

# GENÈVE

AÉROPORT

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Geneva  
Your High Yield Market

Summer 2012

# Key Facts & Figures

## Pax Traffic

- **13.1** million passengers in 2011
- **+10.5 %** traffic increase

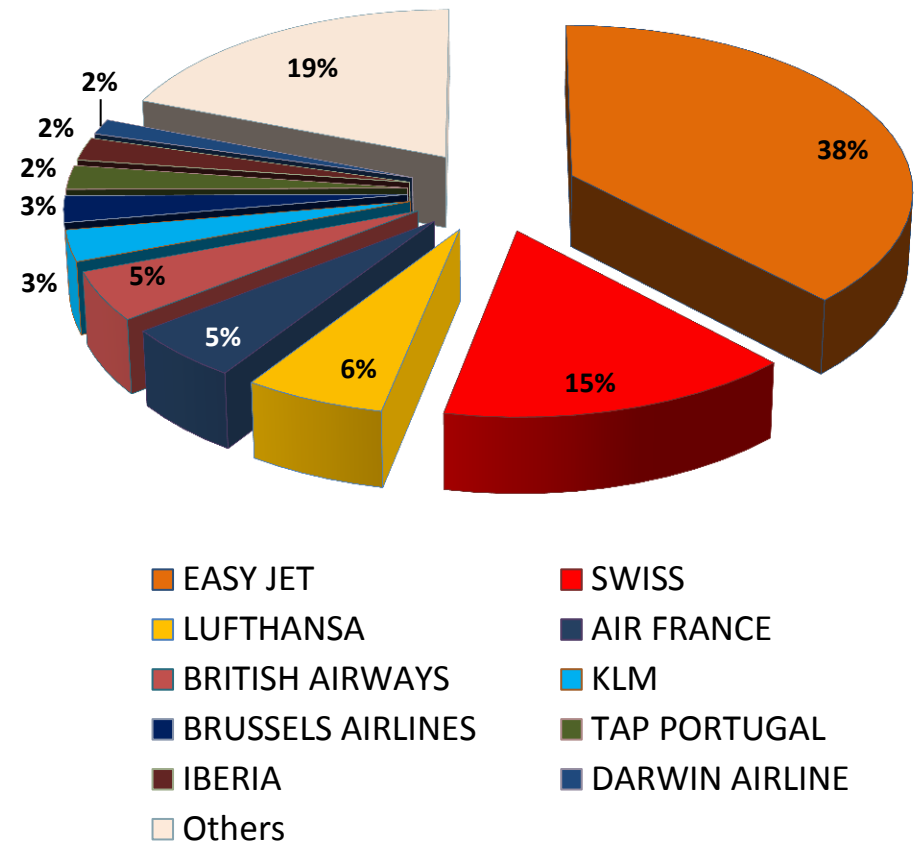
## Route Network

- More than **100** scheduled destinations
- And more than **50** scheduled airlines serving 4 continents

## Catchment Area

- Catchment area over 3 countries (Switzerland, France, Italy)
- Highest concentration of international organizations and multinational companies
- Major touristic spots within 2 hours

