

Rueil-Malmaison, 14 January 2021

VINCI Airports – Traffic 2020

- **Passenger traffic down 70% in 2020 as a result of the global health crisis**
- **Traffic penalised during the fourth quarter by new confinement measures in Europe**
- **Improvement in trends at the end of the year in airports in the Americas and Japan**

Passenger traffic in the VINCI Airports network was down 70% in 2020, with a total of 76.6 million passengers welcomed, versus 255 million in 2019¹, due to the global health crisis.

This situation is the result of strong travel restrictions put in place across the world to combat the spread of Covid-19. Network airports based in Europe and Asia, where restrictive measures were the most severe, reported sharper falls in traffic (around 72%) than airports in the Americas (around 61%).

Passenger traffic saw a rapid uptick in countries, such as the Dominican Republic, that lifted restrictions, reflecting still strong demand for mobility. Salvador airport (Brazil), Sanford Orlando (USA), Itami and Kobe (Japan) have also benefitted from some recovery in domestic travel starting in the summer of 2020. In Europe, the gradual uptick in traffic was cut short by the new restrictions put in place in the autumn.

Faced with this unprecedented crisis, network airports responded proactively by rapidly putting the required hygiene and health measures in place, in close collaboration with local authorities. Innovative projects were launched in 2020, such as *MONA* in Lyon, which offers a fully contactless journey through the airport thanks to use of biometrics. Quality of service at Lisbon airport was recognised by the *ACI Best Airport Award*, a first for a Portuguese airport.

VINCI Airports continued to develop, despite the pandemic:

- At London Gatwick, Wizz Air will open a new base in 2021, while EasyJet will add four more airplanes to its base, taking its offering at the airport to 107 destinations in 28 countries;
- In Portugal, EasyJet has announced opening of an operating base in Faro in the summer of 2021, a sign of its confidence in the country's potential;
- In the United States, VINCI Airports' management contract for terminals E and F in the Atlanta airport was renewed and the operating contract for the Hollywood Burbank airport in California was extended for another 10 years.

2020: sharp fall in traffic due to Covid-19

In Europe:

- Passenger traffic in VINCI airports in **Portugal** fell 69.6% in 2020 on the preceding year. After an uptick during the summer season, it was penalised in the fourth quarter by the new restrictions imposed in France, the United Kingdom and Germany in particular.

¹ Estimated data (100%) on 14 January 2021. 2019 data including full-year traffic in the airports.

- In the **UK** passenger numbers fell sharply in 2020 (down 78.2% at London Gatwick and 72.2% in Belfast compared to 2019), due to the quarantine rules imposed in the country. Traffic remained very weak in the fourth quarter, due to the new lockdown from the start of November.
- Passenger traffic fell 68.2% in **France**. Stronger summer demand in the third quarter was cut short at the end of the year due to the second lockdown put in place from early November to mid-December, although traffic picked up during the end-of-year holidays.
- Passenger traffic at Belgrade airport in **Serbia** was down 69.1%. After an improvement in passenger numbers in the third quarter, the rise in Covid-19 infections led to a gradual fall in traffic at the end of the year.

In Asia:

- Passenger numbers fell 69.4% in **Japan** over the full year. Trends in domestic traffic, boosted by the government "Go To Travel" campaign, improved, limiting the fall in traffic in the Itami and Kobe airports to 44% in the fourth quarter. Conversely, international traffic remained very weak throughout the year due to restrictions on entry into Japan.
- The very strict entry requirements in force in **Cambodia**, particularly from China, sharply penalised passenger traffic, which was down 81.3% over the full year. Fourth-quarter traffic remained very weak.

