

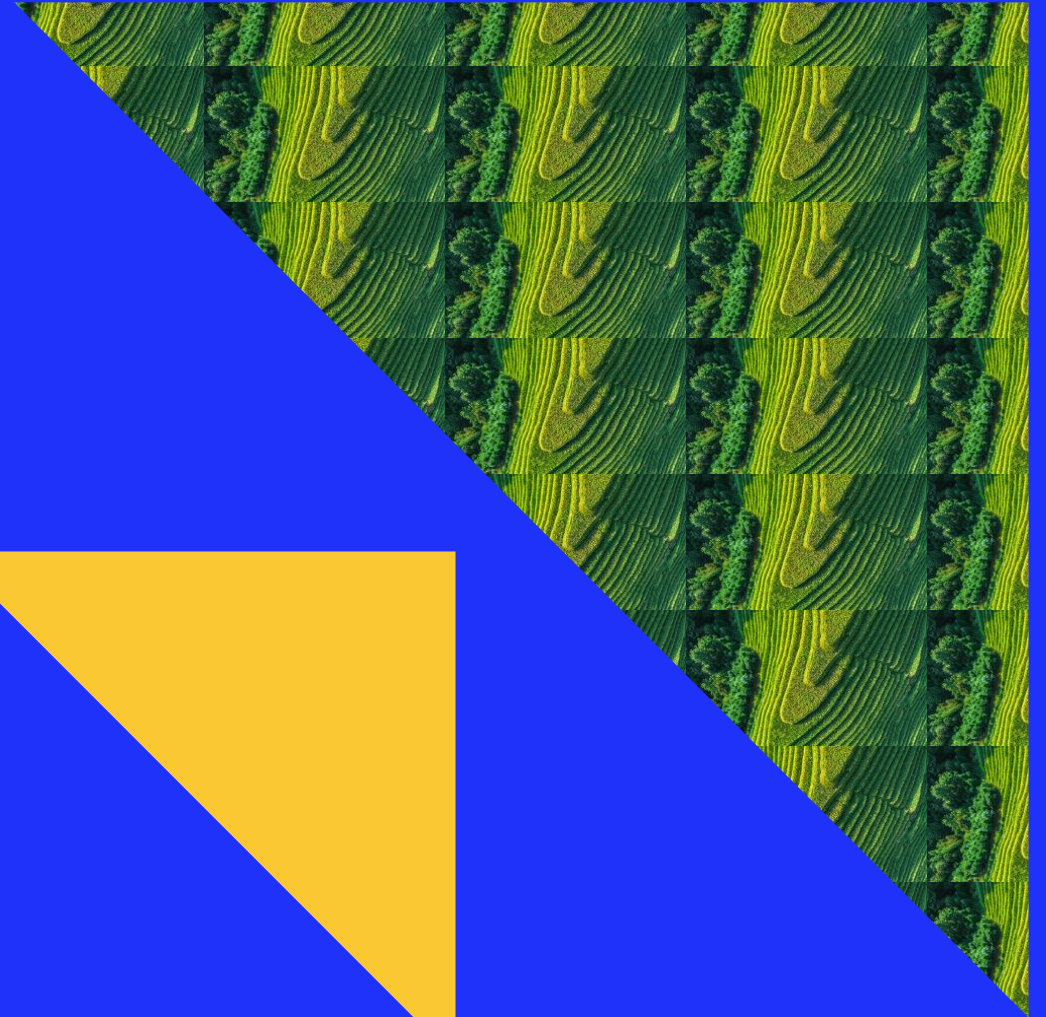
# *IATA Agency Program*

## *Information Event for Travel Agents*

*Starts at 0930*



# *Welcome & Introductions*



# Agenda overview

## AGENDA

**09:30 – 09:35**

**Welcome and introductions**

**09:35 - 10:00**

**Market overview and post-Covid recovery**

- Elena Ciuperceanu, Manager Industry Relationships
- Peter O'Broin, Manager Government Affairs

**10:00 – 10:40**

**IATA Risk Management and post- Covid changes**

- Vitor Cedrola, Senior Manager Agency Settlement Risk
- Ilaria Di Summa, Asst. Manager Agency Settlement Risk

**10:40 - 11:10**

**IATA Customer Service- Aiming for Excellence**

- Marta Lopez-Baisson Vergara, Manager Customer Services
- Laura Valkeajärvi, Assistant Manager, Customer Experience

**11:10 -11:30**

**The Headwinds and Tailwinds of Airline Retailing Adoption**

- Shaunelle Harris Drake, Head Implementation -Distribution

**11:30-11:35**

**Wrap up & Close of sessions**

# IATA Competition Law Compliance

This meeting is being conducted in compliance with the Provisions for the Conduct of the IATA Traffic Conferences. Pursuant thereto, this meeting will not discuss or take action to develop fares or charges, nor will it discuss or take action on remuneration levels of any intermediaries engaged in the sale of passenger air transportation.

This meeting also has no authority to discuss or reach agreement on the allocation of markets, the division or sharing of traffic or revenues, or the number of flights or capacity to be offered in any market. Delegates are cautioned that any discussion regarding such matters, or concerning any other competitively sensitive topics outside the scope of the agenda, either on the floor or off, is strictly prohibited.

The foregoing applies equally to email discussions, instant messaging and social media discussions whether directed to registered participants or other parties not present in the meeting. Participants are reminded that live streaming of this meeting to parties not present in person is not permitted except as indicated by and with the express permission and knowledge of the Chairperson and IATA and only in the event that specific participation on a given item from a party not present in person is required. Unauthorized recording of the meeting is prohibited.

