Goals.

Our 2021 sustainability report, Aviation With Purpose, communicates our goals, targets and initiatives which support these agendas.

# A MESSAGE FROM OUR GROUP CEO

"We are pleased to present our 2021 Sustainability report - 'Aviation With Purpose'. Focused on our post-Covid recovery, we're determined to reduce our environmental impact and continually improve our Customer Service."

**The Covid-19 virus which spread across Europe from March 2020 had a profound and devastating impact on our business last year. However, by restoring our flights, rebuilding our schedules, welcoming back our very loyal customer base and prioritising our Customer Service, we are recovering.**

This year, we invite all our customers to rate their trip within 24 hours of flying. We have set up a customer panel which meets seasonally to recommend service improvements for Ryanair and we are working hard to enhance our day of travel experience, rolling out real-time flight status, boarding gate and Fast Track updates to our app users.

We are committed to growing our annual traffic from 149m to 225m customers p.a. over the next 5 years and are determined to carry customers in such a way that not only lowers the cost of air travel but reduces the impact on the environment.

We intend to cut our $CO_2$ emissions per passenger/km by 10% over the next decade and we have committed to be plastic-free on board our aircraft within the next 4 years.

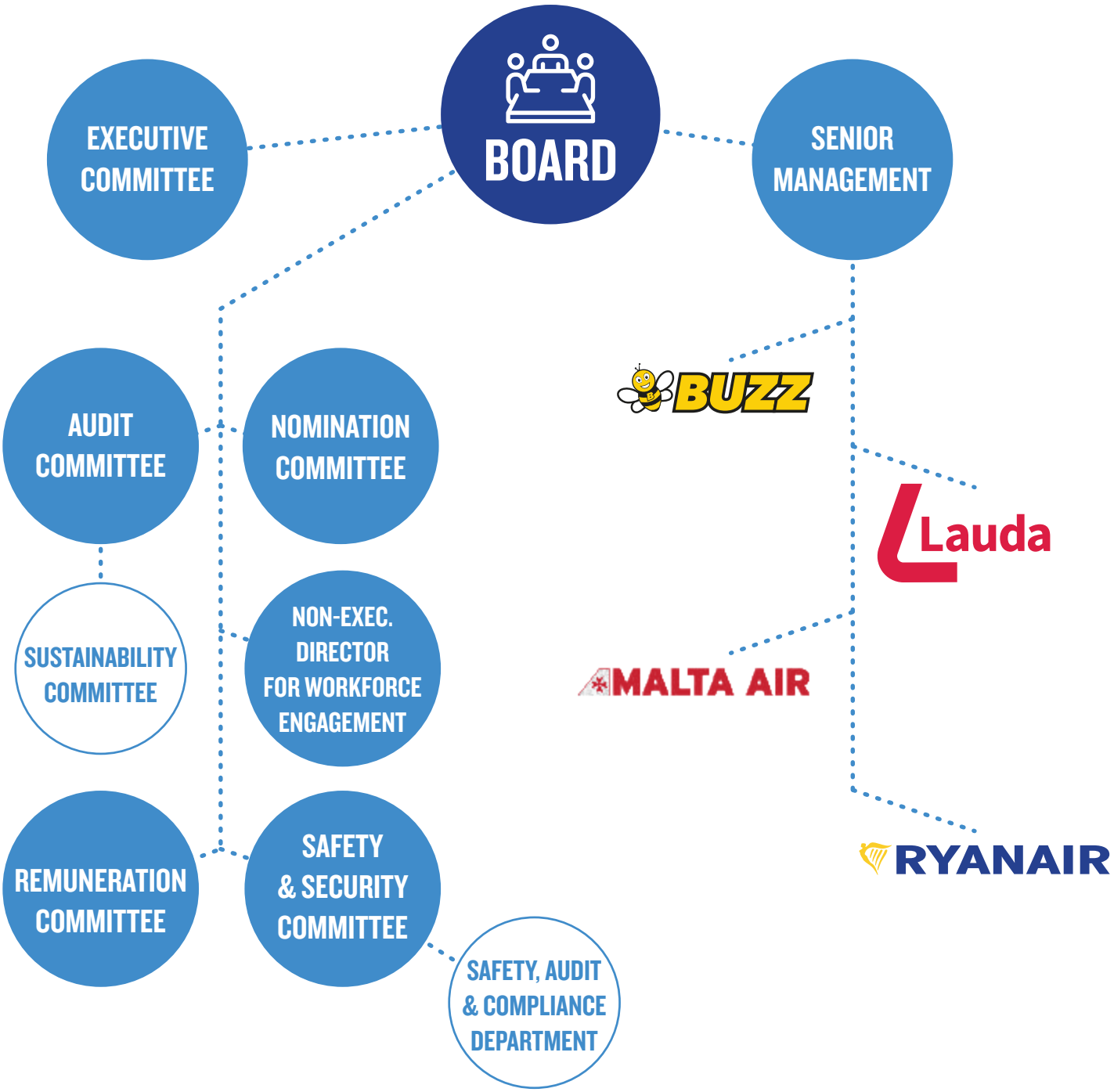
At the heart of Ryanair's environmental strategy is our $22bn investment in new technology 'Gamechanger' aircraft which will deliver more seats per flight with more leg room for improved comfort, yet they will burn 16% less fuel and reduce noise emissions by up to 40%.

We're also very proud of the major strides our Airline Group has made in recent years to promote diversity and inclusion. We're delighted to say that almost 40% of the Group Board are female leaders. In the past 12 months, more than 60% of promotions to middle and senior management roles within the Ryanair Group were female.

All of the team in Ryanair are working hard to deliver on our environmental and social goals and we look forward to a bright future.

**Michael O'Leary**
**Group CEO**

# RYANAIR GROUP GOVERNANCE STRUCTURE




Read more about our work maintaining the highest level of Corporate Governance in the Ryanair Group Annual Report 2021.

# A MESSAGE FROM OUR DIRECTOR OF SUSTAINABILITY

**"Aviation will play a crucial role in environmental sustainability over the next 30 years and Ryanair will continue to lead environmental innovation among airlines."**

**In the past, sustainability in Ryanair was viewed through the lens of fuel efficiency. We had a laser-like focus on reducing our fuel consumption which enabled us to achieve our low-fare, low-cost model. A by-product of this was that it reduced our environmental footprint, leading us to be one of the most environmentally efficient airlines in the world.**

In recent times, through engagement with our stakeholders, we recognised the need to further address climate change, sustainability and equality, hence the publication of our Aviation With Purpose report.

This strategy aligns with the 2015 Paris Agreement and UN Global Compact. Through it, we are striving to innovate and promote sustainable environmental and social practices throughout our business which will benefit our planet, our people and our customers.

Work is underway to achieve the goals set out in Aviation With Purpose through initiatives ranging from investments in new efficient aircraft, reviewing our Diversity, Equality and Inclusion programme and the establishment of our customer panel. Over the coming years, we will expand and enhance these initiatives and, where necessary, introduce new ones.

As our Aviation With Purpose strategy evolves, we will ensure that our future reporting aligns with best practice, taking account of materiality and upcoming regulatory requirements such as the Corporate Sustainability Reporting Directive (CSRD).

Finally, I would like to thank all my colleagues throughout the Ryanair Group who have helped bring purpose to aviation by supporting this ambitious strategy.

**Thomas Fowler, Director of Sustainability & Finance**

## We align to the 17 UN Sustainable Development Goals

# SUSTAINABILITY **PILLARS**

Aviation With Purpose, our sustainability strategy, is supported by the following pillars:

## ENVIRONMENTAL PILLARS

- Invest in New Energy-Efficient Technology
- Invest in Sustainable Aviation Fuel
- Decarbonise Operations
- Participate in Carbon Offsetting
- Decarbonise our Supply Chain
- Support Government Policy & Reform

## SOCIAL PILLARS

- Promote Inclusivity, Diversity & Equality
- Workforce Engagement
- Invest in Job Creation, Training & Development

## CUSTOMER PILLARS

- Act on Customer Feedback
- Make Travel Simpler Through Digital Innovation
- Best for Price, Punctuality, Emissions and Choice

# GOALS AND TARGETS

## ENVIRONMENTAL

Net-Zero Carbon Emissions by 2050

### KEY TARGETS/GOALS

1. Investment in advanced technology (210 B737-8200 'Gamechanger' aircraft)
2. Goal of using 12.5% SAF by 2030
3. 10% reduction in $CO_2$ emissions per pax/km, by 2030

## SOCIAL

Improved Employee Strategy

### KEY TARGETS/GOALS

1. Review and Improve Ryanair's Discrimination Prevention Policy
2. Continue to engage with employees through workforce engagement and surveys
3. Create high quality jobs and invest in world-class training

## CUSTOMERS

Always Delivering the Best Customer Experience

### KEY TARGETS/GOALS

1. 20% increase in NPS and maintain 90% CSAT
2. Deliver customer improvements annually based on customer feedback
3. No.1 position for price, punctuality, emissions and choice

# ESG GOVERNANCE **STRUCTURE**

**Our Board**
The Board has ultimate oversight of our sustainability goals including climate-related issues and the Group's climate strategy. The Board and Audit Committee receive quarterly updates on climate related risks and our performance from the Director of Sustainability.

While the entire Ryanair team plays a role in our sustainability strategy, the Sustainability Committee guides our constructive actions and performance.

**Our Sustainability Committee**
The Sustainability Committee maintains an effective and continual dialogue with the Board and stakeholders (via the Director of Sustainability and Group CFO). The Committee is responsible for identifying, assessing and making recommendations for addressing climate-related risks and opportunities.

The Committee covers all airlines within the Group and includes members from across multiple departments. Together, members integrate Ryanair's sustainability goals with our business' demands. These initiatives are then communicated to the wider organisation.

# MEMBERSHIP AND RATINGS

In financial year ended 31 March 2021 (FY21), we were was ranked as one of the highest-rated airlines in the world for environmental performance.

CDP

CDP awarded us an industry-leading 'B-' climate protection score and we aim to achieve an 'A' score by 2023. CDP also gave us an 'A' score for environmental corporate governance and for emission-reduction initiatives.

SUSTAINALYTICS

Our performance is rated as 'Medium Risk' with Sustainalytics. We have the second highest ranking in the airline industry for the management of carbon emissions.

MSCI

We achieve strong ratings for corporate governance and carbon emissions compared to peers.

**Members of:**

UN GLOBAL COMPACT

SUSTAINABLE FUTURE FORUM

A4E AIRLINES FOR EUROPE

# ENVIRONMENT

We aim to be the leader in aviation and remain the cleanest and greenest airline in Europe, operating one of the industry's youngest fleets with the highest load factor. To build on our environmental progress, we've set ourselves challenging goals and targets.

# ENVIRONMENTAL PERFORMANCE

We're proud of our many sustainable achievements to date and we're not stopping here!

# OUR PATHWAY TO NET ZERO

Climate change is one of the great challenges facing our planet and in turn the airline industry. That's why we fully support the aims of the Paris Agreement.

We've developed a pathway to net-zero emissions by 2050 that aligns to the Paris Agreement and the aviation industry's Destination 2050 initiative. Ryanair's pathway shows that decarbonisation and alignment with EU climate targets is possible.

Based on a hypothetical scenario of no advancements being made in sustainable aviation fuel, technology, operations or regulation, Ryanair would be on track to more than double emissions by 2050 (from 2019 levels).

We recognise that this increase in emissions is unsustainable for the environment and for ourselves, so we've introduced Ryanair's Pathway to Net Zero.

- We expect 32% of carbon emission reduction targets to come from technological and operational improvements combining contributions from major propulsion technologies as well as wing, fuselage and tail technologies.
- Sustainable aviation fuel (SAF) is the cornerstone of our net zero ambition target and will help us to deliver approx. 34% of carbon emission reduction targets. While regulation limits the amount of SAF we can currently use in a flight to a 50% blend, we expect this blend limit to increase over time.
- The introduction of the Single European Sky initiative will reduce emissions by up to 10%.
- We have earmarked 24% of emission reduction targets with offsetting and other economic measures. While we recognise that carbon offsetting is not a long-term solution, either financially or for the environment, much of our climate ambition is dependent on a number of factors, many of them outside our control. Therefore, we may have to continue offsetting beyond 2050, however this would be a last resort.

**32%** of carbon emission reduction targets to come from technological and operational improvements.

**34%** of carbon emission reduction targets delivered with increased use of SAF.

**10%** reduction in emissions with the introduction of the Single European Sky initiative.

**24%** of emission reduction target to occur with offsetting and other economic measures.

# OUR CLIMATE GOALS

It's important to show our stakeholders that we're taking the climate crisis seriously so we've removed all ambiguity and laid bare our Climate Goals.

## Our Climate Goals

### 01 EFFICIENCY

Maintain the highest standards of fuel efficiency.

### 02 FUEL

Work with our suppliers to increase the level of certified sustainable aviation fuel (SAF) and commit to industry-leading goals in SAF use.

### 03 TECHNOLOGY

Continue to invest in innovative aviation technology.

### 04 REGULATION

Continue to work with policy makers on smarter regulation that supports the delivery of climate targets.