In the Americas:

- In **Brazil**, essentially domestic traffic at the Salvador airport continued to build on the recovery initiated in the summer at the end of the year (down 32.1% in December). Overall, traffic dropped 49.9% since the beginning of 2020. We might point out that the airport became one of the GOL airline's hubs in July. The company's seat capacity in the last fortnight of 2020 was 13% higher than the same period in 2019.
- In the **Dominican Republic**, traffic was down 56.1% over the year. The trend improved from the third quarter thanks to less restrictive entry rules, with a fall of 52.4% in the fourth quarter. It benefitted from strong demand from the United States and Europe, since the Dominican Republic is one of the few leisure destinations accessible without restrictions from these two regions.
- In **Chile**, passenger numbers at Santiago Airport, down 65.5% over the full year, moved into a positive trend at the end of the year thanks to partial lifting of travel restrictions. Alongside domestic traffic, regional flights to Colombia and - to a lesser extent - Spain are contributing to this slight improvement.
- In the **United States**, passenger numbers at the Orlando-Sanford airport were down 53.0% in 2020 compared to 2019 (down 50.1% in the fourth quarter). Domestic traffic remained relatively strong in the United States, whereas international borders were globally closed. The airline Allegiant, very active in Orlando, maintained close to 75% of its 2019 fourth-quarter capacities in the same period of 2020.

- In **Costa Rica**, full-year passenger numbers were down 60.8% in 2020. After a third quarter with virtually no traffic, the lifting of travel restrictions as of November 1st allowed a gradual recovery in the fourth quarter.

*In thousands of passengers**

	Q4 2020	% change Q4 2020 / Q4 2019	FY 2020	% change FY 2020 / FY 2019
VINCI Airports	13,889	-76.6%	76,580	-70.0%
Portugal (ANA)	3,042	-77.0%	17,968	-69.6%
United-Kingdom	929	-92.0%	11,913	-77.5%
Japan (Kansai Airports)	3,712	-70.8%	15,849	-69.4%
Chile (Nuevo Pudahuel)	1,628	-72.5%	8,514	-65.5%
France	1,021	-78.5%	6,805	-68.2%
Cambodia (Cambodia Airports)	115	-95.9%	2,170	-81.3%
United States of America	921	-65.7%	4,034	-61.0%
Brazil	1,279	-40.0%	3,900	-49.9%
Serbia	418	-70.3%	1,904	-69.1%
Dominican Republic (Aerodom)	669	-52.4%	2,475	-56.1%
Sweden	104	-80.0%	568	-75.0%
Costa Rica	51	-80.6%	480	-60.8%

*100% data estimated as of 14 January 2021.

About VINCI Airports

VINCI Airports, as the leading private airport operator in the world, manages the development and operation of 45 airports located in Brazil, Cambodia, Chile, Costa Rica, the Dominican Republic, France, Japan, Portugal, Serbia, Sweden, the United Kingdom and the United States. Served by more than 250 airlines, VINCI Airports' network handled 255 million passengers in 2019. Through its expertise as a comprehensive integrator, VINCI Airports develops, finances, builds and operates airports, leveraging its investment capability and know-how to optimise the management and performance of existing airport infrastructure, facility extensions and modernisation projects. In 2019, its annual revenue for managed activities amounted to €4.9 billion, for a consolidated revenue of €2.6 billion. www.vinci-airports.com

About VINCI

VINCI is a global player in concessions and contracting, employing 222,000 people in some 100 countries. We design, finance, build and operate infrastructure and facilities that help improve daily life and mobility for all. Because we believe in all-round performance, above and beyond economic and financial results, we are committed to operating in an environmentally and socially responsible manner. And because our projects are in the public interest, we consider that reaching out to all our stakeholders and engaging in dialogue with them is essential in the conduct of our business activities. VINCI's goal is to create long-term value for its customers, shareholders, employees, and partners and for society at large. www.vinci.com

Appendix – Passenger traffic and commercial aircraft movements at 31 December 2020

