Annex 9 – Passenger profile and estimated number of passengers increase

CONTENT

- Background
- Aviation transport
- Passengers

Prague Airport

Background

PRAGUE

- **CZECH REPUBLIC AMONG TOP 5 EU REGIONS**
  (GDP PER INHABITANT IN PPS, EUROSTAT 2016)

- **AMONG TOP 10 MOST POPULAR DESTINATIONS WORLWIDE**
  (TRIP ADVISOR 2017 TRAVELERS´ CHOICE)

- **6TH MOST PEACEFUL COUNTRY**
  (2016 GLOBAL PEACE INDEX BY THE INSTITUTE FOR ECONOMIC AND PEACE)

- **11TH BEST CONGRESS AND CONVENTION DESTINATION WORLDWIDE**
  (ICCA 2016)

Tourism

- 12 historical monuments on the UNESCO world heritage list in Prague
- record number of 9.3 mio (6.1 mio to prague) incoming tourists (+6.7%) in 2016
- **+10,1% incoming tourists 10/2016 - 09/2017**
- **+25,0% incoming tourists from Asia 10/2016 - 09/2017**

Source: Czech Statistical Office

Prague Airport

Catchment area

Catchment area	Population
within 60 minutes	2,700,000
within 90 minutes	4,900,000
within 120 minutes	8,500,000

Prague Airport

Prague airport facts nowadays 2017

Prague Airport

Aviation transport

Aviation transport

- **69 air carriers** operate scheduled flights to **163 destinations**
- Scheduled traffic of the largest aircrafts **A380** to Dubai (daily) and **B747-8i** to Seoul
- **Newly** launched lines in 2017:

Aarhus	Cracow	
Doha	**Xi´an**	*Hong Kong – cargo*
Keflavik	Tbilisi	*Turkmenbashi – cargo*

- **Future planned** flights in 2018:
  - May 2018 - American Airlines to Philadelphia (USA)
  - May 2018 - WizzAir to Kutaisi (Georgia)
  - June 2018 - increase up to 5 times per week Air Canada Rouge to Toronto (Canada)
  - October 2018 - Ryanair to Paris/Beuavais and Amman (Jordan)

Top 10 destinations 2017

Prague Airport total PAX

Prague Airport

Top 10 destinations – departures 2017

- **Terminal 2**
  - Schengen
  1. **Paris/CDG**
  2. **Amsterdam**
  3. **Frankfurt**
  4. Brussels
  5. Barcelona
  6. Helsinki
  7. Milan/Malpensa
  8. Rome/Fiumicino
  9. Copenhagen
  10. Zurich

- **Terminal 1**
  - Non-Schengen
  1. **Moscow/Sheremetyevo**
  2. **Dubai**
  3. **London/Heathrow**
  4. Tel Aviv
  5. London/Stansted
  6. London/Gatwick
  7. Istanbul
  8. Seoul/Incheon
  9. Dublin
  10. Kiev/Borispol

Prague Airport

Top 5 destinations 2017

- **Terminal 1 Pier A**
  1. **London/Heathrow**
  2. **Moscow/Sheremetyevo**
  3. **Tel Aviv**
  4. London/Gatwick
  5. New York/J.F.Kennedy

- **Terminal 1 Pier B**
  1. **Dubai**
  2. **Moscow/Sheremetyevo**
  3. **Istanbul**
  4. London/Stansted
  5. Seoul/Incheon

- **Terminal 2 Pier C**
  1. **Paris/CDG**
  2. **Frankfurt**
  3. **Amsterdam**
  4. Zurich
  5. Warsaw

- **Terminal 2 Pier D**
  1. **Helsinki**
  2. **Barcelona**
  3. **Milan/Malpensa**
  4. Amsterdam
  5. Rome/Fiumicino

Český Granát
Pilsner Urquell Original Restaurant
Pilsner Urquell
Original Restaurant
A5
A6-A9

