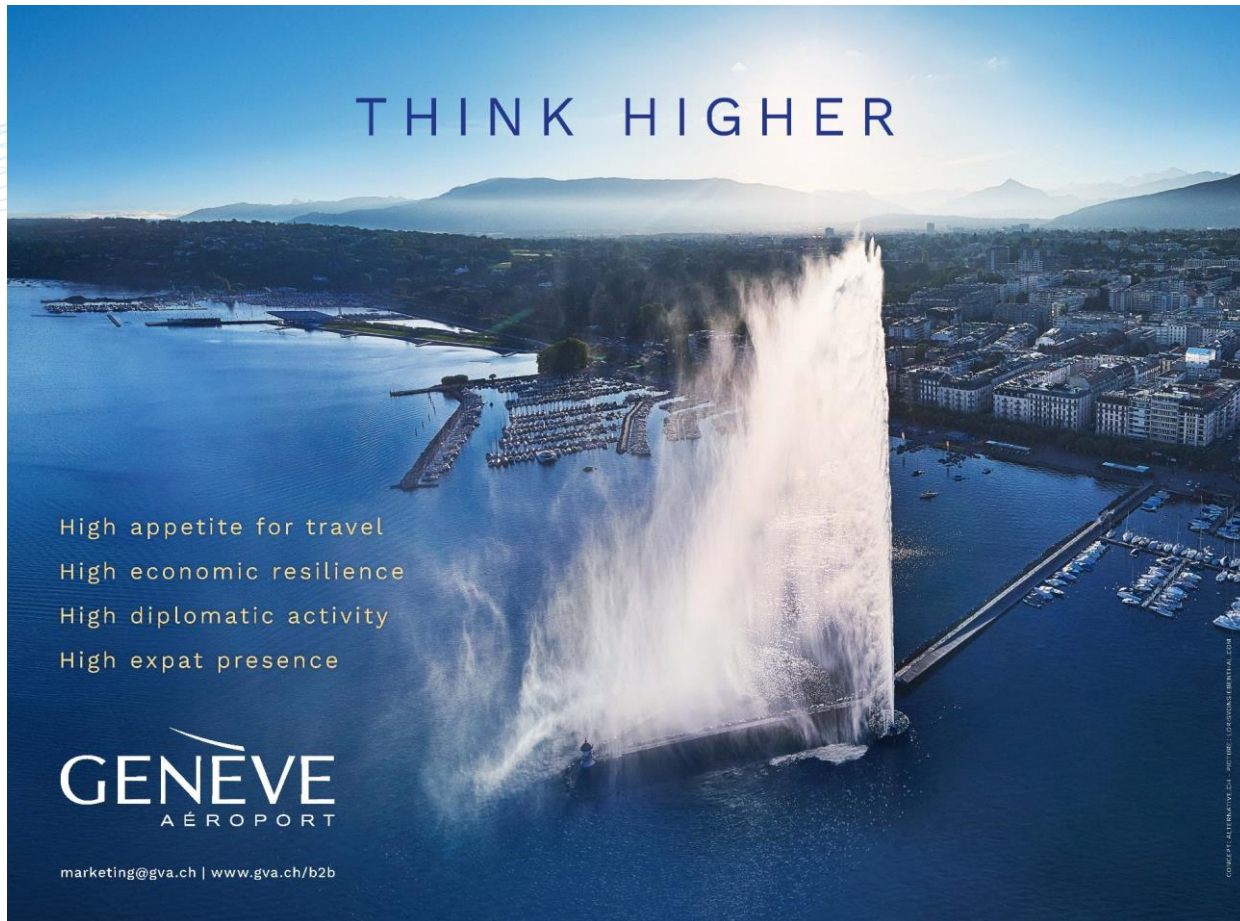


**GENEVA**  
Your  
high-yield  
market

2023



**THINK HIGHER**

High appetite for travel  
High economic resilience  
High diplomatic activity  
High expat presence

