

**NICE CÔTE D'AZUR**  
**AIRPORT**  
NETWORK DEVELOPMENT  
DEPARTMENT



**OPPORTUNITIES SURVEY**  
**NORTH AMERICA FROM/TO NICE AIRPORT**  
Routes Online 2011

## 2010 - INDIRECT TRAFIC FROM/TO NICE



(source : readjusted BSP IATA)

## ROUTE SURVEYS

Click on the left  
button to reach the  
part of your choice

- ▶ **GEO REGION TREND**
- ▶ **NICE-LAS VEGAS**
- ▶ **NICE-LOS ANGELES**
- ▶ **NICE-MIAMI**
- ▶ **NICE-MONTREAL**
- ▶ **NICE-NEW YORK CITY**
- ▶ **NICE-SAN FRANCISCO**
- ▶ **NICE-TORONTO**
- ▶ **NICE-VANCOUVER**
- ▶ **INCENTIVE POLICY**



## NORTH AMERICA – LOCAL TRAFFIC FROM / TO NICE

COUNTRY	2007	2008	2009	2010	VAR 10/09
★ UNITED STATES	252 304	261 223	214 603	181 944	-15%
★ CANADA	77 875	79 401	75 753	148 044	95%
SAINT PIERRE AND MIQUELON	108	76	34	431	1151%
BERMUDAS	498	390	876	260	-70%
<b>Total NORTH AMERICA</b>	<b>330 785</b>	<b>341 090</b>	<b>291 267</b>	<b>330 679</b>	<b>14%</b>

[ local traffic = direct traffic + indirect traffic ]

## NORTH AMERICA FROM / TO NICE BREAKDOWN BY DIRECT AND INDIRECT TRAFFIC

COUNTRY	2010 DIRECT TRAFFIC	2010 INDIRECT TRAFFIC	% INDIRECT
★ CANADA	24 895	123 149	83%
★ UNITED STATES	65 316	116 628	64%
SAINT PIERRE AND MIQUELON	-	431	100%
BERMUDAS	-	260	100%
<b>Total NORTH AMERICA</b>	<b>90 211</b>	<b>240 468</b>	<b>73%</b>

(source : readjusted BSP IATA)



## Split of local traffic on United States from/to Nice

DESTINATION	2010 DIRECT TRAFFIC	2010 INDIRECT TRAFFIC	%INDIRECT
★ New York JFK	65 316	20 709	24,1%
★ Miami	-	15 589	100,0%
★ San Francisco	-	12 238	100,0%
★ Los Angeles	-	11 836	100,0%
★ Las Vegas	-	7 288	100,0%
Newark	-	4 968	100,0%
Boston	-	4 851	100,0%
Orlando	-	4 562	100,0%
Dallas/Ft Worth	-	3 919	100,0%
Washington Dulles	-	2 927	100,0%
Chicago O'hare	-	2 583	100,0%
Ft Lauderdale	-	2 189	100,0%
Phoenix	-	1 747	100,0%
Seattle	-	1 665	100,0%
Houston Intercontinental	-	1 449	100,0%
San Diego	-	1 439	100,0%
Denver	-	1 432	100,0%
Atlanta	-	1 401	100,0%
Tampa	-	1 281	100,0%
Others	-	12 557	100,0%
<b>UNITED STATES</b>	<b>65 316</b>	<b>116 628</b>	<b>64,1%</b>

(source : readjusted BSP IATA)

[ local traffic = direct traffic + indirect traffic ]



## Split of local traffic on Canada from/to Nice

DESTINATION	2010 DIRECT TRAFFIC	2010 INDIRECT TRAFFIC	%INDIRECT
★ Montreal Trudeau	24 895	49 494	66,5%
★ Toronto	-	42 616	100,0%
★ Vancouver	-	11 261	100,0%
Calgary	-	3 945	100,0%
Ottawa	-	3 942	100,0%
Quebec	-	3 871	100,0%
Halifax	-	1 813	100,0%
Winnipeg	-	1 273	100,0%
Edmonton	-	1 107	100,0%
Victoria	-	742	100,0%
Kelowna	-	398	100,0%
St Johns	-	380	100,0%
Regina	-	360	100,0%
Moncton	-	328	100,0%
Saskatoon	-	297	100,0%
Fredericton	-	278	100,0%
Saint John	-	154	100,0%
Bagotville	-	141	100,0%
Others	-	752	100,0%
<b>CANADA</b>	<b>24 895</b>	<b>123 149</b>	<b>83,2%</b>

(source : readjusted BSP IATA)

[ local traffic = direct traffic + indirect traffic ]