Passengers

Expected development of passengers number by the year 2021 based on current trends

Prague Airport

Prague Airport

Comparison of the development of passengers number Europe/Prague Airport

* Source: ACI Europe

Prague Airport

Longterm prediction of passengers growth

Prediction of growth of passengers 2018-2035

- It is expected that the markets of Eastern Europe will grow at a rate faster than the more mature Western Europe
- **Prague = the most important airport** in Central and Eastern Europe
- A large number of **opportunities for new services from/to Prague**
- Prediction **of above-average economic growth for the Czech Republic**

* Source: IATA 20 years passenger forecast - Compound Average Growth Rate (CAGR)

** Source: prediction LP of the annual growths of passengers 2018-2035

Prague Airport

Growth contributors

- **Growing economies**
- **Attractiveness** of the Czech Republic and Prague
- **Location** in Central Europe
- **Safety** of the Czech Republic
- **"Brand"** of Prague Airport (B2B, B2C)

Prague Airport

Passenger growth trend

- **An average of 42 200 passengers pass through the airport daily.**
- There was a reversal of passengers from **Russia**, after a decline in previous years from the end of the year 2016 the number rises again **(+25%)**.
- The second year is experiencing very rapid growth in the number of passengers from China **(+90%)**.
- Growing number of passengers to **Paris, Amsterdam, Frankfurt,** and the Middle East (**Dubai, Tel Aviv**)

Prague Airport

2017 **15.4 million passengers** (+18%)
2018 the assumption of an increase passengers of **9% (16,8M PAX)**

Terminal 2
Schengen

57% passengers

18% annual growth

Terminal 1
Non-Schengen

43% passengers

19% annual growth

Prague Airport

Basic indicators 2017

- **63**% foreigner and **37**% Czechs
- **48**% women and **52**% men
- **31**% realization of purchases
- **57**% purchase snacks
- **25**% business and **75**% private-according to the purpose of the journey

Source: PPM Factum 2017, Prague Airport 2017

Prague Airport

Passengers structure

TRAFFIC REPORT - 2017

TRAFFIC RESULTS

	JAN-DEC 2016	JAN-DEC 2017	Y/Y CHANGE
Total Passengers	**13 074 517**	**15 415 001**	**17,90%**
International	13 037 600	15 381 231	17,98%
Domestic	36 917	33 770	-8,52%
Scheduled	12 462 417	14 895 854	19,53%
Non-scheduled	612 100	519 147	-15,19%
Passengers on departure	**6 537 352**	**7 705 091**	**17,86%**
Local Passengers	6 279 476	7 461 607	18,83%
Transfer passengers	179 292	207 374	15,66%
Transit passengers	78 584	36 110	-54,05%
Total MVT	**136 766**	**148 283**	**8,42%**
International flights	129 338	141 261	9,22%
Domestic flights	4 035	3 980	-1,36%
Others	3 393	3 042	-10,34%
Scheduled	113 461	125 448	10,56%
Non-scheduled	19 912	19 793	-0,60%
Others	3 393	3 042	-10,34%

Historical data in this format since 2002 are available on Václav Havel Airport Prague web site at the public business section with free access:

http://www.prg.aero/en/business-section/aviation-business/statistics-and-reports/prague-airport-traffic-reports/

Prague Airport

Passengers nationality

PAX 2017 T1+T2, Source of nationality: PPM Factum research, 2017

Prague Airport

Passengers nationality since 2010

- growth of Asian PAX **driven by Chinese** – most spending PAX - (growing 90% YOY)
- Top 6 nationalities: Czechs, British, Russians, French, Germans, Italians

Source of nationality: PPM Factum research

Prague Airport

Asia destinations share 2017

Asian PAX spend twice as much per purchase comparing to other passengers!