**GENÈVE**  
AÉROPORT

marketing@gva.ch | www.gva.ch/b2b

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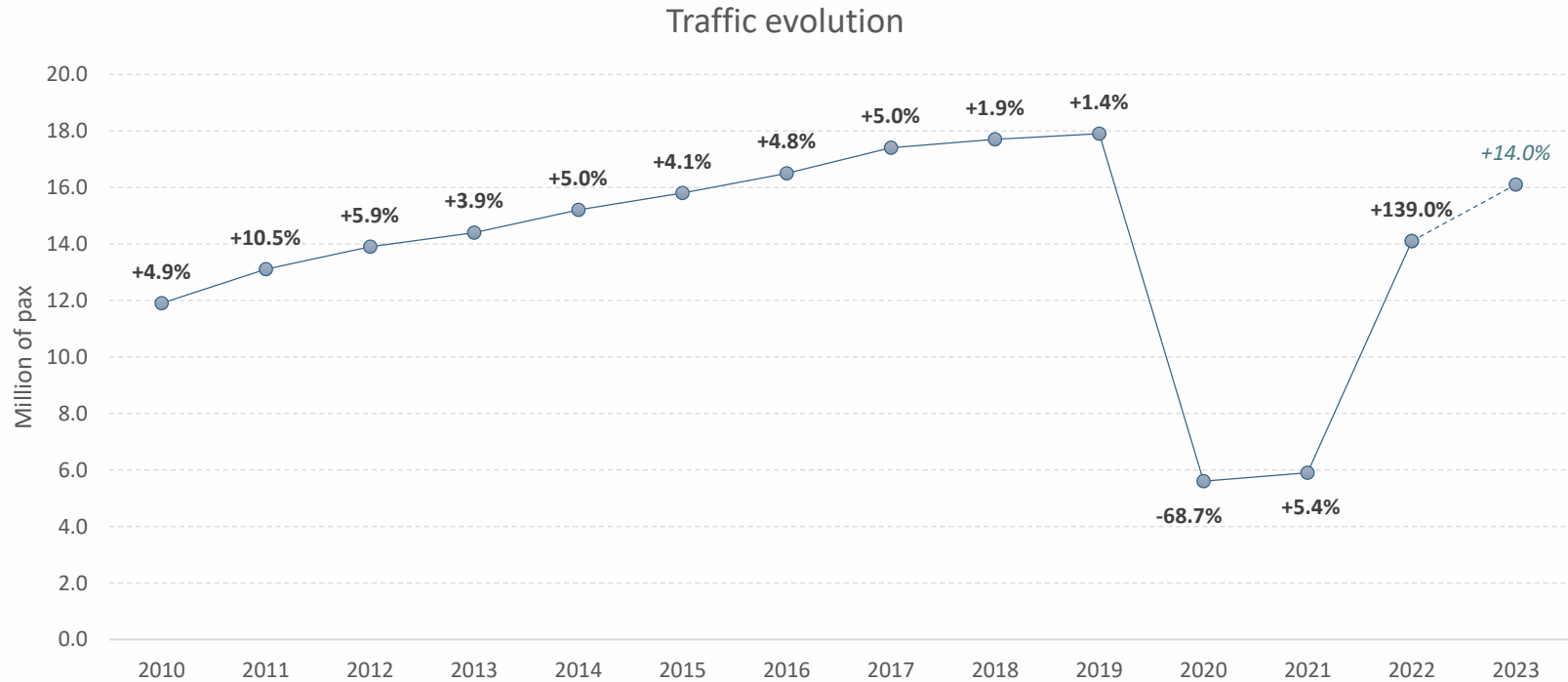
# GVA LATEST NEWS

- The **flight offer has come back** almost to normal pre-pandemic level
- **Long-haul** connectivity in GVA **is totally back**
- **Demand**, especially leisure and VFR, **is booming**
- **Corporate** and **diplomatic** segments are **gradually coming back**
- Globally, the **market and economy** have proven to be **highly resilient**
- **Cargo demand** is vibrant and for some segments (valuables, chemistry, etc.) **higher than before the crisis**
- **Purchasing power** of the population remains one of the **highest**
- **New seasonal daily service** launched by **Delta** on **GVA-JFK** as of 10-April 2023