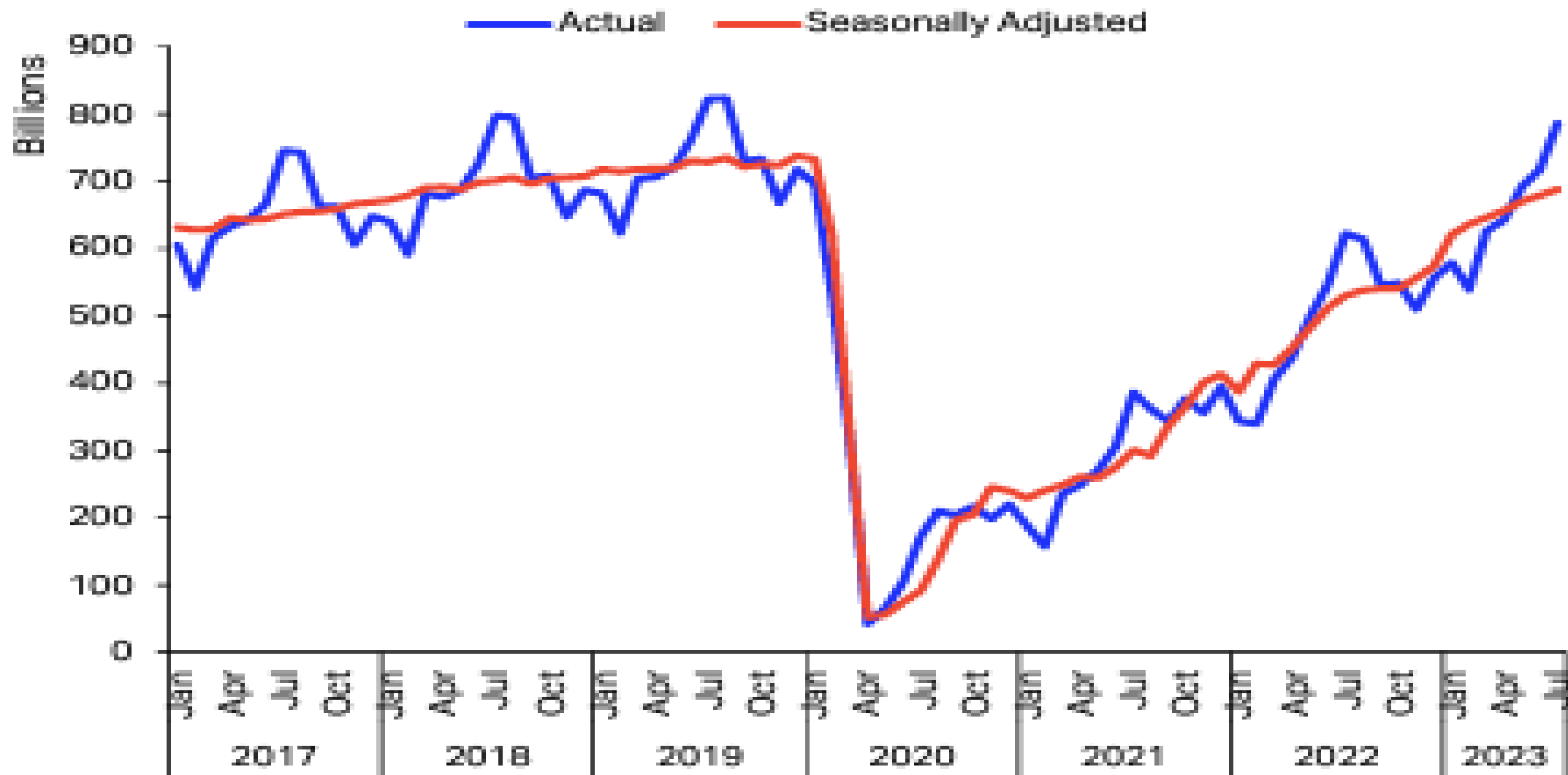
# *Market Overview & post-Covid Recovery*

*Elena Ciuperceanu & Peter O'Broin*

*IATA, UK & Ireland*



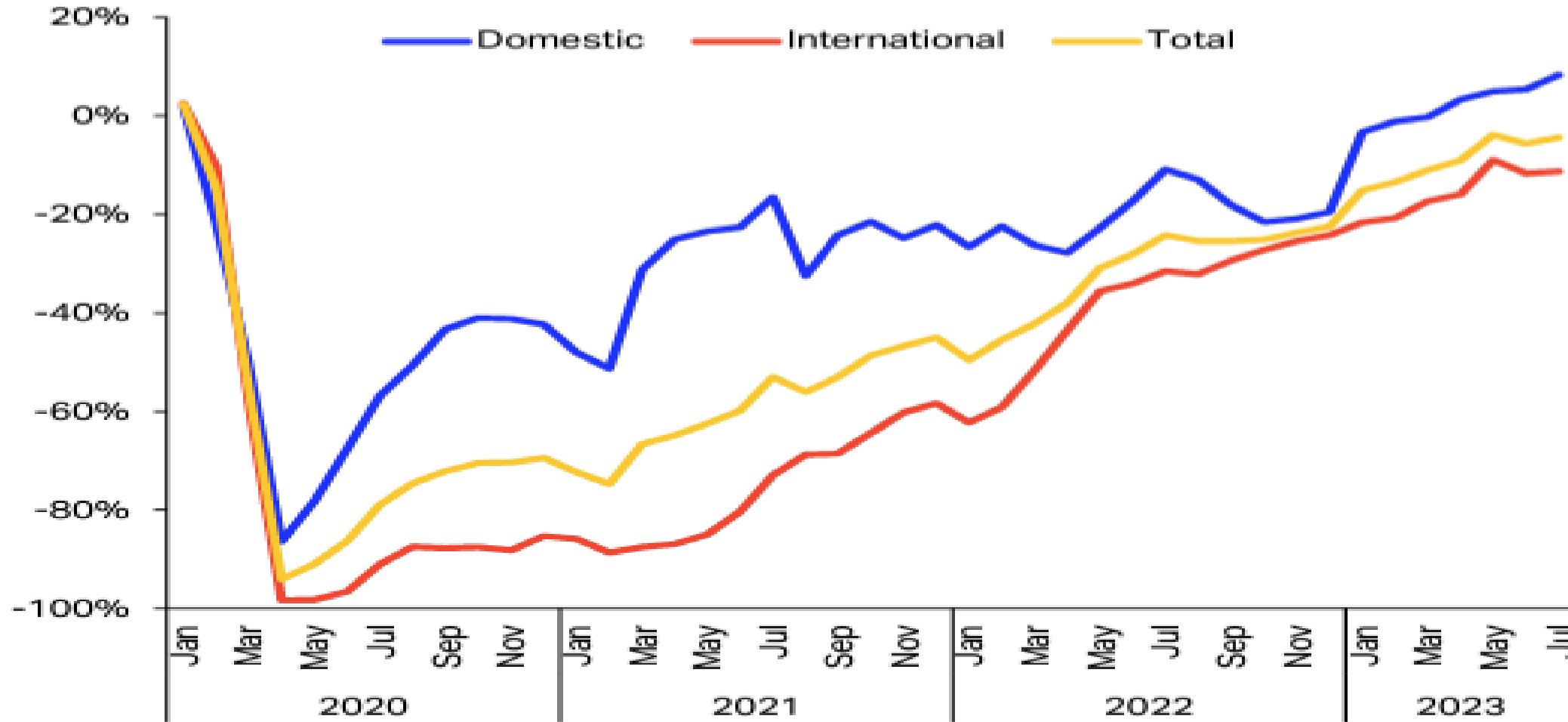
# Recovery-the Global view...RPKs per month