PAX PER TERMINALS - Y/Y YTD CHANGE

		2017/16 CHANGE	2018/17 CHANGE	JAN-FEB 2016	JAN-FEB 2017	JAN-FEB 2018
Prague Airport	**TOTAL**	**19,7%**	**11,9%**	**1 397 415**	**1 673 196**	**1 872 837**
	DEP	19,4%	11,6%	719 493	859 423	958 966
	ARR	20,0%	12,3%	677 922	813 773	913 871
T1	**TOTAL**	**20,8%**	**11,1%**	**615 641**	**743 669**	**826 220**
	DEP	20,6%	11,3%	316 152	381 241	424 211
	ARR	21,0%	10,9%	299 489	362 428	402 009
T2	**TOTAL**	**19,8%**	**13,4%**	**764 468**	**915 633**	**1 038 608**
	DEP	19,4%	12,6%	394 663	471 219	530 792
	ARR	20,2%	14,3%	369 805	444 414	507 816

Prague Airport

PRAGUE AIRPORT PAX

Date			TOTAL				DEPARTURES				ARRIVALS			
Year	Month	YYYY-MM	Total	Terminal 1	Terminal 2	Other	Total	Terminal 1	Terminal 2	Other	Total	Terminal 1	Terminal 2	Other
2016	JAN	2016-01	693 676	312 786	370 765	10 125	368 629	164 432	199 175	5 022	325 047	148 354	171 590	5 103
	FEB	2016-02	703 739	302 855	393 703	7 181	350 864	151 720	195 488	3 656	352 875	151 135	198 215	3 525
	MAR	2016-03	891 489	356 167	523 479	11 843	435 977	171 930	258 012	6 035	455 512	184 237	265 467	5 808
	APR	2016-04	956 812	368 994	576 346	11 472	473 423	180 922	286 803	5 698	483 389	188 072	289 543	5 774
	MAY	2016-05	1 076 846	425 756	643 469	7 621	544 508	214 360	326 335	3 813	532 338	211 396	317 134	3 808
	JUN	2016-06	1 266 387	499 513	757 468	9 406	650 455	256 775	389 024	4 656	615 932	242 738	368 444	4 750
	JUL	2016-07	1 454 862	633 208	812 642	9 012	718 850	317 675	396 681	4 494	736 012	315 533	415 961	4 518
	AUG	2016-08	1 449 549	640 849	798 856	9 844	732 456	319 180	408 308	4 968	717 093	321 669	390 548	4 876
	SEP	2016-09	1 392 017	568 034	813 861	10 122	683 007	278 544	399 421	5 042	709 010	289 490	414 440	5 080
	OCT	2016-10	1 193 413	505 230	678 759	9 424	591 805	253 809	333 266	4 730	601 608	251 421	345 493	4 694
	NOV	2016-11	970 195	414 928	546 891	8 376	488 142	207 243	276 650	4 249	482 053	207 685	270 241	4 127
	DEC	2016-12	1 025 670	438 033	578 789	8 848	499 211	214 759	279 936	4 516	526 459	223 274	298 853	4 332
2017	JAN	2017-01	844 350	382 706	454 893	6 751	446 860	201 501	241 995	3 364	397 490	181 205	212 898	3 387
	FEB	2017-02	828 846	360 963	460 740	7 143	412 563	179 740	229 224	3 599	416 283	181 223	231 516	3 544
	MAR	2017-03	1 045 686	440 056	597 222	8 408	510 265	211 434	294 576	4 255	535 421	228 622	302 646	4 153
	APR	2017-04	1 235 986	498 168	728 769	9 049	619 007	250 402	364 118	4 487	616 979	247 766	364 651	4 562
	MAY	2017-05	1 303 994	525 778	772 951	5 265	652 224	262 218	387 477	2 529	651 770	263 560	385 474	2 736
	JUN	2017-06	1 505 883	607 694	893 416	4 773	775 868	313 634	459 910	2 324	730 015	294 060	433 506	2 449
	JUL	2017-07	1 703 193	744 782	954 140	4 271	847 040	376 621	468 131	2 288	856 153	368 161	486 009	1 983
	AUG	2017-08	1 703 011	760 391	937 860	4 760	855 913	377 362	476 164	2 387	847 098	383 029	461 696	2 373
	SEP	2017-09	1 612 825	667 121	939 979	5 725	791 462	324 376	464 097	2 989	821 363	342 745	475 882	2 736
	OCT	2017-10	1 370 143	575 226	790 430	4 487	672 862	287 332	383 409	2 121	697 281	287 894	407 021	2 366
	NOV	2017-11	1 116 920	467 531	644 307	5 082	561 958	233 905	325 640	2 413	554 962	233 626	318 667	2 669
	DEC	2017-12	1 144 157	495 876	644 479	3 802	559 062	243 737	313 374	1 951	585 095	252 139	331 105	1 851