# DESTINATIONS SUMMER 2023



# HISTORIC TRAFFIC EVOLUTION



# LONG-HAUL DEVELOPMENT



# TOP UNSERVED LONG-HAUL ROUTES

Airport	City	Market Characteristics
<b>NORTH AMERICA</b>		
MIA	Miami	A mix of leisure, business and ethnic traffic
LAX	Los Angeles	Good mix leisure / business
SFO	San Francisco	Mainly leisure demand + some high tech / IT business traffic
BOS	Boston	Around 30% of high-yield traffic; low seasonality
ORD	Chicago	Good mix leisure / business
<b>ASIA</b>		
BKK	Bangkok	Mainly leisure market + connecting to South-East Asia
TYO	Tokyo	Predominantly incoming demand (from Japan)
SIN	Singapour	Business traffic with around 50% of high-yield
PVG	Shanghai	Important business relations
ICN	Seoul	Steadily increasing demand for both business and leisure traffic
DEL	Delhi	Very strong governmental + business traffic demand
<b>LATIN AMERICA</b>		
GRU	Sao Paulo	Largest LATAM market; good mix of business, leisure & ethnic markets; could be combined with GIG
EZE	Buenos Aires	Good mix of tourism & business traffic demand
<b>AFRICA</b>		
MRU	Mauritius	Mainly leisure & ethnic market
JNB	Johannesburg	High corporate traffic demand

# SCHEDULED AIRLINES

## Skyteam



## Oneworld



## Star Alliance



## Legacy Carriers



## Low Cost Carriers



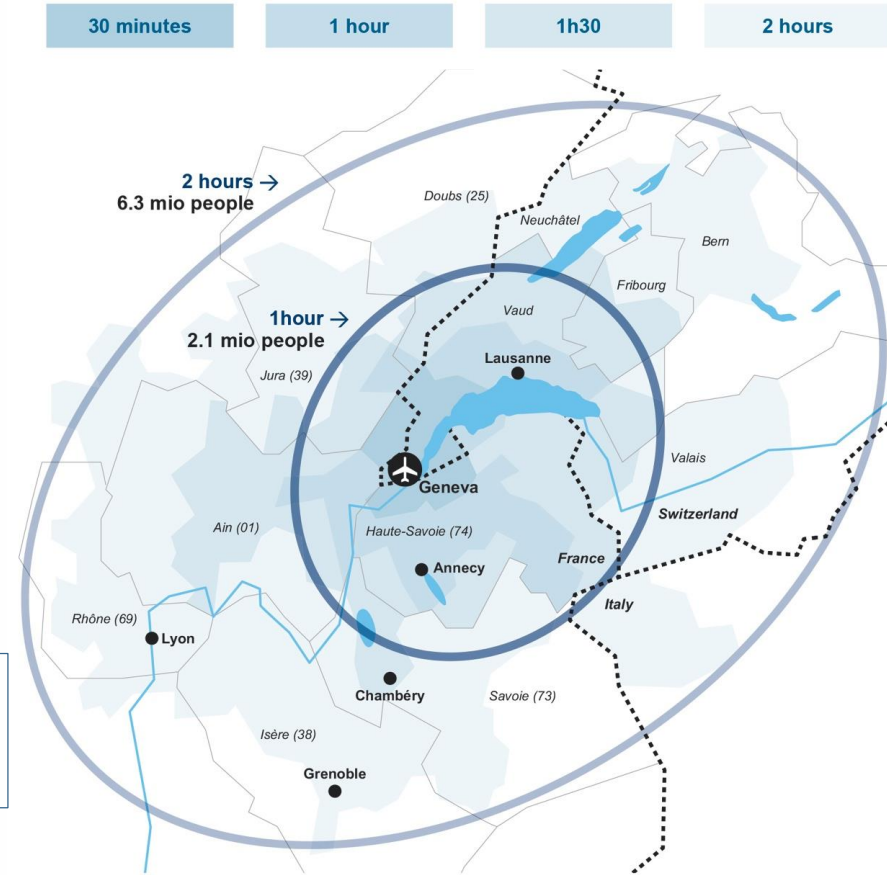
# CATCHMENT AREA

Genève Aéroport is a real multimodal airport with an easy access by:

