

34th Philoxenia – November 10th, 2018

*Decoding the dynamic market
of Thessaloniki Airport
“Makedonia”*

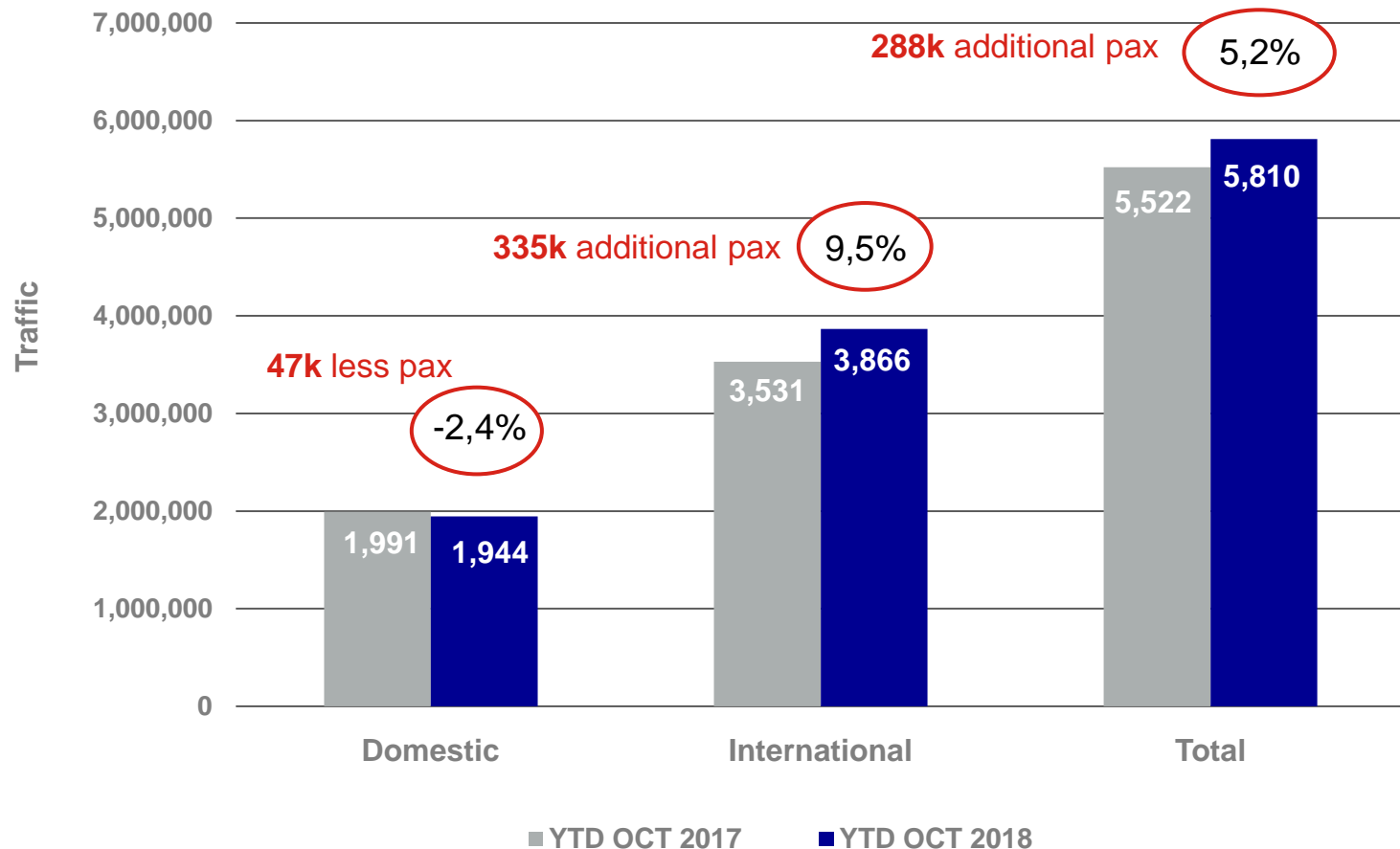
George Vilos

Executive Director of Commercial & Business Development



SKG Airport: Traffic development - YTD October 2018 vs 2017

Domestic presents a slight decline (-2,4%) affected by the state runway works during Q1, while International demonstrates a robust growth (9,5%).

