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The economic impact of Geneva Airport

Final report

Michel Zimmermann, Martin Eichler, Rebekka Heikkilä, Rebeka Furrer and Sandro Tanner

Commissioned by Aéroport International de Genève

INFRAS DENKEN ÜBER MORGEN

Editorial Information

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Commissioned by

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Content

Executive Summary

Geneva is home to a diverse and internationally connected business community as well as to many international organisations. International Geneva, including permanent UN missions, a large diplomatic community, numerous NGOs, and an active conference ecosystem, amongst many others, makes Geneva a centre of global governance. Furthermore, more than 2'000 multinational companies are present in Geneva (Fondation pour Genève 2024), with key sectors such as life sciences, banking and finance, trade, and watches and luxury goods. Located in the heart of the region, Geneva Airport provides the connectivity necessary for these kinds of activities. Geneva Airport opened in 1920 and has since developed into a key infrastructure for the region: Today, the airport is the main access point to the global transportation network for the canton of Geneva and neighbouring regions in Switzerland, France and Italy.

Geneva Airport is important with respect to the regional economy, too. In general, the economic impact of an airport falls into two categories: Firstly, companies located at the airport and companies involved in providing air-transport services for the airport generate employment and value added[1]. This is considered the **direct effect**. The intermediate demand[2] of these companies further adds to the economic impact, i.e. the economic effects of their suppliers' production. The **indirect effect** captures the employment and value added at suppliers located in the regional economy, encompassing the complete supply chain. The **induced effect**[3] measures the economic activities (value added and employment) which result from spending of income by employees, who are employed either at the airport (i.e. part of the direct effect) or somewhere in the supply chain (i.e. part of the indirect effects). These three effects taken together are known as the production-side effects.

Secondly, airports increase a region's international accessibility for both people and goods. Accessibility is an important factor in a region's attractiveness. Well-developed accessibility raises productivity of international businesses, enlarges markets, improves competitiveness and innovation, thereby attracting more business activity and investments to the region. In particular, airports are essential for international tourists traveling to and spending money in the region. For Geneva, the International Geneva complex puts an additional emphasis on the importance of being well connected to the world. All these effects impact the regional economy and can together be subsumed under demand-side effects or catalytic effects. An overview of the various effects is provided in Figure 1.

[1] We consider the gross value added, which includes personnel costs, taxes/duties, depreciation/amortisation and financial costs. It is also defined as revenue minus intermediate consumption. Value added of all companies in an economy builds the Gross Domestic Product (GDP), a key measure of economic activity.
[2] I.e. demand for goods and services which are an input in the production process.
[3] The calculation of the induced effect has changed relative to the last assessment in INFRAS and BAK Economics (2017). Please refer to Box 1 for detail.

Figure 1: Categorisation of economic effects

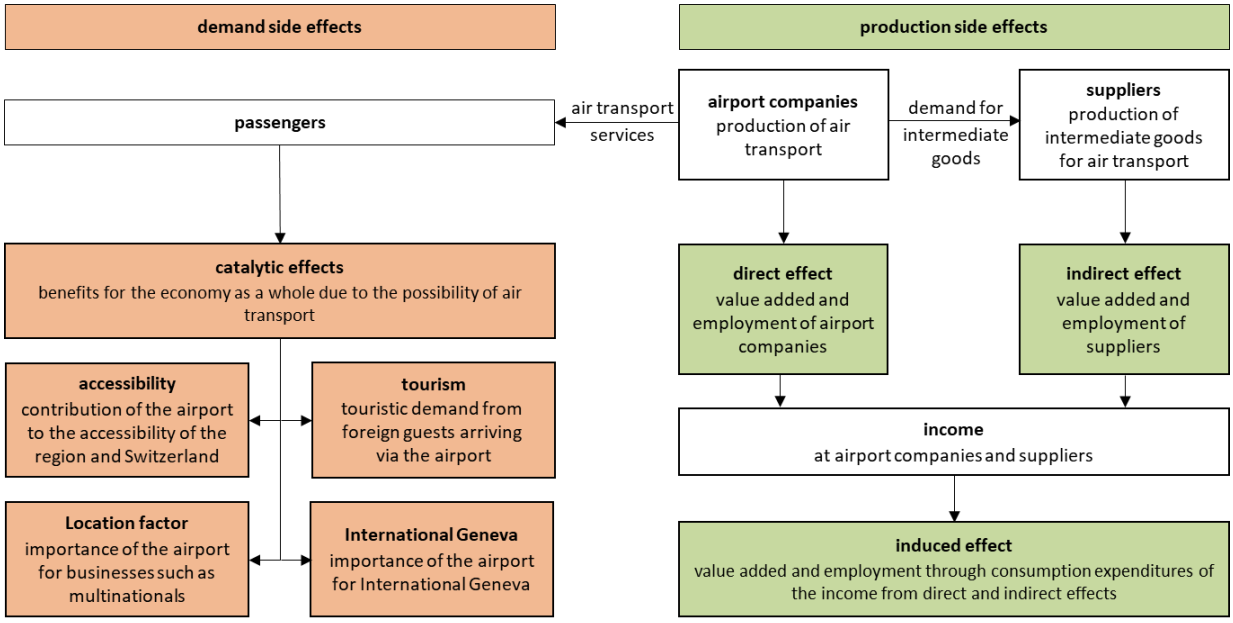


Figure INFRAS.

As the primary travel hub, Geneva Airport has a large impact on the regional economy.

To run and strategically develop an airport, having a comprehensive idea of the airports' wide-ranging economic impacts and the manifold interactions of the airport with the regional economy is crucial. At the same time, a multitude of different stakeholders such as political and business actors, civil society and local residents take strong interest in the airport. Therefore, it is essential for the airport operator AIG (Aéroport International de Genève) to have access to recent and objective information on the role the airport plays in the regional economy and the impact it exerts on it. AIG has commissioned INFRAS to update previous work (INFRAS and BAK Economics 2017) and assess the economic impact of Geneva Airport on the regional economy in 2024. This study analyses both the production-side effects as well as the catalytic effects.

System boundaries

The study analyses the economic impact of Geneva Airport on the regional economy. Particularly for the production-side effects, an unambiguous definition of the regional economy is needed. Here, it primarily extends across two territories: Switzerland as a whole and the nearby French border region[4]. Taken together, they form the geographical system boundary. In addition, results are presented for the sub-regions.

[4] The French border region includes the departments of Haute-Savoie, Savoie, Isère, Rhône, Ain, Saône-et-Loire, Jura, and Doubs.

It is important to understand the influence of different geographical boundaries on the results: The direct effects are always localized at the airport, and only there. For the indirect effects, attribution follows the supply chain: an intermediate input generates an indirect effect only if it is sourced from a supplier located within the given area. Inputs sourced from outside regions are ignored. The same logic applies to induced effects: only income spent again within the defined geographical boundary is included. The reference year for the calculation of production-side effects is 2024.

Box 1: Methodological changes in calculating induced effects

The methodology for calculating induced effects has been revised relative to the previous assessment of the economic impact of Geneva Airport (INFRAS and BAK Economics 2017). The revised approach was first applied in the FOCA study on the economic importance of Swiss aviation (INFRAS 2025b) and is now carried over to the present update.

The multiplier-based approach is unchanged: induced effects are calculated by applying Swiss (or, depending on the system boundary, French) average multipliers to the income available for private consumption. Changes emerge with respect to how the income base is determined. In the 2017 study, employee wages were assumed to correspond directly to the value added generated in the respective activity and were then reduced by a flat factor to account for expenditures abroad. Better data availability now allows a more accurate calculation. We apply sector-specific ratios of compensation of employees to value added, reflecting the fact that labour intensity — and thus the share of wages in total value added — varies across sectors. We also account for the fact that not all income is available for consumption (owing, e.g., to social security contributions and taxes) or is actually spent on consumption (savings rate).

Furthermore, the relationship with other countries is treated explicitly rather than via a flat deduction: direct consumption abroad is excluded in line with the Swiss system boundary, with the relevant share derived from Swiss household expenditure abroad as recorded in the Consumer Price Index survey.

Finally, the income of cross-border commuters is no longer counted as part of the Swiss income base. A small share of this income is likely spent at the workplace, but the lion’s share is spent at the place of residence. As these shares are not known, we assume for simplicity that cross-border commuters' consumption accrues entirely at their place of residence. It is, therefore, not relevant to the Swiss economy. This tends to understate the induced effect at the place of work. At the same time, it marks a substantive departure from the earlier study.

Taken together, these refinements narrow the income base to which the multipliers are applied, relative to the 2017 study.

The production-side effects of Geneva Airport

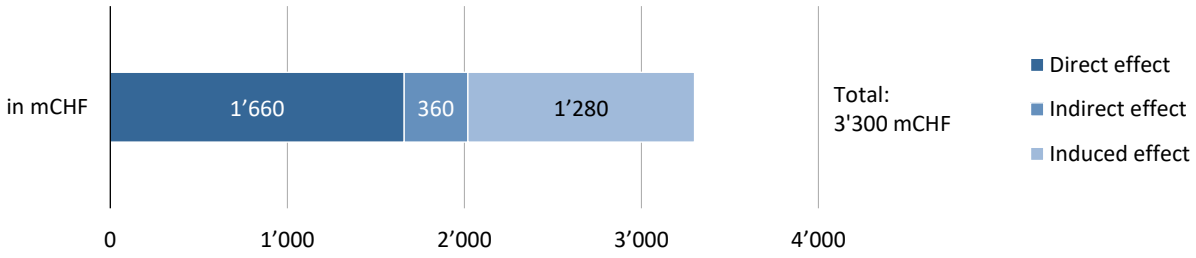
The total production-side effects of Geneva Airport

To quantify the production-side effects, detailed data on employment and economic activity at the airport are required. This information is, however, not readily available, neither in public statistics nor with the airport administration. A workplace survey in autumn 2025, covering all 268 companies operating within the airport perimeter (as laid out by PSIA[5]), provided the necessary data[6].