- Public transportation: 9 bus city lines; efficient taxi service and hotel shuttles; regular coaches to Annecy, Chambéry, Grenoble, Lyon
- Road: connected to Swiss and French highway networks
- Rail: train station within the airport connected to regional and international networks (170 trains/day); 7 min to reach Geneva city center



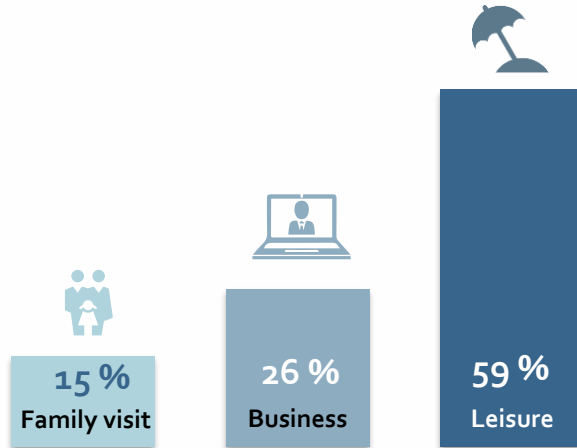
New regional rail network launched in December 2019 with direct access to 45 train stations including ski resorts



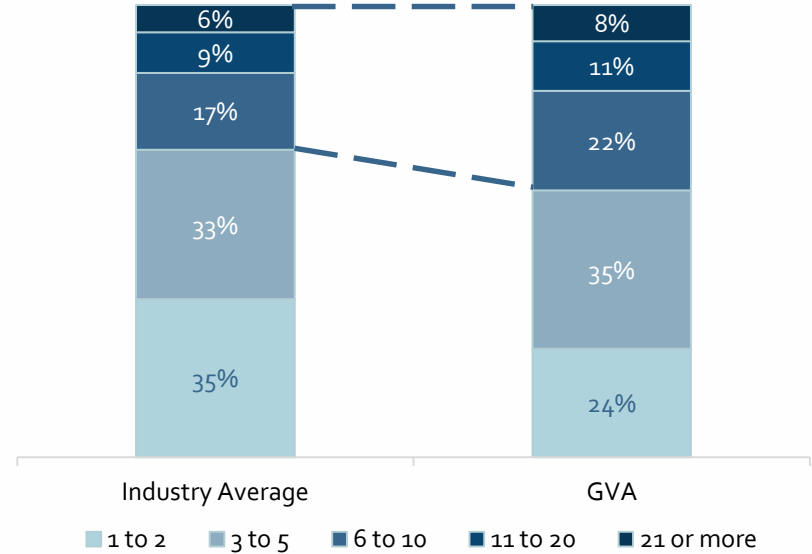


# TRAVELERS PROFILE

## Reason of travel



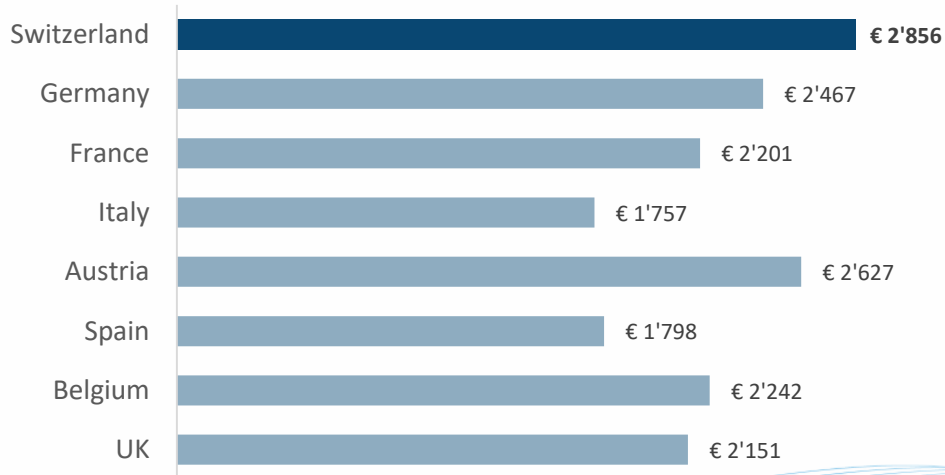