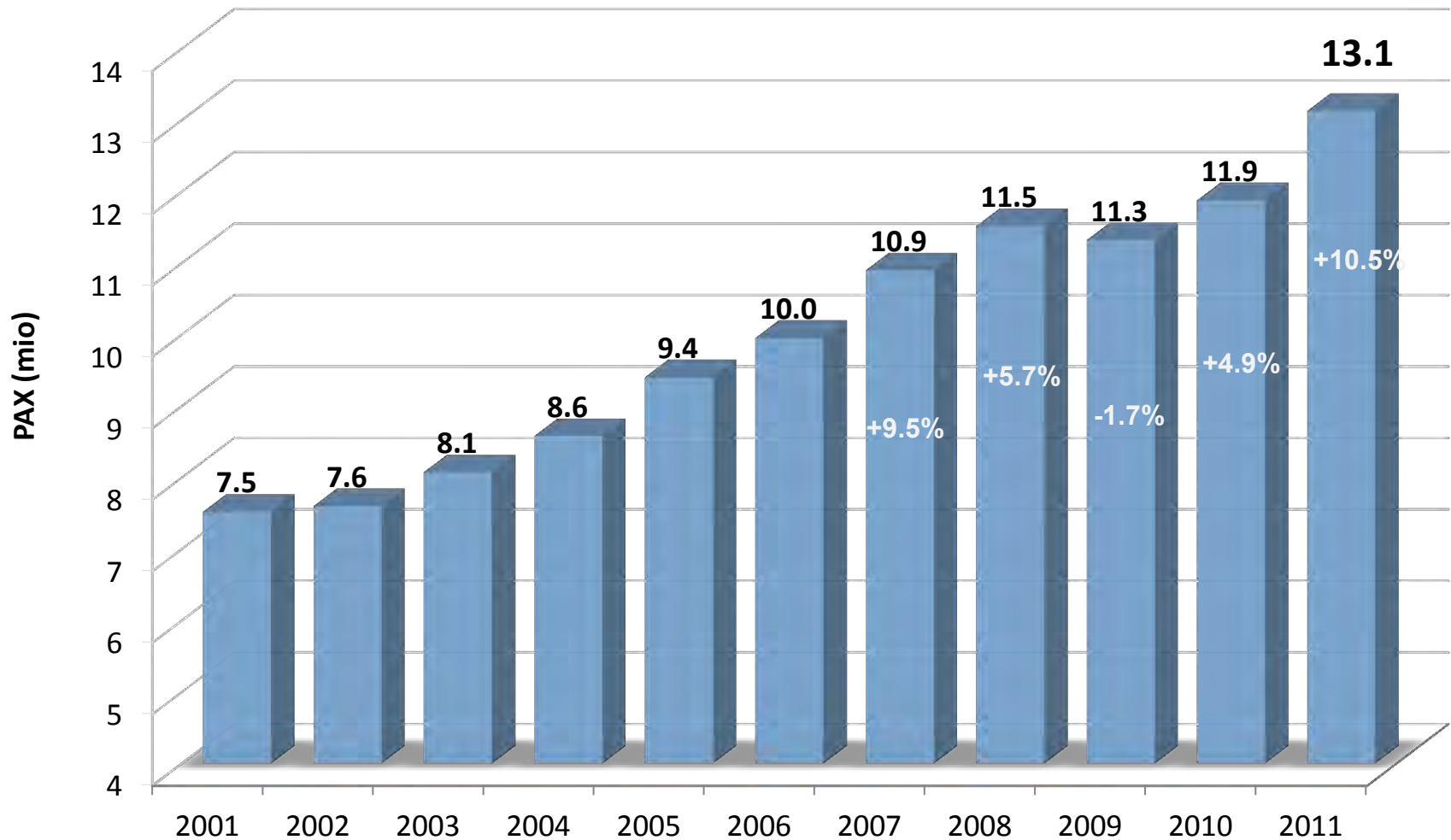
## Main Airlines\*



\* Based on GVA scheduled traffic for full year 2011

Source: GVA Airport,

# Traffic Evolution



# Current Scheduled Carriers

## SKYTEAM



## ONEWORLD



## STAR ALLIANCE



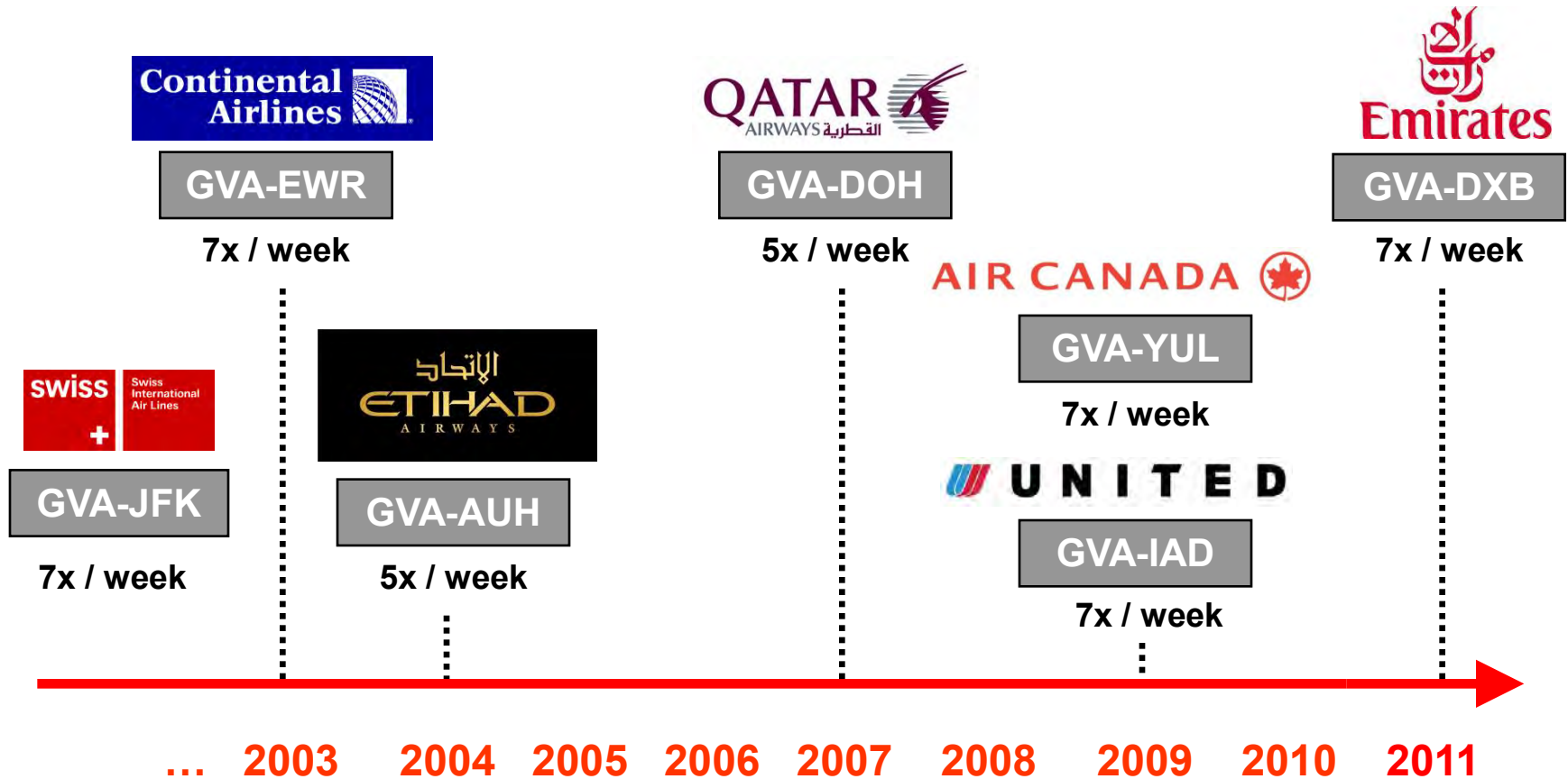
## Legacy Carriers



## LCC



# GVA Long-Haul Development