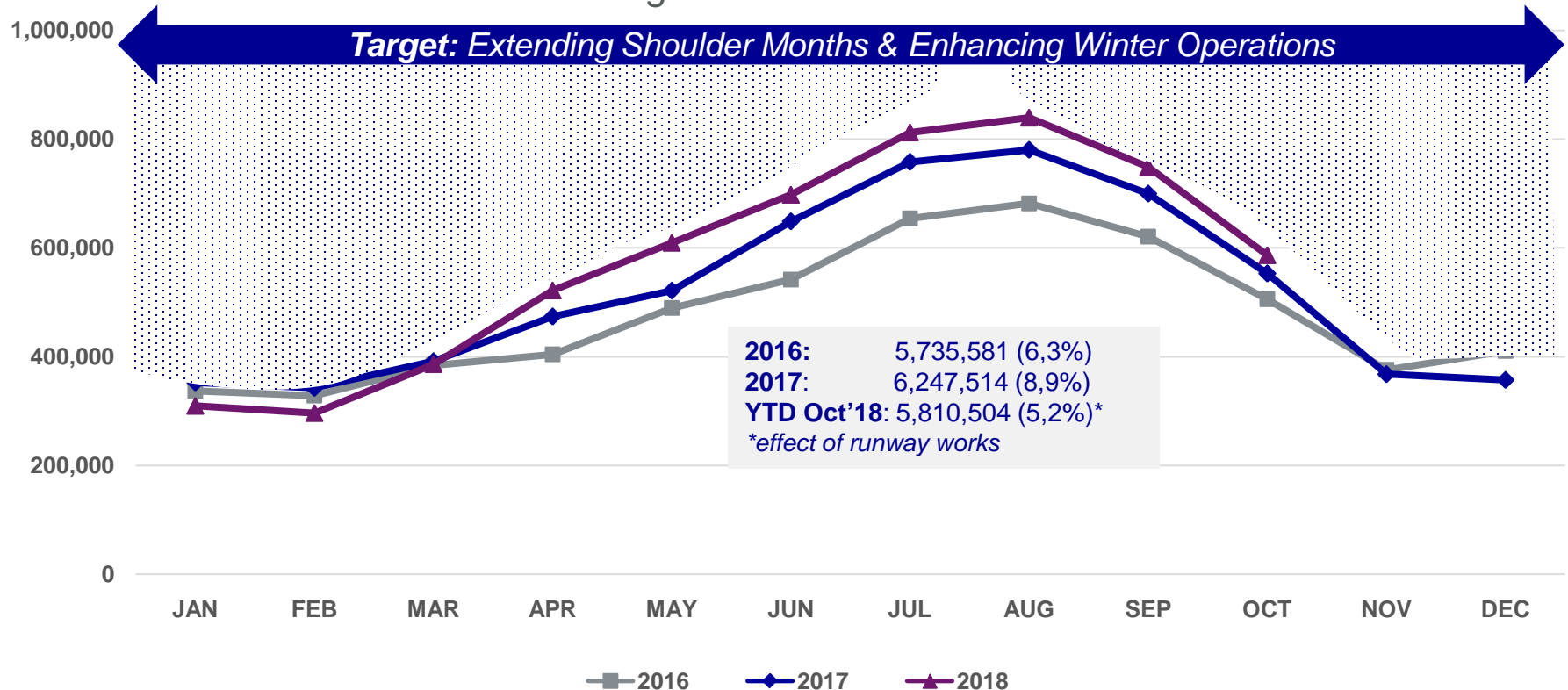


*Source: HCAA & FG Traffic Management

SKG Airport: The developmental potential exists

Attracting additional traffic during winter season, as well as during the shoulder months is the key for extending the tourist season

Total Passenger Traffic 2016 – YTD October'18



*Source: HCAA & FG Traffic Management

SKG Airport: Airline Development – Summer 2018

“Makedonia” airport welcomed a number of new routes and carriers . Indicatively...