### 05 OFFSETS

Prioritise carbon reduction over carbon offsetting

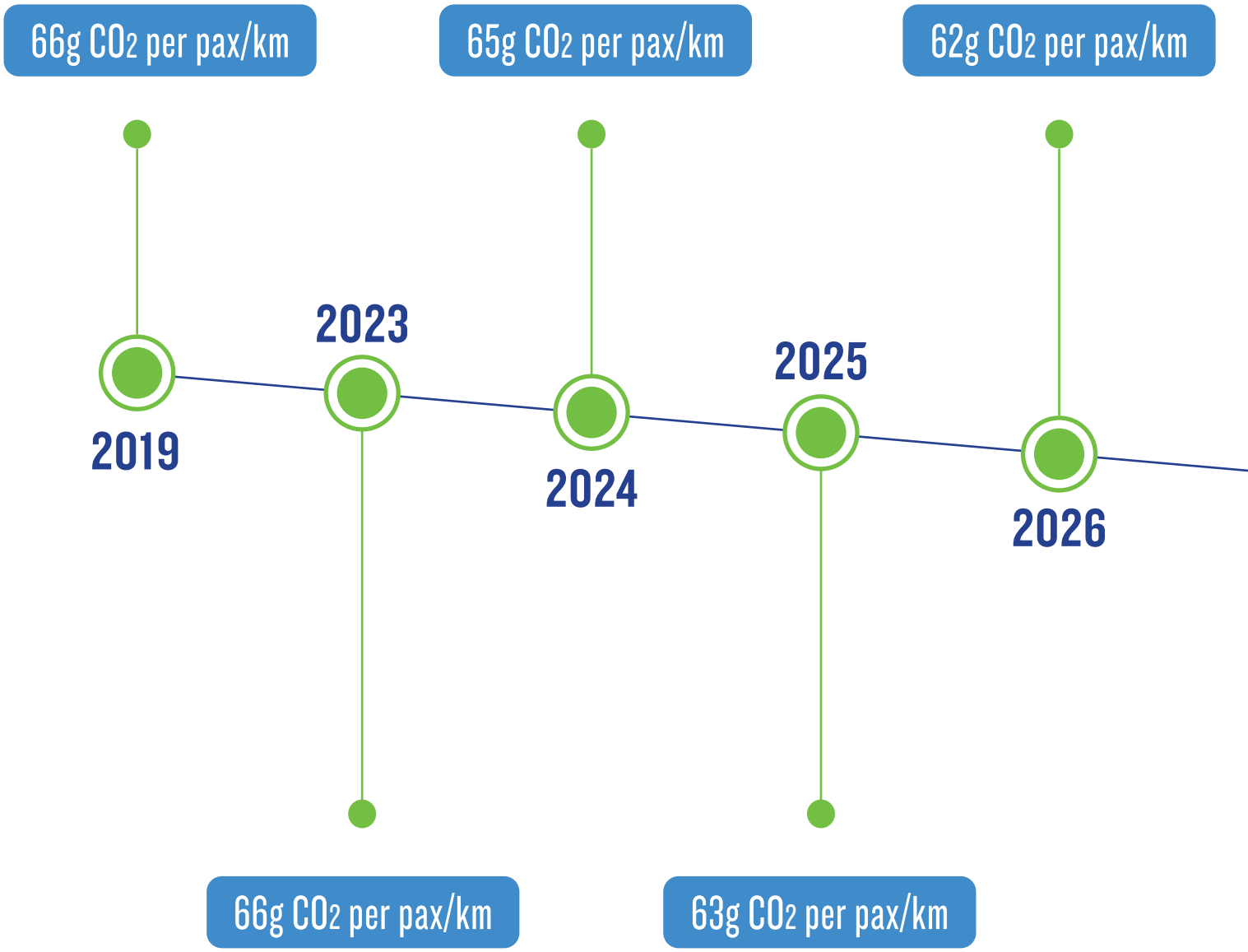
### 06 INSIGHTS

Work with aviation industry bodies to share insights that will help the industry achieve its climate goals.

# OUR JOURNEY TO 2050

We're determined to achieve the following goals:

- net-zero carbon emissions by 2050
- reduced $CO_2$ emissions per passenger/km by 10% by 2030
- power 12.5% of our flights using SAF by 2030



**2027**
61g $CO_2$ per pax/km

**2028**
61g $CO_2$ per pax/km

**2029**
61g $CO_2$ per pax/km

**2030**
60g $CO_2$ per pax/km
**Goal: 12.5% SAF use**

**2050**
NET-ZERO CARBON EMISSIONS

# COMPETITOR ANALYSIS

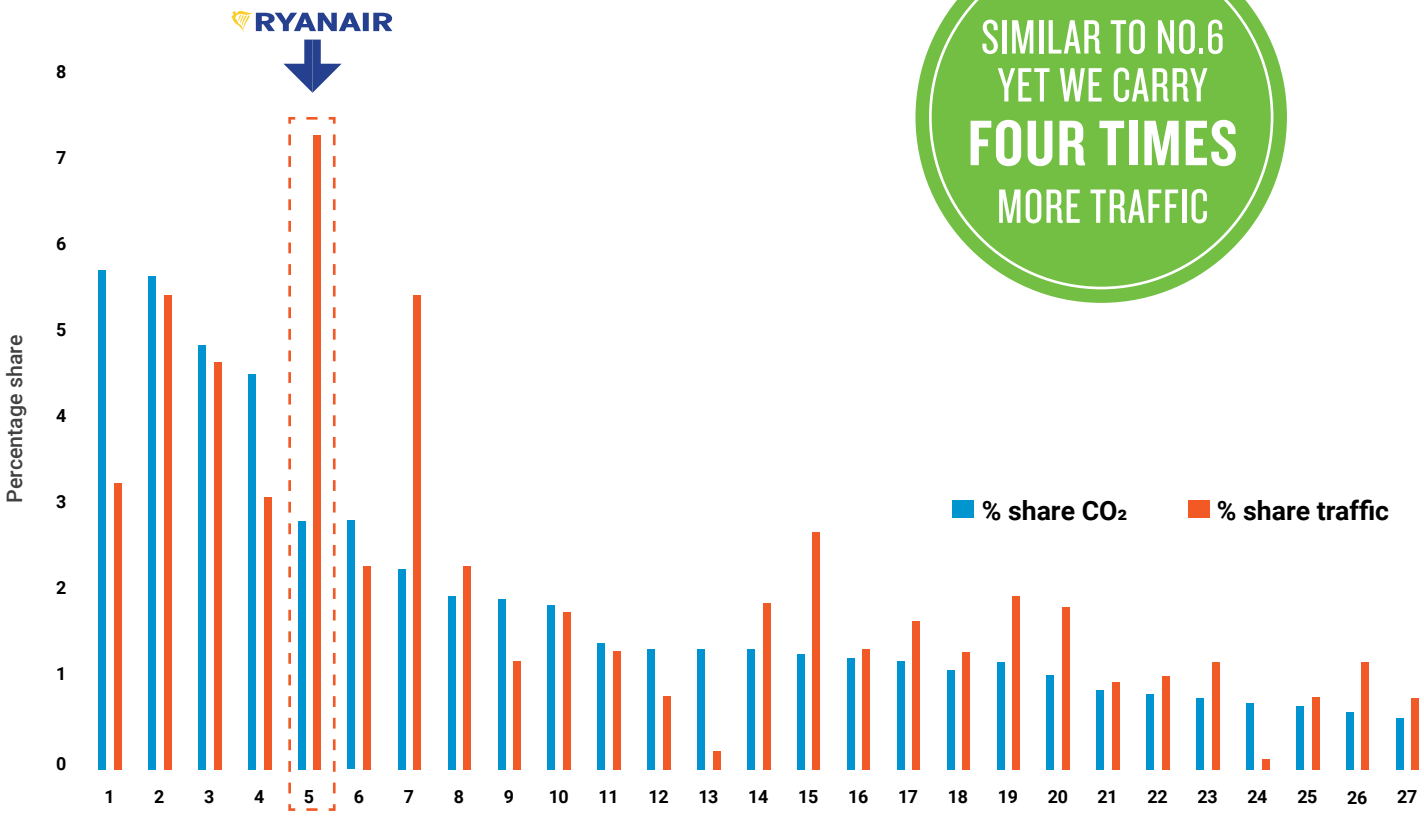
## EMISSIONS AND PASSENGER CAPACITY

NO. 1 AIRLINE FOR TRAFFIC, BUT ONLY NO. 5 FOR $CO_2$ EMISSIONS

### Ryanair vs Europe's flag carriers

We're the No.1 EU airline for traffic, yet we rank fifth in terms of $CO_2$ emissions. What this means is that we carry almost four times the passengers as the No.6 airline while producing similar levels of $CO_2$ emissions.

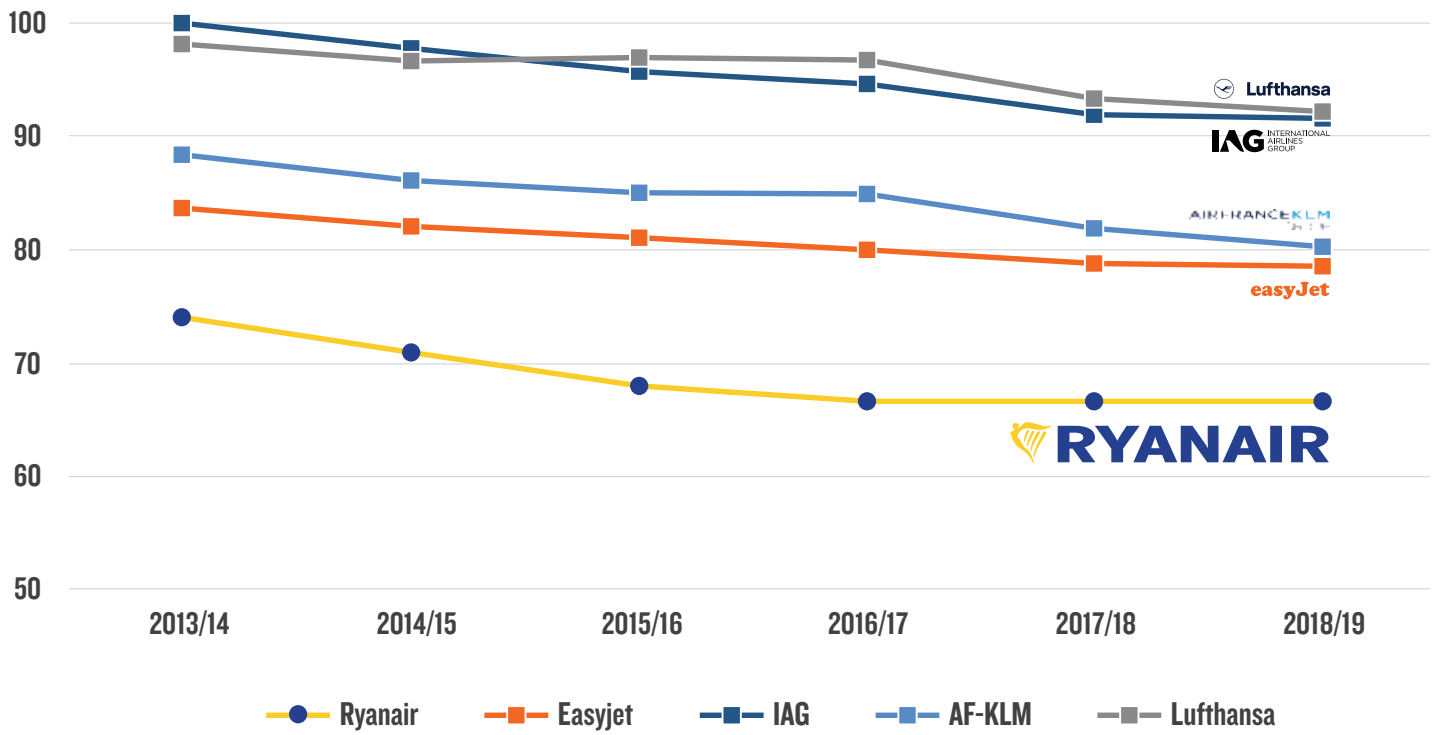
### Top EU airlines' relative share of $CO_2$ and traffic




SIMILAR TO NO.6 YET WE CARRY FOUR TIMES MORE TRAFFIC

Source: Eurocontrol data Jan-Dec 2019

## Carbon efficiency performance




Source: (1) EasyJet Annual Reports, website; (2) IAG Annual Reports, CDP; (3) Air France-KLM CDP responses; (4) Lufthansa CR Reports.

Please note, these figures may split the allocation of flight emissions between passenger and freight activity or incorporate freight activity into the passenger-kilometre metric.

# INVEST IN INNOVATIVE AVIATION TECHNOLOGY

### Fast facts

- We operate the youngest fleet of any major European airline (average age under 9 years)
- Between 2000 and 2020, we took delivery of 531 new Boeing Next Generation aircraft
- Took delivery of first Boeing 737-8200 'Gamechanger' aircraft in June 2021
- Retired 95 older, less fuel-efficient aircraft

**$22bn INVESTMENT IN NEW AIRCRAFT**

## New Boeing 737-8200 'Gamechanger' aircraft

The new Boeing 737-8200 is fitted with CFM International LEAP-1B engines and Advanced Technology winglets. The combination of these new features reduces fuel consumption by approx. 16% on a per-seat basis, as well as operational noise emissions by up to 40%, compared to the Boeing 737-800.