# Flight Network – Summer 2012



➔ **104 destinations**

- 80 European
- 24 Intercontinental

➔ **50 airlines**

- 31 European
- 19 Intercontinental

# Catchment & Access

- **8 mio** people are living within 2 hours drive from the airport



## 1 hour

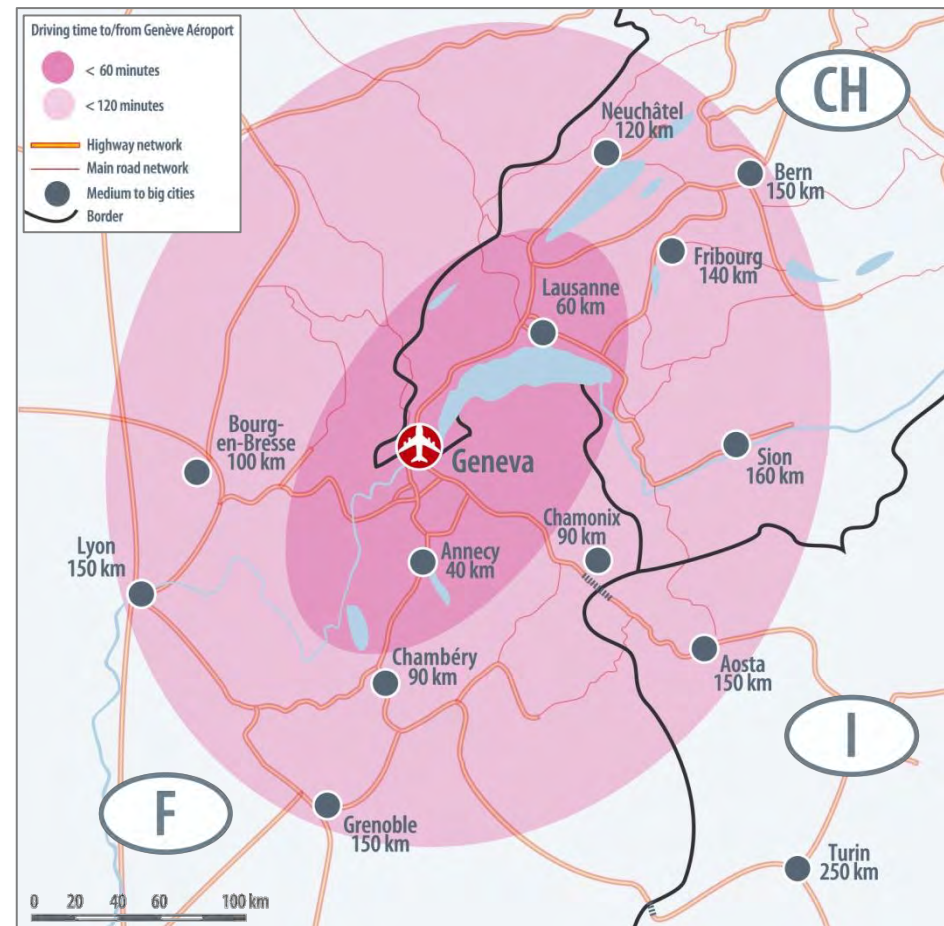
- **Switzerland: 1 mio**
- **France: 1 mio**