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-  **NICE-TORONTO**
-  **NICE-VANCOUVER**
-  **INCENTIVE POLICY**

# 2010 Las Vegas-Nice



## DISTANCE

5,862 Miles

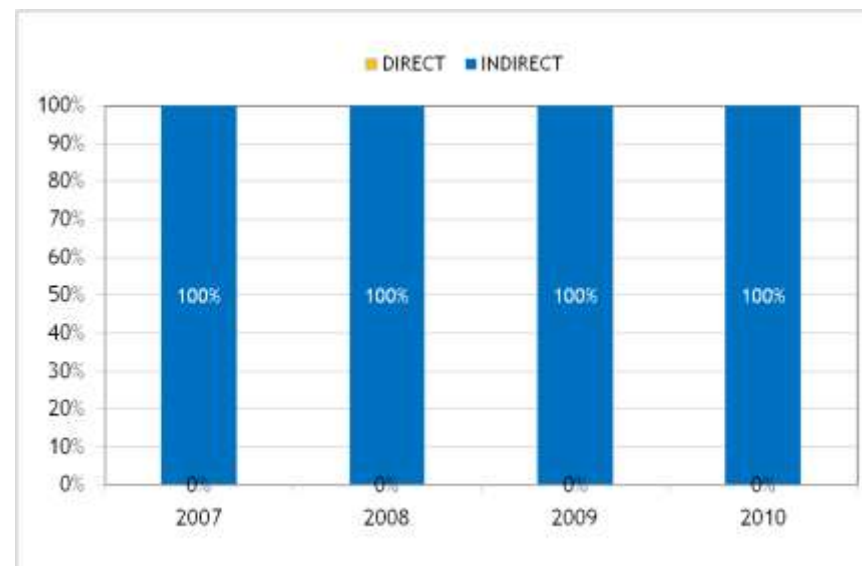
9,434 Kms

## PAST PERFORMANCE

No scheduled program on Nice-Las Vegas

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

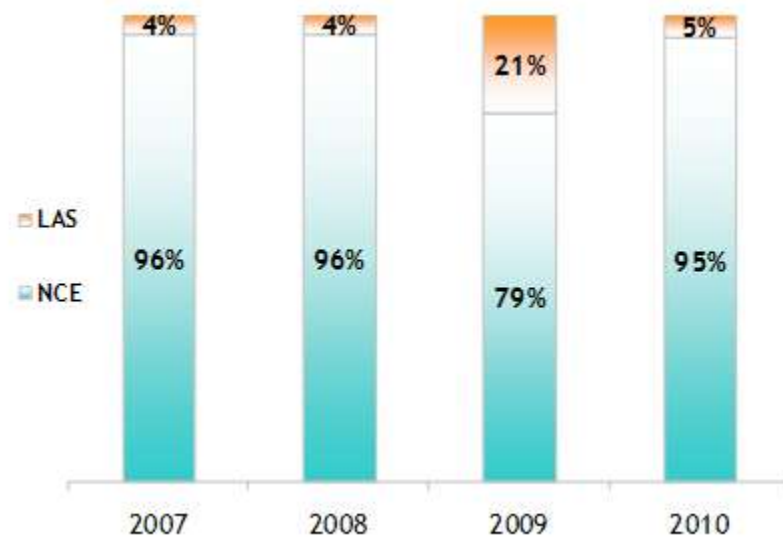
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	-	7 288		136%
2009	-	3 082		-55%
2008	-	6 898		13%
2007	-	6 088		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	10%	11%	16%	11%
<b>LOW FARE</b>	90%	89%	84%	89%

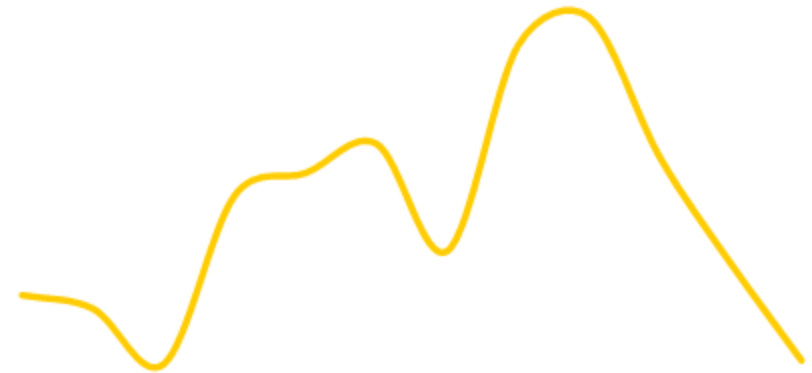
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
JFK	3 360	46%
LHR	1 627	22%
CDG	822	11%
FRA	608	8%
MUC	267	4%
DUB	241	3%
AMS	150	2%
OTHERS	213	3%
<b>Total LAS</b>	<b>7 288</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
— 2010 IND	6%	5%	4%	9%	10%	11%	7%	14%	14%	10%	7%	4%

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# 2010 Los Angeles-Nice



## DISTANCE

6,090 Miles

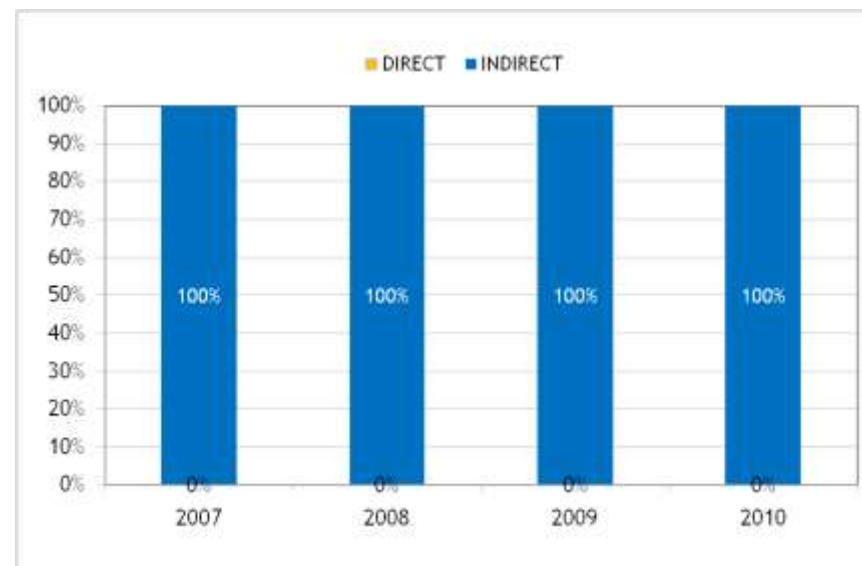
9,801 Kms

## PAST PERFORMANCE

No scheduled program on Nice-Los Angeles

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	-	11 836		-27%
2009	-	16 129		-36%
2008	-	25 337		6%
2007	-	23 864		

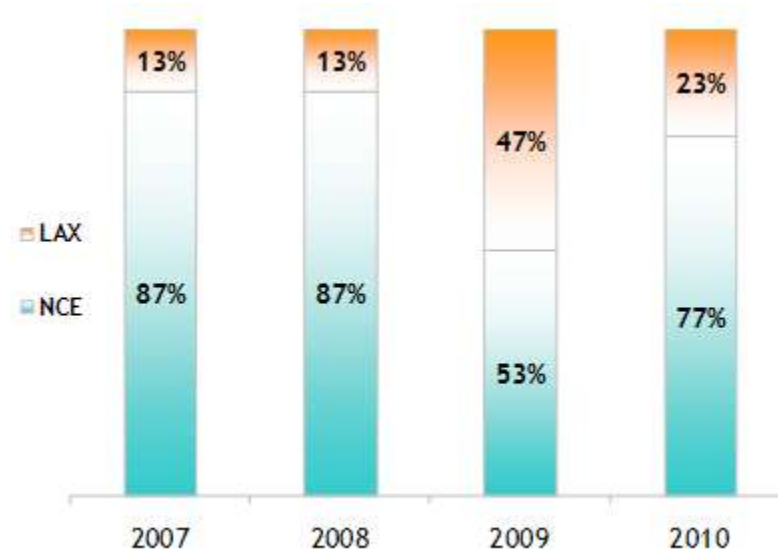


(source : readjusted BSP IATA)

# 2010 Los Angeles-Nice



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	22%	23%	25%	30%
<b>LOW FARE</b>	78%	77%	75%	70%

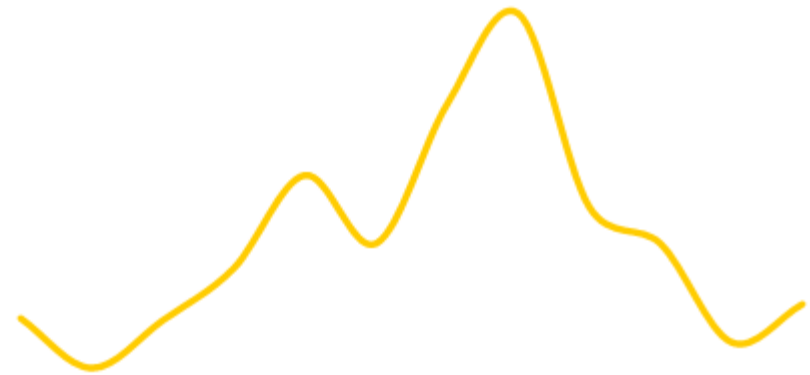
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
CDG	3 335	28%
LHR	2 518	21%
FRA	1 738	15%
ZRH	1 438	12%
JFK	1 357	11%
MUC	533	5%
AMS	403	3%
OTHERS	515	4%
<b>Total LAX</b>	<b>11 836</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
— 2010 IND	5%	2%	5%	7%	12%	8%	15%	19%	10%	8%	4%	5%