## Number of trips per year



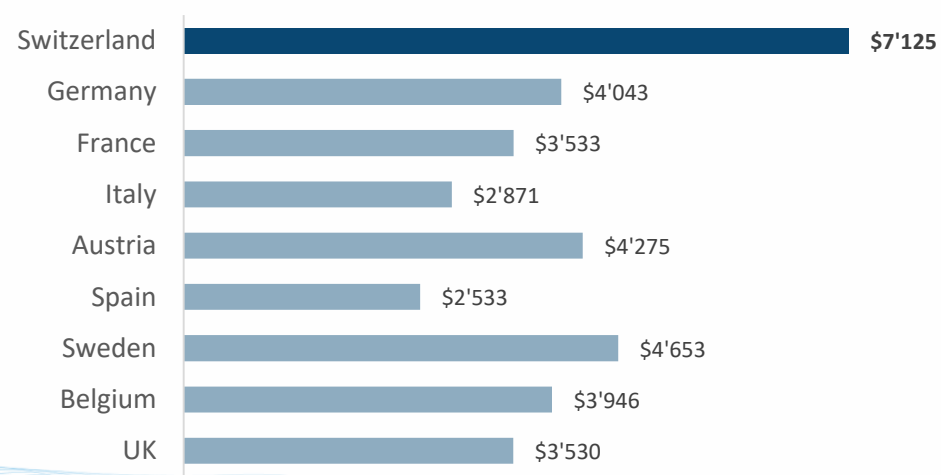
# HIGH PURCHASING POWER

- Swiss households generally earn high income and allocate higher budget for holidays compared to other main Western Europe countries.
- The majority of Swiss tourists prefer traveling abroad for holidays: **57%** in Summer 2022 according to a recent study, which is the 2<sup>nd</sup> top result in European countries behind Austrian at 58%.

Average budget for summer holidays



Average monthly salary

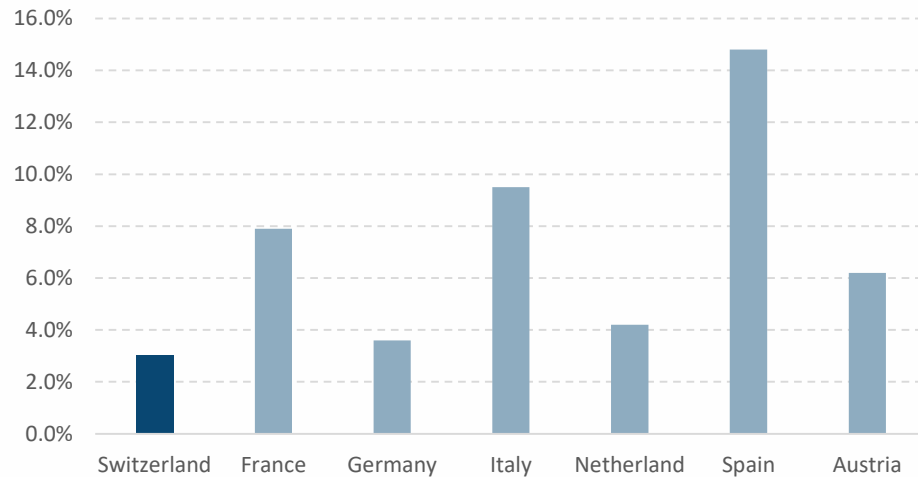


Source: OFS, INSEE, OECD, OpinionWay (Allianz Partners)