I- Passenger numbers by airport

<i>In thousands of passengers</i>	VINCI Airports share (%)	Q4 2020	% change Q4 2020 / Q4 2019	FY 2020	% change FY 2020 / FY 2019
Portugal (ANA) of which					
Lisbon (LIS)	100	1,486	-79.8%	9,261	-70.3%
Porto (OPO)	100	751	-75.4%	4,433	-66.2%
Faro (FAO)	100	374	-76.2%	2,207	-75.5%
Madeira	100	245	-67.5%	1,172	-65.2%
Azores	100	186	-61.7%	896	-63.6%
TOTAL		3,042	-77.0%	17,968	-69.6%
United Kingdom					
Gatwick (LGW)	50	705	-93.2%	10,165	-78.2%
Belfast (BFS)	100	224	-83.0%	1,748	-72.2%
TOTAL		929	-92.0%	11,913	-77.5%
Japan (Kansai Airports)					
Kansai (KIX)	40	871	-88.5%	6,556	-79.5%
Itami (ITM)	40	2,352	-44.4%	7,669	-53.6%
Kobé (UKB)	40	489	-44.3%	1,625	-51.7%
TOTAL		3,712	-70.8%	15,849	-69.4%
Chile (Nuevo Pudahuel)					
Santiago (SCL)	40	1,628	-72.5%	8,514	-65.5%
TOTAL		1,628	-72.5%	8,514	-65.5%
France					
Lyon-Saint Exupéry (LYS) & Lyon-Bron (LYN)	31	543	-79.8%	3,564	-69.7%
Nantes Atlantique (NTE)	85	372	-76.8%	2,328	-67.8%
Saint-Nazaire Montoir (SNR)	85	0	-94.8%	4	-78.8%
Rennes Bretagne (RNS)	49	46	-75.1%	257	-69.9%
Dinard Bretagne (DNR)	49	1	-93.5%	19	-80.6%
Grenoble Alpes Isère (GNB)	100	1	-96.8%	208	-32.5%
Chambéry Savoie Mont Blanc (CMF)	100	1	-96.6%	106	-48.4%
Toulon Hyères (TLN)	100	40	-56.8%	206	-59.4%
Clermont Ferrand Auvergne (CFE)	100	16	-83.9%	115	-73.4%
TOTAL		1,021	-78.5%	6,805	-68.2%

In thousands of passengers

	VINCI Airports share (%)	Q4 2020	% change Q4 2020 / Q4 2019	FY 2020	% change FY 2020 / FY 2019
Cambodia (Cambodia Airports)					
Phnom Penh (PNH)	70	98	-93.6%	1,331	-77.9%
Siem Reap (REP)	70	0	-99.9%	619	-84.2%
Sihanoukville (KOS)	70	17	-95.3%	221	-86.9%
TOTAL		115	-95.9%	2,170	-81.3%
United States of America of which					
Orlando-Sanford (SFB)	100	393	-50.1%	1,544	-53.0%
Hollywood Burbank (BUR)	MC*	437	-73.0%	2,039	-65.5%
Atlantic City (ACY)	MC*	90	-67.6%	451	-60.3%
TOTAL		921	-65.7%	4,034	-61.0%
Brazil					
Salvador (SSA)	100	1,279	-40.0%	3,900	-49.9%
TOTAL		1,279	-40.0%	3,900	-49.9%
Serbia					
Belgrade (BEG)	100	418	-70.3%	1,904	-69.1%
TOTAL		418	-70.3%	1,904	-69.1%
Dominican Republic (Aerodom) of which					
Saint-Domingue (SDQ)	100	603	-49.2%	2,015	-55.4%
Puerto Plata (POP)	100	47	-71.6%	357	-58.6%
Samana (AZS)	100	1	-97.9%	56	-67.3%
La Isabela (JBQ)	100	19	-15.9%	47	-43.9%
TOTAL		669	-52.4%	2,475	-56.1%
Sweden					
Stockholm Skavsta (NYO)	90	104	-80.0%	568	-75.0%
TOTAL		104	-80.0%	568	-75.0%
Costa Rica					
Guanacaste (LIR)	45	51	-80.6%	480	-60.8%
TOTAL		51	-80.6%	480	-60.8%

*MC : Management Contract

Total VINCI Airports		13,889	-76.6%	76,580	-70.0%
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II- Commercial movements by airports