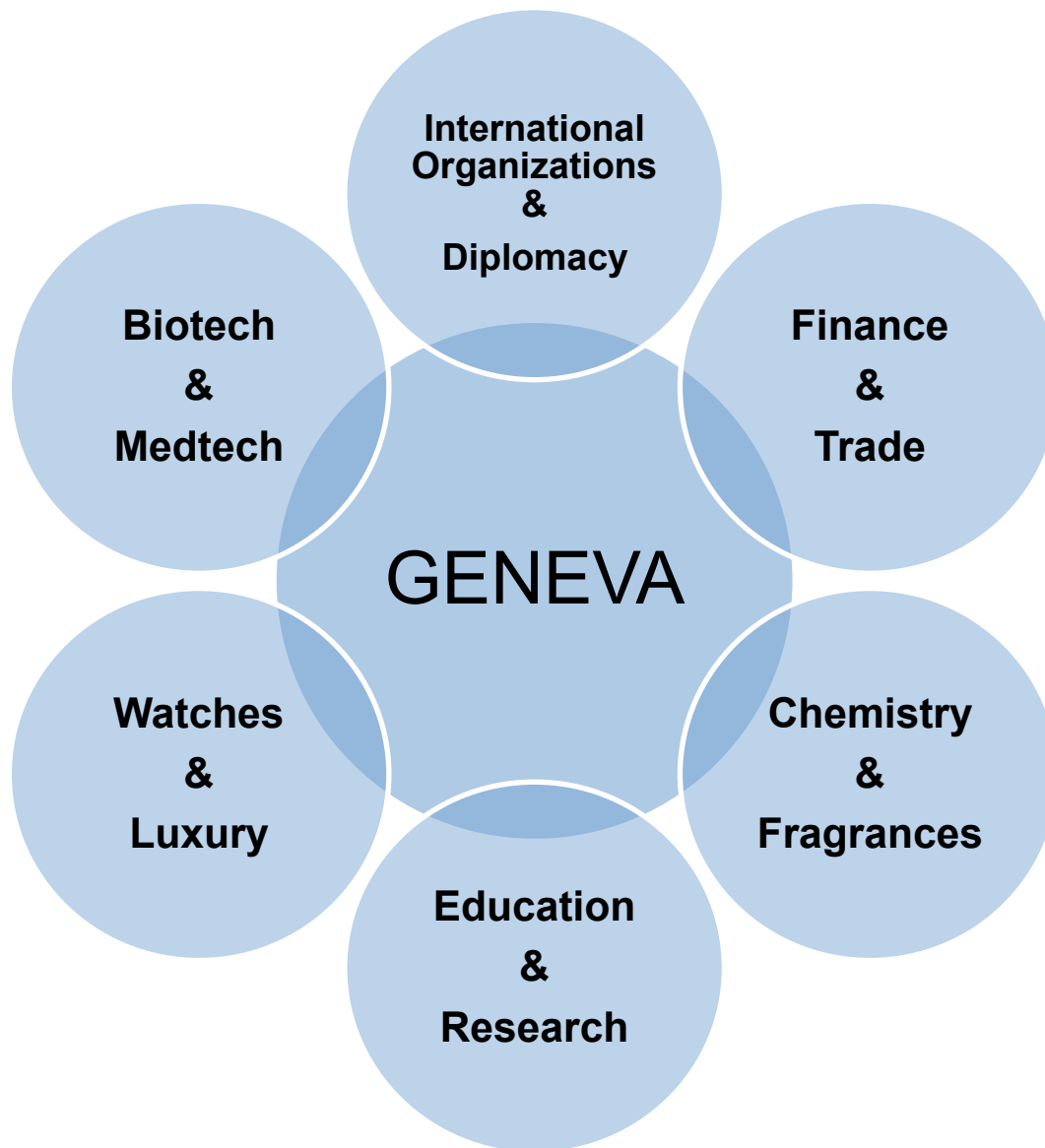
## 2 hours

- **Switzerland: 2.4 mio**
- **France/Italy: 3.6 mio**

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

- **Rail:** train station within the airport; connected to regional and international networks (170 trains/day); 6 min to reach Geneva city center
- **Public transportations:** 6 bus city lines; efficient taxi service and hotel shuttles; shuttle to Chambéry and Grenoble
- **Road:** connected to Swiss and French highway networks





# Geneva International City & Diplomatic Capital

- International Geneva is the heart of the world global governance:
  - **29** major Intergovernmental Organizations employing around **21,500** persons
  - **250** NGOs and **30** sports federation (mainly in Canton de Vaud) with around **2,300** employees
- Geneva is the first center for diplomatic meetings and conferences in the world:
  - **242** missions, permanent representatives and delegations
  - **40,000** diplomats and int'l Civil Servants (incl. families)
  - **3,000** visits by Heads of State, Ministers and other officials
  - **2,700** meetings and International conferences
  - **173,000** delegates and experts attending