Sources: IATA Sustainability and Economics, IATA Monthly Statistics

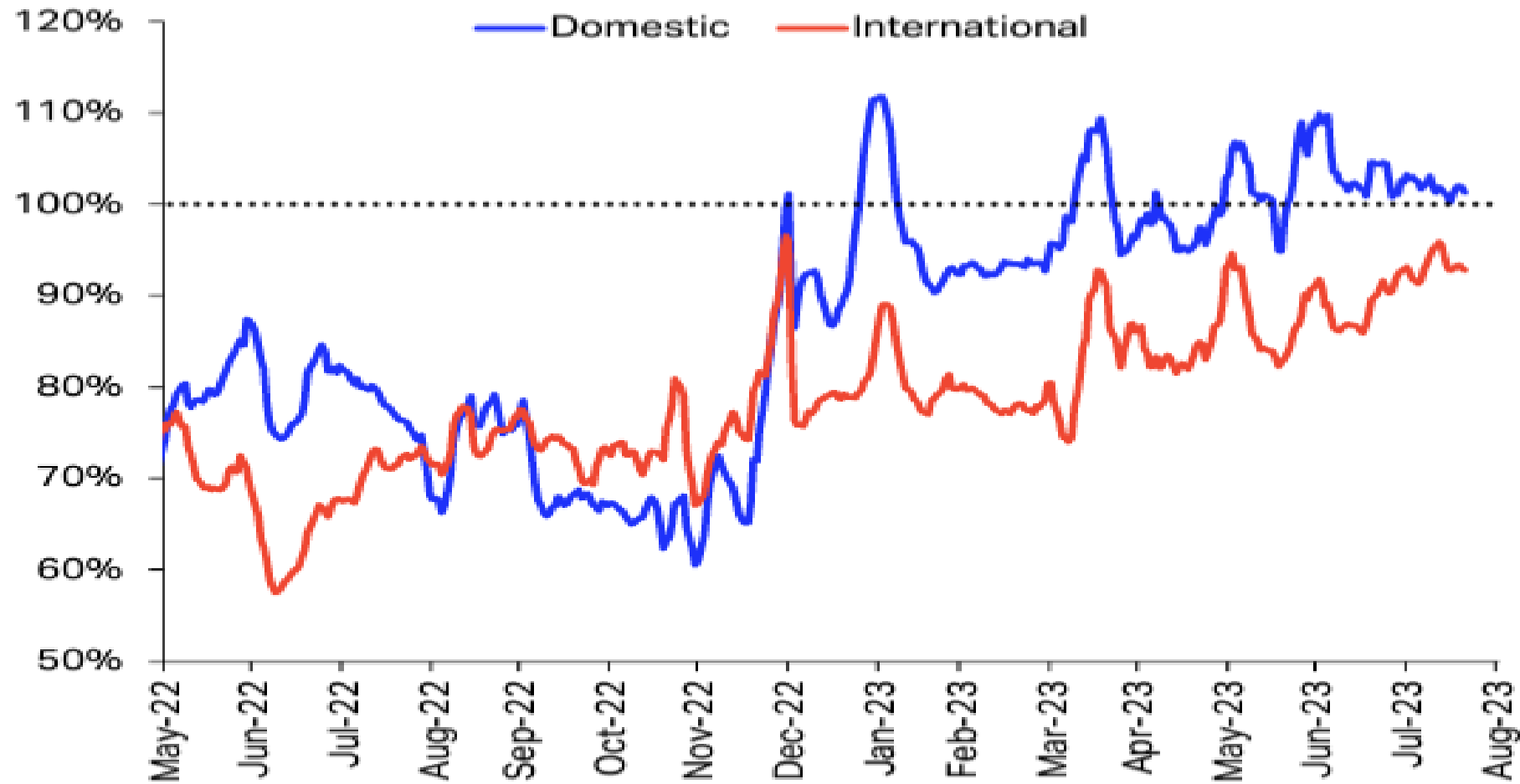


# Recovery-Domestic does better...



Sources: IATA Sustainability and Economics, IATA Monthly Statistics

# Recovery- Ticket sales by purchase date....



Sources: IATA Sustainability and Economics, DDS

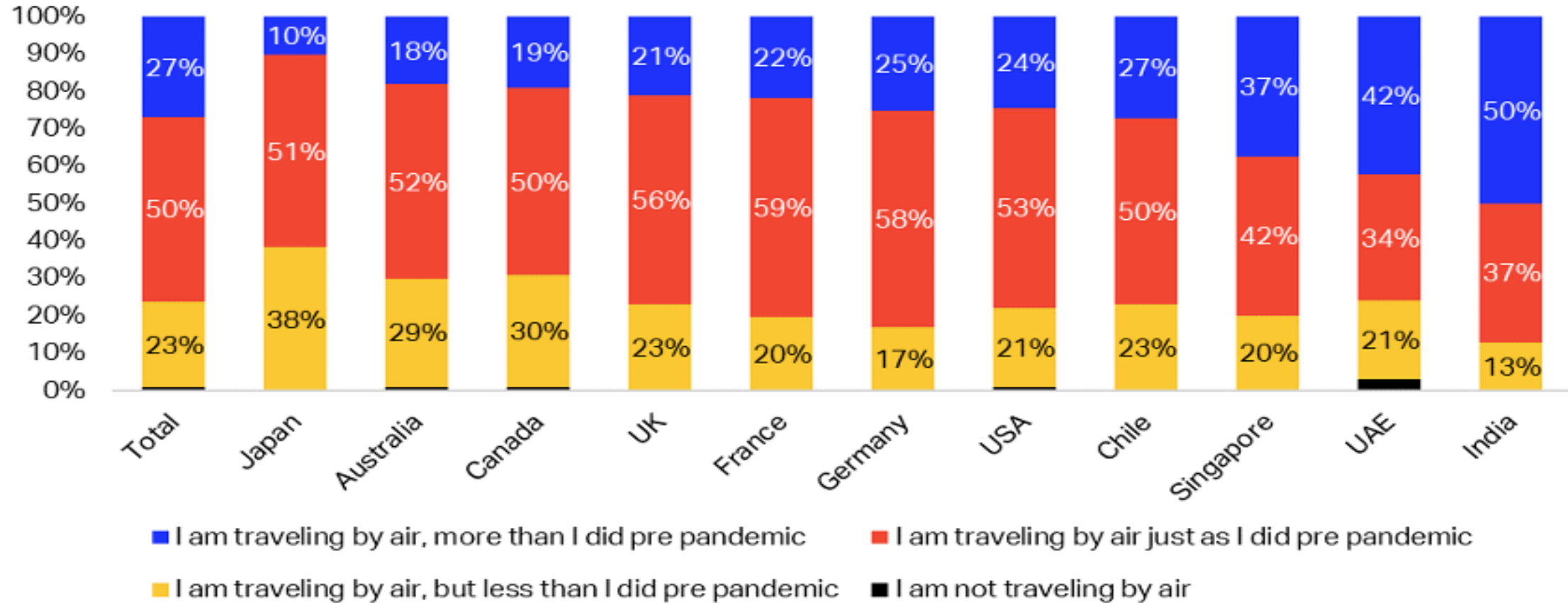