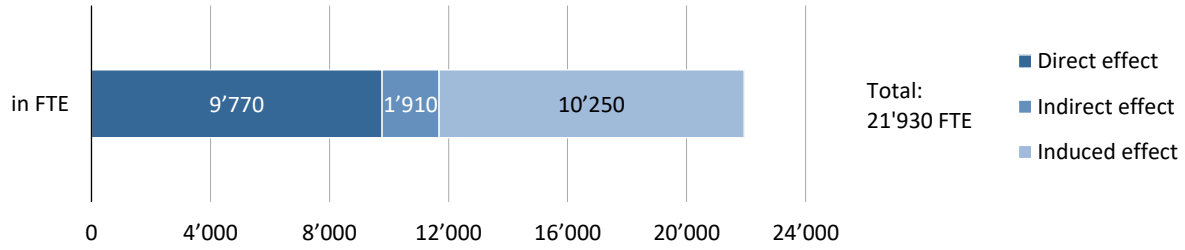
In 2024, the companies located at the airport employed 11'550 people, equivalent to around 9'800 full-time jobs. In total, 1’660 mCHF value added can be attributed directly to Geneva Airport. This direct effect corresponds to around 2.6% of the GDP of canton of Geneva in 2024[7].

The supply of intermediate goods and services, demanded by companies located at the airport and sourced within the region, results in an additional 1’910 full-time jobs and 360 mCHF of value added (indirect effect). Furthermore, taking into consideration the effects generated by the income spending of the employees, another 10’250 full-time jobs and 1’280 mCHF of value added can be attributed to Geneva Airport (induced effect). Taken together, the total production-side value added related to Geneva Airport was 3’300 mCHF in 2024, corresponding to around 21’930 full-time equivalents (FTE). Figure 2 provides an overview of these results.

Figure 2: Total production-side effects for Switzerland and French border region



[5] The “plan sectoriel de l'infrastructure aéronautique” (PSIA) is the federal government’s planning and coordination tool for civil aviation. It outlines the purpose, required perimeter, primary usage aspects, equipment and general operating conditions for every aerodrome (FOCA 2018).
[6] Note that, in addition to all companies located at the airport, companies and their employees were included, if they are providing services directly related to airport or flight operations, even if located outside the perimeter. For example, if an airline has an office in downtown Geneva handling, for example, the HR issues for flight crews stationed in Geneva, we include this in the workplace survey and in the calculation of the direct effect.
[7] Estimated GDP for the canton of Geneva in 2024: 64’515 mCHF (OCSTAT 2026a)



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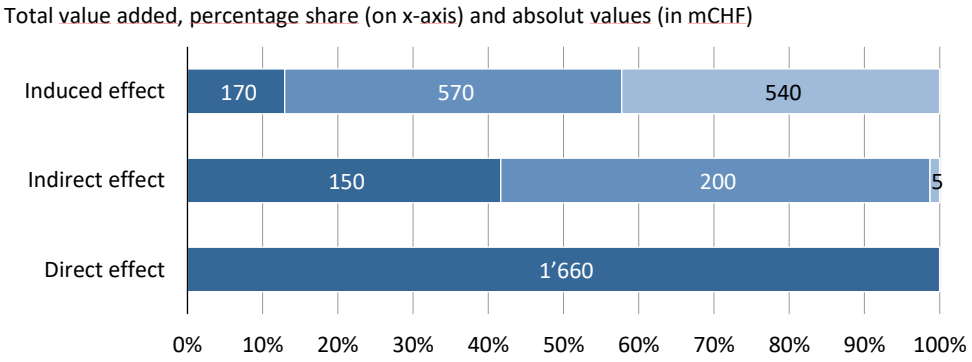
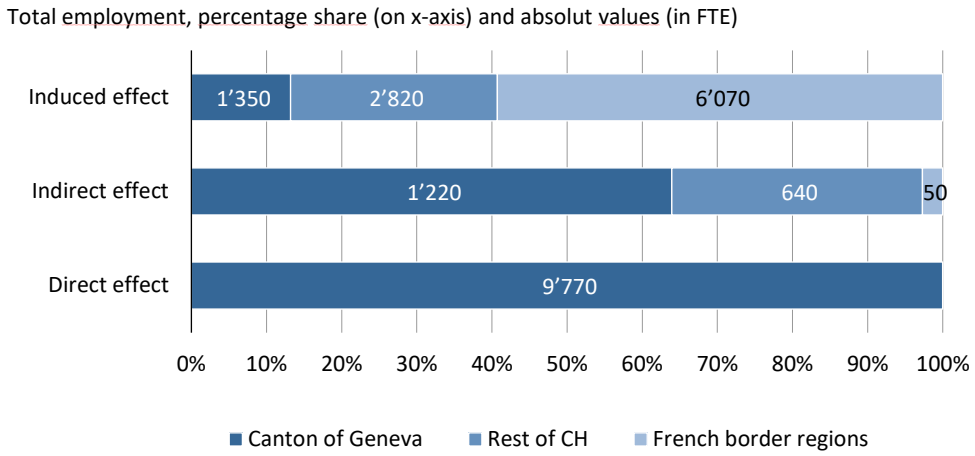
Production-side effects of Geneva Airport for three sub-regions

Figure 3 presents how the contribution of each effect differs for these three regions in terms of value added and employment: The canton of Geneva as the airport’s home canton, the French border region as the immediately adjacent territory, where a lot of employees live, and the rest of Switzerland. In total, the regional effects for the canton of Geneva amount to almost 2 bCHF, while the economic impact of Geneva Airport on the French border region is considerably lower with slightly more than 540 mCHF of value added. The remaining economic effect of roughly 750 mCHF accrues in the rest of Switzerland.

By definition, 100% of the direct effect is attributed to the canton of Geneva, where the airport is located. In terms of the indirect effect, almost all the value added and employment accrues in the canton of Geneva and the rest of Switzerland. This implies that only a small portion of intermediate inputs are sourced from the French border region. For the induced effect, the French border region plays a much more important role. This is driven by the large number of cross-border commuters employed both at the companies at the airport and along the supply chains.

Figure 3: Regional distribution of the economic impact of Geneva Airport in 2024





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Production-side effects of Geneva Airport for selected air travel services

The preceding sections analysed the total effects of all activities at the airport. This section focuses on two categories of activities of particular relevance for Geneva Airport: **general and business aviation** and **air cargo services.**

Around 30 companies are involved in general and business aviation at Geneva Airport. Eighteen of these work exclusively in this field, while the others provide goods and services to general and business aviation, as well as to other aviation activities. These companies come from a variety of sectors, including catering-on-air, maintenance or handling.

In total, general and business aviation generates 330 mCHF of value added. The associated employment effect amounts to 2'410 FTE. This corresponds to around 10% of the total value added and employment effects of Geneva Airport.

Cargo and freight activities at Geneva Airport are provided by more than 90 companies. The majority of these companies are from the air cargo and logistics sectors, most of which are located in Geneva Airport's freight hall. Furthermore, handling companies, as well as e.g. public authorities, also provide services related to cargo and freight activities as well. Finally, there are various airlines that transport goods as part of their flight operations.

In total, the effect amounts to around 330 mCHF value added and 2'400 FTE. The direct and induced effects represent most of the value added and employment, while the indirect effect is only around 10% of the total.

Catalytic effects from Geneva Airport

A full assessment of economic relevance requires looking beyond the airport perimeter: Geneva Airport is a critical gateway for one of Europe's most internationally

oriented economies. As the hub connecting the Geneva region to global markets, the airport shapes the conditions under which firms, international organisations, and tourists engage with the city and its surroundings. It also generates knock-on effects for location decisions, international institutional presence, productivity, and international competitiveness. To assess these catalytic effects, we analyse in turn the connectivity – or accessibility – that Geneva Airport provides to the region, the role this connectivity plays for the business community, as well as how the airport shapes the attractiveness and competitiveness of International Geneva, and its function as an entry point for international tourism.

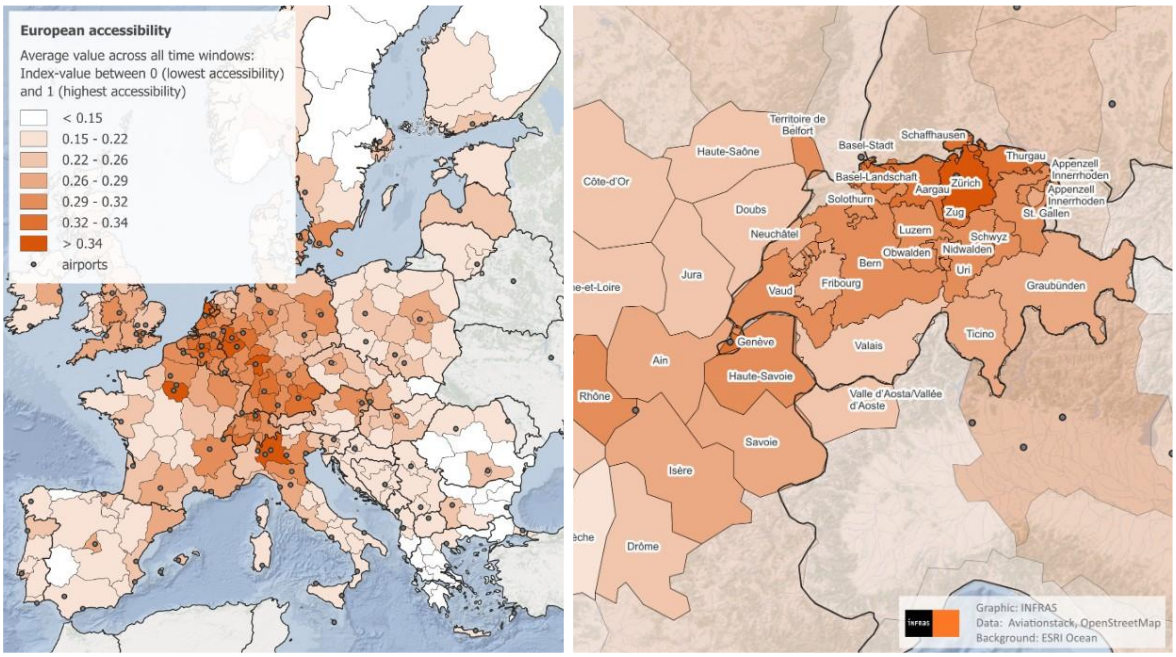
Accessibility of Geneva and the surrounding regions

The INFRAS accessibility model focuses on the needs of business travellers and assesses both European (to destinations in Europe) and global (to destinations outside Europe) accessibility. The model defines accessibility as the ability to reach other regions taking travel time as well as economic attractiveness of the destination (GDP) into account. Accessibility is calculated with actual flight data, includes direct and transfer connections, and captures the complete trip times. The model covers 284 European regions (NUTS 2 level) as starting points as well as destinations. In addition, 116 global regions are included as destinations as well as 135 European airports and 130 airports outside Europe. Furthermore, a more detailed analysis is conducted at the cantonal level for Switzerland and at the NUTS 3 level for neighbouring regions in France and Italy.