# Financial Center & World Trading Capital



- Switzerland manages around **30%** of the world's private offshore assets
- Geneva is the birthplace and capital of international asset management
- **140** banking firms (of which 60 are foreign-owned) and **770** independent asset managers offer their expertise
- More than **35,000** employees (including insurance and law firms)
- Geneva ranks **1<sup>st</sup>** in commodity trading (1/2 of world trade in coffee, 1/2 of world trade in sugar), in finance of commodity trading as well as in inspection and certification
- The sector employs **8,000** persons in **500** companies
- The trading sector in Geneva generates a turnover of **CHF 800 billion** with an annual growth rate of **5%** and represents **2.5%** of the total Swiss GDP



- **Bio Alps**: Is one of the major European centres for biotech and medtech research with:
  - **750** bio- and medical technology companies
  - **500** research laboratories and over **20** world-famous research institutions, universities and university hospitals
  - **25,000** science professionals and **5,000** researchers
  - **~85%** of Swiss medtech products exported
  - **10%** annual growth rate

➔ **1st European centre for research in the industry**



ÉCOLE POLYTECHNIQUE  
FÉDÉRALE DE LAUSANNE



Hôpitaux Universitaires de Genève



sanofi aventis



# Education & Research

- Switzerland is one of the best countries for the quality of its education, research and technologies

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

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

The image features a map of Switzerland in shades of blue, with the cities of Geneva and Lausanne marked with white dots. Surrounding the map are logos for several institutions: **UNIVERSITÉ DE GENÈVE** (top left), **Webster UNIVERSITY** (top center), **ÉCOLE POLYTECHNIQUE FÉDÉRALE DE LAUSANNE** (top right), **THE GRADUATE INSTITUTE | GENEVA** (center left), **IMD** (center right), **Hes·SO** (bottom left and bottom right), **HUG Hôpitaux Universitaires de Genève** (bottom left), **CERN** (bottom left), and **Unil UNIL | Université de Lausanne** (bottom right).

**UNIVERSITÉ DE GENÈVE**

**Webster UNIVERSITY**

ÉCOLE POLYTECHNIQUE FÉDÉRALE DE LAUSANNE

**THE GRADUATE INSTITUTE | GENEVA**  
INSTITUT DE HAUTES ÉTUDES INTERNATIONALES ET DU DÉVELOPPEMENT  
GRADUATE INSTITUTE OF INTERNATIONAL AND DEVELOPMENT STUDIES

**IMD**

**Hes·SO**  
Haute Ecole Spécialisée de Suisse occidentale  
Fachhochschule Westschweiz  
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University of Applied Sciences Western Switzerland

**CHUV**

**Geneva**

**Lausanne**

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

# Multinational Companies

- **930** Multinational Corporations employing more than **76,000** people have offices in Geneva



- Many Swiss global leaders are located within the airport's catchment area



- Recent new relocations in Geneva:

2011



2010

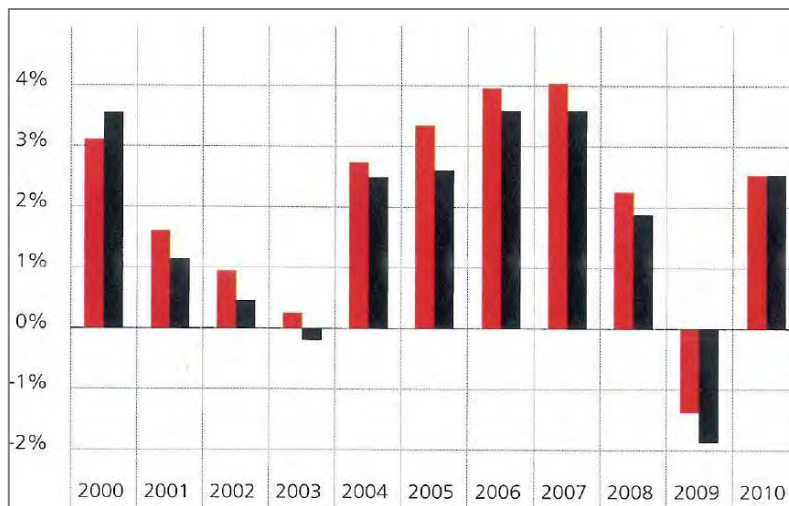


2009



# Strong Macroeconomic Indicators

- Switzerland has been ranked **1<sup>st</sup>** for its competitiveness by the World Economic Forum
- Switzerland is one of the richest country in the world (participation to the GDP: 70,000 CHF per inhabitant) and Geneva region is even richer with a per capita GDP of 95,000 CHF
- The evolution of the Geneva GDP comparing to the total Swiss GDP shows the important dynamism of the area