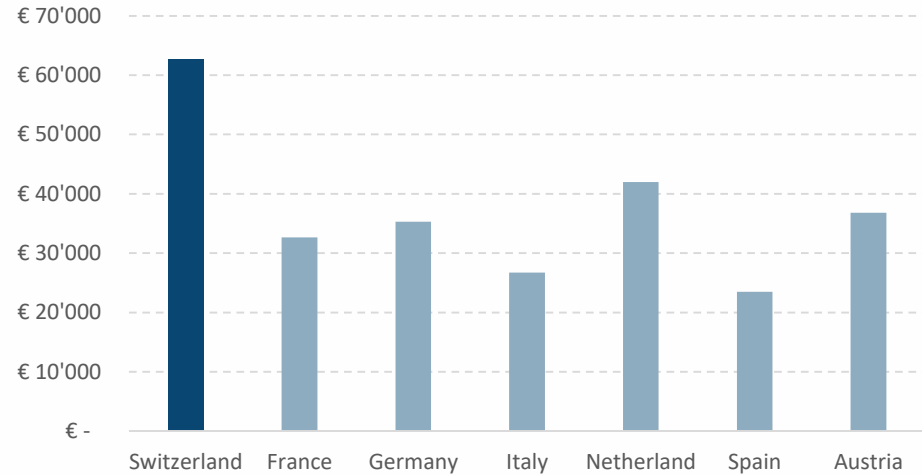
# STRONG ECONOMY

- Switzerland has a strong GDP/capita and very limited unemployment.

Unemployment % 2021



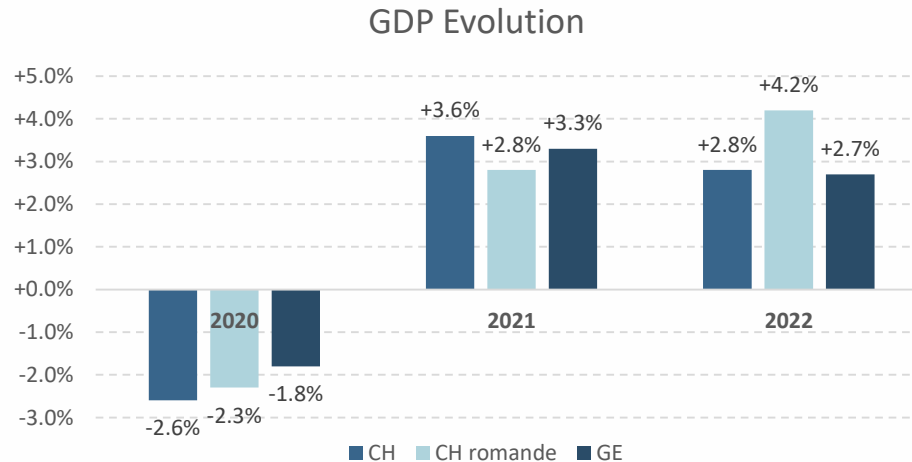
GDP/Capita 2021



Source: SECO, OFS, OECD

# GDP EVOLUTION

- The French-speaking side of Switzerland (aka CH romande) is growing faster than the rest of the country.



- Moreover, the Swiss GDP performed better than neighboring countries during the post-pandemic recovery phase.

# GENEVA INTERNATIONAL CITY & DIPLOMATIC CAPITAL

- International Geneva is the heart of the world global governance
  - 38** International Organizations (IOs)
  - 380** Non-governmental Organizations (NGOs)
  - 177** States represented by a Permanent Mission
  - 32,107** persons employed in IOs, NGOs and permanent missions
  - 47,000** diplomats and int'l Civil Servants (incl. families)
  - 3,364** meetings and International conferences
  - 221,166** delegates and experts attending



ICRC



# MULTINATIONAL CORPORATIONS

- There are **1'651 multinational companies** in the GVA catchment area.
- Multinationals account for **90'688 jobs** in Geneva (i.e.: 29% of total employment in the city) and **88'000** in the canton Vaud.
- **190 different nationalities** are represented among the population (41% of Geneva's residents are foreign nationals).
- The city counts **130 EMEA headquarters** due to its central location in Europe and proximity to Africa and the Middle East.



# FINANCIAL CENTER

- Geneva is the birthplace and capital of international asset management with **120 banking firms**, **3'200 financial intermediaries** and **870 independent asset managers** counting more than **35'000 employees** (including insurance and law firms).

Foreign-controlled banks in Geneva



EDMOND  
DE ROTHSCHILD



# TRADING & SHIPPING

- Thanks to its advantageous geographical position at the crossroads of European commercial routes, Geneva offers a unique and multilateral platform for the negotiation and improvement of the international management of commodities.
- The commodity trading sector in Geneva consists of **311** international trading, certification and shipping companies, and approx. **4'200** persons employed in the sector.
- Geneva hosts approx. 40% of global transactions and 50% of world traded coffee and sugar.