The results show high accessibility for the Lémanique region (Geneva)[8]. Within Europe, the region ranks 19th out of 284 regions, with an accessibility index of 0.33, comparable to major metropolitan areas such as London and Vienna. This reflects strong integration into the European economic core. Figure 4 shows the accessibility of the European regions on the left and the regions in the vicinity of Geneva Airport on a more detailed level (NUTS 3 and cantonal level) on the right.

[8] Accessibility information is a point-related information, and the economic centre of a region is used as point. Therefore, accessibility for the Lémanique region (NUTS 2) is identical to the accessibility for the canton of Geneva (NUTS 3) and the city of Geneva.

Figure 4: Accessibility of the regions in the vicinity of Geneva Airport within Europe



Regions according to NUTS 2 classification (left) and NUTS 3 classification and cantons (right). Average value across all time windows. Additional dot symbols for the airports included in the calculation.

Figure INFRAS.

For global accessibility, the Lémanique region ranks 65th, with an index of 0.28, slightly below major hub regions such as Amsterdam, Frankfurt, Paris, and London. Nevertheless, its global accessibility is comparable to cities like Berlin, Barcelona, and Rome, indicating a solid — though not leading — position in intercontinental connectivity.

Geneva Airport is a key infrastructure for the accessibility of Geneva. For the Lémanique region, 85% of the value of the accessibility within Europe is due to connections which rely on Geneva Airport. This figure decreases for neighbouring regions, but Geneva is still the single most important hub for many of them. For example, more than half of accessibility of the cantons of Vaud (76%), Valais (63%), and Neuchâtel (50%) relies on connections via Geneva Airport. The same is true for Haute-Savoie (FR, 80%) and Valle d'Aosta (IT, 45%). For connections to outside Europe, intercontinental flights from Geneva Airport play a substantial role: About one third of the global accessibility of Geneva relies on intercontinental flights starting at Geneva Airport. Equally important, however, are feeder flights from Geneva Airport via other European airports, which account for the majority of intercontinental connections.

A simulation assessing a hypothetical scenario without Geneva Airport highlights its critical importance. Travel times to major European cities (including access to airport, check-in etc.) would increase significantly (e.g., Geneva–Frankfurt from three to almost five hours; Geneva–Istanbul from six to ten hours). Overall air accessibility for the canton of Geneva would decline by approximately one-third. Accessibility losses

would also affect surrounding NUTS 3 regions and cantons, with reductions ranging from 10% to 30%.

Geneva Airport as a location factor for business

Whether and how strongly a region benefits from airport accessibility fundamentally depends on its economic structure. Sectors that are internationally oriented, knowledge-intensive, or dependent on face-to-face client relationships benefit most. Geneva's economy is disproportionately composed of exactly these sectors. According to the cantonal production accounts (OCSTAT, 2026b), the tertiary sector accounts for 83.4% of gross value added. Wholesale trade, which includes Geneva's globally significant commodity trading cluster, accounts for 17.0% of cantonal value added. Financial services and insurance contribute 12.8%, while professional, scientific and technical services account for 7.2%. Roughly 2’100 multinationals generate direct value added in the canton of Geneva of 21 bCHF and are responsible for more than 107’000 FTEs, which corresponds to almost a third of all employment in the canton (Fondation pour Genève 2024).

The international nature of Geneva's economy is further highlighted by the fact that, historically, more than 10% of all Swiss exports have originated from Geneva, exceeding Geneva’s share of the national GDP. Although the proportion of exports has fallen recently, Geneva still accounted for 7.7% of all Swiss exports in 2024. Half of the 23 bCHF of exported goods in the canton of Geneva come from the watchmaking industry, which has by far the largest share of all exports (OCSTAT 2025a).

Accessibility reduces transaction costs and expands markets, supports innovation through face-to-face exchange of tacit knowledge, and contributes to quality of life and talent attraction. These three channels are not independent — they reinforce each other. Empirical studies confirm that increases in air connectivity are associated with measurable gains in GDP, employment, and productivity.

To better understand the airport's role for the business community, we conducted several interviews with key stakeholders of the business community and additionally exploited an external survey on the relevance of Geneva Airport for businesses and their use of air transport as well as selected firm-level testimonials. 82.5% of the respondents of one survey (AERIA+ 2025) rated Geneva Airport as a major asset for regional business attractiveness. Almost 90% consider a high-performing business aviation sector essential for Geneva to maintain its position as a hub for finance, trade and multinationals. According to firm-level testimonials (GEM 2026), more than 75% of all international business travel goes through Geneva Airport, further underscoring the relevance of the airport as a gateway hub. Businesses use the airport primarily for the movement of people. Freight is secondary in volume but strategically important for specific niches. The most frequently voiced criticism concerned the lack of direct long-haul connections, particularly to Asia.

A central finding across most interviews is that the airport is not the primary reason firms choose Geneva. But no interviewee could imagine Geneva as a credible

international business location without the airport. The airport is the infrastructure that makes much of it possible. Maintaining and developing it is not a luxury, but a condition for Geneva's continued competitiveness as an international business location.

International Geneva

Geneva is a global hub for multilateral diplomacy and international governance without parallel among cities of its size. As of 2025, the canton hosts 42 intergovernmental organisations, 250 international non-governmental organisations with at least one employee, and 185 permanent missions to the United Nations (OCSTAT 2025c). This non-commercial sector alone generated approximately CHF 5 billion in direct value added and around 28,600 FTE jobs in the canton (Fondation pour Genève, 2024). Geneva's distinctiveness lies in the density and diversity of its international presence across health, labour, trade, humanitarian affairs, human rights, and disarmament — all within a compact, highly interconnected ecosystem where organisations, missions, NGOs, scientific institutions, and private actors operate in close proximity.

International organisations are structurally dependent on the movement of people. Their core functions — negotiating treaties, coordinating humanitarian responses, setting technical standards, convening member states — require the physical presence of delegates, officials, and experts drawn from across the world. Conferences, diplomatic missions, and expert consultations are not ancillary to what these organisations do, but central to their existence and meaning. This structural dependency translates directly into demand for air connectivity.

According to interviewees, at least 90% of people in the International Geneva community arrive by air through Geneva Airport. Travel is concentrated at the executive level — it is primarily heads of organisations and their immediate deputies who travel regularly — making the airport a high-frequency, high-value corridor for senior international officials and delegations throughout the year.

When international organisations are asked which factors matter most for their location decisions, the airport is consistently among those named. Without its airport, International Geneva would lose its relevance, and the entire complex would be at risk of relocating. Structural connectivity gaps nonetheless persist: the limited number of intercontinental routes reduces Geneva's attractiveness as a host city for organisations with a globally distributed membership and operations. Current customs congestion is raised as a further source of friction. Please note that according to the airport administration, this issue is being addressed and should be viewed as temporary.

Geneva Airport is not simply a transport node for International Geneva, but rather a structural enabler of the entire complex. The airport's catalytic effect operates through International Geneva as a transmission mechanism: the airport enables the complex, the complex sustains the economy, and any erosion of air connectivity — whether through insufficient intercontinental routes or capacity constraints —

translates, with a lag, into pressure on Geneva's position as one of the world's foremost host city for multilateral institutions.

The economic impact of inbound tourism via Geneva Airport

Tourists are an important factor in modern economies. With their expenditures, they provide revenue to local businesses, and serving their needs ensures employment. The hospitality sector (accommodation and any type of restaurant) in fact plays an important role in the economy of the canton of Geneva.

We examine the economic importance of Geneva Airport for tourism in the canton of Geneva, the rest of Switzerland, and the neighbouring French border region[9]. The objective is to quantify the revenue generated by foreign overnight visitors[10] entering Switzerland via Geneva Airport and the associated total economic effect for Switzerland and the considered French border region.

First, we determine the number of incoming tourists arriving through Geneva Airport. In 2024, Geneva Airport recorded almost 18m passengers, of which 2.9m incoming passengers arrived through Geneva Airport from abroad and generate overnight stays in the wider region. Using the airport's passenger survey, we estimate that approx. 1m foreign visitors stayed in the canton of Geneva, 0.75m international guests travelled to the rest of Switzerland and slightly more than 1m tourists travelled to France, amounting to 2.75m of the 2.9m incoming passengers staying within the system boundaries.

Second, we assess the number of overnights that can be associated with these guests. In total, 6.1m nights can be attributed to foreign visitors arriving through Geneva Airport. Underscoring the importance of Geneva Airport for overnight tourism, we find that 70% of all foreign overnight stays in the canton can be attributed to visitors arriving via Geneva Airport.

Thirdly and finally, we determine the total expenditure by these inbound tourists using data on average spending by visitors, depending on their origin. In total, almost 1.7 bCHF of tourism expenditure can be attributed to guests of Geneva Airport: approx. 630 mCHF in the canton of Geneva, 500 mCHF in other Swiss cantons and roughly 540 mCHF in the adjacent French departments.

The spending by inbound tourism is, however, not equal to the total economic impact for value added and employment in the region. As with production-side effects, the total economic effect encompasses direct, indirect and induced effects. The total spending of 1.7 bCHF translates to a total effect of 1.8 bCHF of value added and an accompanying employment effect of more than 16'800 FTE. Almost half of this total effect is due to the direct effect, which accrues at the places of tourist expenditure — mainly accommodation and hospitality. In case of employment, the dominance of the

[9] The French border region includes the departments of Haute-Savoie, Savoie, Isère, Rhône, Ain, Saône-et-Loire, Jura, and Doubs.
[10] We assume that visitors from Switzerland do not use air transport to visit Geneva. For simplicity, we further assume that only visitors staying overnight generate a relevant expenditure in the tourism industry.

direct effect is even greater, which can be explained by the comparatively low labour productivity in the tourism sector.