█ Geneva Region GDP  
█ Swiss GDP

<u>GDP</u>	2001-2010 (average evolution)	2011
Geneva Region (GR)	+2%	<b>+2.2%</b>
Switzerland (CH)	+1.6%	<b>+1.8%</b>
European Union (EU)	+1.3%	<b>+1.7%</b>

# Major Touristic spots



Paléo Festival  
(Nyon)



Montreux Jazz Festival



Gruyères Castle



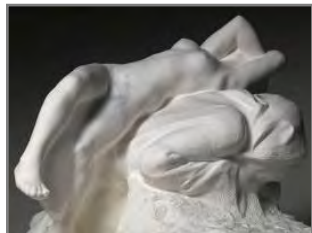
Château d'Oex Festival



Fêtes de Genève  
(Geneva)



Gstaad Open



Gianadda Foundation  
(Martigny)



Chamonix / Mont Blanc



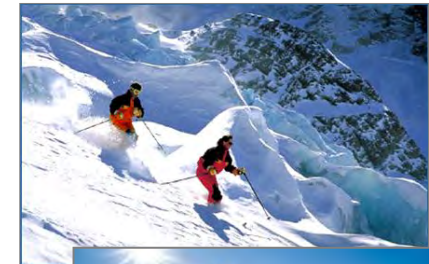
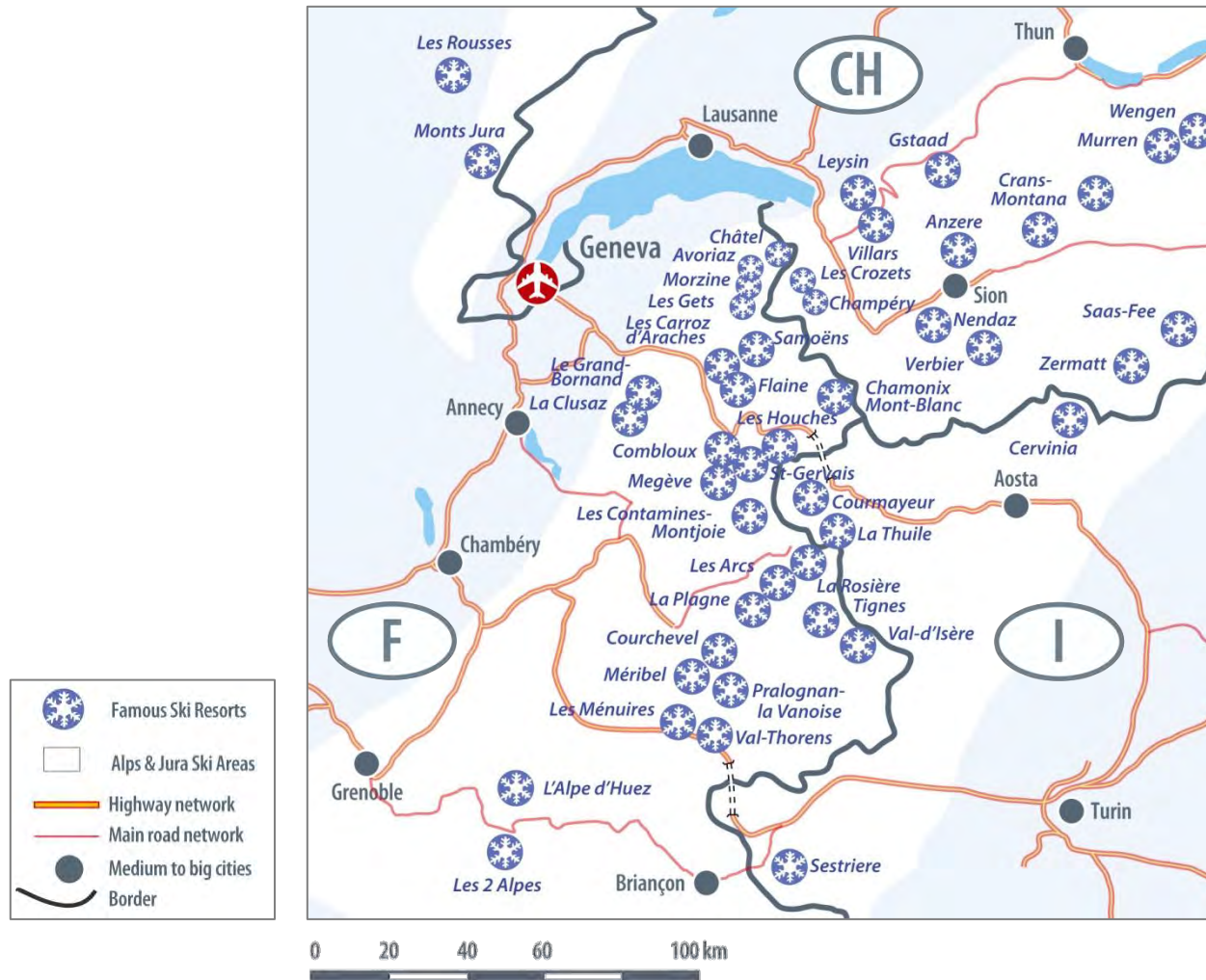
Chillon Castle (Veytaux)