# PHARMACEUTICAL & BIOTECH/MEDTECH

- Geneva is part of BioAlps, the life science cluster in Western Switzerland:
  - **750** biotechnology, pharma and medtech companies
  - **500** research laboratories
  - **20** research institutions, universities and university hospitals with relevant capabilities and expertise
  - Numerous organizations supporting innovation (start-up incubators, science parks, venture capital funds, contract service organizations)
  - **20'000** people employed in companies and **5'000** researchers
- With the lengthening life expectancy and intensification of chronic diseases, global health care spend is expected to grow at 5% annually in the long-term.

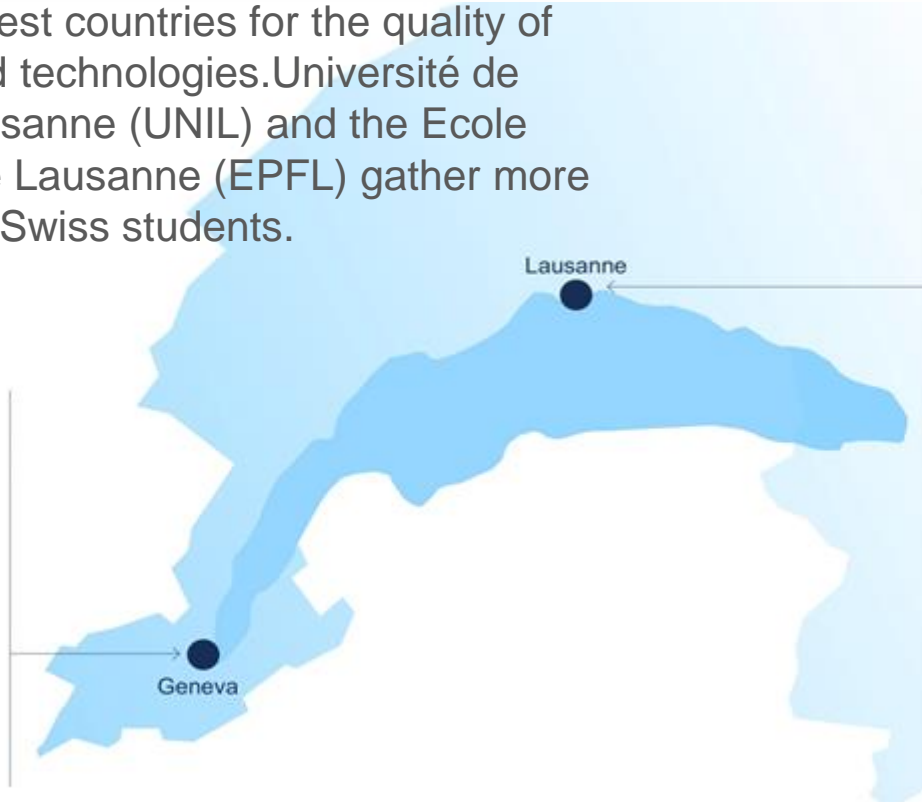


# EDUCATION & RESEARCH

- Switzerland is one of the best countries for the quality of its education, research and technologies. Université de Genève, Université de Lausanne (UNIL) and the Ecole Polytechnique Fédérale de Lausanne (EPFL) gather more than **27% (35'700)** of total Swiss students.



World largest research centre  
in particle physics.  
Birthplace of the World Wide Web (www)



ÉCOLE POLYTECHNIQUE  
FÉDÉRALE DE LAUSANNE

1st European University in  
the Engineering and IT  
category (Academic Ranking  
of World Universities)



1st in Executive Education  
outside the US and 2<sup>nd</sup>  
worldwide (Financial Times)



Unil  
UNIL | Université de Lausanne

# BUSINESS FAIRS & CONFERENCES

- MICE industry is again extremely active in the Geneva region with international fairs & conferences attracting visitors from around the world.