# Air Travelers trends...

## Survey further reveals post-pandemic air traveler trends

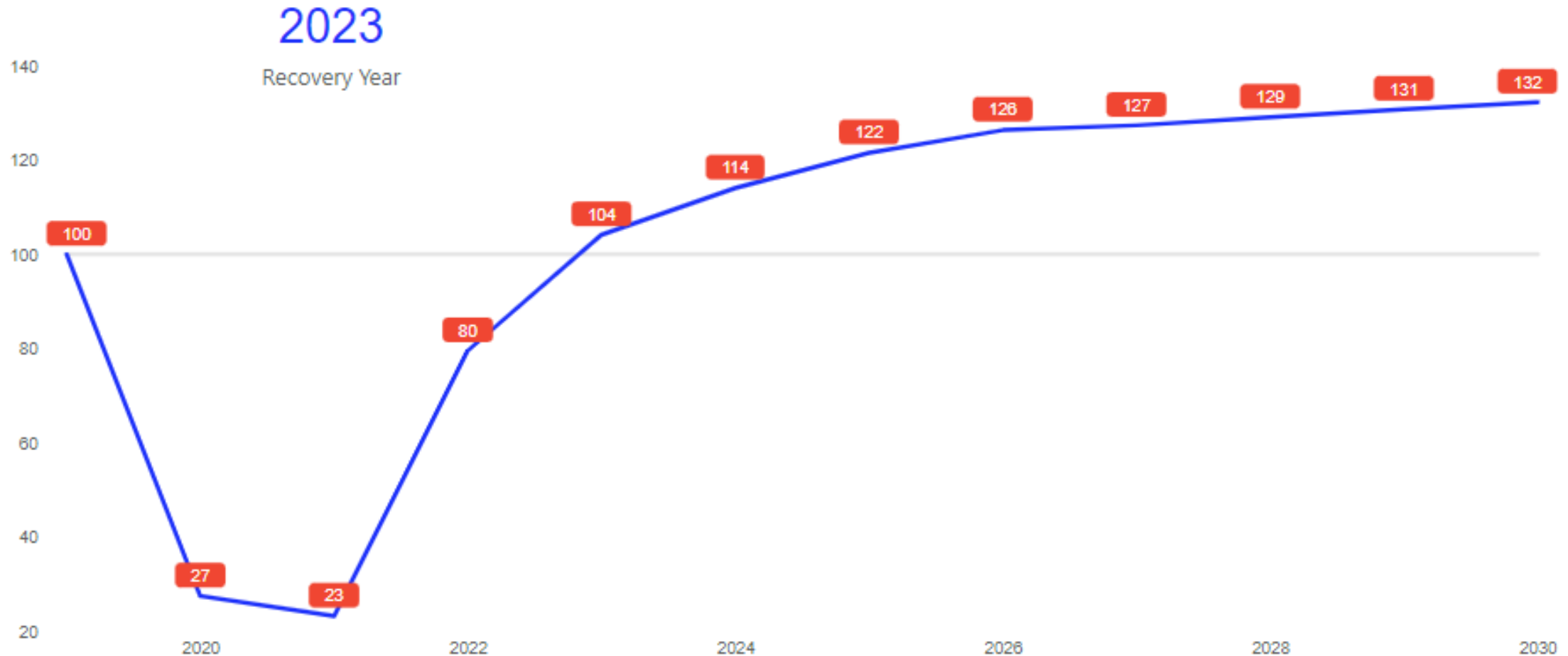
% of responses



Source: IATA 10th edition of its Passenger Trends and Insights Survey



# The UK O&D market recovers in 2023 (previously 2024)



O&D Passengers per year, 2019 = Index 100  
Source: [IATA/ Tourism Economics Air Passenger Forecast](#)