New seating configuration means we can now carry 197 passengers — 8 more than the existing B737-800 fleet, significantly lowering the $CO_2$ emitted per passenger.

**$CO_2$ EMISSIONS PER PAX/KM TO DROP FROM 66G TO 60G BY 2030**

## Industry-leading load factor and noise abatement compliance

Ryanair maintains an industry-leading load factor of 96% (pre-Covid-19) across flights, allowing us to fly as sustainably as possible.

As new fuel-efficient and quieter aircraft join our fleet, the positive impact on local noise and air quality continues to improve.

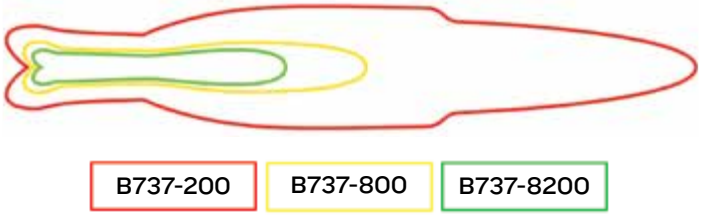
The shift from Boeing 737-200 to 737-800 aircraft reduced our take-off noise footprint by 86% per seat and now the new Boeing 737-8200 extends this reduction to 93% per seat.

**Ranked #1 of 30 airlines**

for Noise Abatement Compliance at London Stansted

## Takeoff noise footprint by aircraft type

Below is the new Boeing 737-8200's noise compared to previous fleets.




"Ryanair continues to strive for perfection in Environmental Noise Abatement Compliance. The airline sets the highest standards for others to aspire to with its stated aim of 100% compliance for continuous descent approaches."

**London Stansted's Flight Performance Manager, August 2019**

**up to 40% less noise emissions**

compared to Boeing 737-800s

# INVESTMENT IN SUSTAINABLE AVIATION

## The Ryanair and Trinity College Dublin Sustainable Aviation Research Centre

**This year, in a landmark initiative, we teamed up with Trinity College Dublin to put in place a number of innovative actions to accelerate the use of sustainable aviation fuel (SAF). By appointing best-in class researchers, we'll achieve our goal of powering 12.5% of our flights with SAF by 2030.**

Together we will:

- **Determine the sustainability of SAF through analysing the amount of lifecycle greenhouse gases emitted throughout production.**
- **Devise pre-screening tools for accelerated certification of early SAF candidates which will remove unnecessary regulatory barriers.**
- **Evaluate the feasibility of zero carbon aircraft propulsion systems.**
- **Create a noise map for the minimal noise aircraft fleet.**

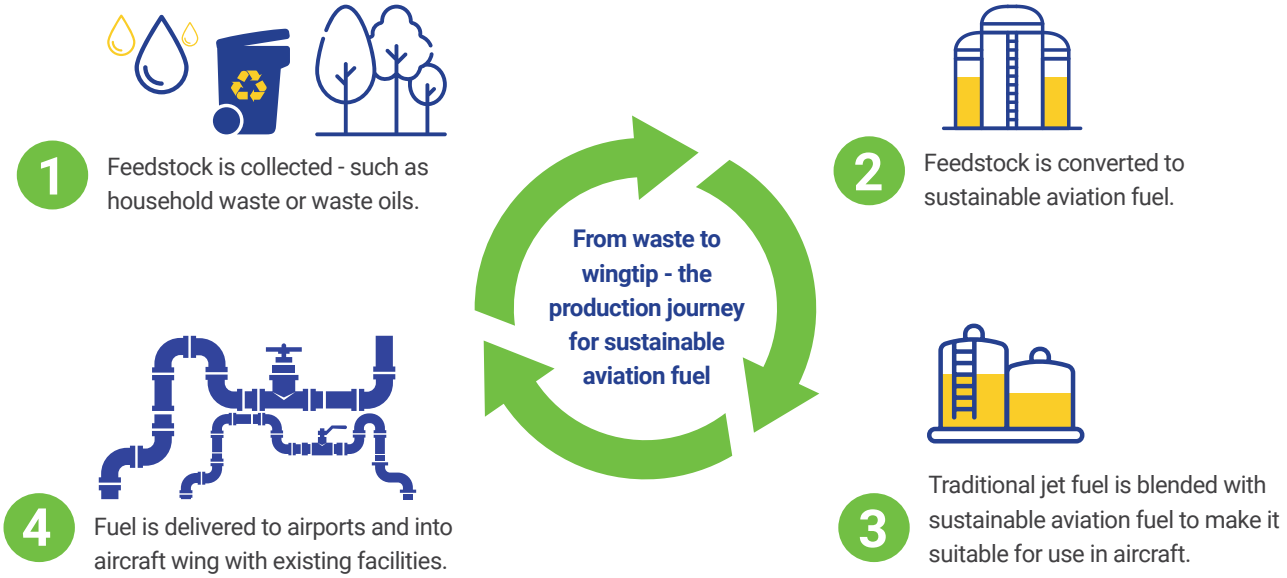
We call on European and national policy makers to support SAF initiatives. The additional production of SAF and greater availability of raw materials are needed to support mechanisms that can cover additional costs for products brought to market.

Right now, the vast majority of fuel used in aviation is fossil jet fuel (a refined petroleum known as kerosene), used globally in the lightweight gas turbine engines for aircraft propulsion.

However, alternative types of fuel, like SAF, allow the aviation industry to retain the lightweight gas turbine propulsion system while reducing greenhouse gas emissions by up to 80%. SAF's lifecycle greenhouse gas emissions are calculated from initial production to final combustion.

The entire SAF supply chain comes under the microscope, from cultivation, to harvesting, processing, transportation, conversion and finally, combustion.

## How is SAF made?




## What is it and where does it come from?

SAF avoids the generation of new carbon emissions from fossil fuels and minimises global warming. Rather than being refined from petroleum, SAF is produced from sustainable sources like waste oils (from biological origin), agricultural residues or non-fossil $CO_2$. SAF can reduce greenhouse gas emissions by up to 80%.

**SAF can be blended with fossil jet fuel and requires no special infrastructure or changes to equipment. Once blended, this fuel can be fully certified and have the same specifications as that of fossil jet fuel.**

Therefore, it is essential that we understand which SAFs will genuinely reduce carbon emissions. Only then can we have an effective regulatory framework that ensures the production of sustainable aviation fuel does not erode or hamper the use of dedicated cropland needed for food production.

Waste oils and residues are likely to be the source of low-carbon or sustainable aviation fuels in the near future, giving the industry small improvements in lowering emissions, but they are not suitable for the long-term. Factoring in cost, availability and effectiveness, SAF will need to be made from agricultural residues, bio-waste and electro fuels from cropland or other sources.

Aviation is not the only industry that will want to implement more sustainable fuels. We must think outside the box and remain inventive to keep costs low, reduce competition for SAF and ensure we're opting to use a fuel that can clearly demonstrate significant greenhouse gas (GHG) reductions. SAF is a very useful way to reduce carbon emissions, we simply want to ensure it is as safe and sustainable as it can possibly be.

### Fast facts

- **Our goal is 12.5% SAF usage by 2030**
- **SAF is blended with jet fuel without the need for engine modification**
- **Ryanair and Trinity College Dublin Sustainable Aviation Research Centre launched in 2021**
- **Widespread use of SAF can reduce aviation greenhouse gas (GHG) emissions by up to 80%**

# DECARBONISE OUR OPERATIONS

**At Ryanair, we're committed to a company-wide decarbonisation programme.**

## New and Dynamic Flight Planning System

Pilots receive up-to-date data-driven flight plans, which allow for more accurate fuel planning. Digital flight plans offer more efficient connectivity of routes and provide pilots with up-to-date information like weather and air traffic data.

**Digitisation of flight plans**

for more efficient connectivity of routes

## Implementation of GPU

The implementation of a ground power unit (GPU) policy (where available) helps us save up to 9kg of fuel per flight or 25,000 tonnes p.a. at start up and shut down.

**Up to 9kg fuel saved**

per flight through the use of electric ground power units

## Implementation of Electronic Flight Bags

Electronic flight bags and paperless cockpits cut 15kg of paper manuals per cockpit, per flight, resulting in fuel-burn savings of approx. 600 tonnes p.a.

**15kg reduction of paper manuals**

per flight with paperless cockpits

## Continuous Descent Operations

With a continuous descent operation, rather than a stepped descent approach, the aircraft can remain at higher altitude for longer and use less fuel. Last year, this saved 80,000 tonnes of fuel. In April 2019, we achieved the target of 100% continuous descent arrival on over 1,500 flights into London's Stansted.

**Ranked #1 for Continual Descent Arrival**

at 7 UK airports for the last 3 years

## Single-engine Taxi Policy

Close to 90% of Ryanair's flights perform single-engine taxi operations between the runway and terminal, saving approx. 68,000 tonnes of fuel.

**68,000 tonnes fuel saved**

p.a. through single-engine taxi policy

## Point-to-point Flying

By flying direct to destinations, without unnecessary stopovers, we burn less fuel.

**Point-to-point routes**

with industry-leading load factor (96% p.a.)

# GREEN CAMPUS

**Our newest and most energy-efficient building, Airside Green, is located in Swords, Dublin. It is A3 BER certified, with motion-sensor lighting. Lights are never left on unless in use and even dim when natural light floods our office space.**

Our HQ is home to a recycling centre, 16 e-charging points, 200 sheltered bicycle spaces (to help promote a greener commute to work) and a solar farm to power our offices.

We participate in the Irish Government's Cycle to Work scheme which helps our teams to commute more sustainably.

We are phasing out the use of all non-recyclable plastics from operations by 2025 — and the canteen is no different. We've incentivised all our team to use reusable cups by offering a discount in our cafe.

# HIGH-TECH HANGARS

We have invested over €500,000 in all-LED lighting projects across our office and hangar sites.

**€500k investment**

in all-LED lighting

**A3 BER certified**

energy-efficient Head Quarters

**16**

e-charging points

**200**

sheltered bicycle spaces

## Energy-efficient Hangars

All our hangars are fitted with LED lighting and operate to the highest standards of energy efficiency.

Kaunas International Airport (KUN), Lituania

# DECARBONISING OUR SUPPLY CHAIN

**Ryanair's supply chain is based around the key suppliers that support our operations. These include:**

- Airports and ground handling
- Aircraft and engine makers
- Fuel providers
- Inflight catering service providers

As part of our procurement processes, the environmental footprint of the vendor plays a key role in our purchasing decision.

We are making progress with vendors to reduce waste and move to more sustainable methods of production.

## Ground handling

We strive to reduce the emissions of our ground handling services. Our ground handling partners at airports like Amsterdam, Gothenburg and Oslo (Menzies) perform fully electric turnarounds.

Additionally, our ground handling partner in Spain, Azul, has invested €7.3m in 248 pieces of electric ground handling equipment across 8 locations in Spain. Through this investment, we aim to achieve 10% of turnarounds using electric equipment this year in Spain. These 'e-turnarounds' reduce greenhouse gas emissions and the consumption of diesel fuel. Using electric equipment also reduces Nitrogen Oxide (NOx) emissions.

**€7.3m investment**
IN 248 PIECES OF ELECTRIC GROUND HANDLING EQUIPMENT

## Airports

A key part of selection criteria when looking at route development is ensuring that we partner with environmentally-efficient airports.

### Fast facts

- **Ryanair's partner invested €7.3m in electric ground handling**
- **We partner with environmentally-efficient airports**
- **Plastic-free flights by 2025**

## Inflight Catering

We are increasing recycling on board our aircraft and throughout operations.

We already use 80% recyclable plastics on board flights and plan to be 100% free from single-use plastics by 2025.

# PARTICIPATE IN CARBON OFFSETTING

**Carbon offsetting is a way to compensate for carbon dioxide or other greenhouse gas emissions.**

### Fast facts

- **Customers can fully offset their carbon footprint**
- **€3.5m contributed so far**
- **100% of contributions go towards Ryanair's climate projects**

## CUSTOMER CARBON OFFSET

**Every customer has the opportunity to offset their $CO_2$ emissions through Ryanair's Carbon Offset Scheme.**

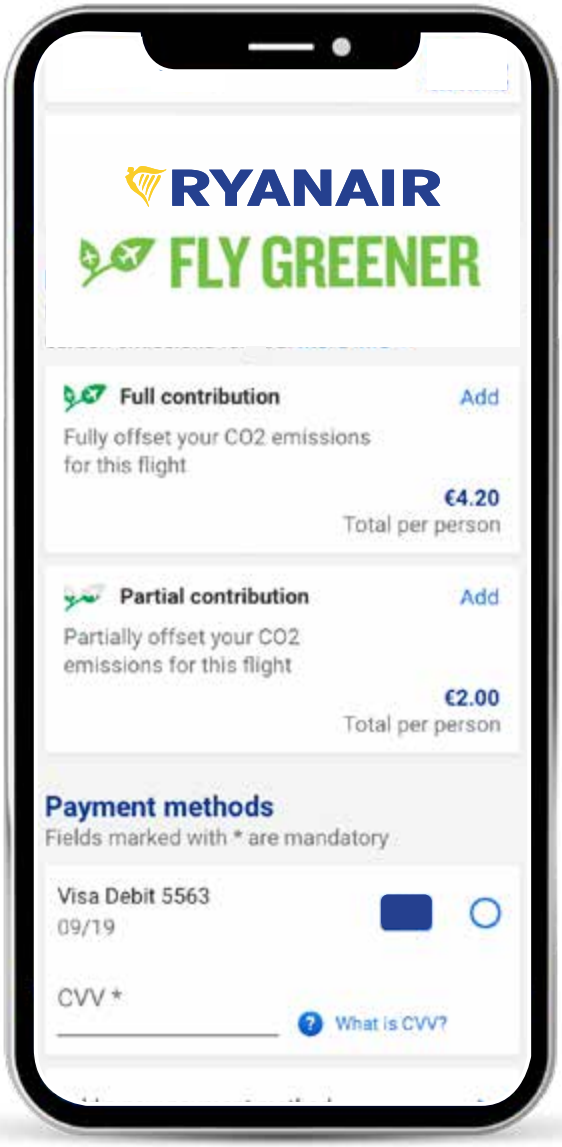
Customers can offset their emissions in two ways when booking a flight with us:

- Contribute €2 to partially offset their emissions
- Use Ryanair's new Carbon Calculator to fully offset their emissions

Ryanair's Carbon Calculator, launched in July 2021, and determines the carbon emissions per passenger on every Ryanair route, incorporating the flight distance and Ryanair's industry-leading load factor. One hundred per cent of customer contributions go to Ryanair's climate projects. In 2019, 3% of customers chose to go greener, and to date they have contributed €3.5m to support environmental projects. .