Figure 5: The total economic effect of tourist spending by inbound tourists flying to Geneva Airport

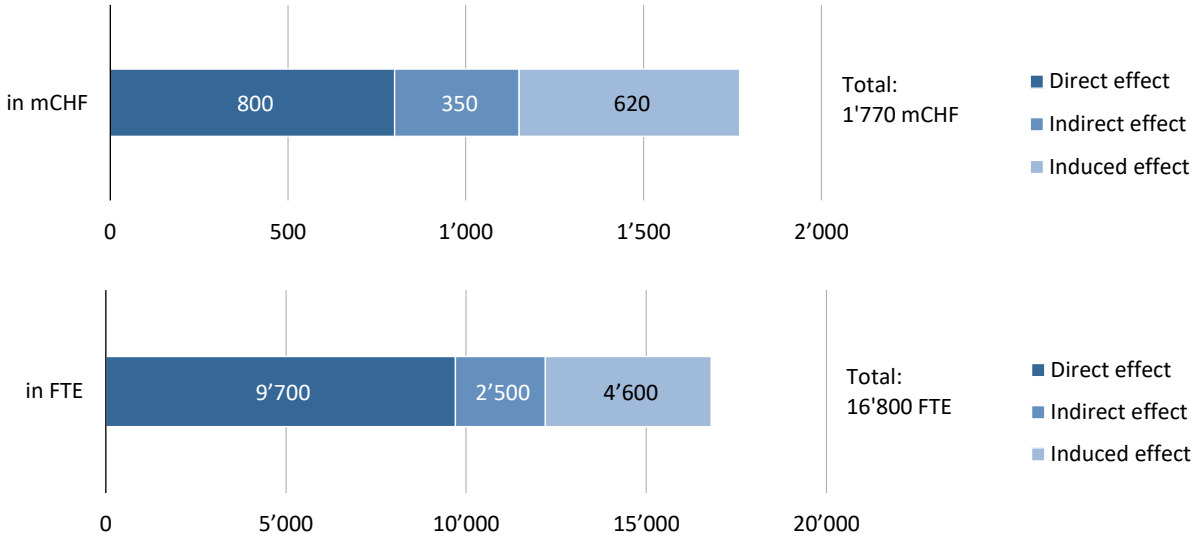


Figure INFRAS.

This analysis demonstrates the importance of catalytic effects of inbound tourism specifically when analysing the economic impact of an airport for its home region. In total, the economic effect that can be attributed to tourists flying into Geneva Airport is more than half of the total production-side effects of Geneva Airport.

1. Introduction

Geneva is home to a diverse and internationally connected business community as well as to many international organisations. International Geneva, including permanent UN missions, a large diplomatic community, numerous NGOs, and an active conference ecosystem, amongst many others, makes Geneva a centre of global governance. Furthermore, more than 2'000 multinational companies are present in Geneva (Fondation pour Genève 2024), with key sectors such as life sciences, banking and finance, trade, and watches and luxury goods. Although Geneva's economic structure is diverse, a substantial part of it relies heavily on the linkages with the globalized economy.

Centrally located in the heart of the region, Geneva Airport is the main hub providing connectivity to all these international and intercontinental activities. Geneva Airport opened in 1920 and has since then developed into a key infrastructure for the region: Today, the airport is the key access point to the global transportation network for travellers and goods to and from Geneva and its neighbouring regions in Switzerland, France and Italy. In 2024, it connects 146 destinations with a direct airlink from Geneva, thereof 39 intercontinental destinations (including Turkey). These 146 destinations have been served with more than 135'000 commercial flights (without business aviation, charter flights and other non-commercial flights), providing a dense and well-knitted travel network. A total of 17.8 million passengers travelled via Geneva Airport in 2024, nearly returning to pre-pandemic record levels in 2019. Most of the passenger traffic was to and from European destinations, but a substantial share of around 13% chose destinations outside of Europe. Geneva Airport is also an important hub for business and general aviation as well as for air freight. In addition to passengers, in 2024 the airport handled 92'615 tonnes of freight (all figures: Aéroport International de Genève 2025a).

As the primary travel hub, Geneva Airport has a large impact on the regional economy. The economic activities at the airport contribute to the Gross Domestic Product (GDP) of Geneva and the airport provides numerous jobs. Furthermore, the economy in Geneva and the neighbouring regions profit from the international and intercontinental accessibility that is enabled by the airport. Without it, doing international business would be much more costly and less efficient, market access would be greatly reduced, and fewer companies would locate their activities in Geneva. Moreover, international Geneva with all its knock-on economic effects would suffer substantially, and tourists would find it harder to come to Geneva and the neighbouring alpine destinations in Switzerland and France. These demand-side effects, also known as catalytic effects, result directly from the use of aviation services provided at the airport. Together with the production-side effects, which refer to the value added, and employment generated by the economic activities at the airport, these two types of economic effects are essential for assessing an airport's economic impact on a region.

To run and strategically develop an airport, knowledge of these effects and the manifold interactions of the airport with the regional economy is crucial. At the same time, a multitude of different stakeholders such as political and business actors, civil society and local residents take strong interest in the airport. Therefore, it is essential for the airport operator AIG (Aéroport International de Genève) to have access to recent and objective information on the role the airport plays in the regional economy and the impact it exerts on it. AIG has commissioned INFRAS to update previous work (INFRAS and BAK Economics 2017) and assess the economic impact of Geneva Airport on the regional economy in 2024.

The study is structured as follows:

- Section 2 categorises the different kinds of economic impacts of Geneva Airport and provides some important background information such as the system boundaries to interpret the results correctly.
- Section 3 focuses on the production-side effects. Following a short methodological introduction and the results of a workplace survey conducted at Geneva Airport, it presents the results for the different effects that are generated by Geneva Airport. First, the total effects are summarised for the collective region “Switzerland and the French border region”. Secondly, the total effects are subdivided and discussed along the geographical boundaries of the canton of Geneva, the French border region and the rest of Switzerland. The section closes with a specific focus on the business aviation and air cargo.
- Section 4 focuses on the catalytic effects. A general discussion of the mechanisms at work in catalytic effects is followed by four sub-sections on specific, important aspects, using a combination of quantitative and qualitative methods. First, the development of accessibility and the contribution of Geneva Airport is analysed. Second, we assess the importance of accessibility as a location factor for economic actors in Geneva. Third, an in-depth examination is conducted for International Geneva. Fourth and finally, the economic impact achieved in Geneva and its neighbouring regions due to inbound tourism traveling via Geneva Airport is calculated.
- Section 5 concludes and summarises the most important findings.
- Various appendices provide details on the methodology used as well as additional results.

2. The economic impact of Geneva Airport

An airport impacts the economy of its surrounding regions and countries through multiple channels. The airport and the companies situated at the airport offer a wide range of employment opportunities and thus provide income to employees. In addition, the regional and national economy benefits from the demand of intermediate inputs generated at the airport. Furthermore, an airport enables the regional and national economy to maintain business connections around the world and promotes the tourism industry via improved accessibility.

2.1. Categorisation of economic effects

The economic impact of an airport can be divided into two categories: Firstly, companies located at the airport generate employment and value added. Furthermore, they generate economic effects along the value chain, with value added and employment for the many suppliers of the companies located on the airport and the wider economy. These effects are known as the production-side effects. Secondly, airports increase a region's international accessibility for both people and goods. Accessibility is an important factor in a region's attractiveness and can affect employment and value added of companies in a region, in addition to the effects in the aviation sector. Airports are used by tourists to travel to and spend money in the region, businesses and the various organisations of the International Geneva ecosystem use it to receive and visit clients and stakeholders, allowing an efficient and productive international cooperation. These different kinds of effects all have an impact on the regional economy, on business opportunities, productivity and competitiveness. Together, they can be summarised as demand-side effects or catalytic effects.

This study analyses both kinds of economic effects. On the production side, we distinguish between three levels of production-side effects that arise from economic activity at Geneva Airport: direct, indirect and induced effects. For the catalytic effects that arise on the demand side, we first introduce them as part of a general discussion, followed by an analysis of accessibility of Geneva and the surrounding regions, the resulting economic benefits for the business sector and for International Geneva, respectively, and the economic effects of incoming tourism via Geneva Airport. Figure 6 provides an overview of the categorisation of these effects.

Figure 6: Categorisation of economic effects

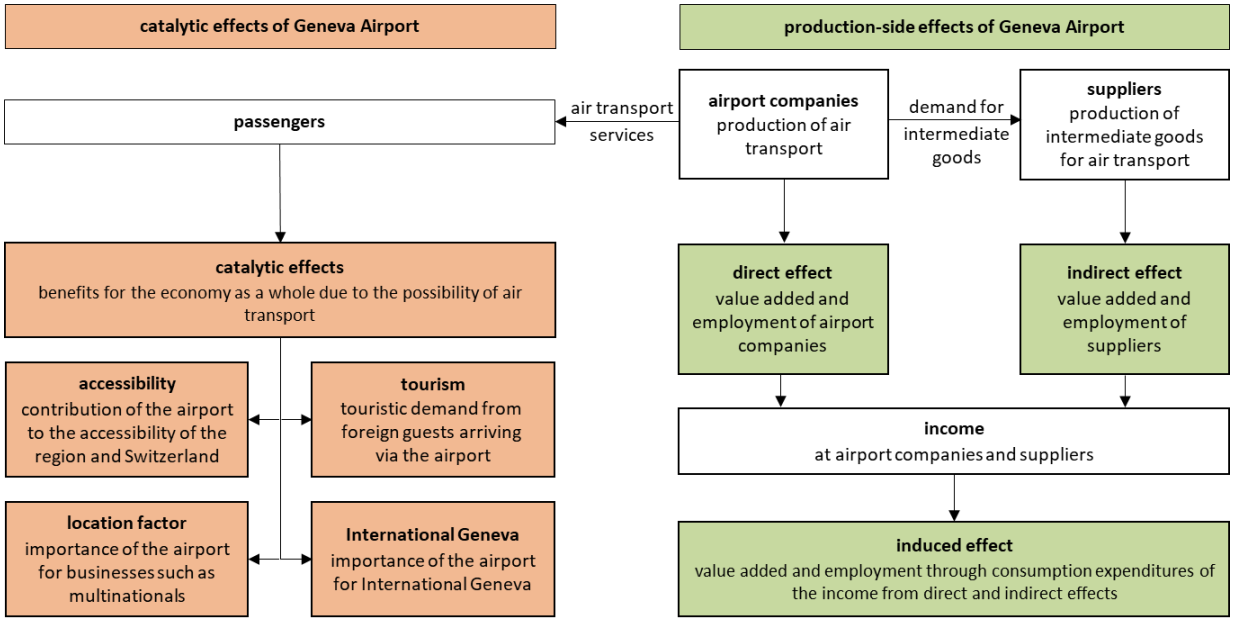


Figure INFRAS.