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-  **NICE-TORONTO**
-  **NICE-VANCOUVER**
-  **INCENTIVE POLICY**



## DISTANCE

4,901 Miles

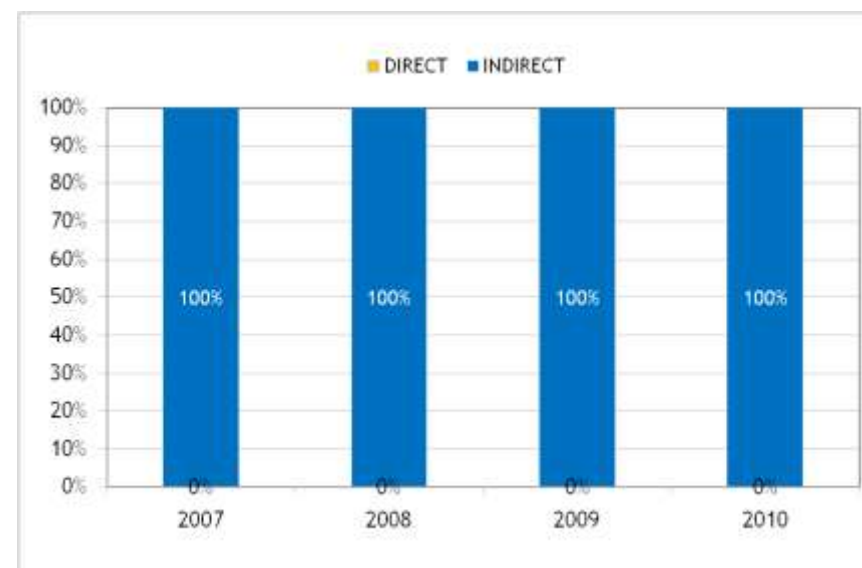
7,887 Kms

## PAST PERFORMANCE

No scheduled program on Nice-Miami

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

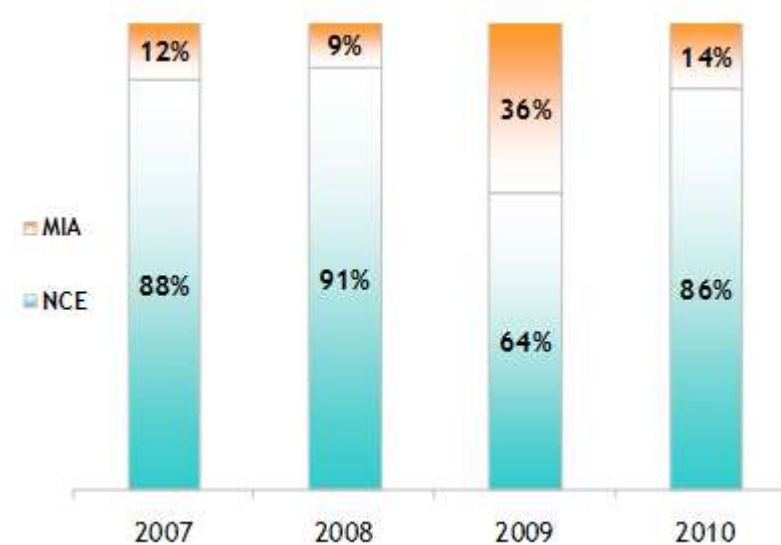
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	-	15 589		-13%
2009	-	17 977		-7%
2008	-	19 350		-2%
2007	-	19 820		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	21%	20%	18%	19%
<b>LOW FARE</b>	79%	80%	82%	81%

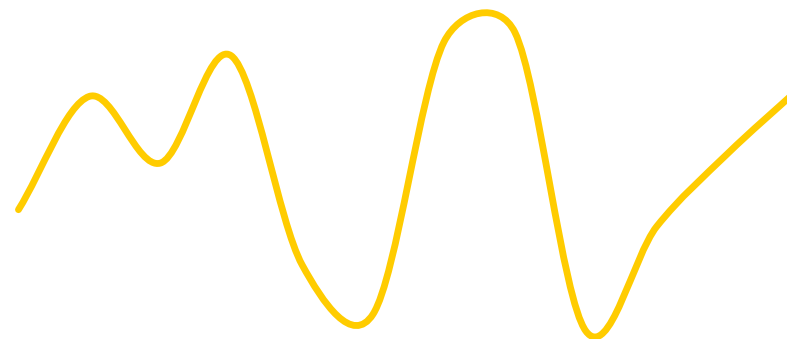
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
CDG	3 355	22%
JFK	3 120	20%
LHR	2 860	18%
MAD	2 454	16%
ZRH	1 839	12%
FRA	733	5%
FCO	507	3%
MUC	458	3%
OTHERS	263	2%
<b>Total MIA</b>	<b>15 589</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
— 2010 IND	7%	10%	8%	11%	6%	4%	12%	12%	4%	7%	9%	10%

## ROUTE SURVEYS

Click on the left  
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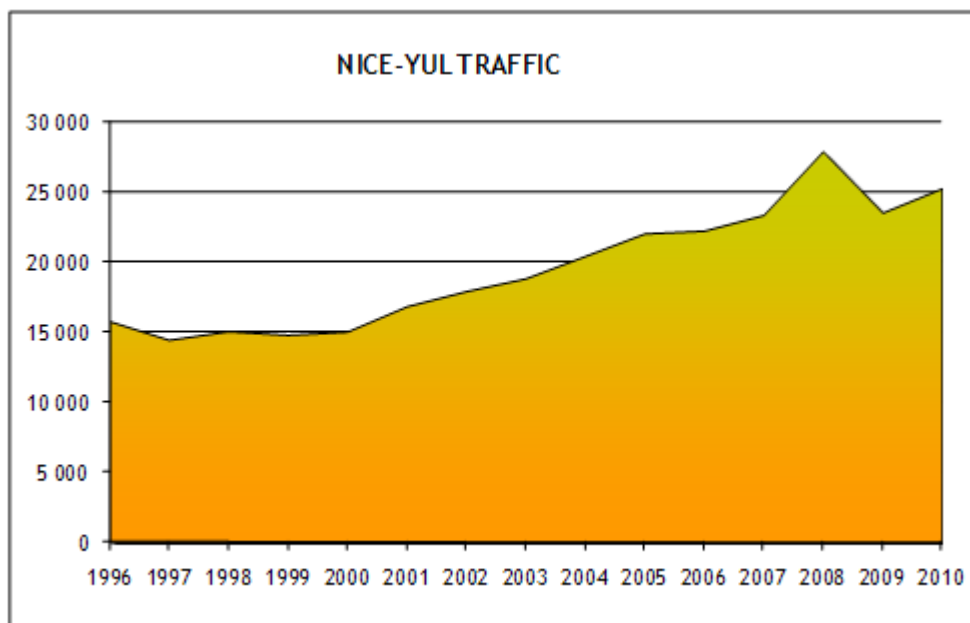
- ▶ **GEO REGION TREND**
- ▶ **NICE-LAS VEGAS**
- ▶ **NICE-LOS ANGELES**
- ▶ **NICE-MIAMI**
- ▶ **NICE-MONTREAL**
- ▶ **NICE-NEW YORK CITY**
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- ▶ **NICE-VANCOUVER**
- ▶ **INCENTIVE POLICY**