3% of customers currently offset their emissions

BOOST **AWARENESS** TO GROW CONTRIBUTIONS



# WORKING WITH ENVIRONMENTAL PARTNERS

## Ryanair partners with high quality, impactful sustainability projects.

**Renature Monchique** was established by Ryanair in 2019 as part of its environmental commitment to reduce $CO_2$ emissions. It was founded in partnership with GEOTA, ICNF, the Algarve Tourism Board and The Municipality of Monchique to help with the Algarve region's reforestation following wildfires in 2018, the largest to have ever hit Europe.

Thousands of hectares were destroyed and millions of euros lost. In the last 2 years, over 135,000 trees have been planted with the help of over 150 local volunteers. The project has helped 43 landowners and their families to date while ecological restoration was initiated covering an area of 584 hectares. All of this would have been impossible without the support of Ryanair's customers through our Carbon Offset Scheme.

Ryanair has also worked with **First Climate**, the international emissions reduction project organisation, to support its Ugandan Cookstove Project since 2019.

With funds raised through Ryanair's Carbon Offset Scheme, we have been able to help distribute energy-efficient cookstoves to households within Uganda's Kampala region. This has meant families can significantly lower charcoal use and save on the cost of fuel, reducing greenhouse gas emissions and conserving the area's native woodland. Furthermore, the improved design of the stoves leads to a much higher combustion temperature, helping to shrink indoor pollution and therefore prevent associated health problems like respiratory infections, cardiovascular disease and ocular disease.

## Since 2020, Ryanair has partnered with local projects in both Malawi and Turkey to support the Gold Standard's offsetting initiatives, further developed by CO2balance and Enerjisa Enerji.

**Improved Kitchen Regimes, Malawi**
This Gold Standard project, developed by CO2balance, supports the Dowa and Kasungu districts of Malawi, where there is limited access to clean water.

To disinfect the water here, it must be boiled, requiring timber as a source of fuel. By rehabilitating boreholes, the water is clean and there is no longer a need to boil it, therefore saving firewood and cutting carbon emissions. Ryanair's Carbon Offset Scheme continues to provide funds to support the long-term maintenance of these boreholes. To date, Ryanair's involvement in the project has helped save 245,000 tonnes of $CO_2$ emissions from going into the atmosphere.

**Balikesir Wind Power Plant project, Turkey**
This Gold Standard project, developed by Enerjisa Enerji Üretim A.S., aims to reduce greenhouse gas emissions in Turkey by stimulating growth in the wind power industry. Consequently, this will boost employment and reduce the country's dependency on fossil fuel power generation, helping to lower Turkey's increasing energy deficit, as well as diversify the power generation mix and reduce the country's dependency on imports.

Ryanair's involvement in the project has helped save 330,000 tonnes of $CO_2$ emissions from entering the atmosphere so far.

# GOVERNMENT POLICY AND REFORM

**Along with Ryanair's progress to date and our robust roadmap of initiatives to become net carbon neutral by 2050, the EU and local governments also have a large part to play. Ryanair continues to call on leaders to act now.**

## Air Traffic Management Reform

**Ryanair, together with other European airlines and through Airlines for Europe (A4E), fully supports the reformation of the European airspace and the completion of the Single European Sky.**

The primary role of Air Traffic Management (ATM) is to ensure the safe separation of aircraft during travel. ATM impacts how high, low, fast and slow an aircraft flies and therefore the amount of fuel used.

A standard, more efficient, ATM process would result in a **10% reduction in carbon emissions** and bring us closer to our goal of net-zero carbon emissions by 2050.

**CURRENT AIR TRAFFIC MANAGEMENT**

+10% $CO_2$

**BETTER AIR TRAFFIC MANAGEMENT**

-10% $CO_2$

IMPROVED ATM WOULD RESULT IN A **10%** REDUCTION IN CARBON EMISSIONS

## The Fuelling Flight Initiative

**Ryanair is actively working with the European Commission, the Fuelling Flight Project and industry fuel suppliers to encourage government support of the industry investment in SAF and to incentivise its use.**

We support and have signed up to the **Fuelling Flight Project** and want to bring about policies that promote sustainable fuels to reduce aviation's climate impact and also help us to reach net-zero carbon emissions target by 2050.

The Fuelling Flight Project is a stakeholder group formed by the European Climate Foundation and the ClimateWorks Foundation. It includes industry and civil society representatives with technical support from the International Council on Clean Transportation. Its aim is to find various ways to reduce greenhouse gas emissions, initiate and guide the growth of a European SAF industry and encourage the market uptake for it.

Investment certainty for the production of SAF in Europe is dependent on long-term EU policies and we're dedicated to helping to ensure these policies bring about the most sustainable fuels in the most sustainable way possible. We want to create a positive and impactful reduction in emissions by means of excluding biofuels produced from dedicated cropland and therefore avoid further competition for limited and already dedicated agricultural resources.

European Climate Foundation

## Environmental Taxes

### Ryanair paid over €540m in environmental taxes in FY19 and €630m in FY20.

Taxes on aviation are not an efficient way to reduce emissions. Taxes deliver no environmental benefits while they favour high-fare inefficient airlines over low-fare options that make the best use of time and resources.

A global emissions-trading system would be more efficient in emissions reduction compared to an additional passenger tax under the guise of an 'environmental tax'.

Taxes make it more difficult for airlines to achieve climate gains, as extra costs incurred by the business hinder further investment in climate-friendly solutions. Taxes also disproportionately impact peripheral regions, lowering income across communities that rely heavily on air connectivity for economic growth.

A single global market-based mechanism is the best way to govern emissions across the entire industry. We therefore encourage regulators to:

- Refine existing carbon-pricing mechanisms before creating new pricing schemes that overlap with existing regulations.
- Earmark any revenue raised from auctioning emission allowances to finance the high-tech transition towards lower-emitting aircraft that carry a higher load factor.

| Ryanair Environmental Taxes (€m) | FY19 | FY20 |
|---|---|---|
| UK APD | 330 | 383 |
| GERMAN APD | 88 | 85 |
| SCANDINAVIA APD | 5 | 5 |
| AUSTRIAN APD | 5 | 6 |
| BCN TAX | 1 | 1 |
| EU-ETS PAYMENTS | 115 | 150 |
| **TOTAL** | **544** | **630** |
| **COST PER GUEST (% of avg. ticket)** | **€3.82 10%** | **€4.12 11%** |

**11% OF THE AVERAGE TICKET COST IS ENVIRONMENTAL TAXES**

## Fit for 55

**In July 2021, the European Commission introduced its Fit for 55 package — a set of proposals to reduce emissions by at least 55% by 2030.**

While these proposed measures may intend to incentivise the decarbonisation of the transport industry and bring about the wider use of sustainable aviation fuel, what it will really mean is increased costs for airlines and their customer base, even though $CO_2$ emissions are already taxed under the EU's ETS.

**Fit for 55 aviation policies are to include:**

- A 5% SAF blending mandate under the RefuelEU Aviation initiative
- A kerosene tax under the Energy Taxation Directive (ETD) on intra-EU flights.
- Revisions to EU ETS and CORSIA
- A review of the Alternative Fuels Infrastructure Directive

While Ryanair supports the EU's goal of net carbon neutrality by 2050, a kerosene tax will not achieve this. The proposed tax would exclude the highest polluters – long-haul carriers – and goes against the principle that the polluter pays. It will also reduce capital available for investment in carbon reduction initiatives.

Fit for 55 excludes legacy airlines and long-haul traffic which accounts for the majority of aviation related emissions. It disproportionately penalises efficient short-haul operators, while exempting the majority of emissions which come from long-haul carriers. Many EU states and regions will also be penalised with no flying alternatives available.

Aviation plays a huge role in kick-starting Europe's societal and economic recovery following Covid-19 restrictions. EU policies should promote EU connectivity and support competitiveness within the sector rather than hinder it.

Ryanair welcomes mandatory SAF blending of 5% by 2030 even though the proposal is well below its own goal of 12.5% SAF by that same year. The onus is now on the fuel suppliers to provide SAF and for airports to ensure they have the infrastructure to support the proposal.

**FIT FOR 55 WILL INCLUDE SEVERAL POLICIES IMPACTING EU AIRLINES**

# SOCIAL

Our aim is to bring out the very best in our dedicated team of over 17,000 aviation professionals. From the cockpit to our HQ, our people are key to our success and ensure we live up to the highest aviation safety standards while delivering exceptional service to our guests.

# A MESSAGE FROM OUR NON-EXECUTIVE DIRECTOR OF WORKFORCE ENGAGEMENT

**"I am grateful to our crews and people who have given their time and shared their views in our engagements to date and I look forward to meeting more of our 17,000 aviation professionals whose hard work, dedication to safety and customer service are key to our Group's success."**

**Ms Róisín Brennan**
**Non-Executive Director of Workforce Engagement**

**In FY21 the Group built on its well-established workforce communication and engagement mechanisms with my appointment as the Non-Executive Director for Workforce Engagement. My role is to engage with employees and bring feedback to the Board so together, we can understand and consider these views in our decision making. The Board includes Workforce Engagement as an agenda item at least quarterly.**

This is a new role which we look forward to developing in the year ahead. This year, we established Colleague Contribution Panels to gather feedback from key business areas.

We conducted a series of virtual consultations including with pilot and cabin crew colleagues from a range of Group airline bases, as well as colleagues from our Airside Ryanair Labs and Engineering Department.

Although the Covid pandemic restricted my ability to travel and meet staff groups, we have had very positive engagement in our online panel discussions and I look forward to building on this early success with more engagement, including face-to-face meetings.

