GENEVA
YOUR HIGH YIELD MARKET

www.gva.ch/b2b
2020

REACH NEW HEIGHTS
**Pax Traffic**
- **17.9** mio pax in 2019.
- **+1.4 %** traffic increase.

**Route Network**
- **149** scheduled destinations.
- **57** 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.

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**Key Facts & Figures**

**Scheduled Airlines**

- **28% Star Alliance**
- **10% Skyteam**
- **8% Oneworld**

- easyJet
- Swiss
- British Airways
- Air France
- Klm
- Iberia
- Tap Portugal
- Brussels Airlines
- Lufthansa
- Emirates
- Others

Source: Genève Aéroport
<table>
<thead>
<tr>
<th>Year</th>
<th>Million of pax</th>
<th>Change %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>11.9</td>
<td>+10.5%</td>
</tr>
<tr>
<td>2011</td>
<td>13.1</td>
<td>+5.9%</td>
</tr>
<tr>
<td>2012</td>
<td>13.9</td>
<td>+3.9%</td>
</tr>
<tr>
<td>2013</td>
<td>14.4</td>
<td>+5.0%</td>
</tr>
<tr>
<td>2014</td>
<td>15.2</td>
<td>+4.1%</td>
</tr>
<tr>
<td>2015</td>
<td>15.8</td>
<td>+4.8%</td>
</tr>
<tr>
<td>2016</td>
<td>16.5</td>
<td>+5.0%</td>
</tr>
<tr>
<td>2017</td>
<td>17.4</td>
<td>+1.9%</td>
</tr>
<tr>
<td>2018</td>
<td>17.7</td>
<td>+1.4%</td>
</tr>
<tr>
<td>2019</td>
<td>17.9</td>
<td>+0.0%</td>
</tr>
</tbody>
</table>

Source: Genève Aéroport
GVA LONG-HAUL DEVELOPMENT

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2003

Continental Airlines

GVA-EWR 7x / week

2004

2018

Ethiopian

GVA-ADD

3x / week (now 4x)

June 2019

GVA-JFK 7x / week

2007

2013

AIR CHINA

GVA-PEK

4x / week

GVA-DOH 5x / week (now 7x)

2009

GVA-DXB

7x / week (now 14x)

GVA-YUL 7x / week

2011

GVA-NBO 4x / week

GVA-IAD 7x / week

2019

GVA-ADD 3x / week (now 4x)

GVA-AUH 5x / week (now 7x)

Emirates

Kenya Airways

The Pride of Africa

QATAR AIRWAYS

UNITED

AIR CANADA
DESTINATIONS SUMMER 2020
• A recent study carried by AirPlus International shows that more than half of passengers travelling via Genève Aéroport to intercontinental destinations are high-yield travelers.

• The proportion of frequent travelers is higher than industry average.

• GVA benefits from a good mix of passengers profile in terms of age and residency.

Source: Genève Aéroport Service Quality (ASQ) satisfaction survey; GVA Arrivals Survey; AirPlus International Survey
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 - 10x/day
  - Chambéry - 6x/day
  - Grenoble - 6x/day
  - Lyon - 3x/day
- 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

Source: OFS; INSEE; ISTAT; Lemanis; Genève Aéroport.
GENEVA’S FIELDS OF EXCELLENCE

International Organisations & Diplomacy
Finance & Trade
Chemistry & Fragrances
Education & Research
Watches & Luxury
Biotech & Medtech
International Geneva is the heart of the world global governance:
- 34 International Organizations (IOs)
- 380 Non-governmental Organizations (NGOs)
- 177 States represented by a Permanent Mission
- 30,183 persons employed in IOs, NGOs and permanent missions
- 47,000 diplomats and int’l Civil Servants (incl. families)
- IOs annual expenses reached CHF 6.19 billion in 2017
- GDP contribution of IOs, NGOs, permanent missions and consulates is estimated at 11.3% in Geneva

Geneva is the first center for diplomatic meetings and conferences in the world:
- 3,000 visits by Heads of State, Ministers and other officials
- 3,364 meetings and International conferences
- 221,166 delegates and experts attending

Number of conferences organized by IOs in Geneva

Source: OCSTAT; Permanent Mission of Switzerland to the UN; Federal Department of Foreign Affairs; Republic and State of Geneva.
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.

Multinationals born in Geneva

Watchmaking Industry
- 69 companies active in the watchmaking industry, and 9’546 people employed in the sector

- Rolex
- Patek Philippe Geneve
- Cartier
- Piaget
- Breguet

Flavors and fragrances industry
- 1st world rank for the production of flavors and fragrances (70% share of global market)

- Givaudan
- Firmenich

Source: Geneva Economic Development Office, Geneva Multinational Companies (GEM), OCSTAT
• Switzerland manages around 26% of the world’s private offshore assets with 290 banking firms and 105,000 employees active in the financial sector.

• The potential long-term growth throughout the financial sector is around 2%, which is superior to the economy as a whole even though experts agree that growth rates equivalent to those in the 1990s or the pre-crisis boom will no longer be reachable.

• 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 37,000 employees (including insurance and law firms).

Source: Swiss Banking Association; Geneva Financial Foundation; BAKBasel.
• The trading and shipping sector in Switzerland represents an estimated 3.5% of the national GDP.

• 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 400 international trading, certification and shipping companies, and approx. 8’000 persons employed in the sector.

• Geneva hosts approx. 40% of global transactions and 50% of world traded coffee and sugar.

Source: Swiss Trading & Shipping Association; Geneva Economic Development Office.
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.

**New comers**  
Multinational pharma companies which have recently chosen Geneva for their operations:

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.

Source: SER; swissworld.org; EPFL; IMD; Cern; CCIG.
Switzerland is one of the richest and most successful countries in the world with a particularly low unemployment rate and an export-oriented economy specialized in high value-added products.

Geneva Area grows at a faster pace than Switzerland overall and Euro zone.

Source: Swiss Federal Office of Statistics; OCSTAT; Forum des 100; BCV; FMI
Around 1’200’000 travelers transit via Genève Aéroport each winter season to access the largest ski area in the world with more than 200 ski resorts within 3 hours drive.

Four of the Top 10 ski resorts per volume worldwide are located in the GVA area:

1. La Plagne
2. Saalbach Hinterglemm Leogang (AT)
3. SkiWelt Wilder Kaiser Brixental (AT)
4. Les Arcs
5. Ischgl/Samnaun Silvretta Arena (AT)
6. Whistler Blackcomb (CA)
7. Alta Badia (IT)
8. Val-Thorens
9. Courchevel Méribel
10. Vail (USA)

Source: International Report on Snow & Mountain Tourism 2015; Genève Aéroport
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)

**Total Freight 2019**

- Air Freight 68%
- Truck Freight 27%
- Mail 5%
- Total 84'927 t

**Main imported goods**
- Spare parts for machinery
- Perishables
- Electronic components
- Computer equipment

**Main exported goods**
- Chemical and pharma products
- Watches, jewelry
- Machinery
- Electronic components

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

Source: RDC Aviation
MARKETING SUPPORT

1. Exploratory Phase
   • Airport cost analysis
   • Route feasibility studies
   • Market research & statistics
   • Administrative support (regulation, government, operational contacts, etc.)
   ...

2. Launching Support
   • PR & Events (B2B 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.)
   ...

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NEW “EAST WING” PROJECT

- 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 in December 2020
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 centre, and free night buses available for pax departing with early flights.

Genève Aéroport supports and regularly takes part in fairs and events that promote a social, environmental and economically sustainable development.

Source: Genève Aéroport, ACI
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