## PAST PERFORMANCE

	1996		1997		1998		1999		2000		2001		2002		2003		2004		2005		2006		2007		2008		2009		2010	
MONTREAL	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W		
AIR TRANSAT																	2		2		2		2		3		2		2	0

Summer 2011  
**2 weekly services**



1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
15 796	14 463	15 078	14 817	15 051	16 856	17 935	18 848	20 444	22 054	22 255	23 370	27 920	23 539	25 271

DIRECT + BEYOND PASSENGERS

(source : Statistics Nice Côte d'Azur Airport)



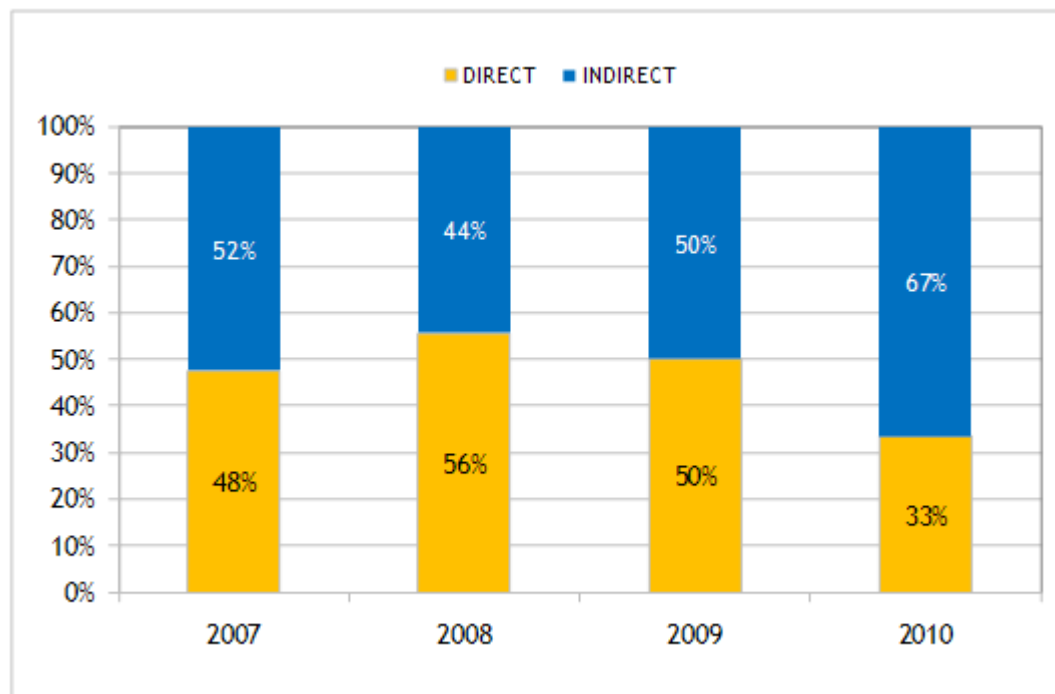
## DISTANCE

3,819 Miles

6,146 Kms

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

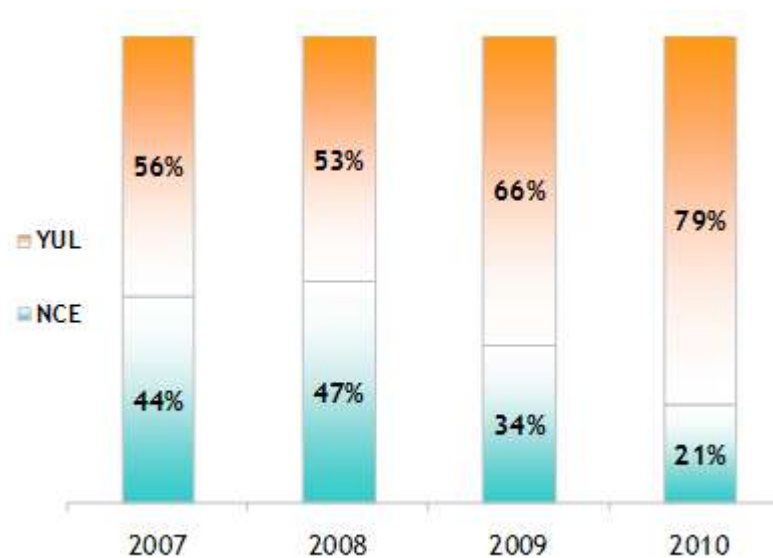
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	24 895	49 494	23%	146%
2009	20 196	20 137	-26%	-8%
2008	27 455	21 922	19%	-14%
2007	23 037	25 459		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	11%	15%	10%	21%
<b>LOW FARE</b>	89%	85%	90%	79%

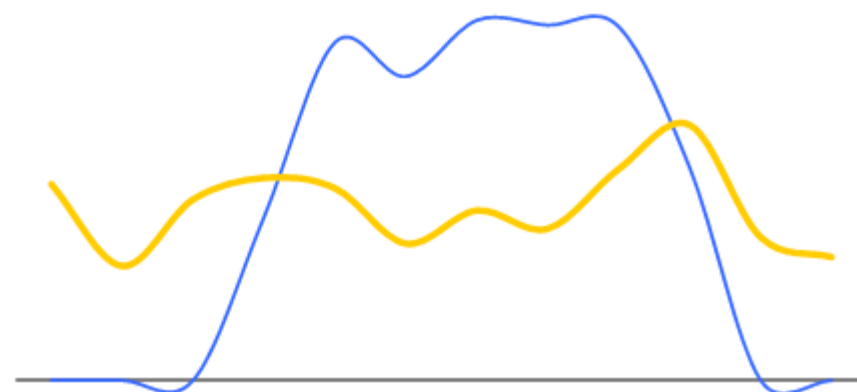
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
<b>CDG</b>	<b>26 520</b>	<b>54%</b>
LHR	6 214	13%
ZRH	5 417	11%
AMS	2 810	6%
JFK	2 713	5%
FRA	2 345	5%
MUC	2 174	4%
BRU	824	2%
OTHERS	477	1%
<b>Total YUL</b>	<b>49 494</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	8%	16%	15%	17%	17%	17%	10%	0%	0%
— 2010 IND	9%	6%	9%	10%	9%	7%	8%	7%	10%	12%	7%	6%