<i>Commercial flights (ATM)</i>	VINCI Airports share (%)	Q4 2020	% change Q4 2020 / Q4 2019	FY 2020	% change FY 2020 / FY 2019
Portugal (ANA) incl.					
Lisbon (LIS)	100	18,318	-65.2%	86,843	-60.1%
Porto (OPO)	100	8,834	-61.9%	41,983	-56.5%
Faro (FAO)	100	4,972	-53.2%	22,520	-61.7%
Madeira	100	3,203	-46.9%	12,432	-52.3%
Azores	100	4,788	-17.9%	18,406	-37.6%
TOTAL		40,131	-59.2%	182,268	-57.5%
United Kingdom					
London Gatwick (LGW)	50	7,702	-87.8%	76,366	-72.8%
Belfast (BFS)	100	5,816	-46.6%	21,826	-55.6%
TOTAL		13,518	-81.7%	98,192	-70.2%
Japan (Kansai Airports)					
Kansai (KIX)	40	16,307	-68.0%	83,420	-59.7%
Itami (ITM)	40	26,121	-24.3%	96,215	-30.5%
Kobé (UKB)	40	7,447	-16.6%	26,247	-16.4%
TOTAL		49,875	-47.1%	205,882	-45.3%
Chile (Nuevo Pudahuel)					
Santiago (SCL)	40	14,696	-60.2%	62,686	-60.1%
TOTAL		14,696	-60.2%	62,686	-60.1%
France					
Lyon-Saint Exupéry (LYS) & Lyon-Bron (LYN)	31	10,552	-63.0%	49,442	-59.6%
Nantes Atlantique (NTE)	85	4,399	-69.3%	23,299	-63.1%
Saint-Nazaire Montoir (SNR)	85	236	-43.3%	919	-44.3%
Rennes Bretagne (RNS)	49	946	-69.3%	4,176	-68.4%
Dinard Bretagne (DNR)	49	82	-62.2%	653	-48.2%
Grenoble Alpes Isère (GNB)	100	188	-70.1%	2,929	-24.3%
Chambéry Savoie Mont Blanc (CMF)	100	469	-60.9%	4,825	-29.6%
Toulon Hyères (TLN)	100	1,109	-42.2%	6,105	-45.1%
Clermont Ferrand Auvergne (CFE)	100	889	-59.4%	3,891	-57.4%
TOTAL		18,870	-63.2%	96,239	-58.6%

<i>Commercial flights (ATM)</i>	VINCI Airports share (%)	Q4 2020	% change Q4 2020 / Q4 2019	FY 2020	% change FY 2020 / FY 2019
Cambodia (Cambodia Airports)					
Phnom Penh (PNH)	70	2,550	-83.1%	18,346	-67.2%
Siem Reap (REP)	70	69	-99.3%	7,751	-80.5%
Sihanoukville (KOS)	70	271	-93.8%	3,151	-82.3%
TOTAL		2,890	-90.1%	29,248	-74.3%
United States of America <i>incl.</i>					
Orlando-Sanford (SFB)	100	4,055	-29.4%	15,989	-34.4%
Hollywood Burbank (BUR)	MC*	31,488	-17.1%	106,805	-27.1%
Atlantic City (ACY)	MC*	1,035	-48.3%	4,641	-42.8%
TOTAL		36,578	-20.0%	127,435	-28.8%
Brazil					
Salvador (SSA)	100	15,857	-25.3%	49,574	-36.7%
TOTAL		15,857	-25.3%	49,574	-36.7%
Serbie					
Belgrade (BEG)	100	8,198	-49.7%	33,622	-52.2%
TOTAL		8,198	-49.7%	33,622	-52.2%
Dominican Republic (Aerodom) <i>incl.</i>					
Saint-Domingue (SDQ)	100	6,978	-38.9%	23,976	-44.6%
Puerto Plata (POP)	100	595	-52.1%	2,862	-53.9%
Samana (AZS)	100	94	-63.0%	507	-61.5%
La Isabela (JBQ)	100	1,759	-24.5%	5,840	-38.7%
TOTAL		9,436	-38.3%	33,255	-45.1%
Sweden					
Stockholm Skavsta (NYO)	90	1,017	-69.7%	4,820	-66.0%
TOTAL		1,017	-69.7%	4,820	-66.0%
Costa Rica					
Guanacaste (LIR)	45	1,090	-65.5%	5,554	-60.2%
TOTAL		1,090	-65.5%	5,554	-60.2%

*MC : Management Contract

Total VINCI Airports		212,156	-56.6%	928,775	-54.8%
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