- **Production-side effects**[11]
  - **Direct effects:** These capture the employment of the companies located at the airport and the value added[12] produced by these companies. In addition, activities directly related to flight operations performed by companies or employees outside the airport perimeter are also included. For companies that are active internationally (e.g. airlines), only the number of employees based at Geneva Airport is used for the calculation of the direct effect. The direct effect illustrates the employment or value added that is directly and causally connected to Geneva Airport.
  - **Indirect effects:** These include employment and value added that result from the intermediate consumption of airport companies. Intermediate consumption refers to the goods or services needed for production processes that are purchased from other parties (i.e. suppliers), such as energy and material costs. We also take into account that the suppliers in turn purchase intermediate goods themselves (and their suppliers, and so forth), whereby only the intermediate inputs sourced within the system boundaries are included (see section 3.2).
  - **Induced effects:** These include the employment and value added generated when employees of companies — either working at the airport (part of the

[11] The methodology used to calculate the production-side effects of the Airport is based on international recommendations published by Airports Council International (ACI) in 2000 (ACI Europe and York Aviation, 2004). This method has been employed several times in Switzerland, both for the entire civil aviation sector (INFRAS 2025b) and for individual airports (INFRAS 2022 for Zurich Airport, INFRAS and BAK Economics 2017 for Geneva Airport), or internationally for the airports in Düsseldorf (INFRAS 2025a), Cologne/Bonn (INFRAS 2016b), Frankfurt (INFRAS and BAK Economics 2014), Munich (VBW 2015) and Hamburg (Bernhardt et al. 2025).

[12] We consider the gross value added, which includes personnel costs, taxes/duties, depreciation/amortisation and financial costs. It is also defined as revenue minus intermediate consumption.

direct effects) or part of the supply chain (part of the indirect effects) — spend their income. As with the indirect effects, the induced effect shows a multiplying effect: It illustrates what happens if the income generated in the direct and indirect effect is spent again, such as on rent and groceries. The induced effects are similarly constrained by the relevant system boundaries and employees living beyond these boundaries are to be excluded from the assessment.

- **Demand-side or "catalytic" effects:**

  These are the benefits for the economy as a whole due to the possibility of air transport. Unlike with the production-side effects, the various aspects of the demand side cannot be fully quantified in monetary terms and aggregated into one number. Rather, different catalytic effects need to be assessed individually using a mix of qualitative and quantitative analyses and evaluations. This study specifically analyses four important pillars of catalytic effects[13] in a combination of qualitative and quantitative approaches:

  – accessibility,
  – inbound tourism,
  – Geneva Airport as a location factor for business, as well as
  – its relevance for the 'International Geneva'.

2.2. System boundaries

Before turning to the production-side analysis, the system boundaries that govern both production-side and catalytic assessments need to be made explicit. To conduct the following analysis and to interpret the results accurately, a clear definition and understanding of the system boundaries applied in the assessment of the economic effects of Geneva Airport is necessary. These boundaries determine where economic effects are measured, and which effects fall within the scope of this study. They are applied systematically to production-side effects, where a clear attribution of effects is feasible. This is true for the effects that are part of the initial impulse for the production-side effects (i.e. which economic activity occurs on Geneva Airport) and the later diffusion through the economy (i.e. where there are knock-on effects along the value chain). On the demand side, the same logic applies in principle, though a clear separation of effects is often more difficult in practice.

The airport perimeter

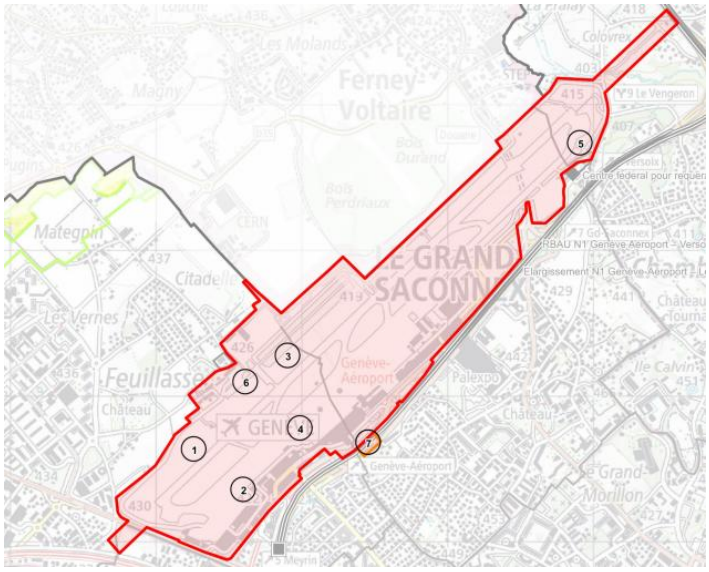
When analysing the production-side effects of Geneva Airport, we include all the economic activity and employees working on the airport premises, as laid out by the PSIA,

[13] The methodology for each type of catalytic effect is described in detail in section 5.

and those providing services directly related to airport or flight operations, even if they are based outside the perimeter[14]. The same applies to financial data.

As shown in Figure 7, the Geneva Airport perimeter includes the terminals, the runway, and workplaces along the airport and freight roads. The perimeter also includes the train platform. The economic activity of all these companies is thus part of the initial impulse of the production-side effects of Geneva Airport and included in the assessment in Section 3.

Figure 7: Geneva Airport perimeter



Source: FOCA (2018, p.45)

Geographic boundaries

Geneva Airport's economic effects primarily extend across two territories: Switzerland as a whole and the nearby French border region[15]. Together, these form the geographical system boundary for the main results presented in section 3.2 (Figure 8). Section 3.3 applies the same boundaries, but disaggregates these results further, presenting effects for the canton of Geneva, for the rest of Switzerland and the French border region (again Figure 8).

[14] For example, if an airline has an office in downtown Geneva (i.e. outside the airport perimeter), but employs people that work in HR handling employees relevant to flight operations at Geneva Airport, we include the economic activity (both employment and revenue / value added).
[15] The French border region includes the departments of Haute-Savoie, Savoie, Isère, Rhône, Ain, Saône-et-Loire, Jura, and Doubs.

Figure 8: Geographical system boundary (French border region and Switzerland)

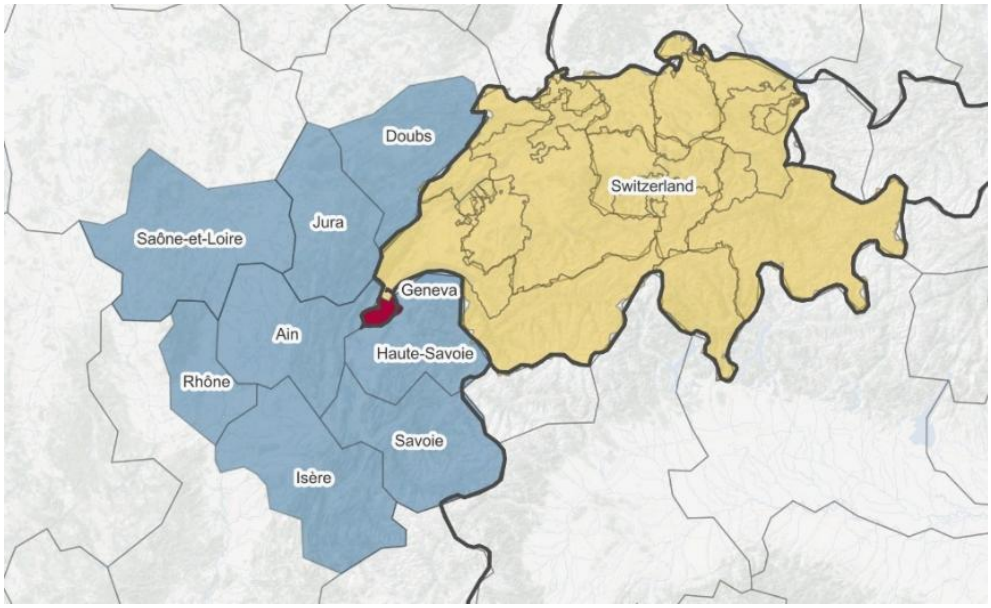


Figure INFRAS. Source: own illustration

It is important to understand the influence of different geographical boundaries on the results. The direct effects are localized at the airport and unambiguously attributable to a territory. For the indirect effects, attribution follows the supply chain: an intermediate input generates an indirect effect in a given area only if it is sourced from a supplier located within the area. An intermediate input sourced to the airport from a company located in Paris would not count towards the indirect effect for the French border region. The same logic applies to induced effects: only income earned by employees within the defined geographical boundary is included[16].

Reference year

The reference year for the calculation of production-side effects is 2024. Companies that were part of the survey (see Annex A1) were asked to provide employment figures as of December 31st 2024 and financial data corresponding to the fiscal year 2024. Any other sources used in the calculation of the production-side effects were either drawn from 2024 directly or deflated to 2024 prices.

For the catalytic effects, the reference year varies depending on data availability. More recent data were used for the accessibility analysis in Section 5.1, in which the accessibility was calculated for 2025. For inbound tourism, we particularly used data from the passenger statistics and passenger survey of Geneva Airport and tourist accommodation statistics for Switzerland (HESTA/PASTA) for 2024. Furthermore, data from the Tourism Monitor Switzerland (TMS) was used, for which the most recent

[16] Due to a lack of data, we assume that income is spent according to usual spending patterns at a person's place of residence. Meanwhile, no income is spent at the place of work.

figures were available for 2023. When necessary, figures from before 2024 were deflated to 2024 prices.

3. Production-side effects

This section describes the results for the production-side effects of Geneva Airport: the direct, indirect and induced effects. First, in Section 3.2, we present the results for the whole area "Switzerland and the French border region", followed by a regional decomposition for the canton of Geneva, the French border region, and the rest of Switzerland in Section 3.3. Finally, we illustrate the economic impact for two specific types of economic activities (Section 3.4): general and business aviation and cargo and freight activities, respectively.