Qatar Airways

New year-round services to/from Doha

Flydubai

New year-round services to/from Dubai

Germania

New services to/from
Nuremberg, Dresden, Erfurt & Munster

SAS

New year-round service to/from Stockholm

Jet2.com

New services to
London, Birmingham, Glasgow &
Newcastle

Ryanair

New services to
Nürnberg, Budapest, Naples, Eindhoven,
Poznan & Bratislava

easyJet

New service to Venice

SKG Airport: Airline Development – Winter 2018/19

- Introduction of a Winter “New International Route” Incentive
- The airport will welcome new, extended and relaunched routes during off-peak season

Domestic

Sky Express

- **Thessaloniki** to Mitiilini (4w)

Ryanair (relaunch)

- **Thessaloniki** to Chania (4w)

International

Ryanair

- **Thessaloniki** to Bologna (2w), Bratislava (2w), Nürnberg (2w) & Warsaw/WMI (2w) **new**

*relaunched routes:

- **Thessaloniki** to Hamburg (2w) & Paris (2w)

Aegean

- **Thessaloniki** to Tel Aviv (2w) **new**

Israir

- **Thessaloniki** to Tel Aviv (2w) **new**

Lufthansa

- **Thessaloniki** to Frankfurt (2w)

Wizz

- **Thessaloniki** to Vienna (3w)

Qatar

- **Thessaloniki** to Doha (4w) **new**

Blue Air

- **Thessaloniki** to Larnaca (6w)

Cyprus Airways

- **Thessaloniki** to Larnaca (2w)

“New International Route” Incentive Programme

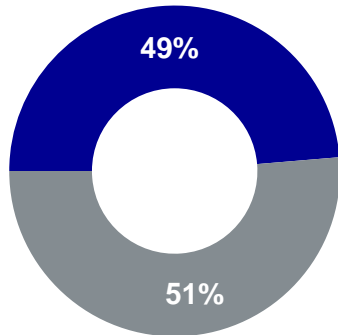
Winter '18-19	Winter '19-20
7 EUR per Dep Pax	7 EUR per Dep Pax

- Eligible are new international routes introduced in W'18-19 & W'19-20
- New international routes must be operated on a year-round basis

*Underlined the routes eligible for FG's Winter Incentive

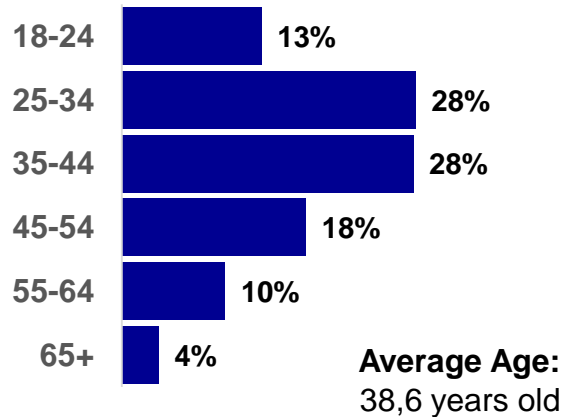
Demographic profile (SKG)