Cervin / Matterhorn  
(Zermatt)

# Winter Sport Gateway

- Within **3 hours** drive from Genève Aéroport the largest ski area in the world gives access to more than **200** ski resorts

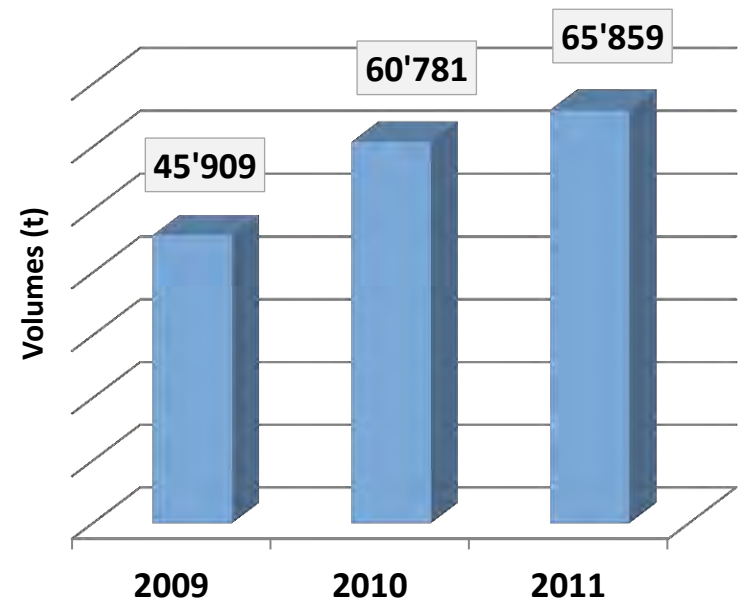


# Freight Activity

- The cargo terminal of Genève Aéroport is a real multimodal platform located in the heart of Europe and equipped with all modern facilities