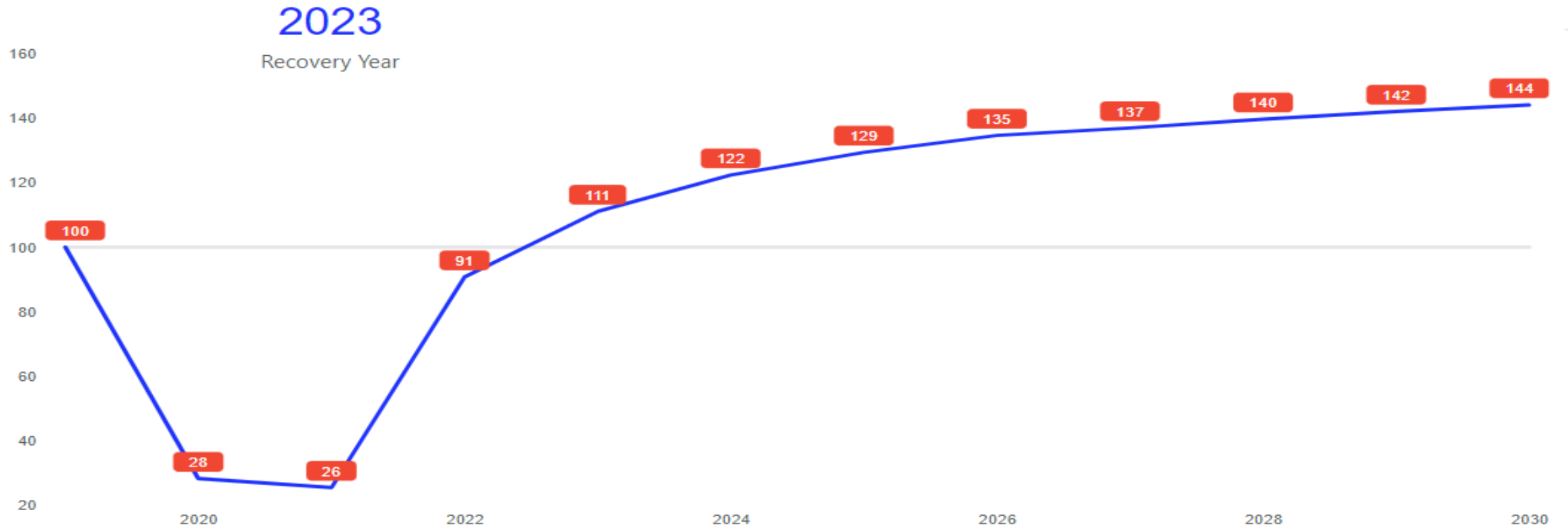
Last updated

Wednesday, June 07, 2023



# The IE O&D market recovers in 2023

## Ireland



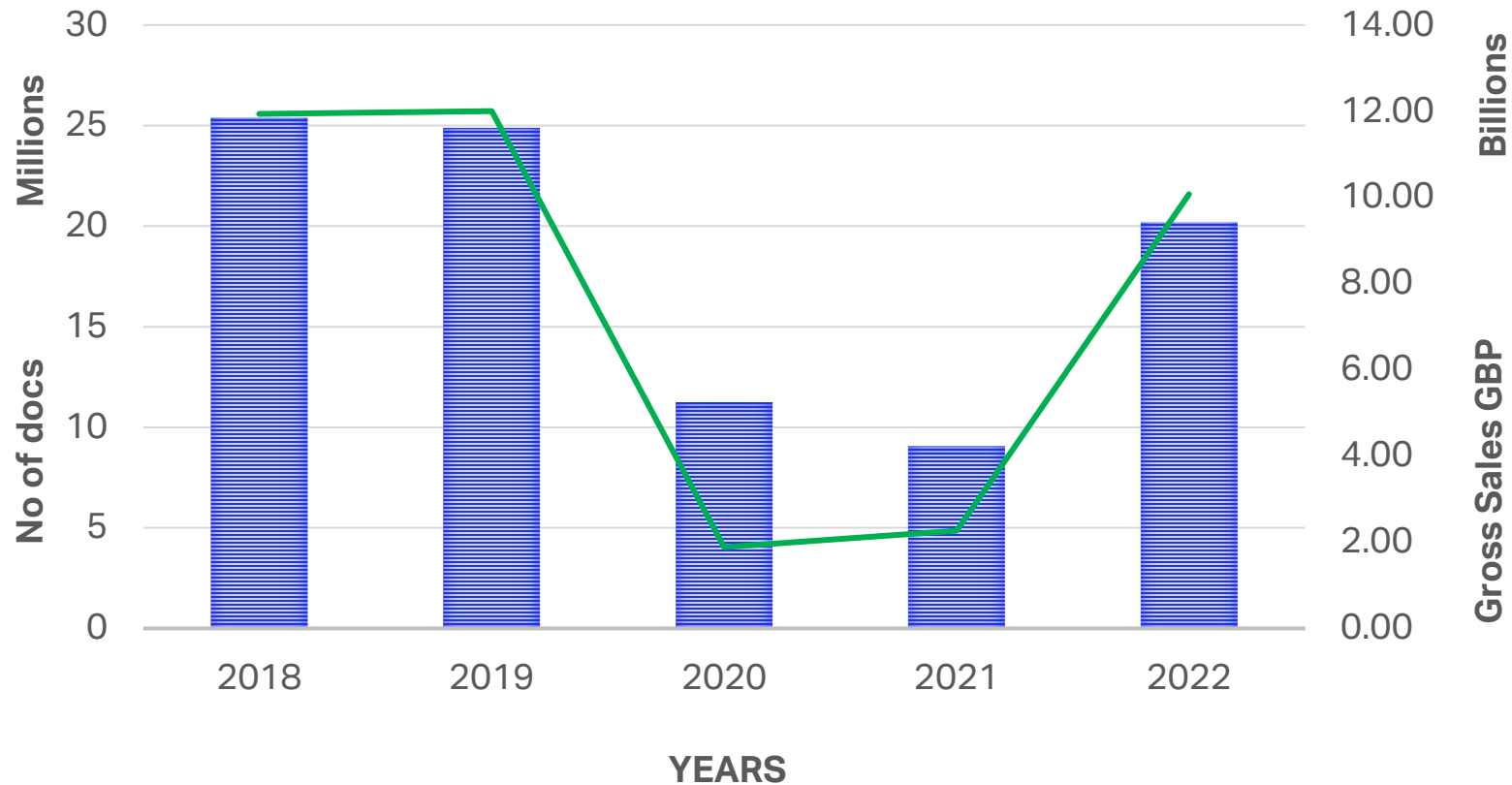
O&D Passengers per year, 2019 = Index 100  
Source: [IATA/ Tourism Economics Air Passenger Forecast](#)