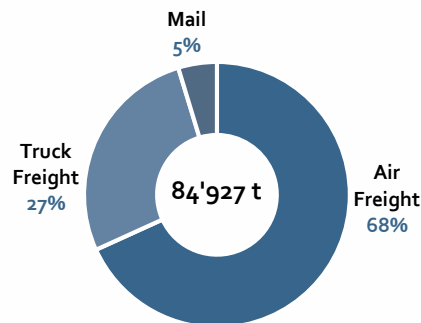


# FREIGHT ACTIVITY

- Genève Aéroport offers a modern cargo terminal :
  - Warehouse: 24'000 m2 - Capacity: 100'000t/year
  - Refrigerated storage (Pharma & Perishables)
  - Safes for valuables
  - Handling room for radioactive goods
  - Loading platform adjustable for any type of lorry
  - Free ports (10'000m2) inside the freight terminal
  - French customs with possibility of direct customs clearance from the cargo building to all countries of the European Union
  - Very short consignment time: 70-90 min. on average
  - Reliability of services (punctual dispatch, no strikes, security for goods)

<b>Switzerland</b>	<b>2022</b>	<b>2023</b>
Evol. Exports of goods %	+4.2%	+3.7%
Evol. Imports of goods %	+4.7%	+3.9%

Total Freight 2019



<b>Main imported goods</b>	<b>Main exported goods</b>
Spare parts for machinery	Chemical and pharma products
Perishables	Watches, jewelry
Electronic components	Machinery
Computer equipment	Electronic components

# NEW EAST WING

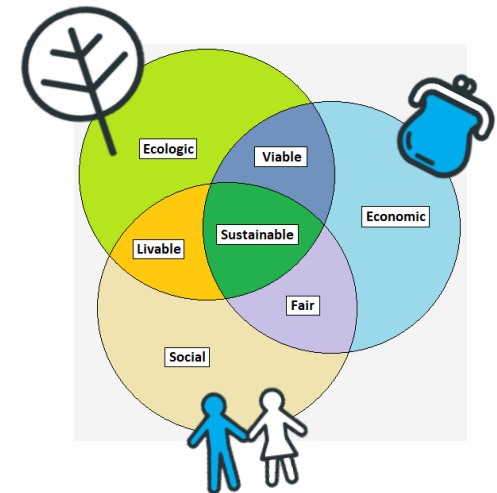
- New pier dedicated to wide-body aircrafts.
- 6 stands for wide-body aircrafts + 1 for narrow-body (or mixed utilization with more stands).
- Start of operations on **14-December 2021**.
- Processing capacity of 3'000 pax/hours.
- Possibility to have Premium class dedicated gate.



- Design by Rogers Stirk Harbour + Partners (LHR-Terminal 5, MAD-Terminal 4).
- Positive-Energy Building:
  - 7'000 m<sup>2</sup> photovoltaic solar panels
  - Refrigerated through Geneva Lake (Genilac)

# ENVIRONMENTAL EFFORTS

- Since 2018, Genève Aéroport holds the ACA3+ accreditation from ACI, which is the highest level that certifies its carbon neutrality.
- This is achieved by providing funds or resources to other projects that reduce carbon dioxide so as to make up for the emissions that the airport is not able to eliminate yet.
- The airport infrastructure is continuously renovated in order to gain energetic efficiency, e.g.:
  - 13,500 m2 photovoltaic solar panels
  - 6 fully electric busses for pax transportation
  - New East Wing fully autonomous in electricity
  - Lake Geneva water used for heating and cooling of buildings
  - A specific noise absorber hangar to run engine tests is operational since 2016
- Free public transport tickets are available for arriving pax to reach Geneva city center, and free night buses available for pax departing with early flights.



# NEW GENERATION AIRCRAFT SUPPORT

- Genève Aéroport adopted a scheme that recognizes the operation of new generation aircraft on the “best-in-class” principle.
- Narrow body aircraft categorized in **noise class 5** as well as wide-body aircraft categorized in **noise class 4** according the Swiss AIP shall be entitled to the following rebates :
  1. discount of **20%** on the **landing charge**
  2. reduction of **CHF 0.40** on the **PSC** per departing passenger
  3. bonus on landing charges for incremented movements of NewGen aircrafts
  4. credit on the PSC if the load factor for a given year is greater then or equal 80%
- As an example, the benefit of an aircraft change from an A330-300 to a B787-8 can reach **CHF ~500'000** per year for a daily operation.

# AIRPORT CHARGES COMPARISON

Average charges for a long-haul operation