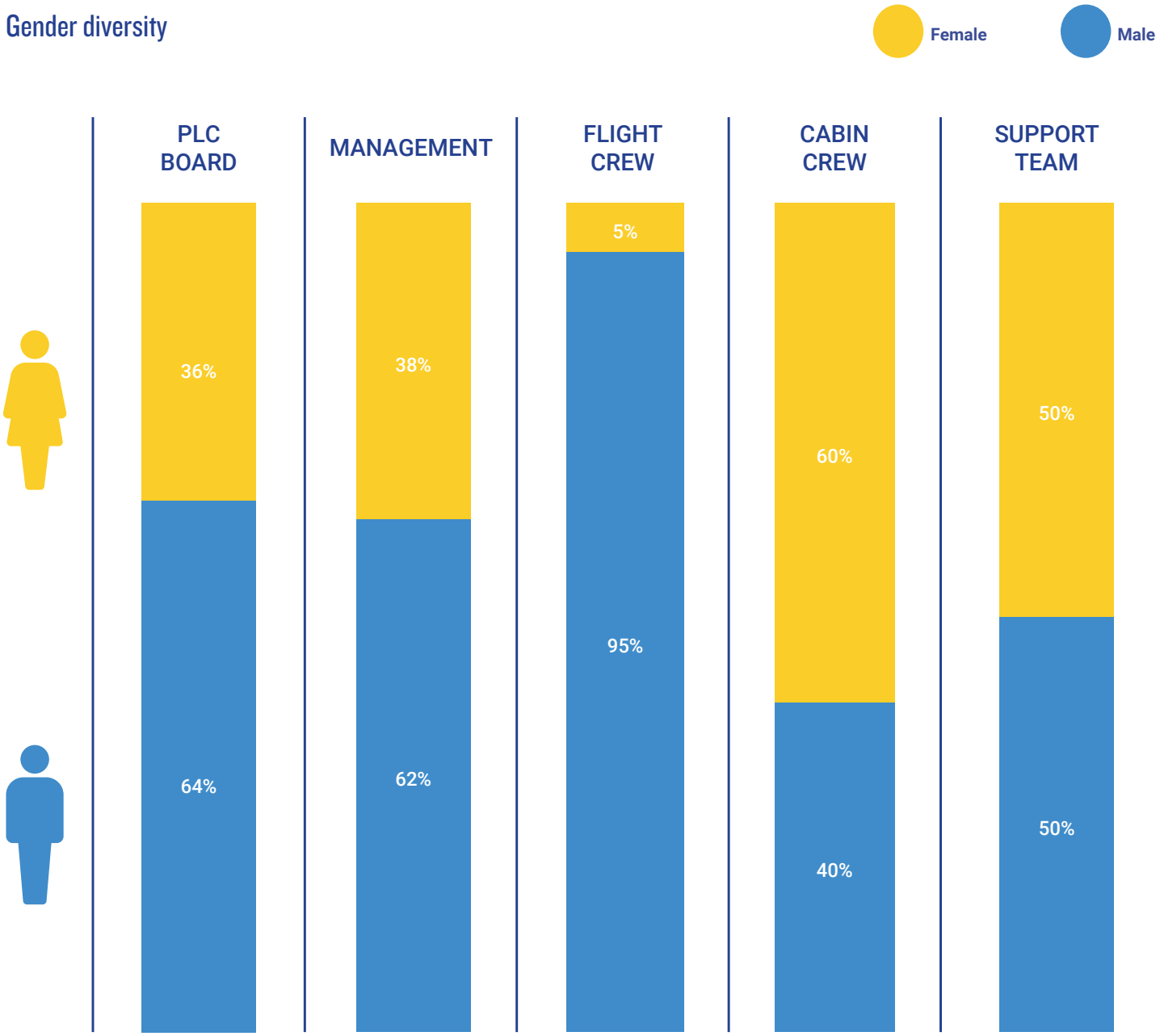
# RYANAIR'S PEOPLE IN NUMBERS

**17,000 +**
employees

**66**
nationalities

**42**
languages

## Gender diversity



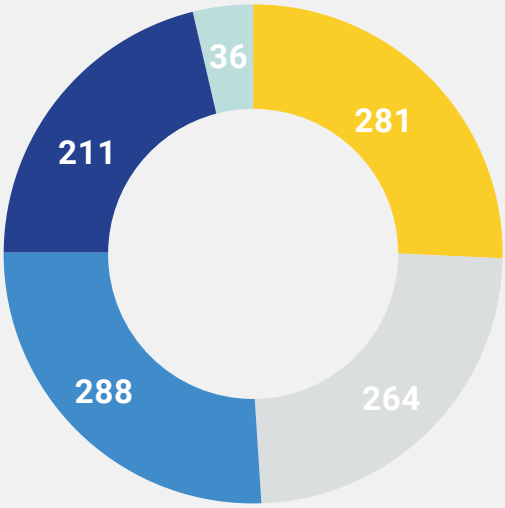
## Nationalities of cadets over the last 5 years

**20%** Italian
**15%** French
**14%** British
**11%** Spanish
**8%** Dutch
**7%** German
**6%** Irish
**4%** Belgian
**4%** Swedish
**3%** Portuguese
**3%** Danish
**2%** Norwegian
**2%** Polish
1% cadets from **18** other countries

### Number of captains that have been with us longer than 5 years

- 1,973 have 5 years + service
- 809 have less than 5 years service

### First officers promoted to captain




- 2016
- 2017
- 2018
- 2019
- 2020 (Covid-19)

## Nationalities of captains and first officers currently employed

**21.5%** British
**21%** Italian
**10.5%** Spanish
**8%** German
**7.5%** Irish
**6%** French
**3.5%** Belgian
**22%** Other

# RYANAIR'S PEOPLE GOALS

Ryanair's goals provide clarity, security and opportunity for our people, as well as a brighter future for Ryanair. To achieve these goals we will:

1

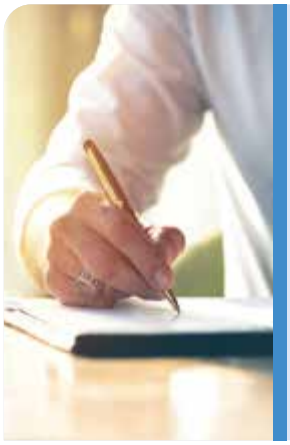
**Inclusivity, Diversity & Equality**

## Review and Improve Ryanair's Discrimination Prevention Policy

To further strengthen Ryanair's existing policies, we are committing to review our Discrimination Prevention Policy to ensure it is fit for purpose.

2

**Workforce Engagement**



## Continue to engage with employees through workforce engagement and surveys

Over the coming 12 months we will continue to carry out a workforce engagement programme through face-to-face meetings with the Non-Executive Board Director and also carry out employee surveys targeting specific areas of the employment relationship.

3

**Job Creation, Training & Development**

## Create high-quality jobs and invest in world-class training

We will create 5,000 new jobs and open 2 high-skills training centers in Spain and Poland over the next 5 years. To support this and to supplement our world-class training for operational staff, we will carry out an analysis of office staff training.

# EMPLOYEE REPRESENTATION

Ryanair engages with trade unions and its people throughout Europe. We regularly meet with pilot and cabin crew unions to negotiate on pay and conditions.

**Since recognising trade unions in December 2017, we have concluded long-term collective labour agreements with employees in all of our major markets throughout Europe. To date, almost 90% of colleagues have signed up to these agreements.**

## Ryanair's Response to Covid-19

During the Covid-19 restrictions, we prioritised the safety and well-being of crew and and prioritised job protection. Ryanair provided its people with regular updates and were able to communicate the range of health protection measures implemented on board Ryanair aircraft and at our workplaces and other facilities.

In March 2020, we opened discussions with trade unions and employee representative groups throughout Europe on emergency agreements which included modest short-term pay cuts (to be fully restored over the lifetime of the agreements) plus productivity improvements and job protection. These agreements gave Ryanair's people the reassurance that we would protect their jobs at a time when competitors were cutting thousands.

# OPPORTUNITIES

**Ryanair rewards hard work. We give employees the opportunities to fast track their careers within a supportive environment and we encourage development and internal promotion.**

Ryanair's focus on people development applies across all areas of the business, from advancing junior cabin crew to supervisors, first officers to captains, IT graduates to skilled developers, and many more.

Ryanair's open culture, world-class training and focus on internal talent allows people to develop their confidence and skill set quickly, so they are well positioned to secure promotions and develop their careers.

## Team Communication

Throughout Ryanair, team participation and engagement in regular everyday operations is hugely important to us. We use Ryanair Labs technology centres to develop an industry-leading suite of internal communication tools including a digital helpdesk, Ryanair TV, Safety TV and Fleet Tweet (a short messaging platform) for employees.

This proved especially helpful during Covid-19 restrictions when we were able to utilise these digital systems to keep people networking and informed.

## Succession Planning for Management

This year, we enhanced Ryanair's succession management processes to identify and develop future business leaders and to give high-potential people ownership of their career paths. All senior management roles have a succession plan including development goals and strategies for the next generation of leaders.

**All senior management roles**

have a succession plan

**60%**

OF PROMOTIONS TO MIDDLE AND SENIOR MANAGEMENT TEAMS HAVE BEEN FEMALE

### Fast facts

- **36% of our Group Board are female leaders, above our 33% target**

## Gender Diversity

As part of Ryanair's Diversity, Equality and Inclusion programme, we are committed to building on the number of female employees in management and leadership positions.

We're very pleased that 36% of the Group Board are female leaders while over the past 12 months, more than 60% of promotions to middle and senior management teams have been female.

The airline industry has traditionally suffered from a lack of female pilots and male cabin crew applicants but recent increases in female applications for cadet positions have shown great promise, increasing by over 7.5% in the last 12 months.

Over the coming months, we will undertake a review of Ryanair's Diversity, Equality and Inclusion programme to ensure it remains best in class and fully aligned with the latest industry standards.

# RYANAIR'S PEOPLE, THEIR BENEFITS

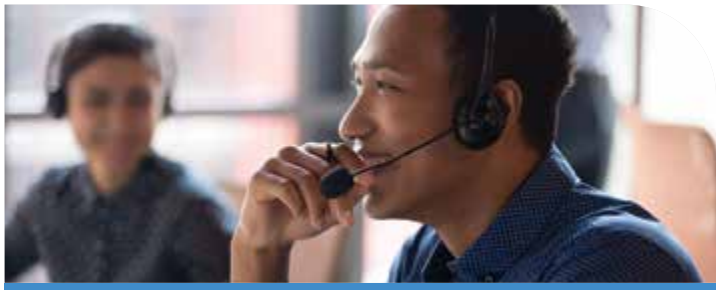
**At Ryanair, we want to retain the best talent and so we invest in people and their future.**

## Job Security

With a sustainable and proven business model, we've negotiated agreements on job security and have created over 17,000 highly-paid, high-skilled jobs.

## Career Progression

We provide people with the opportunity to prove themselves and we promote hundreds of our people each year, resulting in long-term careers at Ryanair.



## Best Pay

Always rewarding hard work, Ryanair's market-leading earnings are driven by productivity.

## World-class Training

We ensure comprehensive, industry-leading training for pilots, cabin crews, engineers and the wider team.

## Best Roster

Due to our industry-leading fixed rosters, Ryanair's crew don't stay overnight in hotels, they go home each night to their own beds. Our new work-life balance policies allow office based teams to adopt a mix of working from home and from the office.

## Travel Benefits

From the day their jobs begin, our people are entitled to privilege travel concessions.

# RYANAIR'S GRADUATE PROGRAMME

**Ryanair's graduate programmes, internships and apprenticeships range from one to four years across key areas of the business.**

These include: Engineering, Maintenance, Materials Management, Flight Operations, Ground Operations, Safety & Security, Finance, Legal, Marketing and many more.

Graduates are a vital part of Ryanair's talent pipeline with 70% of each intake moving to permanent positions within the Group.

High performers are fast-tracked into management positions, made possible by track-record growth across the entire business and our strong belief in promoting from within.

**70% of graduates**

move to permanent positions

HIGH PERFORMERS FAST-TRACKED INTO **MANAGEMENT** POSITIONS

# TRAINING

## At Ryanair, people have access to the best training facilities in the industry.

Pilot and cabin crew training facilities in Ireland, the UK, Germany and Italy are strategically located and have state-of-the-art flight simulators and cabin training facilities. We started a new partnership this year with Airline Flight Academy (AFA) in Dublin which has invested €50m in Boeing and Airbus flight simulators, as well as cabin crew training facilities.

**Number of training simulators per country**

| Ireland | UK | Italy |
|---|---|---|
| 3 Full Motion | 11 Full Motion | 2 Full Motion |
| 3 Fixed base | 5 Fixed base | 1 Fixed base |

Our pilots undergo extensive training to qualify and operate our aircraft. We operate in a highly-regulated industry with the European Union Aviation Safety Agency (EASA) stipulating the training flight deck crew must undergo before being certified to operate on either the Boeing or Airbus fleet. In addition, once licenced to operate, each member of the flight deck crew must undergo recurrent training in excess of 50 hours per year. This includes simulator training, line check training, e-learning and classroom lectures.

Cabin crew undergo an extensive 6-week training course prior to commencing duties. That training includes health and safety, aviation safety, passenger safety and crew resource management safety. Like flight deck crew, EASA stipulates minimum training requirements to operate as a customer service agent and customer service supervisor.

To be promoted from a customer service agent to a customer service supervisor, a cabin crew member must have at least 12 months flying experience.

Annual training of over 50 hours is also undertaken by cabin crew so that they are kept up to date on passenger safety and customer service.

**Our cabin crew training includes**

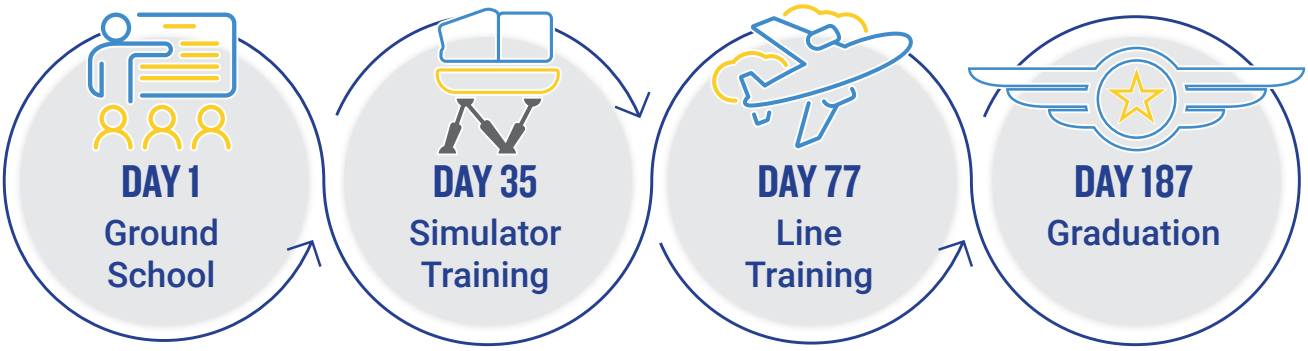
Health and Safety | Aviation Safety | Passenger Safety | Crew Resource Management Safety

## Our Pilot Training Journey

Ryanair affords the most motivated and hard-working cadets the opportunity to learn from the best-trained pilots in the industry.

With a comprehensive training plan, continuous simulator training, line training in a variety of airports, guidance from the very best and online resources available any time, cadets can progress to captain in as little as 5 years.