Prague Airport

PAX - COUNTRIES Terminal 1 (departures & arrivals; 1st destination): 2017

#		PAX (#) 2017	PAX Y-Y (#) 2017 Y-Y	PAX Y/Y (%) 2017 Y/Y	Share on PAX (%) 2017	Share on PAX Y-Y (#) 2017 Y-Y
#	Total	6 482 190	+1 059 266	+19,4%	100,0%	0%
1	**United Kingdom**	1 821 559	+113 267	+6,6%	27,9%	-3,3%
2	**Russian Federation**	1 198 190	+235 861	+24,5%	18,4%	+0,8%
3	**Turkey**	502 060	+85 881	+20,6%	7,7%	+0,1%
4	United Arab Emirates	475 509	+49 528	+11,6%	7,3%	-0,5%
5	Israel	439 252	+64 400	+17,2%	6,7%	-0,1%
6	Egypt	337 778	+176 605	+109,6%	5,2%	+2,2%
7	Bulgaria	236 368	+49 535	+26,5%	3,6%	+0,2%
8	Ukraine	205 053	+71 761	+53,8%	3,1%	+0,7%
9	Korea, Republic of	200 172	+12 418	+6,6%	3,1%	-0,4%
10	Ireland	200 146	+7 010	+3,6%	3,1%	-0,5%
11	China	179 452	+81 597	+83,4%	2,7%	+1,0%
12	Tunisia	116 790	+53 718	+85,2%	1,8%	+0,6%
13	Croatia	97 454	+17 419	+21,8%	1,5%	+0,0%
14	Romania	81 391	+1 837	+2,3%	1,2%	-0,2%
15	United States	72 130	-13 687	-15,9%	1,1%	-0,5%
16	Belarus	63 593	+17 212	+37,1%	1,0%	+0,1%
17	Serbia	58 745	+7 177	+13,9%	0,9%	-0,0%
18	Canada	43 457	+4 568	+11,7%	0,7%	-0,0%
19	Cape Verde	34 566	+9 799	+39,6%	0,5%	+0,1%
20	Qatar	31 870	+31 870	new	0,5%	+0,5%
21	Cyprus	18 341	+2 527	+16,0%	0,3%	-0,0%
22	Slovakia	17 819	-23 021	-56,4%	0,3%	-0,5%
23	Lebanon	17 703	+8 247	+87,2%	0,3%	+0,1%
24	Morocco	11 698	-1 566	-11,8%	0,2%	-0,1%
25	Montenegro	11 286	-97	-0,9%	0,2%	-0,0%
26	Albania	9 808	+699	+7,7%	0,2%	-0,0%