Last updated

Wednesday, June 07, 2023



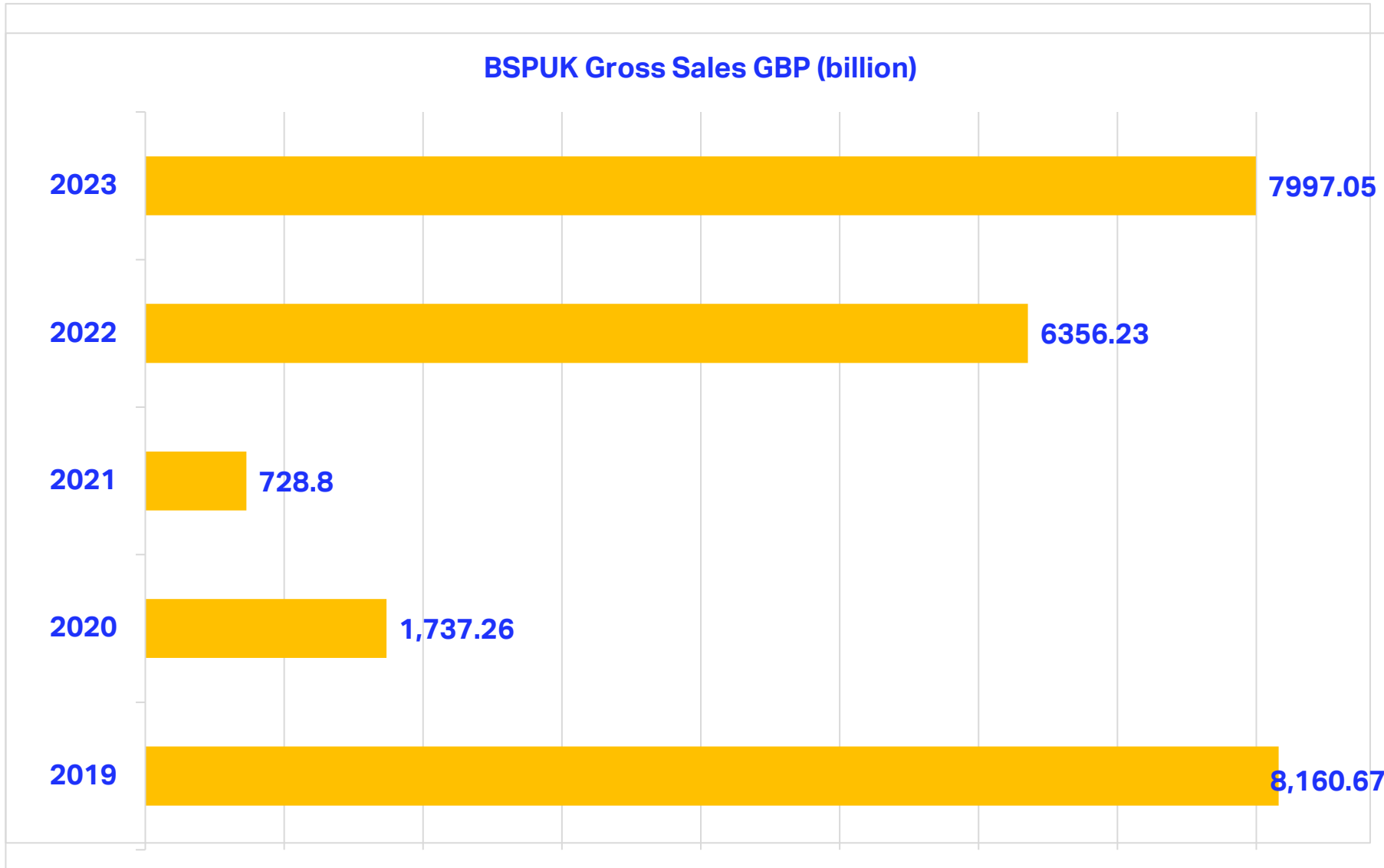
# BSPUK: reminder how we closed 2022 (2018-2022)