3.1. The economic activities at Geneva Airport

Workplace survey

To quantify the production-side effects, detailed data on employment and economic activity at the airport are required. This information is, however, not readily available, neither in public statistics nor with the airport administration. INFRAS therefore conducted a workplace survey in autumn 2025 covering all 268 companies operating either on the airport perimeter (as laid out in Section 2.2) or outside the perimeter, if they are providing services directly related to airport or flight operations[17].

The survey data were combined with complementary sources – including internal AIG records and previous INFRAS studies – to extrapolate results to the total population of companies. The approximately 100 companies that took part in the survey encompassed almost 75% of the final total number of full-time equivalent (FTE)[18]. A detailed account of the survey design, extrapolation procedure and the data collected is provided in Annex A1.

Direct value added and employment effects at Geneva Airport

In 2024, the companies located at the airport employed 11'550 people, equivalent to around 9'800 full-time jobs. The value added created by these companies' activities amounts to more than 1.5 bCHF.

Table 1 outlines the gross revenue per segment[19]. The airline-related segment makes up over half of the total gross revenue of 3.5 bCHF. This is followed by the airport-

[17] For example, if an airline has an office in downtown Geneva (i.e. outside the airport perimeter) but employs people that work in HR handling employees relevant to flight operations at Geneva Airport, we include the economic activity (both employment and revenue / value added) in the assessment.
[18] Many of the companies at Geneva Airport have only a small number of employees (often only one).
[19] The airline-related segment includes all sectors directly related to flight operations; the airport-related includes sectors that are crucial to airport operations; the Retail/Gastro/Services-related segment includes other sectors that operate at the airport and offer services that are relevant to airport users, but which are not directly connected to airport or flight operations. Finally, we have an "Other"-segment that is a collective category for companies that cannot be clearly assigned as well as companies in other sectors. For a detailed definition, please refer to Annex A1.

related segment, which generates around one fourth of the revenue (940 mCHF). The retail/gastro/services-related segment (300mCHF) and 'other' segments (250 mCHF) play a minor role.

Table 1: Gross revenue per segment (direct effect)

	airline-related	airport-related	retail/gastro/services-related	other	Total
Gross revenue	2'060	940	300	250	3'550

In mCHF.

Table INFRAS. Source: own calculation

The gross revenue consists of value added and intermediate consumption. Figure 9 shows the value added of the companies on the airport for the four segments and the employment related to it. In total, 1'660 mCHF value added can be attributed to Geneva Airport and the companies located on the airport site (direct effect). This corresponds to around 2.6% of the GDP of canton Geneva in 2024[20].

Airline- and airport-related segments represent most of the direct value added and employment effects at Geneva Airport. Together, they correspond to around 85% of value added and 80% of FTE. The latter is especially driven by airline-related companies, which make up almost half of the FTE with 4'680.

Figure 9: Direct value added and employment effects at Geneva Airport per segment

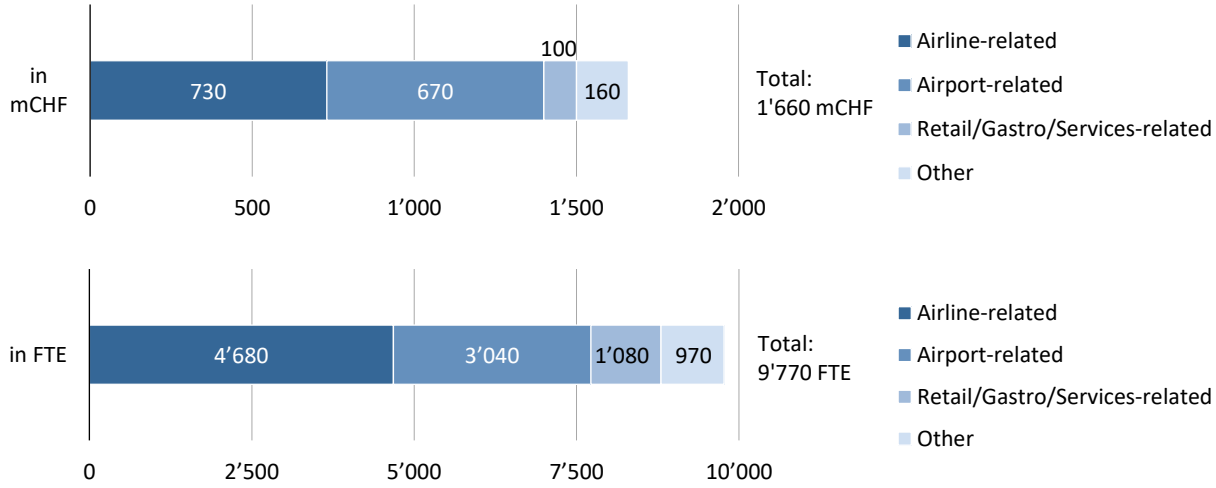


Figure INFRAS. Source: own calculation

[20] Estimated GDP for the canton of Geneva in 2024: 64'515 mCHF (OCSTAT 2026)

3.2. The production-side effects of Geneva Airport in Switzerland and the French border region

The activities described in Section 3.1 correspond to the direct effect of Geneva Airport in the area of Switzerland and the French border region. In addition, the companies at the airport require products and services to generate these direct effects. The supply of these goods and services, if sourced within the system boundaries, generate additional 1'910 full-time jobs and 360 mCHF of value added with suppliers in Switzerland and the French border region (indirect effect). Furthermore, considering the effects from employees' consumption involved in the direct and indirect effects, another 10'250 full-time jobs and 1'280 mCHF value added can be attributed to Geneva Airport (induced effect). Taken together, the total production-side value added of Geneva Airport was 3'300 mCHF in 2024, corresponding to around 21'930 FTE. Figure 10 provides an overview of these results.

The direct effect makes up around 50% of value added, while the induced effect generates around 40% of the total effect. Meanwhile, only around 10% of the total production-side effects for Switzerland and the French border region is generated by indirect effects via suppliers. A reason for the comparatively small indirect effects is the exclusion of intermediate inputs sourced from outside of Switzerland and the French border region.[21]

In terms of employment, the induced effect surpasses the direct effect and provides the largest contribution. This is partly due to lower productivity of activities related to private consumption.

Figure 10: Total production-side effects for Switzerland and French border region

[21] Furthermore, note that intermediate consumption between companies at the airport is not counted, as it is already part of the direct effect. This is necessary to avoid double-counting.

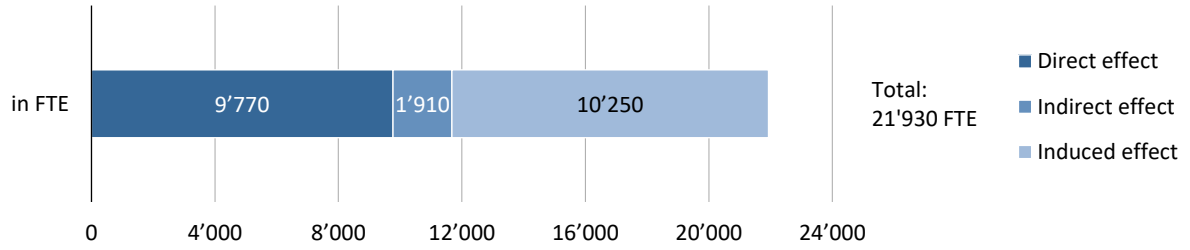


Figure INFRAS. Source: own calculation

Total effects mirror the observed pattern for the direct effects: airline- and airport-related sectors together account for the large majority of the total effects. In value-added terms, the two segments are broadly comparable. Total employment effects differ substantially, however: airline-related activities generate 10’440 FTE compared with 6’970 FTE for airport-related activities. This gap reflects the more labour-intensive production structure of certain airline-related branches – notably handling – which was already visible at the level of direct effects. Although less accentuated, this also holds true for the induced effects, for which the value added per FTE is lower in sectors of the airline-related sector. Within the airport-related segment, total effects are driven primarily by the airport operator and public authorities, the two largest sectors in this segment by a considerable margin.

Figure 11: Total production-side effects for Switzerland and French border region per segment

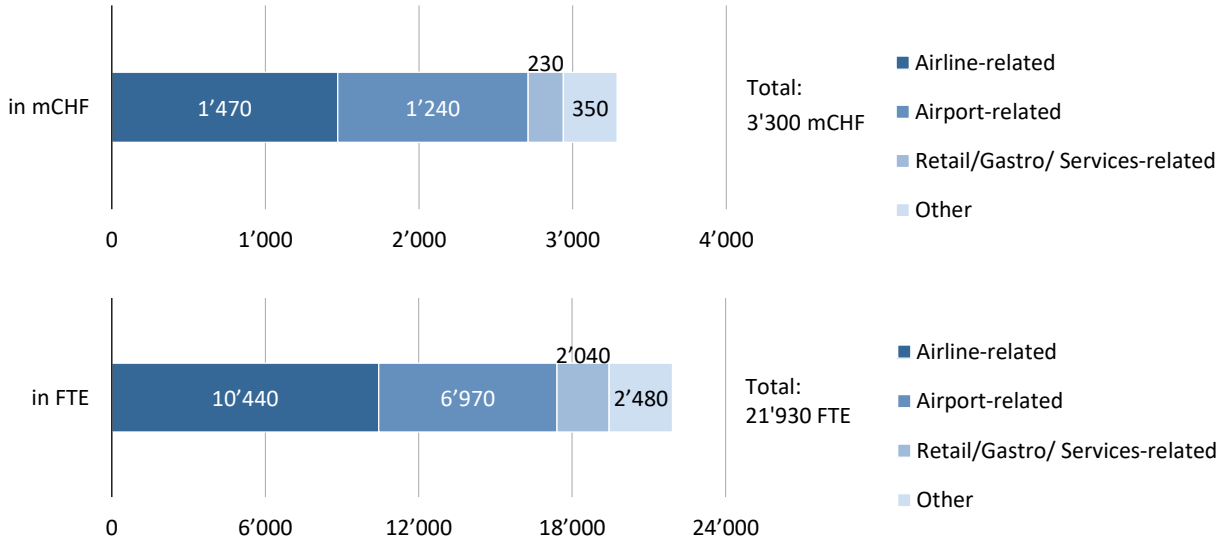


Figure INFRAS Source: own calculation

3.3. The production-side effects of Geneva Airport for selected regions

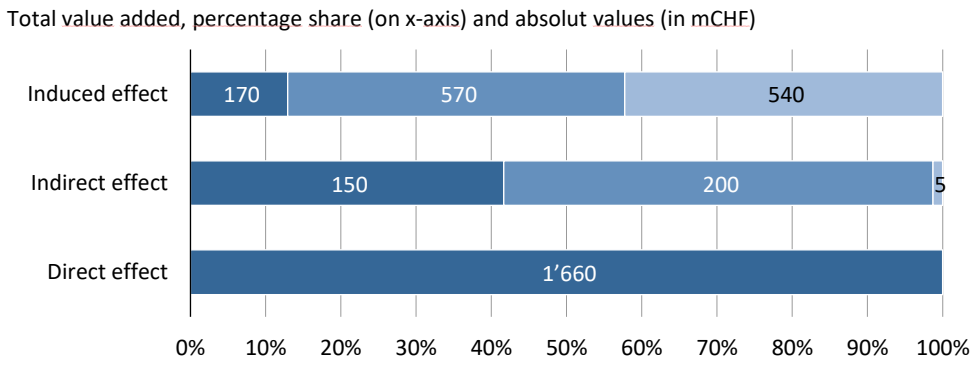
The following section breaks down the results above by sub-region. Geneva Airport is one of Switzerland's three national airports, and its economic footprint extends beyond the canton of Geneva, both to the rest of Switzerland and the French departments near the Swiss border.