**Overview of the training undertaken by cadets**



# OPERATIONAL SAFETY & SECURITY

CREW HAVE **24-HOUR** ONLINE ACCESS TO RYANAIR'S SAFETY SYSTEMS

**Ryanair is very proud of its industry-leading 36-year safety record. We prioritise the safety and security of our people and customers above all else.**

Ryanair has not had a single fatality in its 36-year operating history. The Ryanair Safety Committee reviews air safety and security performance on an ongoing basis. The Committee reports to the Board of Directors quarterly and includes Ryanair's Chief Risk Officer; the Non-Executive Director, responsible for Safety at Board level and the Accountable Managers of each of the Ryanair Group Airlines. This Committee facilitates the sharing of best safety and security practices across the Group.

## RYANAIR'S SAFETY STRATEGY 2020 – 2024

**Safety and security remain Ryanair's top priority. As part of this unwavering commitment, we will continue to invest in and develop our Safety Management System (SMS) to ensure it is robust and facilitates our goal of continuous improvement.**

Ryanair's 2020 - 2024 Safety Strategy builds on our experience, acknowledges our past achievements and establishes safety targets for the future.

**We have identified 5 focus areas (below) and 14 strategic safety goals:**

1. Management of Change
2. Key Operational Risk Areas (KORAs)
3. SMS Continuous Improvement
4. Aviation Security
5. Group Operations

We remain committed to keeping safety and security at the heart of everything we do.

### Monitoring Our Progress

Progress is tracked at our Group Safety Committee and at individual Airline level and updates are presented at each Ryanair Board meeting.

**Industry-leading**

36-year safety record

**5 focus areas**

guide our safety strategy

# STRATEGIC SAFETY GOALS

| FOCUS AREA | STRATEGIC SAFETY GOAL |
|---|---|
| 1. Management of Change | **Goal 1:** We will, so far as possible, standardise our management systems across all Ryanair Group Airlines to ensure we draw on the extensive operational experience of 36 years of safe operations.<br>**Goal 2:** We will manage the growth of Ryanair Group Airlines in a way that ensures safety and security remain at the heart of everything we do.<br>**Goal 3:** We will continue to integrate the Airbus A320 into our Approved Training Organisation (ATO).<br>**Goal 4:** We will make the necessary arrangements for the safe introduction of the Boeing 737-8200 into our operations from 2021 onwards.<br>**Goal 5:** We will remain vigilant to emerging threats and ensure appropriate mitigations are in place. |
| 2. Key Operational Risk Areas (KORAs) | **Goal 6:** We will carry out a safety survey with our people to ensure our KORAs remain appropriate.<br>**Goal 7:** We will review our Safety Performance Indicators (SPIs) to ensure they remain effective in assessing our safety performance.<br>**Goal 8:** We will ensure that our processes for the prevention of maintenance errors are robust and effective. |
| 3. SMS Continuous Improvement | **Goal 9:** We will continue to invest in safety-enhancing technology and manage its safe introduction to Group Airlines.<br>**Goal 10:** We will ensure we have robust processes in place for safety and security, promotion and communication.<br>**Goal 11:** We will continue to work closely with European and national regulators to ensure that safety and security is at the heart of rulemaking activity. |
| 4. Aviation Security | **Goal 12:** We will review our Cyber Security Policies and Procedures to ensure they take account of regulatory requirements and are robust and effective in managing developing risks.<br>**Goal 13:** We will ensure that our Security Management System (SeMS) addresses the potential 'insider threat' and aviation security considerations as we continue to grow. |
| 5. Group Operations | **Goal 14:** We will work with regulators to safely deliver Group operations between our Boeing Airlines. |

# RYANAIR'S COMMUNITY PARTNERS

**Ryanair is committed to giving back to charities and organisations that truly make an impact in the countries and communities in which they operate.**

## Ryanair's Erasmus Student Network

Ryanair has been the exclusive partner of the Erasmus Student Network (ESN) since 2017, offering Erasmus students across Europe huge savings with fare discounts, free bags and tailored travel offers. Ryanair has done more than any other company or institution to make the movement of people a reality within Europe.

Ryanair's role in bringing Europe together made Ryanair a natural partner for the Erasmus programme and we have carried 10 million Erasmus students since the partnership launched four years ago.

**The partnership offers students with an ESN card the following:**

- 15% discount on Ryanair flights
- A free 20kg Check-in Bag
- Community forum to share travel hints and tips
- Weekly travel offers so students can easily travel across Europe
- Tailored Ryanair in-journey offers on our mobile app

INTERNATIONAL EXCHANGE
ERASMUS STUDENT NETWORK

## Ryanair and the ISPCC

The ISPCC directly provides a range of services to children and families, and advocates for change to enhance the lives of children in Ireland. Ryanair commenced its partnership with ISPCC Childline five years ago and has fundraised more than €500,000 to date. Over the years, Ryanair has engaged in a number of initiatives to support the work of the charity, ensuring that Childline can continue listening to children 24 hours a day, every day.

The ISPCC and Ryanair work in collaboration on a number of campaigns and competitions to help make the protection of children everybody's priority.

**€500k in 5 years**

raised for the ISPCC. Continuation of ISPCC's essential Childline services is now also online thanks to Ryanair funds

## Ryanair and Pequeño Deseo

Ryanair has worked with Pequeño Deseo for more than five years, first as one of its scratch card charity partners and since 2019, as chosen European charity partner. Ryanair believes in giving back to organisations that need further funding and awareness, and is proud to help the charity bring a smile to sick children throughout Spain. Ryanair and its customers will support key awareness initiatives throughout the year across Spain and Europe.

**€400k in 5 years**

raised for Pequeño Deseo

## Ryanair's FAI Cerebral Palsy Football Team Sponsorship

In 2019, Ryanair nominated the FAI's Cerebral Palsy Football Team as a charity partner and flew the Irish team to Seville for the World Cup tournament through the Ryanair Scratch Card Charity Partnership fund.

The FAI's Football for All programme provided opportunities for over 3,500 players to play football in their local communities and Ireland's CP team was one of nine international disability player pathways that ensured players of all abilities would have the chance to don the green jersey.

## Scratch Cards

Ryanair makes regular donations to various charities from the proceeds of our Ryanair Scratch Cards, available on board our flights. In 2017, the company established the Ryanair Foundation to work with selected charitable partners and educational projects across Europe. Between 2008 and 2020, almost €10m has been contributed to various charities across Europe, thanks to Ryanair Scratch Cards.

**Scratch Card charity partners include:**

# BOOSTING ECONOMIES

**We take pride in bringing more wealth and prosperity to the economies and regions in which we operate, to the people who fly with us, and to those who supply and partner with Ryanair.**

Ryanair has generated thousands of jobs in Europe's tourism industry, both directly and indirectly. With our customer base set to grow to 225m p.a. by FY26, we'll be boosting local European economies, creating approx. 66,000 new jobs in European tourism alone. This is why we are against policies which encourage poorly designed tax proposals that disproportionately affect regional and peripheral economies which are reliant on air connectivity to maintain tourism jobs and growth.

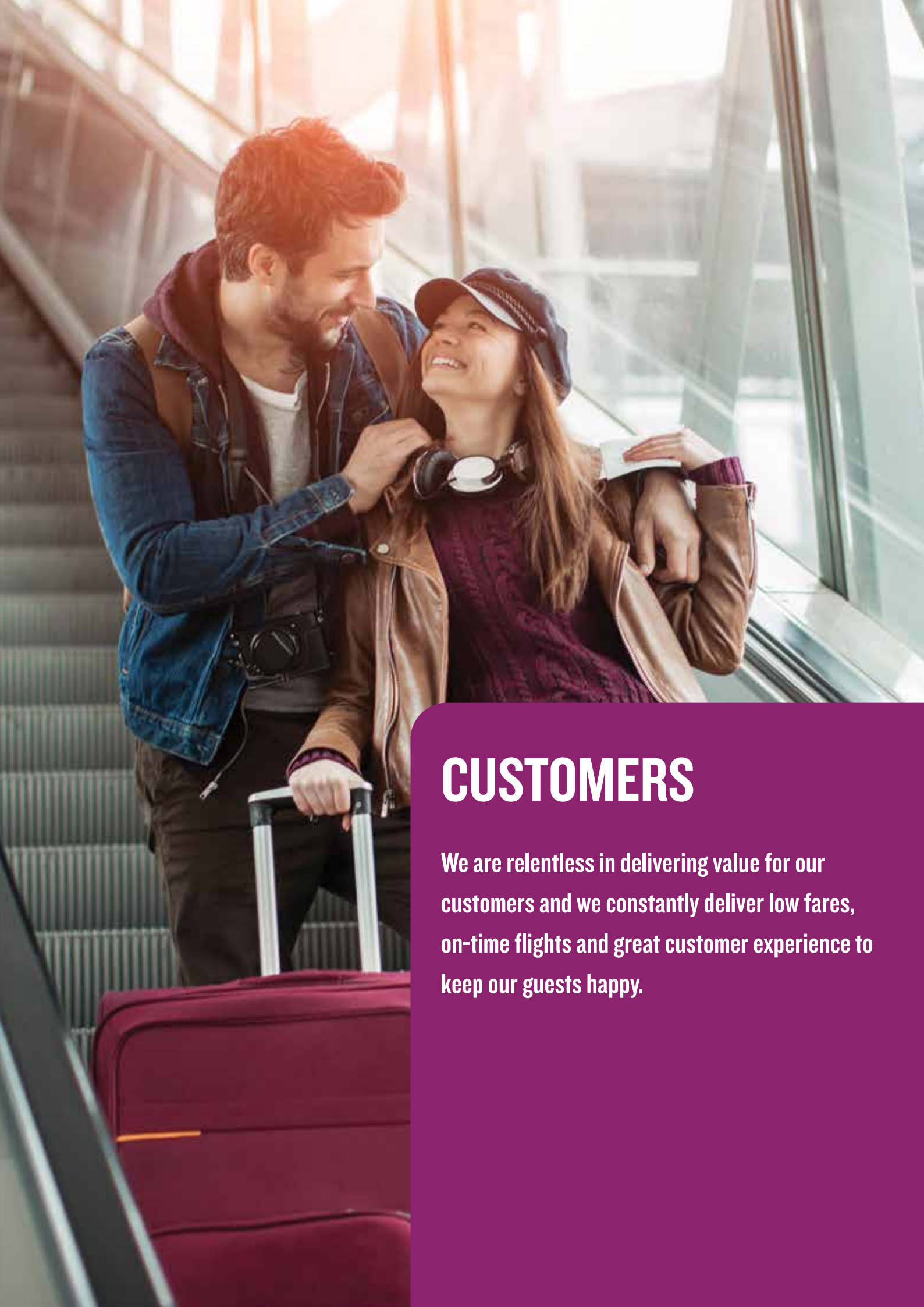
In Ryanair's early days, we primarily flew into secondary and regional airports. This enabled us to deliver higher rates of on-time departures and faster turnaround times, not only providing customers with more choice but communities with opportunity and wealth creation.

For the last number of years, we've increased flights to primary airports such as Amsterdam, Arlanda, Athens, Barcelona, Berlin, Bratislava, Brussels, Cologne, Frankfurt, Gdansk, Madrid, Rome, Prague and many more.

We continue to open up new routes, bringing growth and success to different regions, business owners and all those working in the travel industry, driving economic development and promoting the free movement of people throughout Europe.

**66,000 NEW JOBS FOR EUROPEAN TOURISM**

Bergamo, Italy



# CUSTOMERS

We are relentless in delivering value for our customers and we constantly deliver low fares, on-time flights and great customer experience to keep our guests happy.

# NO.1 CHOICE FOR CUSTOMERS

**As we grow to over 225m passengers by 2026, we understand that we must continue to deliver on what matters most to our customers. We consistently offer the lowest fares, on-time flights, lowest emissions and great customer service.**

**Our teams constantly review our customer satisfaction scores where we consistently enjoy an industry-leading result of over 90%, and our Net Promoter Score has improved by over 30% since 2019 (7 vs 11). The constant monitoring of these metrics and the direct feedback from our customers ensures we are always delivering on what matters most.**

Every customer who flies with us is invited to provide feedback after their flight, giving us updates on airport experience, crew friendless, inflight experience, food and drink, and overall trip satisfaction.

This year, we launched our first-ever customer panel that represents the voice of our customers. We selected 6 people from over 10,000 applicants across 35 countries. Over the course of two days, we held a series of workshops between the panel and our teams, receiving direct feedback on the improvements customers wanted.

This year, we announced over 400 new routes in summer 2021 and introduced new improvements that further enhance our customers' experience when they fly with us by using our new Self-Service Hub. Now customers can easily self-serve online, track interactions and receive the latest updates from our Customer Service team.

Customers will also enjoy an improved day of travel experience with real-time terminal, boarding gate, and flight updates. In the small cases of disruption, we've transformed how we communicate latest updates with our industry-first live broadcasts sent from our operations centre directly to our passengers via the Ryanair app. As Europe's No.1 airline, we'll continue to ensure we deliver for our customers every time they fly with us.

## THINGS THAT MATTER MOST TO OUR CUSTOMERS

**LOW FARES**
**€37**
AVG. FARE

**PUNCTUALITY**
**90%**
AVG. ON TIME

**CHOICE**
OVER **2,500**
ROUTES

**LOW EMISSIONS**
**66g**
$CO_2$ PER PAX/KM

# OUR CUSTOMERS

**Our passengers will grow to over 225m p.a. by 2026 and we are committed to delivering the best service to our customers.**

**225m CUSTOMERS BY 2026**

## Europe's No.1 Airline

We rank No.1 or No.2 for market share in the majority of European markets. Our low fares, on-time flights, lowest emissions and great customer care formula means we are the No.1 choice for customers.