Prague Airport

PAX - COUNTRIES Terminal 2 (departures & arrivals; 1st destination): 2017

#		PAX (#) 2017	PAX Y-Y (#) 2017 Y-Y	PAX Y/Y (%) 2017 Y/Y	Share on PAX (%) 2017	Share on PAX Y-Y (#) 2017 Y-Y
#	Total	8 819 066	+1 324 038	+17,7%	100,0%	0%
1	**Italy**	**1 351 393**	**+308 721**	**+29,6%**	**15,3%**	**+1,4%**
2	**Germany**	**1 228 366**	**+96 862**	**+8,6%**	**13,9%**	**-1,2%**
3	**France**	**1 041 968**	**+86 054**	**+9,0%**	**11,8%**	**-0,9%**
4	Spain	963 513	+155 927	+19,3%	10,9%	+0,2%
5	Netherlands	800 882	+126 397	+18,7%	9,1%	+0,1%
6	Greece	600 165	+101 835	+20,4%	6,8%	+0,2%
7	Belgium	479 806	+60 130	+14,3%	5,4%	-0,2%
8	Switzerland	382 828	+57 817	+17,8%	4,3%	+0,0%
9	Finland	317 943	+35 958	+12,8%	3,6%	-0,2%
10	Denmark	272 303	+21 880	+8,7%	3,1%	-0,3%
11	Sweden	266 136	+45 750	+20,8%	3,0%	+0,1%
12	Poland	220 657	+23 792	+12,1%	2,5%	-0,1%
13	Norway	198 921	+15 331	+8,4%	2,3%	-0,2%
14	Portugal	194 439	+75 697	+63,7%	2,2%	+0,6%
15	Austria	156 058	+15 807	+11,3%	1,8%	-0,1%
16	Hungary	110 477	+32 313	+41,3%	1,3%	+0,2%
17	Latvia	54 986	+11 211	+25,6%	0,6%	+0,0%
18	Slovakia	54 522	+8 460	+18,4%	0,6%	+0,0%
19	Malta	36 771	+16 563	+82,0%	0,4%	+0,1%
20	Czech Republic	30 980	-1 233	-3,8%	0,4%	-0,1%
21	Iceland	30 216	+27 547	+1032,1%	0,3%	+0,3%
22	Slovenia	12 946	+768	+6,3%	0,1%	-0,0%
23	Luxembourg	12 544	+595	+5,0%	0,1%	-0,0%
24	Estonia	135	-84	-38,4%	0,0%	-0,0%
25	United Kingdom	111	+111	new	0,0%	+0,0%
26	OSTATNÍ	0	-171	closed	0,0%	-0,0%

Prague Airport

PAX - AIRPORTS Terminal 1 (departures & arrivals; 1st destination): 2017

#		PAX (#) 2017	PAX Y-Y (#) 2017 Y-Y	PAX Y/Y (%) 2017 Y/Y	Share on PAX (%) 2017	Share on PAX Y-Y (#) 2017 Y-Y
#	Total	5 368 298	+1 059 266	+19,4%	100,0%	0%
1	**Moscow/Sheremetyevo**	748 495	+85 845	+13,0%	11,5%	-0,7%
2	**Dubai**	469 315	+43 835	+10,3%	7,2%	-0,6%
3	**London/Heathrow**	440 364	+7 181	+1,7%	6,7%	-1,2%
4	Tel Aviv	437 140	+62 288	+16,6%	6,7%	-0,2%
5	London/Stansted	329 986	-22 265	-6,3%	5,1%	-1,4%
6	London/Gatwick	326 387	-19 657	-5,7%	5,0%	-1,3%
7	Istanbul	271 486	+13 991	+5,4%	4,2%	-0,6%
8	Seoul/Incheon	200 172	+12 418	+6,6%	3,1%	-0,4%
9	Dublin	200 146	+7 010	+3,6%	3,1%	-0,5%
10	Kiev/Borispol	180 222	+65 768	+57,5%	2,8%	+0,7%
11	Manchester	174 697	+21 998	+14,4%	2,7%	-0,1%
12	Bourgas	163 187	+33 730	+26,1%	2,5%	+0,1%
13	Marsa Allam	163 060	+74 568	+84,3%	2,5%	+0,9%
14	Hurghada	162 807	+90 127	+124,0%	2,5%	+1,2%
15	St Petersburg	158 568	+26 153	+19,8%	2,4%	+0,0%
16	Antalya	127 270	+60 232	+89,8%	2,0%	+0,7%
17	London/Luton	115 241	-7 846	-6,4%	1,8%	-0,5%
18	Edinburgh	93 011	+21 925	+30,8%	1,4%	+0,1%
19	Istanbul/Sabiha Gokcen	86 528	+12 084	+16,2%	1,3%	-0,0%
20	Bucharest/Otopeni	81 045	+1 491	+1,9%	1,2%	-0,2%
21	Beijing/Capital	76 919	+20 583	+36,5%	1,2%	+0,1%
22	Moscow/Vnukovo	74 646	+67 386	+928,2%	1,1%	+1,0%
23	Ekaterinburg	74 296	+27 813	+59,8%	1,1%	+0,3%
24	New York/J.F.Kennedy	72 130	-13 618	-15,9%	1,1%	-0,5%
25	Bristol	71 339	+3 482	+5,1%	1,1%	-0,1%
26	Birmingham	69 841	+32 578	+87,4%	1,1%	+0,4%