Figure 12 presents how the contribution of each effect differs for these three regions: The canton of Geneva as the airport's home canton, the French border region as the immediately adjacent territory abroad, where a lot of employees working in Geneva live, and the rest of Switzerland reflecting the airport's role as a national airport and its extended impact. In total, the regional effects for the canton of Geneva amount to almost 2 bCHF, while the economic impact of Geneva Airport on the French border is considerably lower with slightly more than 540 mCHF of value added. The remaining economic effect of roughly 750 mCHF accrues in the rest of Switzerland.

Per definition, 100% of the direct effect is attributed to the canton of Geneva, where the airport is located. In terms of the indirect effect, the rest of Switzerland together with the canton of Geneva make up almost all the effect in terms of both value added and employment. This implies that only a small portion of intermediate inputs are sourced from the French border region. Intermediate inputs sourced from the rest of France and from abroad are outside the system boundaries and therefore not included here. For the induced effect, the French border region plays a more important role. This is driven by the large number of cross-border commuters employed both at the companies at the airport and along their supply chains. Lower productivity levels in the French border region by comparison with Swiss levels increase the absolute induced effects substantially and is the main driver of the high induced effect, as displayed in the results in Section 3.2.

The differences in shares between value added and employment are due to sectoral differences in productivity as well as to different structures of place of living of the employees across sectors.

Figure 12: Regional distribution of the economic impact of Geneva Airport in 2024



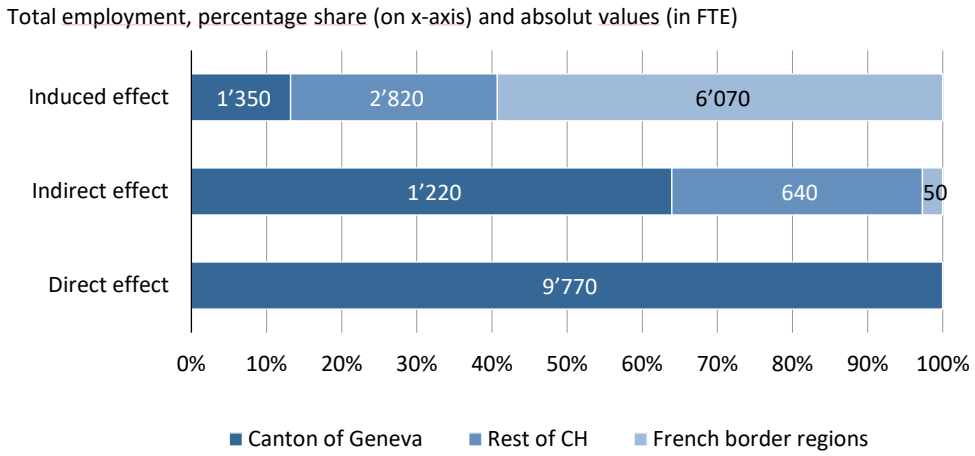


Figure INFRAS. Source: own calculation

3.3.1. The regional effects for the canton of Geneva

The direct effects in Geneva are, by definition, identical to the results for Switzerland and the French border region. For the indirect effect, only suppliers located in the canton of Geneva are included, while the effects for suppliers located in other Swiss cantons and abroad are excluded. Similarly, only the income spent by the employees living in the canton of Geneva is considered as part of the induced effects.

Figure 13 summarises the effects. As expected, the results show that the economic impact for the canton of Geneva is mainly driven by the direct effect. The contribution of both the indirect and induced effects is similar in size for value added as well as for employment, but in both cases rather small compared to the direct effect.

Figure 13: Regional effects for canton of Geneva

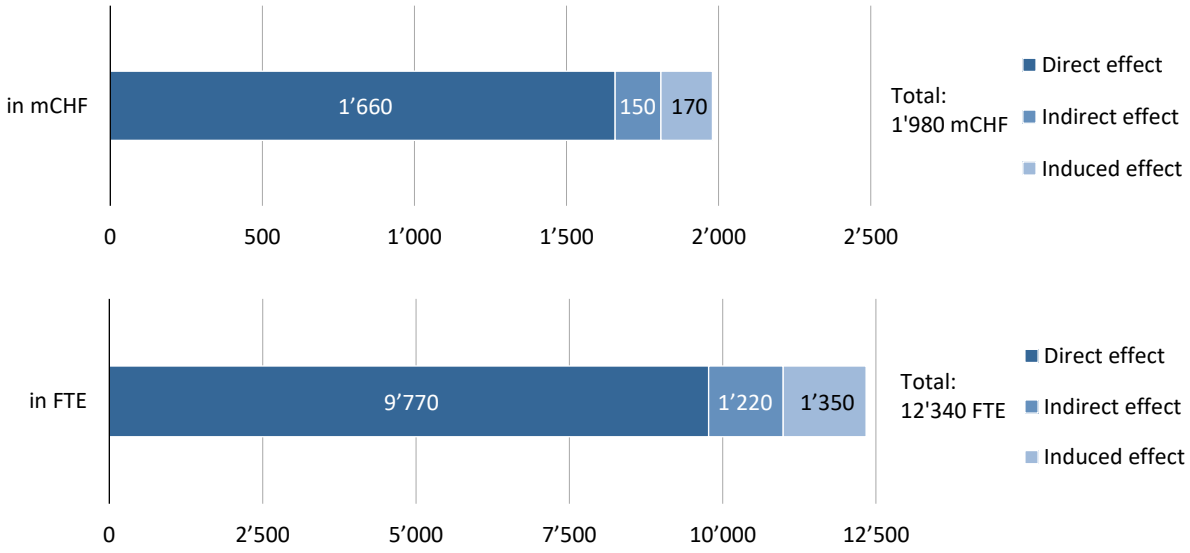


Figure: INFRAS Source: own calculation

In the annex, Figure 40 provides the total effects for the four sectoral segments in the canton of Geneva. As the direct effects dominate in Geneva, the results mirror the main analysis discussed in Section 3.2. One difference compared to the main results at Geneva Airport is that the value added generated by the airport-related segment is slightly higher than the value added of the airline-related segment. More employees live outside of Geneva and more intermediate inputs are sourced from outside Geneva in the airline-related segment compared to the airport-related segment.

3.3.2. The regional effects for the French border region

In the following section, the focus is on the French border region. The system boundaries are therefore different given the focus on employees and suppliers located in the French border region. Per definition, there is no direct effect, as the value added and employees at the airport site are already counted towards Geneva. For indirect effects, only sourcing from suppliers located within the French border region is relevant. Similarly, for the induced effect only the income spent by the employees living in the French border region is included[22].

Figure 14 summarises the effects. The result for the neighbouring French border region is dominated by the induced effect, both in terms of the value added and employment. A very small portion can be attributed to the indirect effect, corresponding to 5 mCHF value added and 50 FTE. This is a direct consequence of the low percentage of goods supplied from the French border region to the airport. In contrast, induced effects are higher due to the high number of cross-border commuters, which leads to substantial value added and employment for local firms.

Figure 14: Regional effects for the neighbouring French border region

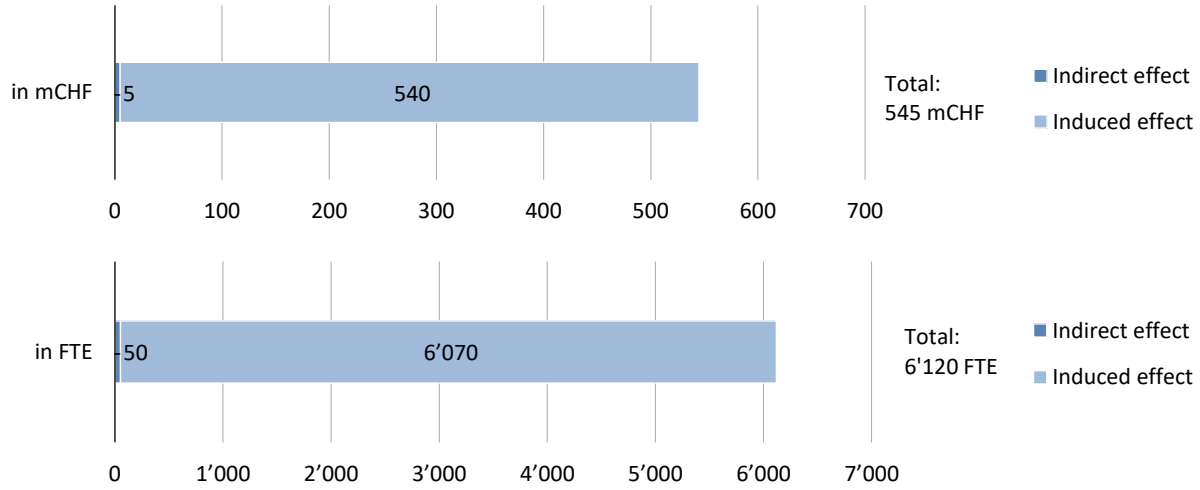


Figure INFRAS. Source: own calculation

[22] Please note that this includes employees of companies at the airport as well as employees of suppliers form Geneva or other Swiss sites, who live in the French border region.