### Top 5 Markets

**Spain**
**27m**
passengers

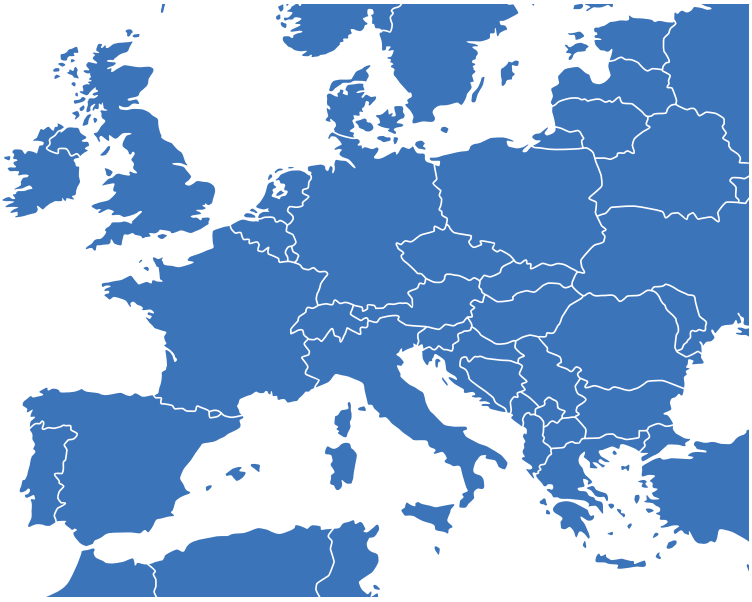
**Italy**
**27m**
passengers

**Germany**
**12m**
passengers

**United Kingdom**
**25m**
passengers

**Ireland**
**9m**
passengers

FLYING TO OVER **40** COUNTRIES



*FY20 passenger data

## Europe's Best-Known Airline

Ryanair is one of Europe's best-known airlines. We regularly check brand awareness by surveying consumers in our top markets. Over 90% of people surveyed already know Ryanair which allows us to have lower marketing spend, lower costs and therefore lower fares.

**95%** UK

**97%** Italy

**93%** Spain

**95%** Poland

**99%** Ireland

**90%** Germany

# Customer Satisfaction & Net Promoter Score

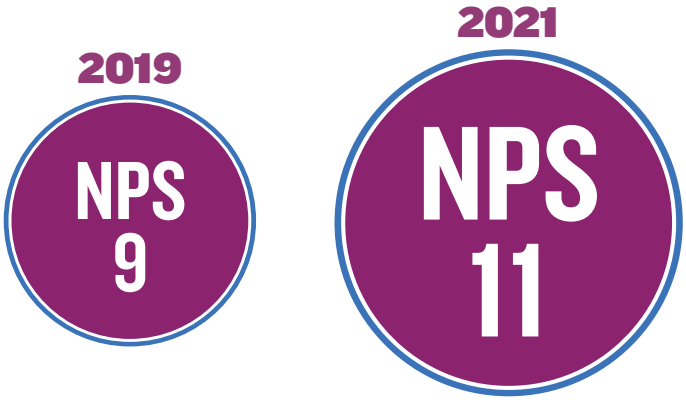
Understanding what customers want is key to our success and so we constantly track and listen to customer feedback so we can improve.

## CSAT

Every passenger that flies with Ryanair is invited to rate their trip and give feedback on food and drink, crew friendliness, value for money, punctuality, and the amount of choice on board. This direct feedback from our customers allows us to constantly improve our service and ensure we deliver on what matters most to customers.

## NPS

This is an industry benchmark where we ask our customers if they would recommend us to a friend. It allows us to constantly evaluate and track our performance in the eyes of our guests. Our Net Promoter Score has improved by over 20% in the last three years and we have set a target of a further 20% increase over the next three years.




## Customer Satisfaction: Score out of 100

| | |
|---|---|
| 90% | Overall trip rating |
| 92% | Inflight experience |
| 93% | Crew friendliness |
| 90% | Customer Service satisfaction |
| 91% | Reliability |
| 93% | Punctuality |
| 92% | Choice of destinations |
| 4/5 | App rating |

## What Matters Most to Our Customers

When we ask our customers to rank what's most important to them, below are the key factors. Ryanair is the No.1 choice for what customers want and delivering on these key requirements will allow us grow to over 225m passengers by 2026.

| Country | 1st | 2nd | 3rd |
|---|---|---|---|
| **United Kingdom** | Reliability | Price | Punctuality |
| **Italy** | Price | Reliability | Punctuality |
| **Spain** | Price | Reliability | Punctuality |
| **Poland** | Price | Reliability | Punctuality |
| **Ireland** | Price | Reliability | Punctuality |
| **Germany** | Reliability | Punctuality | Price |

# CUSTOMER IMPROVEMENTS

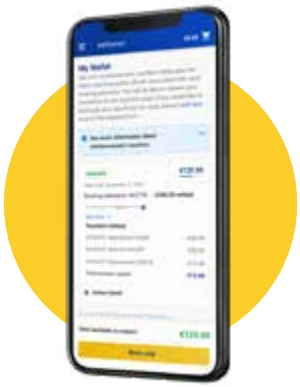
Our customers love flying with us because we offer the lowest fares and best on-time performance but we continuously try to improve the Ryanair experience.

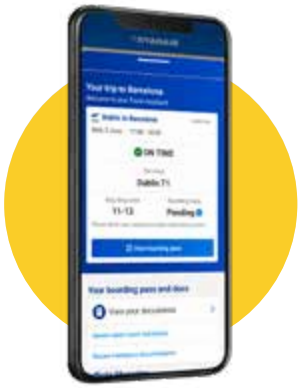
## Customer Care During Covid

During Covid-19, we introduced healthy flying measures including cashless payments, mandatory masks, state-of-the-art air filtration systems and disinfected aircraft daily. We also reduced inflight services and removed inflight menus, and maintained a limited flight operation to ensure connectivity for essential purposes. We ramped up our customer service operations to process over €2bn in refunds for over 30m passengers and introduced our zero-change fee policy which allowed passengers to move their flights without incurring a change fee.

## Ryanair Wallet

Covid-19 highlighted the need for a more seamless refund process during flight disruptions. All flight credit requests are now processed and visible on our customers' myRyanair Wallet within 24hrs, making it easy for customers to book new flights, or if they want a refund to their original form of payment, this will be processed within 5 working days.





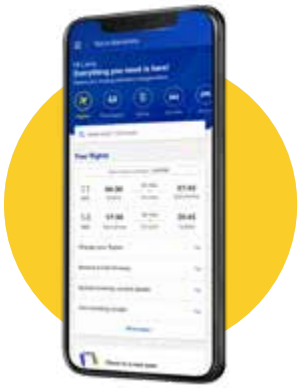
## Day of Travel App

We wanted to make the day of flying better so with our new Day of Travel Assistant, available on the Ryanair app, customers receive real-time updates on terminal, flight information, bag drop and gate number. In the small cases of major disruption, we're transforming how we communicate with passengers by posting live videos and webcasts from our operations centre, keeping passengers informed of how we're minimising their delay.

## Self-Service Hub

Our new Self-Service Hub allows passengers to self-serve 100% online, eliminating the need to contact our Customer Service agents. Passengers can easily make changes to their booking, including flight changes, passenger details, add bags, seats and much more.

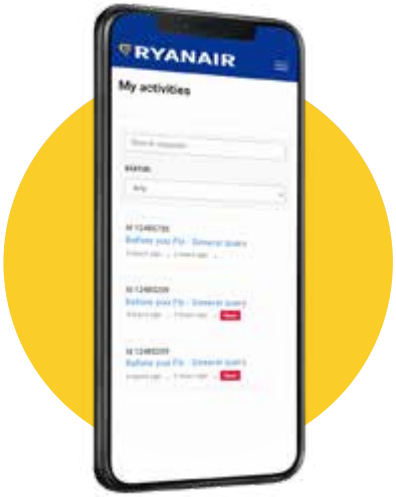
Where our customers do need additional support, our new and improved Customer Service Help Centre reduces waiting time for passengers who need assistance from our agents and with enhanced phone and chat options, plus real-time updates on claims and escalations, issues are resolved quickly and efficiently.



## Chat

Our chatbot handles 80% of customer queries and our customers can reply in more languages than ever before.

We've added video content too, as we've learned from customer feedback that visual aids can be much easier to follow.



## Fare Finder

This search tool allows customers to fly anywhere, anytime and at the lowest fares. Customers can filter options by country, region, airport, trip type and tourist attraction making for a faster, more efficient booking process that's catered to them.

## Social Media

We're reaching newer and younger audiences across our social platforms. Here, our goal is to be front of mind and expand our ever-growing audience and customer base. We aim to be the most useful and entertaining travel/airline business across social media.

**5M** **559k** **790k**

**1.2M** **80k** **357k**

## Customer Panel

We received over 10,000 applications from 35 countries from customers wishing to join our new Customer Advisory Panel. Our first panel meeting took place in late summer and will now meet twice yearly. We will continue to add customers to our panel to ensure we receive representative feedback.

This in-depth customer feedback has helped us to continually drive improvements and recommendations for customer-led initiatives into the future.

# PROTECTING OUR CUSTOMER DATA

**GDPR SAFEGUARDS CUSTOMER DATA**

## Cyber Control

Ryanair's Chief Technology Officer (CTO) reports our cyber security strategy to the Ryanair Board on an annual basis. The strategy is also reviewed quarterly by the Board and monthly by our Technology Leadership team.

To ensure robust controls are in place, we receive audits by independent third parties to ensure that the National Institute of Standards and Technology (NIST) Framework is being complied with. Additionally, Ryanair conducts annual Third Party security audits to assess its system software, system configuration and information handling practices. In addition, all employees are required to do annual cyber security training.

## Security and Resilience

Ryanair's dedicated Information Security team proactively monitor threats and respond to incidents. The team conduct regular penetration testing on key systems and networks to ensure data control and protection is in place.

**Regular penetration testing**

on key systems and network

## Protecting Your Data

**Carrying 149m customers p.a. and employing 17,000+ aviation professionals, we take the protection and appropriate processing of personal data of our customers, employees, partners and suppliers very seriously. We are committed to protecting their privacy and ensuring transparency around how their data is processed.**

Personal data is processed in accordance with the Company Data Protection Policy (which was approved by the Board) and in compliance with applicable laws, including the EU General Data Protection Regulation (GDPR). GDPR, as well as other data protection legislation, safeguards customer data and individuals' specific rights to their personal information.

We process personal data fairly, lawfully and transparently. This data protection rule means, amongst others, that we are transparent with individuals about the use and processing of their personal data.

All Ryanair employees and contractors are required to comply with the Company Data Protection Policy when they process personal data on Ryanair's behalf. Each department must be able to point to a specific legal basis for each category of personal data that the department is processing.

We ensure all employees are aware of the importance of processing and protecting personal data and are informed about data protection security measures, requirements and legal obligations through regular awareness campaigns. All employees, including contractors, are required to do annual mandatory data protection training.

We have adopted comprehensive and effective governance measures to meet the requirements under data protection laws, including robust procedures for personal data breach management, for the exercise of data subjects' rights and for vetting and assessing of our suppliers. We require all suppliers to have appropriate technical and operational measures in place in line with data protection laws.

We have incorporated data protection by design in our processing operations by implementing our technical and organisational measures at the earliest stages of the design process, in such a way that safeguards privacy and data protection principles right from the start. Our technical and organisational measures also ensure that, by default, personal data is processed with the highest privacy protection.

To enhance the effectiveness of our compliance efforts, we have appointed a Data Protection Officer (DPO) whose tasks and responsibilities are clearly set and documented in accordance with the GDPR. The DPO reports to the Group CLO and has regular access to senior management across the business. In addition, each department in Ryanair has a Data Protection Steward who acts as a data protection champion and first point of contact for day-to-day queries.

Ryanair DAC is the data controller of all personal information that is collected and used on Ryanair customers, as well of personal information relating to its employees and contractors, suppliers and business contacts. The Irish Data Protection Commissioner is the lead data protection supervisory authority for Ryanair.

The data provided to us by customers is protected using Secure Sockets Layer (SSL) technology. SSL is an industry standard encryption method for personal information and credit card details. All payment details are transmitted over SSL across a dedicated network infrastructure (Multiprotocol Label Switching/MPLS).

SSL

**Secure Socket Layer**

technology encrypts all payment details

# CUSTOMER TESTIMONIALS

### Customer 1

★★★★★

"@Ryanair Further thanks to the brilliant crew on the Manchester/Valencia flight 29th September. So efficient. Chief steward Brian was hilarious and made the flight entertaining. Great service."

### Customer 2

★★★★

“Has made travel totally easier, so easy it makes other travellers jealous. Thanks @Ryanair, once again.”

### Customer 3

★★★★★

“Good app, easy to use, all info required is easily accessible. I like it, well done.”

### Customer 4

★★★★

“I have to say that I wasn’t the biggest Ryanair fan but they have grown on me. So far, all my flights have been on time or even earlier. Booking priority boarding is a no-brainer — speedy boarding and an additional piece of hand luggage. Perfect for short trips away.”