## ROUTE SURVEYS

Click on the left  
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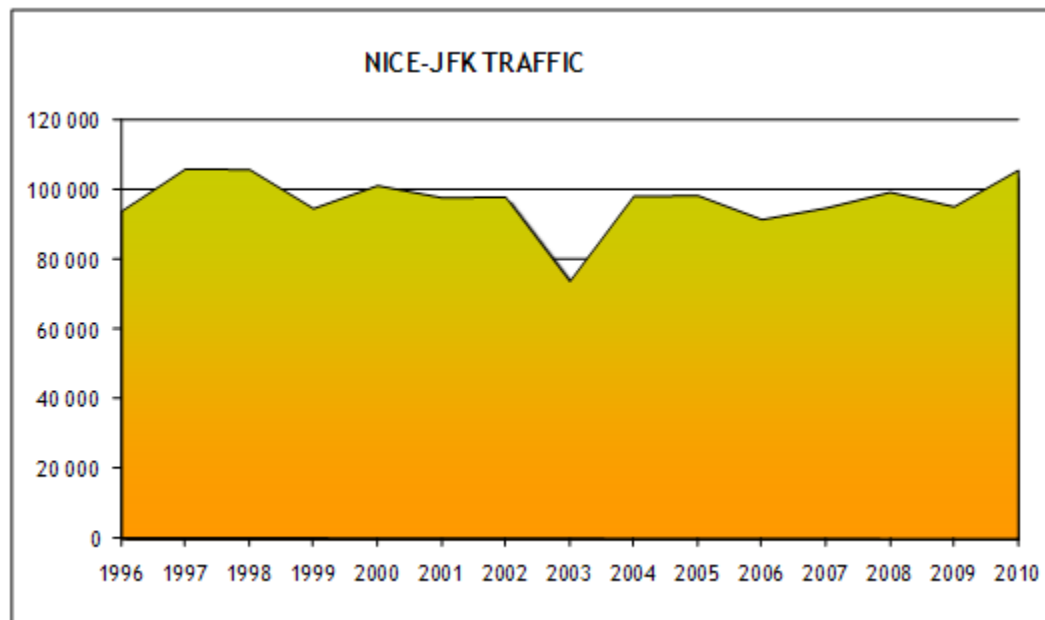
- ▶ **GEO REGION TREND**
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## PAST PERFORMANCE

	1996		1997		1998		1999		2000		2001		2002		2003		2004		2005		2006		2007		2008		2009		2010	
NEW YORK	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W	S	W
DELTA AIR LINES	7	5	7	5	7	6	7	6	7	7	7	5	7	5	7	4	7	5	7	3	7	3	7	4	7	4	7	4	7	4

Summer 2011  
**7 weekly services**



1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
94 023	106 165	106 055	94 846	101 424	97 978	98 123	73 930	98 391	98 556	91 699	95 010	99 509	95 400	105 848

DIRECT + BEYOND PASSENGERS

(source : Statistics Nice Côte d'Azur Airport)



## DISTANCE

3,991 Miles

6,423 Kms

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

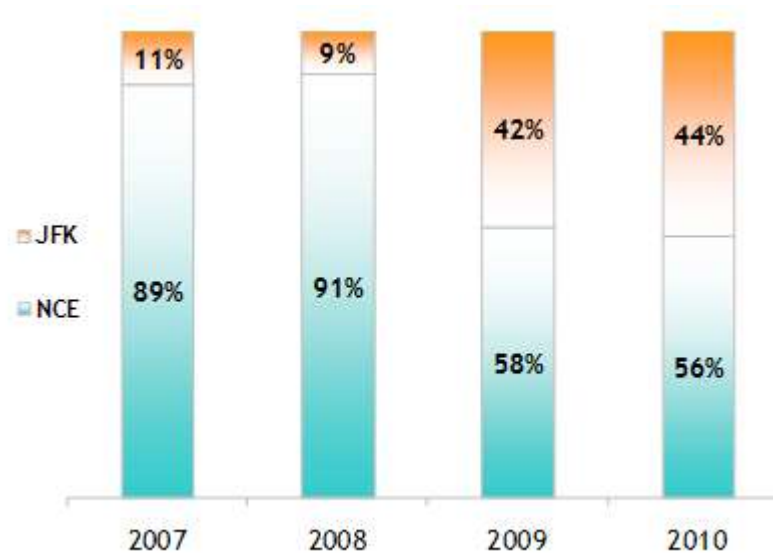
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	65 316	20 709	17%	-25%
2009	56 033	27 471	-20%	-18%
2008	70 413	33 423	21%	10%
2007	58 369	30 383		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	18%	14%	17%	14%
<b>LOW FARE</b>	82%	86%	83%	86%

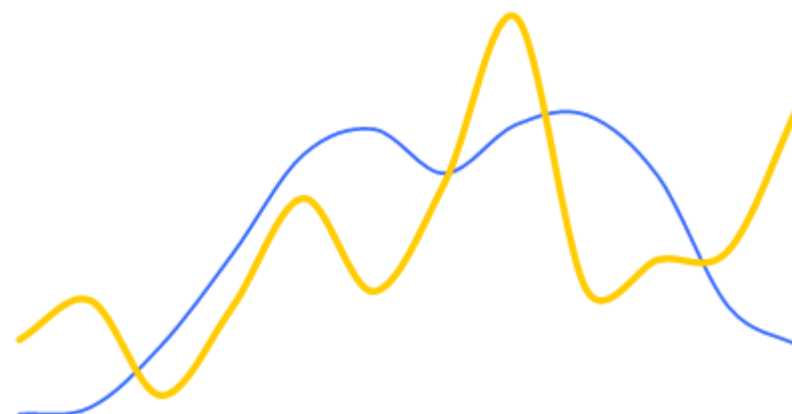
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
LHR	4 916	24%
CDG	4 628	22%
MAD	3 084	15%
ZRH	2 466	12%
FRA	1 766	9%
DUB	1 265	6%
FCO	837	4%
AMS	500	2%
MUC	336	2%
BCN	316	2%
DUS	312	2%
OTHERS	284	1%
<b>Total JFK</b>	<b>20 709</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	3%	3%	5%	8%	11%	12%	11%	13%	13%	11%	6%	5%
— 2010 IND	5%	6%	3%	6%	10%	7%	10%	16%	7%	8%	8%	13%