Gender

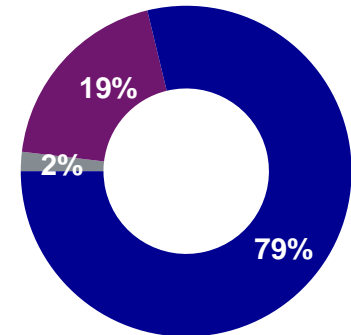


- Male
- Female

Age

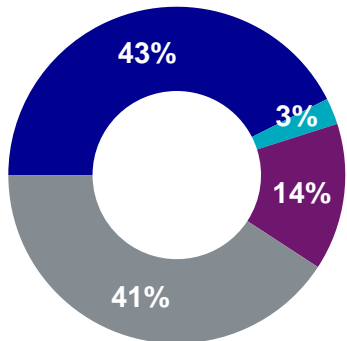


Education



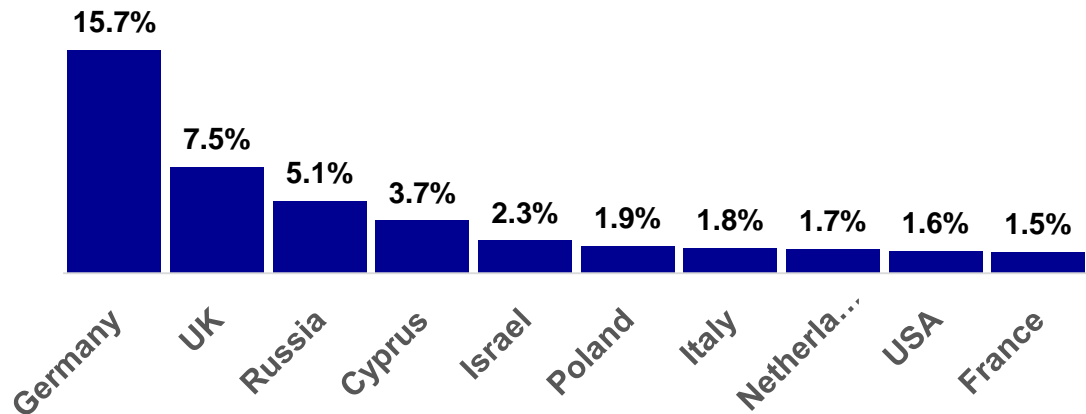
- Elementary
- High School
- University

Nationality vs Residence



- Greeks in Greece
- Foreigners in Greece
- Greeks Abroad
- Foreigners Abroad

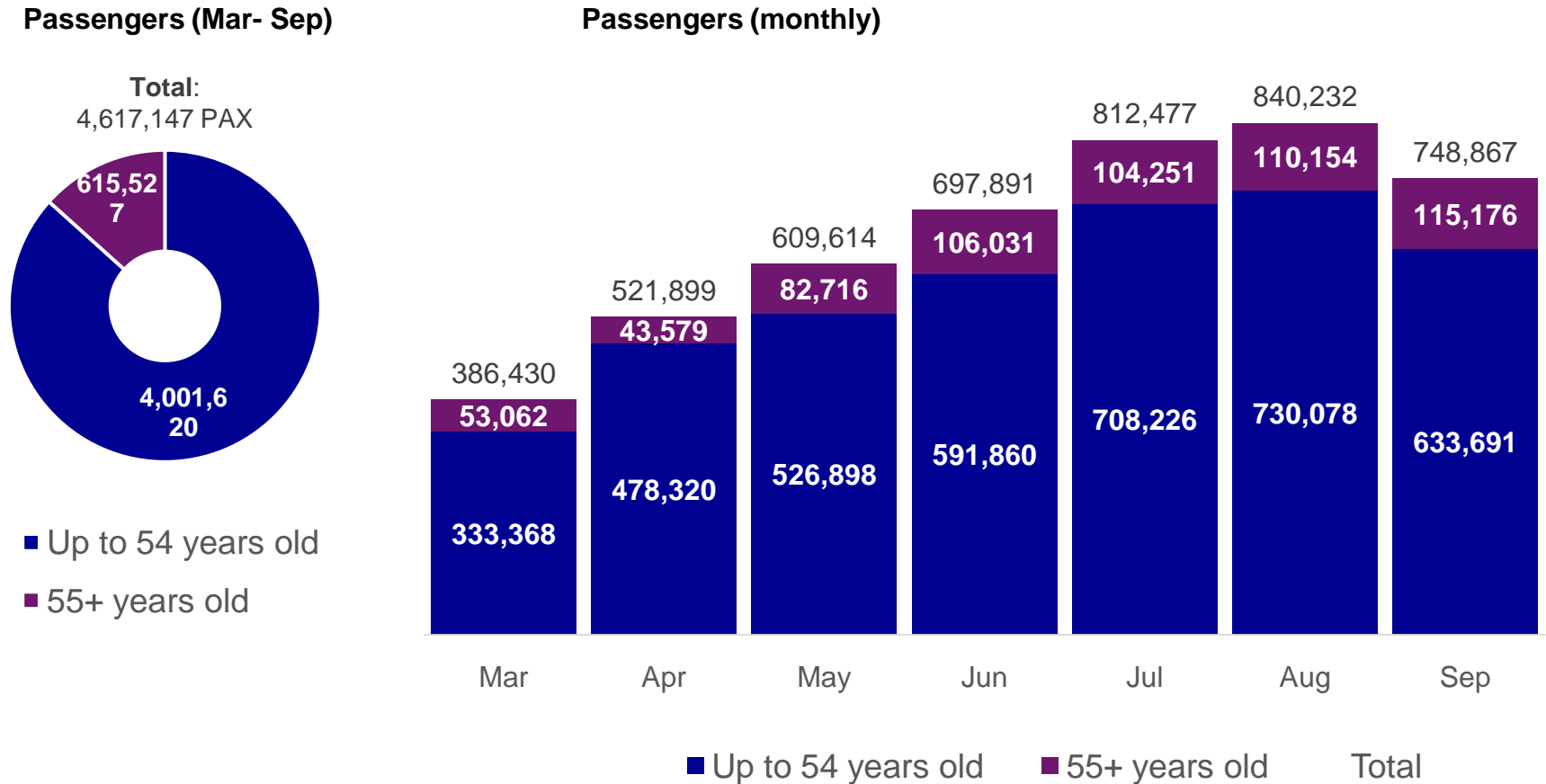
Top 10 Foreign Residencies



Source: Passenger Survey Fraport Greece (SKG)

Age groupings – monthly volumes (SKG)

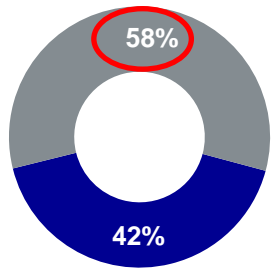