### Customer 5

★★★★★

“Everybody should fly with @Ryanair. I will be flying Ryanair again. 10/10!”

### Customer 6

★★★★★

“Great service. Amazing prices. Wide range of options.”

### Customer 7

★★★★★

“Extremely quick and user friendly. Links all passenger locator forms now too which saves you time and hassle.”

### Customer 8

★★★★★

"Best fares to travel in Europe without doubt. Best Irish contribution to aviation."

### Customer 9

★★★★

"Ryanair are very reliable, and their fares are reasonable. Thank you."

### Customer 10

★★★★★

“What’s not to like?”

# CLOSING STATEMENT
# AVIATION WITH PURPOSE

We're extremely proud of what our people and business have achieved to date in terms of advancing our sustainability agenda while remaining Europe's No.1 airline.

With the planet and people at risk due to climate change we must continue to create change for the better and see governments, businesses and people all over the world unite to seek out and pursue effective policies. Our primary goals of net-zero carbon emissions by 2050, improved employee strategy and better customer experience are front and centre to every one of our operations today.

We have made a promise to all stakeholders, our people and our customers, that we will continue to drive change and remain world leaders in the advancement and promotion of green, sustainable aviation policies and practices, in accordance with the UN Sustainable Development Goals and the Paris Agreement.

**Join us as we lead a more sustainable aviation industry for the future. Join us in Aviation With Purpose.**

# APPENDIX

# SUSTAINABILITY ACCOUNTING STANDARDS BOARD (SASB) INDEX (AIRLINE INDUSTRY STANDARD)

Greenhouse Gas Emissions

| Accounting Metric | Unit of Measure | FY21 | FY20 | FY19 | FY18 | FY17 | SASB Code |
|---|---|---|---|---|---|---|---|
| Gross Global Scope 1 Emissions | Million metric tonne (t) $CO_2$-e | 2.9 | 12.7 | 11.8 | 11.0 | 9.9 | TR-AL-110a.1 |
| Total Fuel Consumed | USG (millions) | 307 | 1,339 | 1,244 | 1,157 | 1,043 | TR-AL-110a.3 |

Activity Metrics

| Accounting Metric | Unit of Measure | FY21 | FY20 | FY19 | FY18 | FY17 | SASB Code |
|---|---|---|---|---|---|---|---|
| Available seat kilometres | ASK (millions) | 49,271 | 192,165 | 184,325 | 170,745 | 158,260 | TR-AL-000-A |
| Passenger load factor | Rate | 71% | 95% | 96% | 95% | 94% | TR-AL-000-B |
| Revenue passenger kilometres | RPK (millions) | 34,982 | 182,556 | 176,952 | 162,208 | 148,764 | TR-AL-000-C |
| Number of departures | Number | 204,828 | 823,897 | 789,771 | 725,044 | 675,482 | TR-AL-000-E |
| Average age of fleet (owned) | Years | 9 | 8 | 7 | 7 | 6 | TR-AL-000-F |

Labour Practices

| Activity Metric | Unit of Measure | FY21 | FY20 | FY19 | FY18 | FY17 | SASB Code |
|---|---|---|---|---|---|---|---|
| Percentage of active workforce covered under collective bargaining agreements | % | 88% | 88% | 88% | N/A | N/A | TR-AL-310a.1 |
| Number of work stoppages | Number | 0 | 0 | N/A | N/A | N/A | TR-AL-310a.2 |
| Total days idle | Days | 0 | 0 | N/A | N/A | N/A | |

Competitive Behaviour

| Accounting Metric | Unit of Measure | FY21 | FY20 | FY19 | FY18 | FY17 | SASB Code |
|---|---|---|---|---|---|---|---|
| Total amount of monetary losses as a result of legal proceedings associated with anti-competitive behaviour regulations | €'m | 0 | 9.2 | 0 | 14.4 | 1.0 | TR-AL-520a.1 |

# TASKFORCE ON CLIMATE-RELATED FINANCIAL DISCLOSURES (TCFD)

| TCFD Recommendation | | Ryanair Group Approach |
|---|---|---|
| Governance | Board oversight of climate-related risks and opportunities. | The Ryanair Board has the ultimate oversight of climate-related issues and receives regular reports and updates from the Group CEO, Group CFO and Director of Sustainability.<br><br>Key risks are identified and analysed as part of the six-monthly review of the Group Enterprise Risk Register. Climate-related risks, along with associated plans to mitigate such risk, are assessed, scored and highlighted to the Audit Committee and the Board.<br><br>The Board receives a quarterly update from the Director of Sustainability on performance with respect to climate-related issues and the Board annually reviews the Group's Climate strategy. |
| | Management's role in assessing and managing climate-related risks and opportunities. | The Director of Sustainability is responsible for day-to-day management of climate-related risks, annual reporting, strategy implementation and risk assessment.<br><br>On a monthly basis, the Sustainability Committee, made up of senior management from Operations, Engineering, Finance, Legal and Ryanair Labs, meets to monitor our climate-related impacts and upcoming environmental legislation, fuel efficiency and energy performance. This committee identifies, assesses and makes recommendations for addressing climate-related risks and opportunities.<br><br>The Director of Sustainability reports to the Board quarterly with respect to performance on climate-related issues.<br><br>Within the six-monthly review of the Enterprise Risk Register, senior management across the Group have the opportunity to highlight climate-related risks to provide a variety of perspectives and identify actions taken to mitigate those risks. |
| Strategy | Climate-related risks and opportunities identified over the short, medium and long term. | Ryanair Group's long-term strategy identifies climate change as a key area for the business which will have an impact going forward.<br><br>Short and medium-term risks and opportunities are addressed on an ongoing basis by the Ryanair Sustainability Committee and Sustainability team who report onwards to the Board.<br><br>Please see our 2021 annual report for further details relating to our environmental policy, key risks and opportunities. |
| | Impact of climate-related risks and opportunities on the Group's businesses, strategy and financial planning. | Climate-related risks and opportunities are incorporated into Ryanair Group's environmental policy. The Board reviews the environmental policy once a year and receives quarterly updates on performance. Environmental opportunities and threats are factored into our financial and operational planning, including operational fuel efficiencies and regulatory impacts. |

# TASKFORCE ON CLIMATE-RELATED FINANCIAL DISCLOSURES (TCFD)

| | | |
|---|---|---|
| **Risk Management** | Processes for identifying and assessing climate-related risks. | Ryanair Group has short, medium and long-term climate-related physical and transition risks identified. These risks are an inherent part of operating in the airline industry and their impact are assessed through the Enterprise Risk Register. The potential financial impact is assessed using forecasting scenario analysis.<br><br>For transition risks, the Ryanair Group is currently reviewing different future climate scenarios and the associated potential resilience and impact on the Ryanair Group. We will report on these in due course. |
| | Processes for managing climate-related risks | Key areas of the business (e.g. operations and sustainability departments) are responsible for the ongoing monitoring and management of climate-related risk based on the likelihood and impact to the Group. |
| | How processes for identifying, assessing, and managing climate-related risks are integrated into the organisation's overall risk management. | All risks including those related to climate change are identified through the Group's Enterprise Risk Register. The register highlights the risks, their likelihood of occurring and impact with associated risk mitigation.<br><br>The key elements of risks identified by the Group and their effective management are discussed extensively at the Audit Committee and at board level twice a year. See the 'Risk' section of our 2021 annual report for further details (from page 83 - Risks Related to the Company). |
| **Metric and Targets** | Metrics used by the organisation to assess climate-related risks and opportunities in line with its strategy and risk management process. | Ryanair Group has outlined all key metrics (in line with SASB disclosure requirements) used to measure and manage climate-related risks. |
| | Scope 1, Scope 2, and if appropriate, Scope 3 greenhouse gas (GHG) emissions, and the related risks. | Ryanair Group reports on its Scope 1 greenhouse gas emissions annually (see page 4), in accordance with the EU Emissions Trading Scheme. Ninety-nine per cent of Ryanair Group's direct greenhouse gas emissions relates to jet fuel. |
| | Targets used by the organisation to manage climate-related risks and opportunities and performance against targets. | Ryanair Group reports on performance against targets annually. See page 81 and 82 of our 2021 annual report for information and historical performance. |

**Leslie**
Head of Inflight Safety, Security & Regulatory Compliance

**Tracey**
Chief Financial Officer

**Carol**
Chief Risk Officer

**Lorna**
Deputy Director HR

**Aine**
Head of Customers & Audiences

**Deirdre**
Head of Marketing & Customer Communications

# Celebrating the Female Leaders of Ryanair

**Shauna**
Head of HR

**Izabella**
Head of Customer Operations, Training & Quality

**Rose**
Standards Captain

**Jennifer**
Data Protection Officer

**Chiara**
Head of Sales & Marketing

**Sinead**
Director of Inflight

**Laura**
Head of Product & Design

**Joelle**
Deputy Director of Security & Compliance

**Lisa**
Deputy Director of Technical Services

**Yvonne**
Head of Pilot Rostering

**Tracy**
Director of Customer Service

**Aoife**
Head of Inflight Retail

**Lisa**
Deputy Director HR

**Sinead**
General Manager Ground Operations

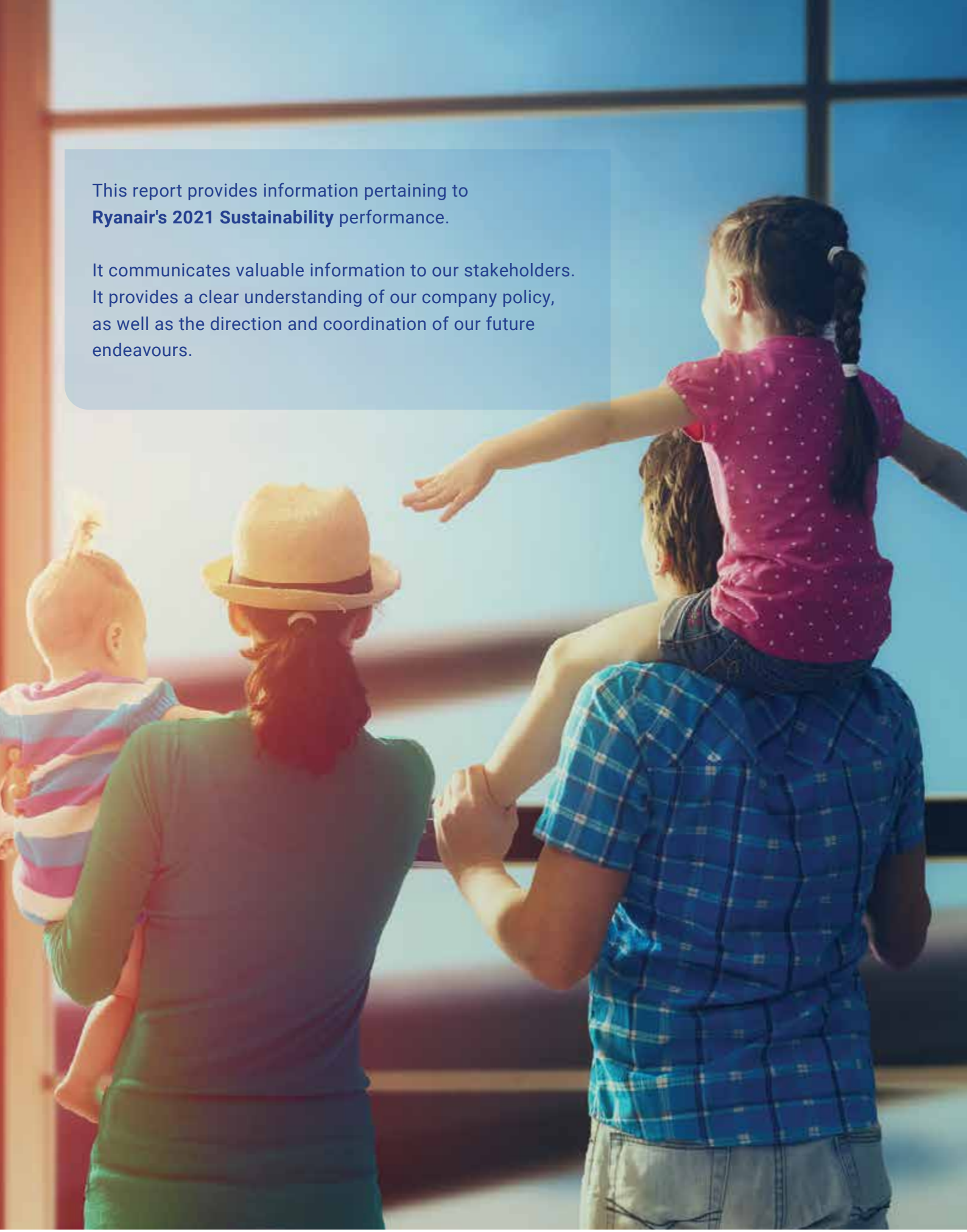
**Ruth**
Head of Brand Communications

**Sandra**
Head of Payroll

**Jade**
Head of Communications

## Here's to our fantastic female leaders who have helped us navigate through the Covid-19 challenges.

RYANAIR



This report provides information pertaining to **Ryanair's 2021 Sustainability** performance.

It communicates valuable information to our stakeholders. It provides a clear understanding of our company policy, as well as the direction and coordination of our future endeavours.

BUZZ Lauda MALTA AIR RYANAIR