## Steady recovery:

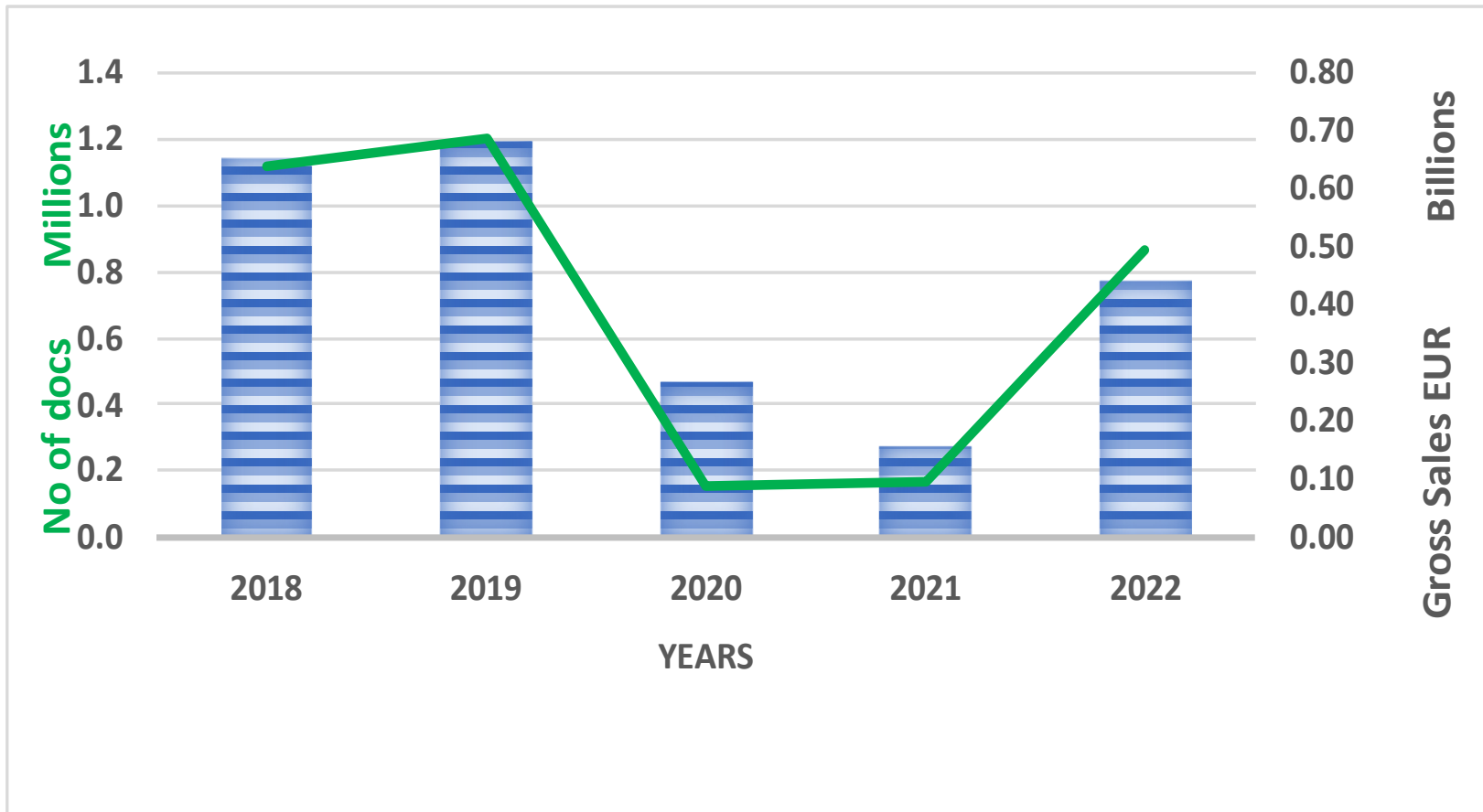
- In 2022 **Gross Sales** reached **84%** of 2019 levels and
- **No. of docs** processed **81%** of 2019

# And this is how AUG YTD compares...



- **AUG 2023 (YTD) is 98% of the 2019 volume**
- **We should expect to reach 2019 volumes by the end of this year**

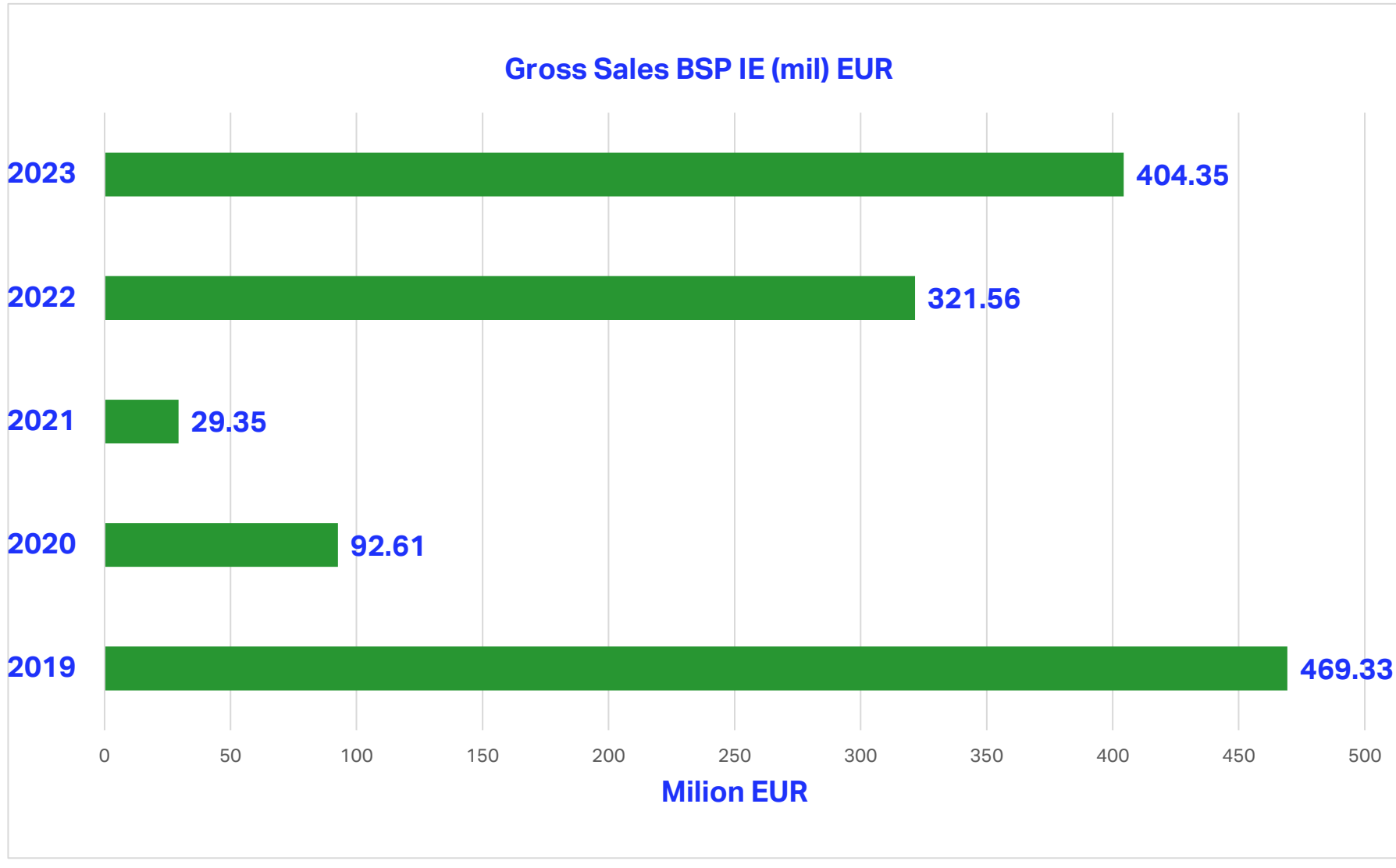
# BSP IE: reminder how we closed 2022 (2018-2022)