The 55+ age group represents 13% of SKG total traffic, with the months of June and September having a slightly higher contribution with 15%. For the period Mar-Sep 2018 a total number of 615,527 PAX (55+) have travelled from SKG.



Passenger Profile (SKG, 55+ age group)

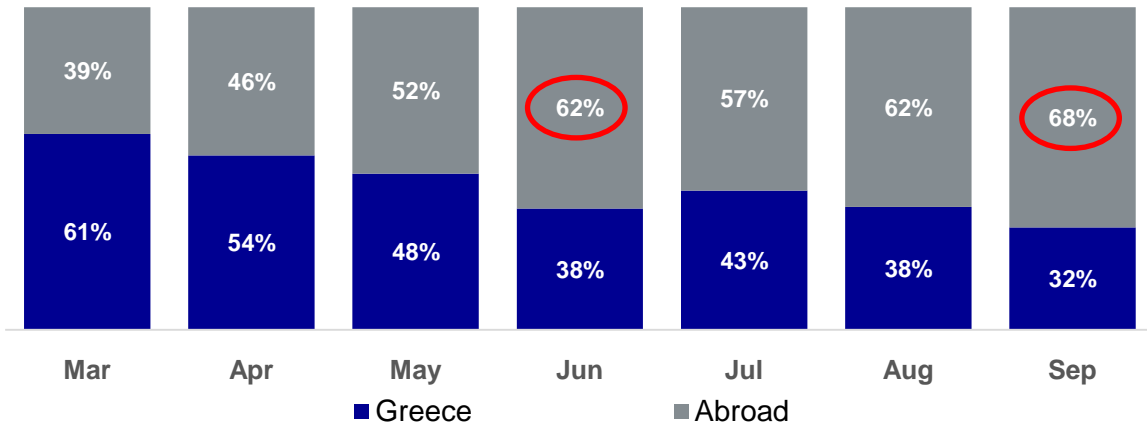
Within the age group 55+, foreigners represent 58% of total traffic, with an even higher penetration in the months of June and September. Greek diaspora has a significant presence in March (16%).

Residence Country (Mar- Sep)

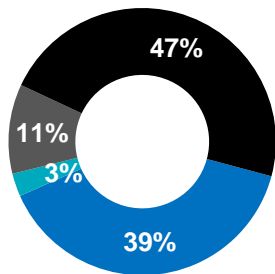


■ Greece ■ Abroad

Residence country (monthly)