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## DISTANCE

6,010 Miles

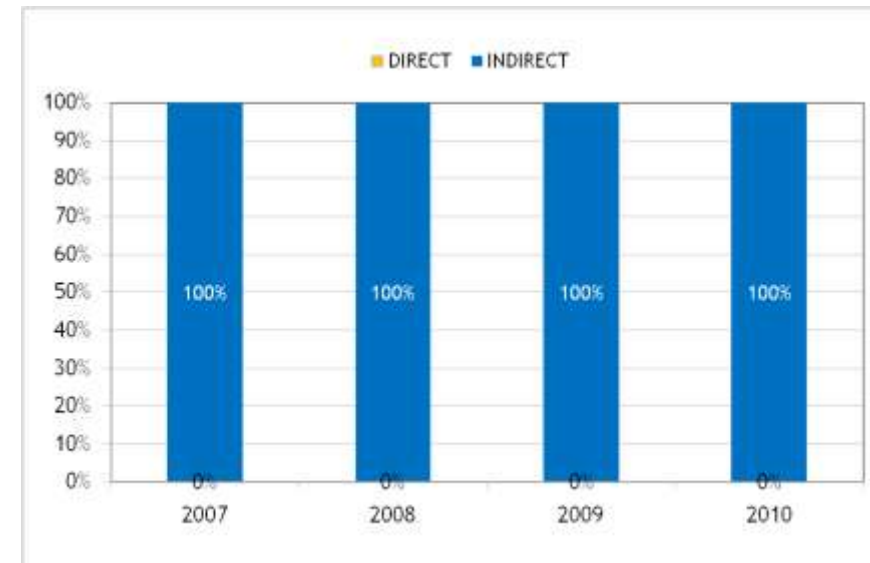
9,672 Kms

## PAST PERFORMANCE

No scheduled program on Nice-San Francisco

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

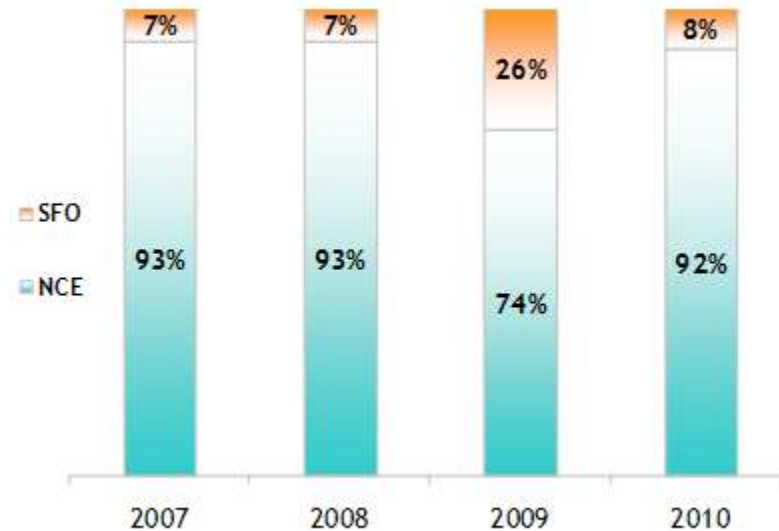
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	-	12 238		3%
2009	-	11 871		-25%
2008	-	15 783		7%
2007	-	14 790		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	22%	20%	28%	25%
<b>LOW FARE</b>	78%	80%	72%	75%

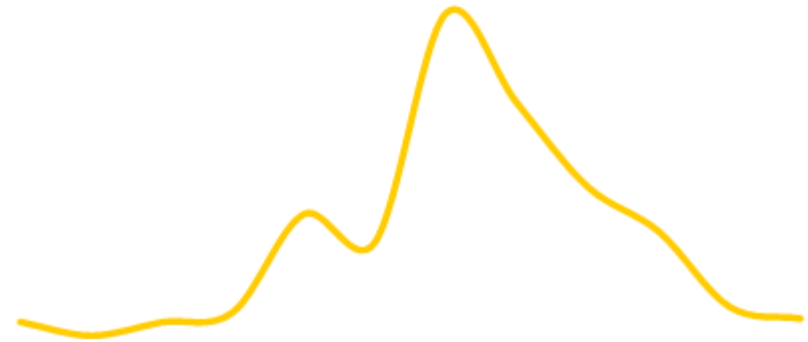
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
CDG	3 733	31%
FRA	2 533	21%
JFK	2 066	17%
LHR	1 562	13%
MUC	945	8%
AMS	535	4%
ZRH	486	4%
OTHERS	378	3%
<b>Total SFO</b>	<b>12 238</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
— 2010 IND	5%	4%	5%	5%	10%	8%	19%	15%	11%	9%	5%	5%

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- ▶ **NICE-SAN FRANCISCO**
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- ▶ **NICE-VANCOUVER**
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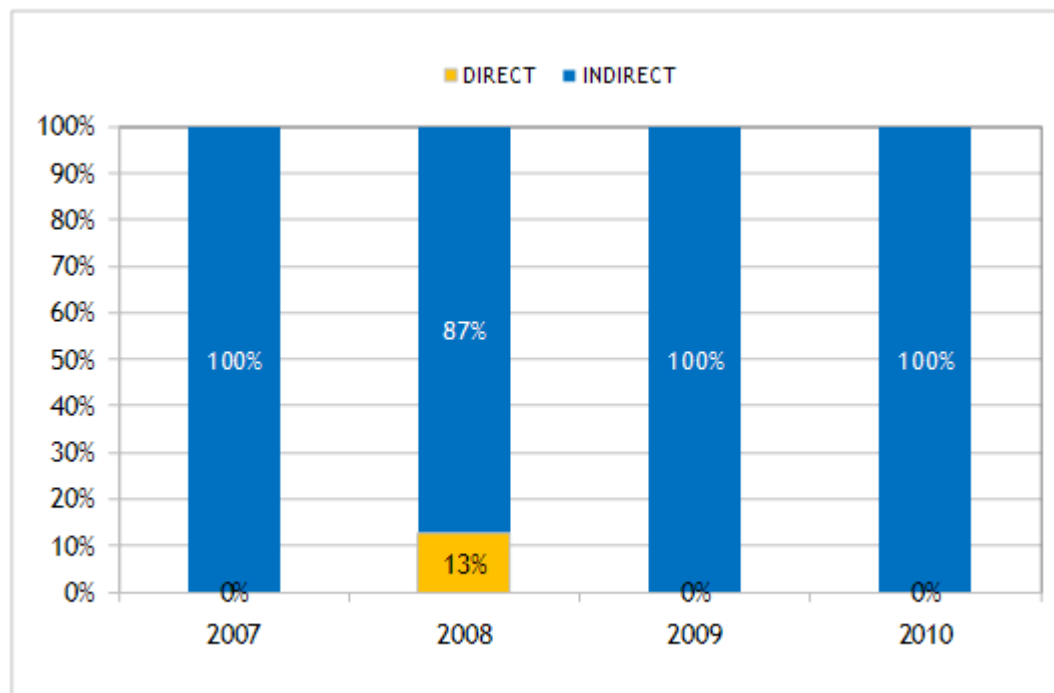
## DISTANCE