Prague Airport

PAX - AIRPORTS Terminal 2 (departures & arrivals; 1st destination): 2017

#		PAX (#) 2017	PAX Y-Y (#) 2017 Y-Y	PAX Y/Y (%) 2017 Y/Y	Share on PAX (%) 2017	Share on PAX Y-Y (#) 2017 Y-Y
	Total	6 668 641	+1 324 038	+17,7%	100,0%	0%
1	**Paris/CDG**	743 936	+59 025	+8,6%	8,4%	-0,7%
2	**Amsterdam**	658 210	+57 540	+9,6%	7,5%	-0,6%
3	**Frankfurt**	520 851	+4 892	+0,9%	5,9%	-1,0%
4	Brussels	327 118	+61 329	+23,1%	3,7%	+0,2%
5	Barcelona	320 654	+58 613	+22,4%	3,6%	+0,1%
6	Helsinki	317 943	+36 276	+12,9%	3,6%	-0,2%
7	Milan/Malpensa	295 472	+16 403	+5,9%	3,4%	-0,4%
8	Rome/Fiumicino	272 460	+1 742	+0,6%	3,1%	-0,5%
9	Copenhagen	261 446	+22 124	+9,2%	3,0%	-0,2%
10	Zurich	260 789	+45 529	+21,2%	3,0%	+0,1%
11	Madrid	248 170	+51 561	+26,2%	2,8%	+0,2%
12	Stockholm/Arlanda	243 185	+35 203	+16,9%	2,8%	-0,0%
13	Dusseldorf	234 612	+41 811	+21,7%	2,7%	+0,1%
14	Warsaw	212 281	+17 565	+9,0%	2,4%	-0,2%
15	Munich	208 687	+2 126	+1,0%	2,4%	-0,4%
16	Milan/Bergamo	206 064	+108 218	+110,6%	2,3%	+1,0%
17	Vienna	155 741	+15 702	+11,2%	1,8%	-0,1%
18	Charleroi	152 688	+397	+0,3%	1,7%	-0,3%
19	Lisbon	146 044	+62 240	+74,3%	1,7%	+0,5%
20	Rome/Ciampino	143 507	+78 043	+119,2%	1,6%	+0,8%
21	Eindhoven	142 291	+68 476	+92,8%	1,6%	+0,6%
22	Oslo	141 416	+2 690	+1,9%	1,6%	-0,2%
23	Heraklion	132 214	+20 749	+18,6%	1,5%	+0,0%
24	Hamburg	110 484	+36 167	+48,7%	1,3%	+0,3%
25	Budapest	110 275	+32 111	+41,1%	1,3%	+0,2%
26	Paris/Orly	102 103	-7 136	-6,5%	1,2%	-0,3%

Prague Airport