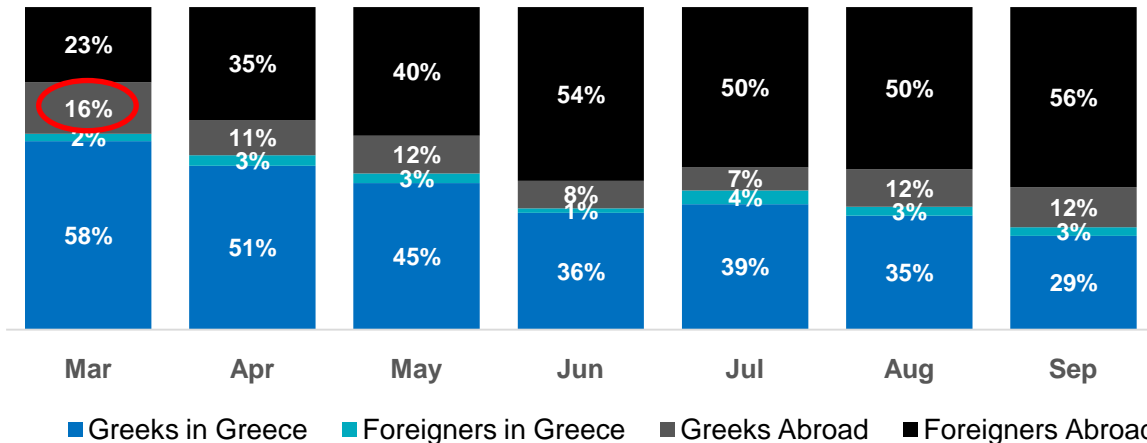


Residence vs Nationality (Mar- Sep)



■ Greeks in Greece
 ■ Foreigners in Greece
 ■ Greeks Abroad
 ■ Foreigners Abroad

Residence vs Nationality (monthly)



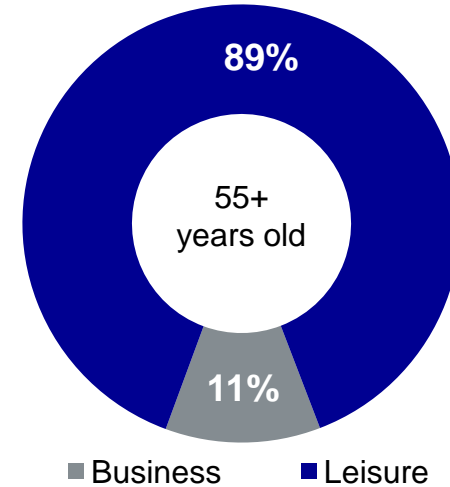
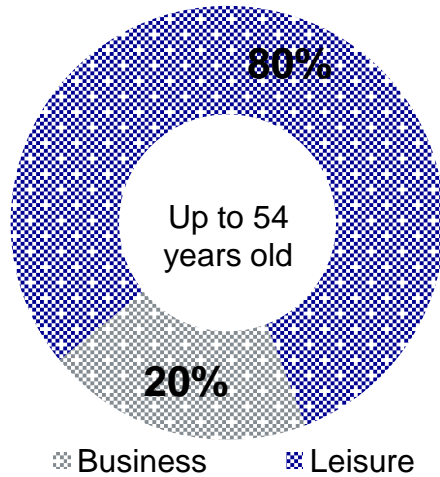
Base: All

Source: Passenger Survey Fraport Greece

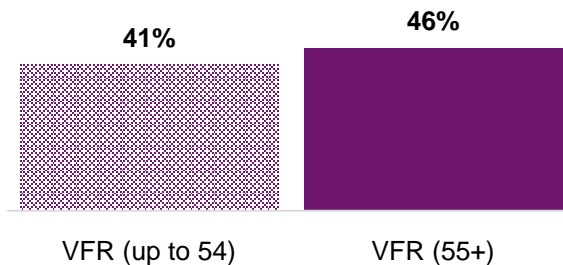
Passenger Profile (SKG, 55+ age group)

55+ passengers travel mostly for leisure 89% throughout the year (80% for younger ages). Within leisure passengers, the 55+ age group state "holidays" less as a trip purpose. However VFR is significantly higher for 55+, especially in the months of March and April.