4,131 Miles

6,648 Kms

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

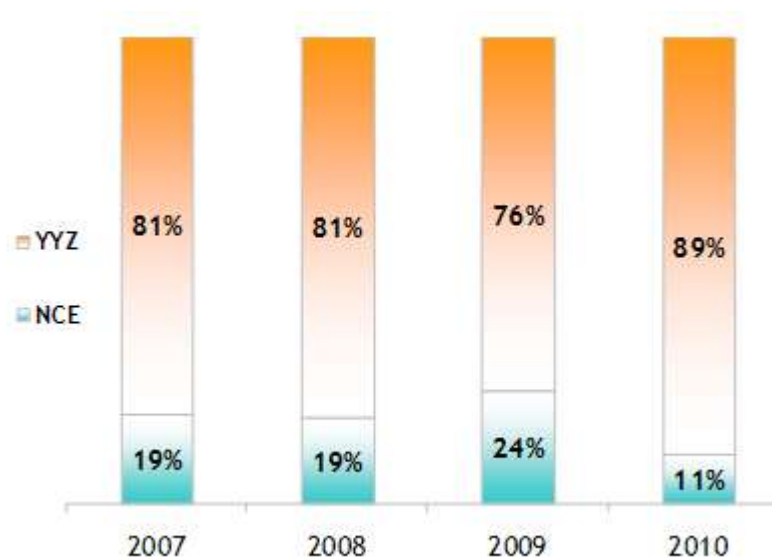
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	-	42 616		120%
2009	-	19 361	-100%	26%
2008	2 228	15 325		-5%
2007	-	16 199		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	26%	21%	21%	30%
<b>LOW FARE</b>	74%	79%	79%	70%

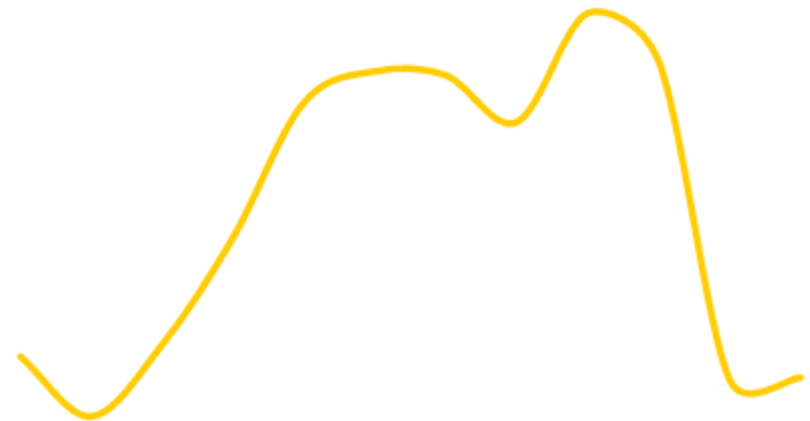
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
CDG	10 833	25%
FRA	9 592	23%
LHR	7 464	18%
JFK	4 039	9%
AMS	3 531	8%
ZRH	2 401	6%
MUC	1 878	4%
BRU	1 641	4%
OTHERS	1 236	3%
<b>Total YYZ</b>	<b>42 616</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
— 2010 IND	4%	2%	4%	8%	12%	13%	13%	11%	14%	13%	3%	3%

## ROUTE SURVEYS

Click on the left  
button to reach the  
part of your choice

- ▶ **GEO REGION TREND**
- ▶ **NICE-LAS VEGAS**
- ▶ **NICE-LOS ANGELES**
- ▶ **NICE-MIAMI**
- ▶ **NICE-MONTREAL**
- ▶ **NICE-NEW YORK CITY**
- ▶ **NICE-SAN FRANCISCO**
- ▶ **NICE-TORONTO**
- ▶ **NICE-VANCOUVER**
- ▶ **INCENTIVE POLICY**



## DISTANCE

5,371 Miles

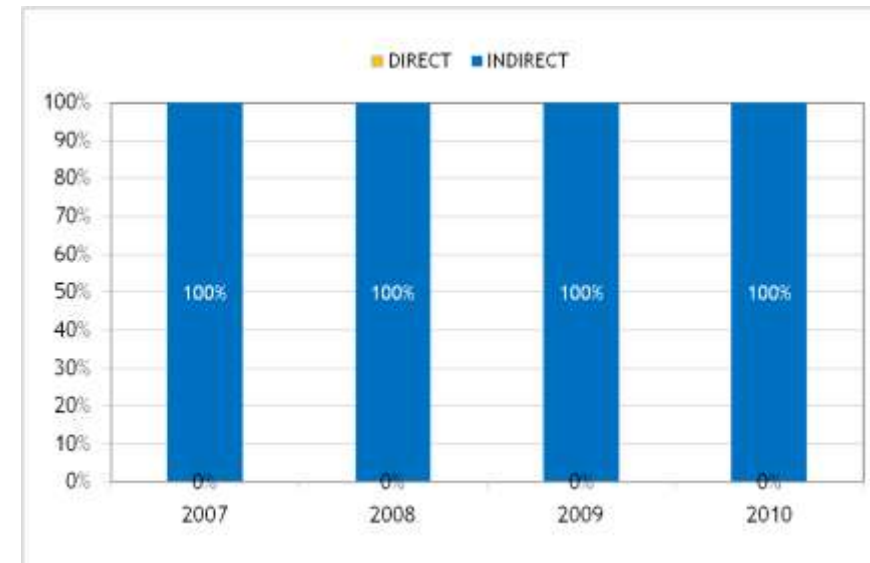
8,644 Kms

## PAST PERFORMANCE

No scheduled program on Nice-Vancouver

## TREND OF THE ROUTE AND DIRECT/INDIRECT BREAKDOWN

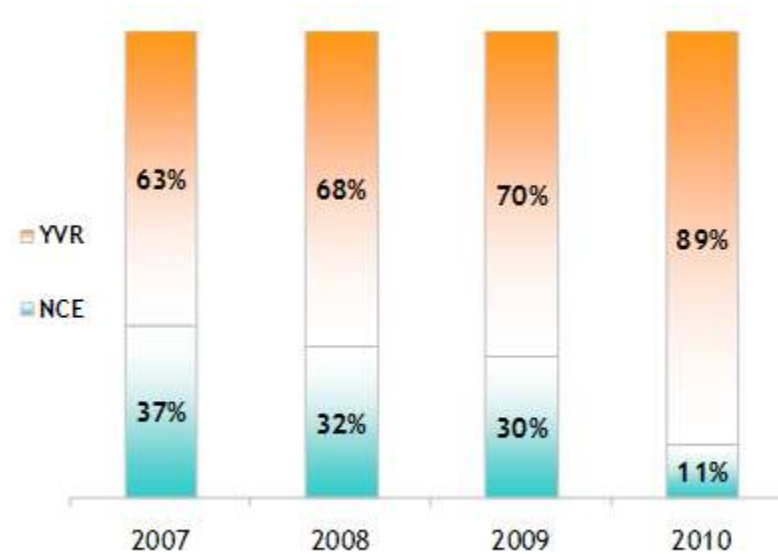
YEAR	DIRECT	INDIRECT	VAR DIR	VAR INDIR
2010	-	11 261		77%
2009	-	6 359		34%
2008	-	4 758		4%
2007	-	4 583		



(source : readjusted BSP IATA)



## POINT OF ORIGIN



## HIGH FARE TRAFFIC

	2007	2008	2009	2010
<b>HIGH FARE</b>	30%	23%	15%	40%
<b>LOW FARE</b>	70%	77%	85%	60%