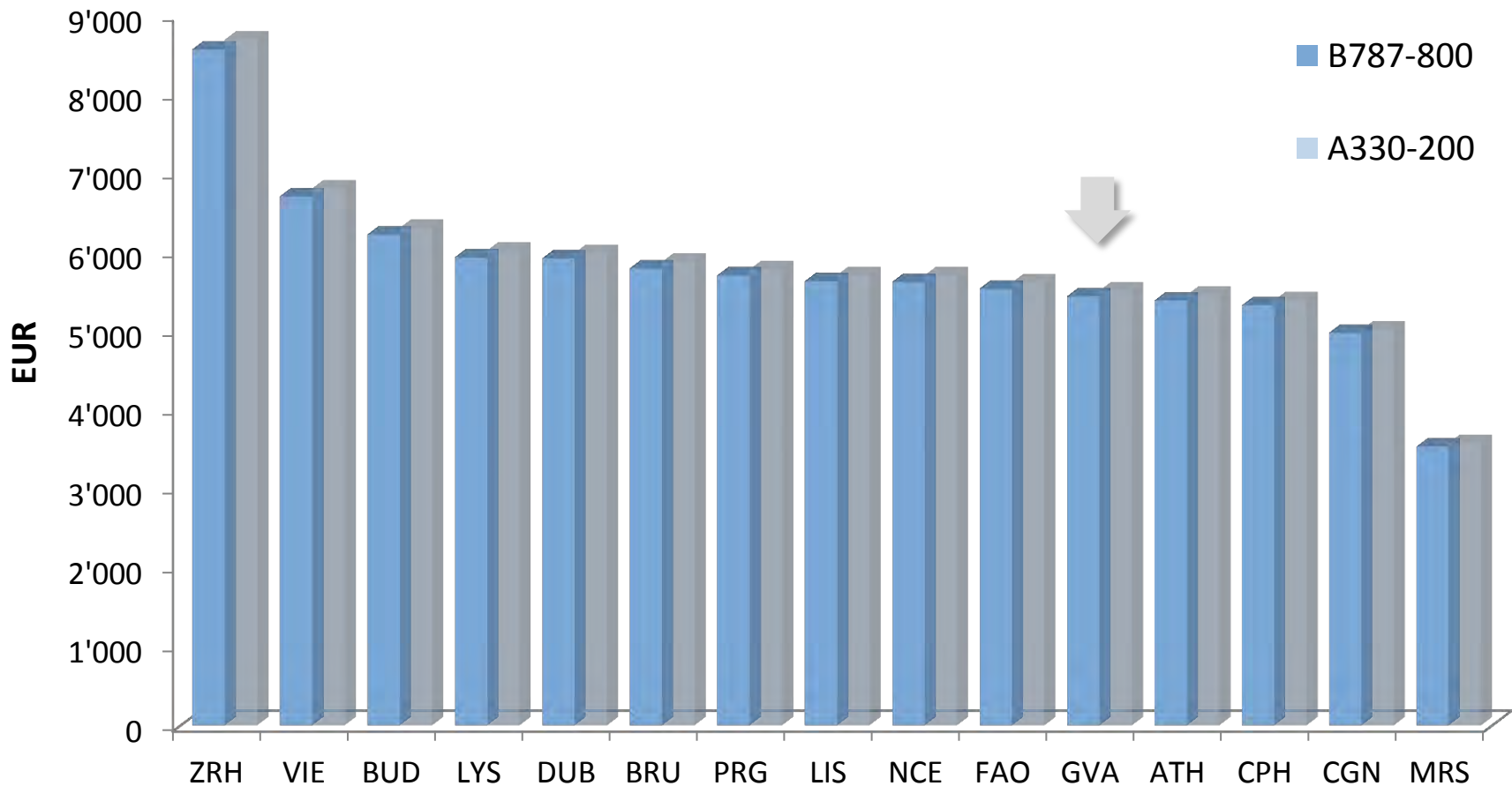


- Handling capacity of **80,000 tons/year**
  - Swiss and French customs (intra European customs clearing possibilities)
  - Strong rooms for valuables (**650 m<sup>2</sup>**)
  - 40 forwarders within the airport
  - High security level
  - Fast consignment (average 90 min.)
  - Warehouse: **24,000 m<sup>2</sup>**
  - Refrigerated rooms (perishables and medicines)
  - Handling room for radioactive goods
  - Heated storerooms during the winter
- **40** airlines have cargo operations in GVA
  - Cargo traffic volumes\* grew by **43%** in 3 years reaching nearly **66,000** tons in 2011



# Comparison of Airport Charges

- Average charges for an International Operation (including all charges related to landing, noise, emission, terminal navigation, parking, passenger, security, etc.)



1

## Exploratory Phase

- **Airport cost analysis**
- **Route feasibility studies**
- **Market research & statistics**
- **Administrative support** (regulation, government, operational contacts, etc.)
- ...

2

## Launching Support

- **PR & Events** (BtoB launching event, press release, conference, etc.)
- **Airport Advertising** (outdoor megasurface billboard, flags in check-in hall, etc.)
- **E-marketing** (banner on airport website, on-line prize draw)
- **Marketing & Sales support** (destination leaflet, dedicated workshop, promotion on airport stand in public faires, etc.)
- ...

3

## Long-term Commercial Support

- **Follow-up of commercial and traffic results**
- **E-marketing** (banner on airport website, on-line prize draw)
- **Marketing & Sales support** (destination leaflet, dedicated workshop, promotion on airport stand in public faires, etc.)
- ...

# Commercial Incentives

- Discount for new destination (based on landing fees)

Short-haul routes		Long-haul routes	
Periods (6 months each)	Rebate	Periods (1 year each)	Rebate
1 <sup>st</sup> period	80%	1 <sup>st</sup> period	80%
2 <sup>nd</sup> period	60%	2 <sup>nd</sup> period	60%
3 <sup>rd</sup> period	40%	3 <sup>rd</sup> period	40%
4 <sup>th</sup> period	20%	4 <sup>th</sup> period	20%

### Conditions

- New destination for airport & not operated during 12 months
- Scheduled flight & year-round
- Applicable only to landing fees (not to surcharges and ATC)

- Passenger growth scheme

Annual Pax Growth	Refund
≥ 5%	3.5%
≥ 10%	6%
≥ 15%	10%
≥ 20%	15%
≥ 25%	20%

- Growth calculated on a yearly basis (January to December)
- Refund based on the passenger service charge (PSC) collected during the period (CHF 11 per pax)
- Current policy valid for 2011-13 period

## New “East Wing” (2012-2016)

- New dedicated wide-body terminal under design by Rogers Stirk Harbour + Partners (LHR-Terminal 5, MAD-Terminal 4)
- Total investment of € 270 millions
- 530 m. long and 40,000 sq. m. of useful surface
- 6 stands for « code E » aircrafts + 1 for « code C » (or mixed utilization with 3 « code E » and 7 « code C » for example)
- Short-walking distances and full-comfort waiting areas with some shopping facilities
- Flexibility Schengen / Non-Schengen