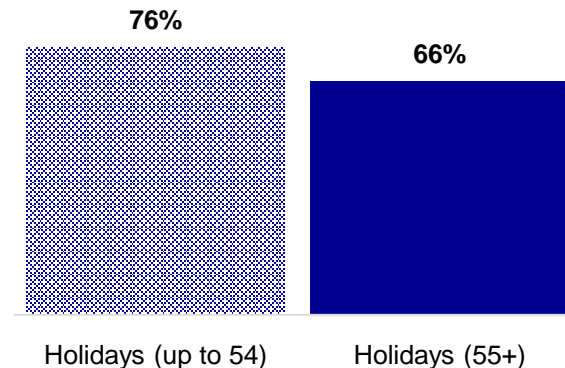
Trip Purpose (Mar- Sep)



Trip Purpose – VFR (Mar-Sep)



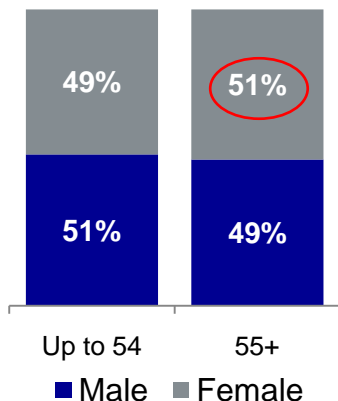
Trip Purpose – Holidays (Mar-Sep)



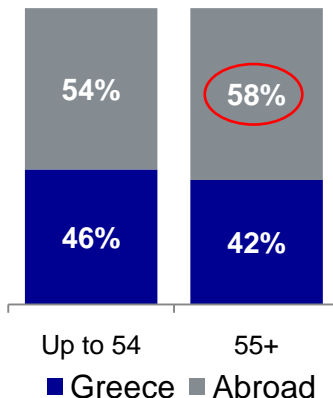
Passenger Profile (SKG, 55+ age group)

55+ age group passengers have a more female profile, with more contribution of foreign residents, especially from Germany and Israel. They travel for VFR more than younger ages and even though they travel less frequently, they spend more days in Greece

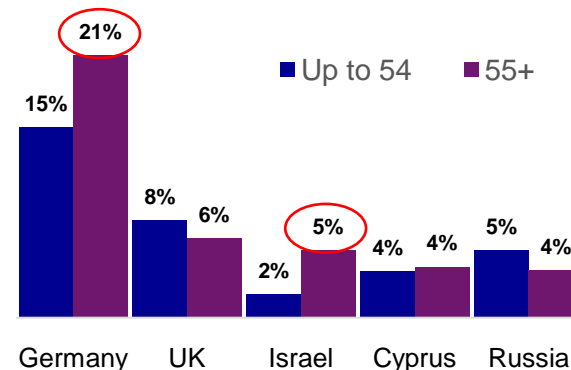
Gender



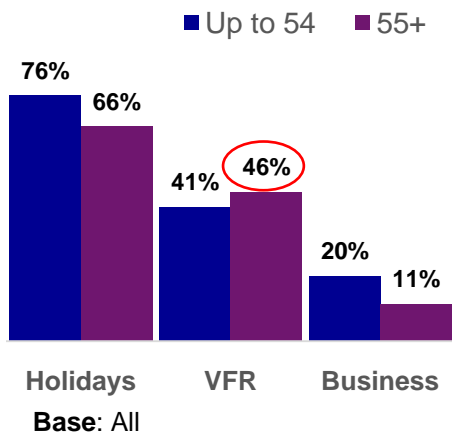
Residence Country



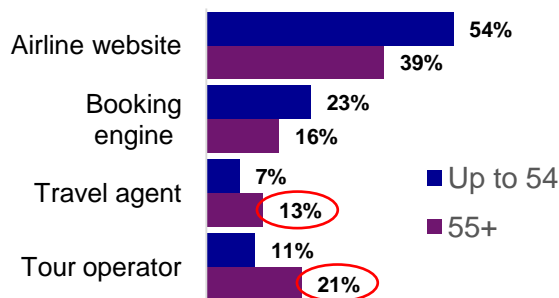
Foreign Residents



Trip Purpose



Ticket Booking Means



Booking period prior to departure:

Up to 54: 49 days
55+: 59 days

Travelling Profile

Frequency of Travel	Up to 54	55+
Traveling from SKG (last 12 months)	3,3 times	2,5 times

Length of Trip (SKG)	Up to 54	55+
Average days of trip (for return home flights)	11,6 days	12,9 days



Thank You

Contact us at: aviationmarketing@fraport-greece.com