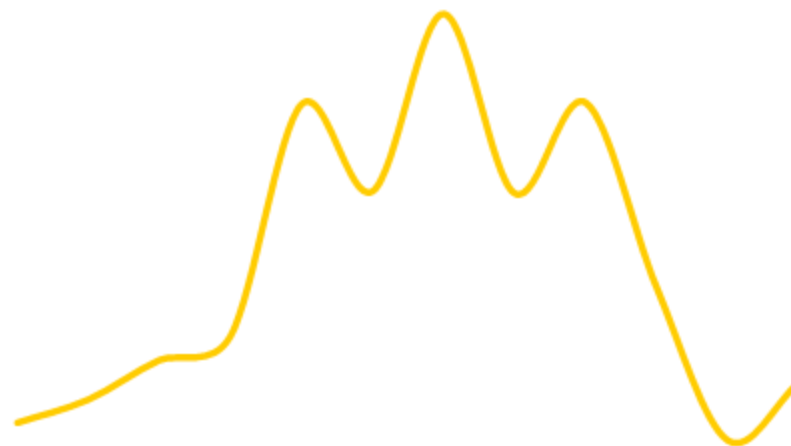
(source : readjusted BSP IATA)



## HUBS OF INDIRECT TRAFFIC

CNX HUB	IND TRAFF 2010	%
LHR	4 310	38%
FRA	4 174	37%
AMS	1 407	12%
DUS	483	4%
ZRH	253	2%
MUC	238	2%
CDG	232	2%
OTHERS	164	1%
<b>Total YVR</b>	<b>11 261</b>	<b>100%</b>

## SEASONALITY ON THE ROUTE



	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
— 2010 DIR	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
— 2010 IND	3%	4%	5%	6%	14%	11%	17%	11%	14%	8%	2%	4%

## ROUTE SURVEYS

Click on the left  
button to reach the  
part of your choice

-  **GEO REGION TREND**
-  **NICE-LAS VEGAS**
-  **NICE-LOS ANGELES**
-  **NICE-MIAMI**
-  **NICE-MONTREAL**
-  **NICE-NEW YORK CITY**
-  **NICE-SAN FRANCISCO**
-  **NICE-TORONTO**
-  **NICE-VANCOUVER**
-  **INCENTIVE POLICY**



# NICE CÔTE D'AZUR AIRPORT NETWORK DEVELOPMENT DEPARTMENT

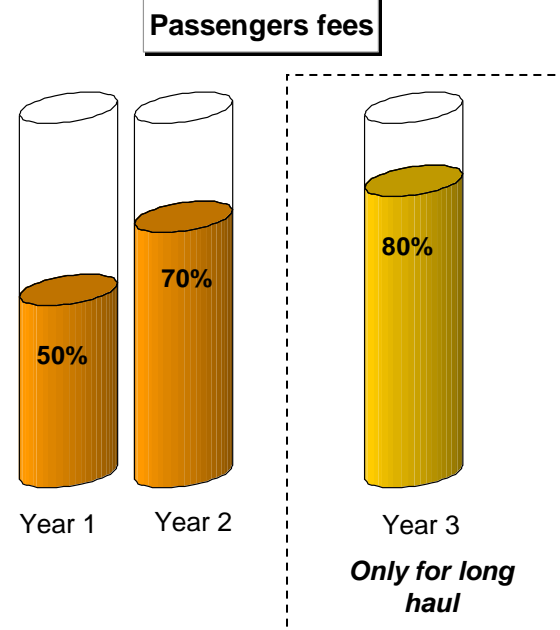
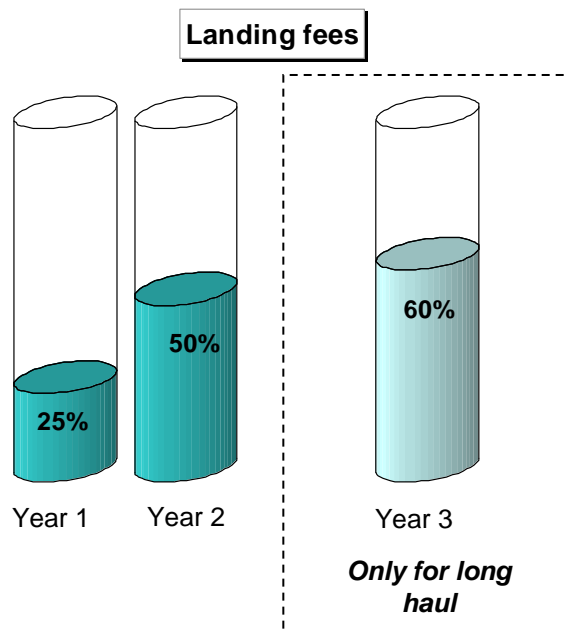


## NICE AIRPORT INCENTIVE POLICY

# 2011 Incentive policy



Open a new destination  
and pay only...



See conditions for application

# 2011 Incentive policy



## Open a new destination and pay only...

### Conditions for application – Short and medium haul

1. The route hasn't been operated for at least 12 months by the same airline
2. The route has to be operated for at least one aeronautical season and on the minimum basis of 24 rotations during summer and/or 16 rotations during winter
3. Night flight excluded (from 22:00 pm to 06:00 am local time)
4. The catchment area of the new destination must be independent of any other served catchment area from/to Nice
5. If a second airline operates the same new route, the latter will benefit from the same discount application for the remaining period

### Conditions for application – Long haul

1. The route must be equal or longer than 3,400 km
2. The route hasn't been operated for at least 12 months by the same airline
3. The route has to be operated for at least one aeronautical season and on the minimum basis of 16 rotations during summer and/or 12 rotations during winter
4. Night flight excluded (from 22:00 pm to 06:00 am local time)
5. The catchment area of the new destination must be independent of any other served catchment area from/to Nice
6. If a second airline operates the same new route, the latter will benefit from the same discount application for the remaining period

*Before each aeronautical season, a committee composed by Aéroports de la Côte d'Azur, 2 major Airlines, CSTA, SCARA, ratifies the discount applications for each new route.*

# 2011 Incentive policy



**Develop your traffic at Nice  
and be awarded with our BONUS !**

## Winter Season

Overpass Nice Airport's growth objective of 3% for winter season 2011/2012

And be awarded with a **bonus of €5 excl. VAT**, per extra departing passenger, above the airport's winter growth objective

## Summer Season

Overpass Nice Airport's growth objective of 4,7% for summer season 2011

And be awarded with a **bonus of €1.5 excl. VAT**, per extra departing passenger, above the airport's summer growth objective



*See conditions for application*

# 2011 Incentive policy



**Develop your traffic at Nice  
and be awarded with our BONUS !**

Conditions for application

1. Unscheduled routes are excluded
2. Night flight excluded (from 22:00 pm to 06:00 am local time)



If you need more information  
or a more detailed survey  
please contact us :

[The Nice Airport  
Network Development Team](#)