## Steady recovery:

- In 2022 **Gross Sales** reached **72%** of 2019 levels and
- **No. of docs** processed **64.7%** of 2019

# And this is how AUG YTD compares...



- **AUG 2023 (YTD) is only at 86% of the 2019 volume**
- **while the market overall is expected to fully recover in 2023, BSP figures are lagging behind**

# UK Advocacy Round Up

## Overview

- A lot of consultation activity – 12 so far this year, with three ongoing
- No expectation of any major legislative changes (slots, consumers etc) until after a General Election
- Not clear yet where Labour stands on key issues

## Key Policy Areas

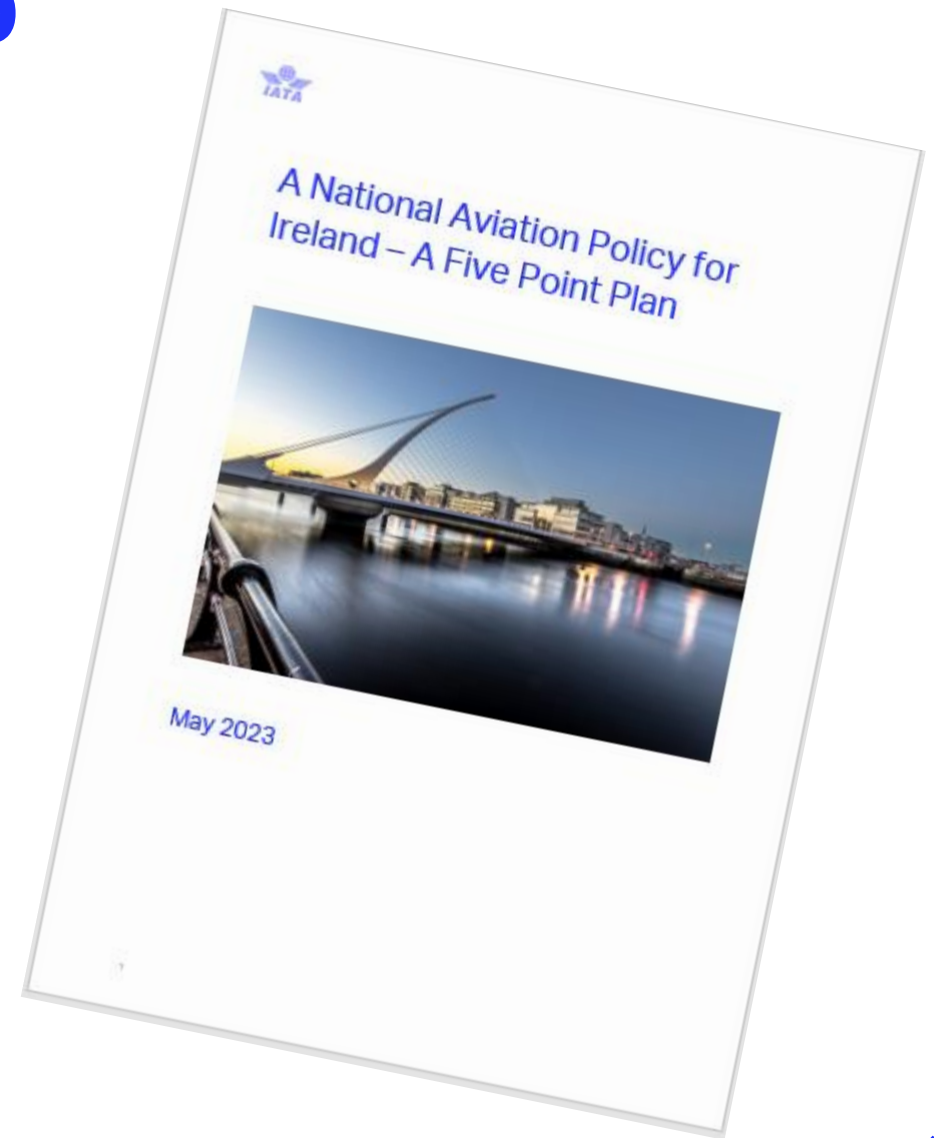
- Sustainability - Focus remains on getting the right policies in place. UK yet to meaningfully move to delivery on SAF.
- Consumers - CAA Performance Framework for Airline Accessibility
- Wider review of consumer and slots policies expected in Q4/Q1 2024





# Ireland Advocacy Round Up

- Dublin's new runway – Noise Quota or 65 movements per night?
- Willie Walsh appearances before Oireachtas Transport Committee
- A National Aviation Policy for Ireland – Five Point Plan
- Aviation Dinner with support of IATA Sustainability team
- SM op-ed in Irish Examiner on SAF



# *Questions & Answers*