Figure 41 in the Annex provides the segment-specific results for the French border region. Here, the airline-related segment dominates the total effect with a share of more than 50%. This result is driven by residential locations of the employees of airlines and handling companies, which have a particularly high share of employees living in the French border region.

3.4. The production-side effects of selected air-travel services

The preceding sections analysed total effects by type of effect, by segment and by geography. A further dimension is the type of air-travel service. This section focuses on two categories of particular relevance for Geneva Airport:

- General and business aviation covers “all civil aviation operations other than scheduled air services (i.e. commercial airlines) and non-scheduled air transport operations for remuneration or hire” (ICAO 2013). It encompasses private flying and flight training, with business aviation being especially relevant for Geneva Airport.
- Air cargo services refer to the transportation of property by aircraft, excluding mail, passenger baggage and stores (ICAO 2018).

The remainder of air-travel services is largely attributable to commercial passenger services. Not all airport activities can be assigned to these categories; this includes activities unrelated to air travel but located within the airport perimeter, as well as general airport administration. Some activities are mixed by nature – the use of belly freight, for instance, straddles both cargo and passenger services. The following analysis therefore focuses on activities that can be clearly attributed to general and business aviation or cargo and freight, based on companies’ business models. Where a unique attribution was not possible, shares were applied based on expert assessments provided by the companies concerned or Geneva Airport.

3.4.1. The economic impact of general and business aviation

General and business aviation at Geneva Airport encompasses around 30 companies in several sectors. 18 companies work exclusively for the general aviation sector, while companies in other sectors, such as in catering-on-air and maintenance, provide goods and services to general aviation as well as to other aviation activities.

Figure 15 illustrates the total production-side effects associated with the activities related to general and business aviation at Geneva Airport in Switzerland and the French border region. In total, general and business aviation generates 330 mCHF of value added. The associated employment effect amounts to 2’410 FTE. This corresponds to around 10% of the total value added and employment effects of Geneva Airport calculated in Section 3.2.

The direct effect is responsible for approximately half of total economic effects of general and business aviation with a direct value added of 150 mCHF and 1'020 FTE.

The induced effect in value added is nearly as large (around 140 mCHF) or slightly larger (1'180 FTE). The indirect effects are comparatively small. The overall composition of the total economic effects mirrors that of the total effects.

Figure 15: Total production-side effects of General and Business Aviation at Geneva Airport

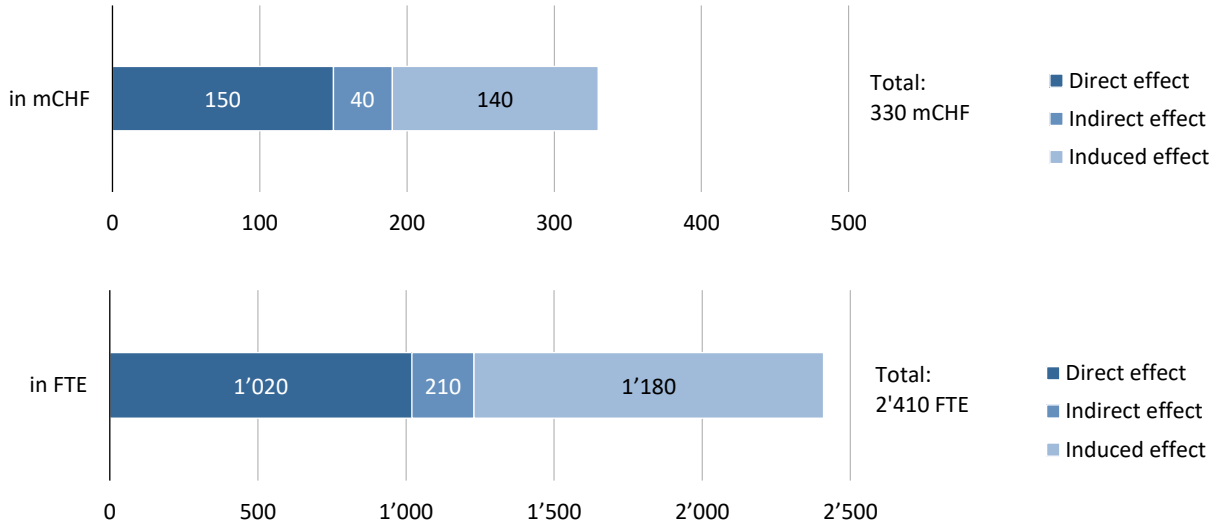


Figure INFRAS. Source: own calculation

Most of the effect from general and business aviation activities are generated by companies in the airline-related segment, which includes general aviation itself. All effects taken together, the airline-related segment amounts to 280 mCHF value added and a corresponding 2'100 FTE. The remaining value added and employment effects stem from the airport-related segment, while there is basically no contribution from retail/services/gastro-related companies.

3.4.2. The economic impact of cargo and freight activities

Cargo and Freight activities at Geneva Airport are provided by more than 90 companies, which straddle a wide range of sectors. The majority of these companies are from the air cargo and logistics sectors, most of which are located in the freight hall at Geneva Airport[23]. Furthermore, companies from other sectors, such as handling and public authorities, also provide services related to cargo and freight activities. Finally, there are also various airlines that transport goods as part of their flight operations.

Figure 16 illustrates the total production-side effects for Switzerland and the French border region associated with cargo/freight at Geneva Airport. In total, the effect amounts to around 350 mCHF value added and 2'400 FTE. The direct and induced effects represent the majority of the value added and employment, while the indirect effect is associated with around 10%. As for general and business aviation, the total

[23] The freight hall at Geneva Airport is a dedicated area at the airport for Cargo and Freight activities.

effects from cargo and freight activities show a similar composition to the total effect for the airport as whole, although it is substantially smaller.

Figure 16: Total production-side effects of cargo and freight at Geneva Airport

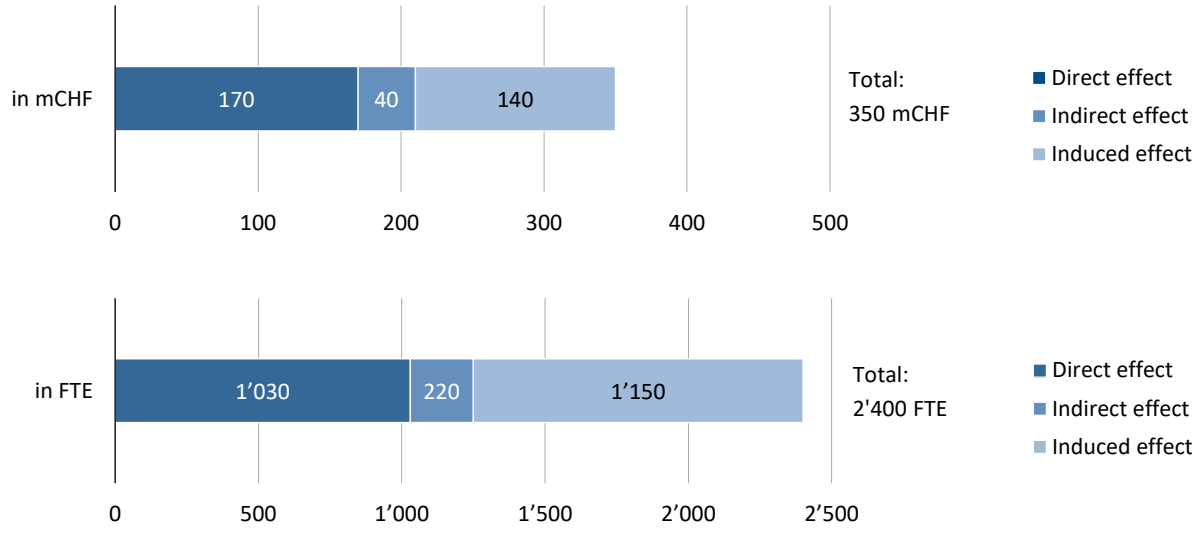


Figure INFRAS. Source: own calculation

A large portion of the total effects is attributed to the airline-related segment (over 90%), which includes air cargo and logistics sectors. This segment generates around 330 mCHF of value added and 2'220 FTE. The remainder of the effect is divided more or less equally between the airport-related, retail/gastro/services-related and 'other' segments.

The production-side effects quantified in this section capture the economic activity that takes place at the airport site and propagates along its supply chains. They are, however, only one part of the airport's economic relevance for the region. A second, distinct set of effects arises from the international accessibility the airport provides — and from the way this accessibility shapes business location decisions, the international institutional complex, and tourism flows. These catalytic effects are the subject of the following section.

4. Catalytic effects

Geneva Airport is a critical gateway for one of Europe's most internationally oriented economies. As the hub connecting the Geneva regions to global markets, the airport shapes the conditions under which firms, international organisations, and visitors engage with the city and its surroundings. The economic effects analysed in the preceding sections capture the airport's role as substantial contributor to the regional economy. Yet a full assessment of economic relevance requires looking beyond the airport perimeter: airports generate catalytic effects by raising the accessibility of the regions they serve, with knock-on effects on the productivity and market size of local companies, on location decisions, on international institutional presence, and on tourism flows.

Accessibility is a relevant location factor for companies. A high-quality travel network is a prerequisite for a region to benefit from a globally integrated economy and participate in the world-wide exchange efficiently and competitively. In the region, this leads to higher productivity and, in turn, wages. A well-developed connectivity is – for the same reasons – a crucial element in location decisions for (international) companies, too. As EUROCONTROL (2005) points out, the more easily destinations can be reached, the larger the pool of potential employees, customers, and suppliers as well as the easier it is to transfer knowledge and innovations. BAK Economics (2020) emphasizes this as well: Good accessibility is a prerequisite for a region to benefit from the division of labour in the globalized world economy. Business travel also facilitates the cultivation of personal relationships and international cooperation with customers, suppliers, and partners. While this applies to accessibility via transportation systems in general, the faster travel speed of aviation is what makes practical global connectivity possible in the first place.

For International Geneva – home to a dense concentration of international organisations, diplomatic missions and NGOs – direct and indirect air links are equally essential: they enable the movement of delegates, experts and staff that multilateral institution depends on. For tourism, air connectivity determines which origin markets can practically reach a destination efficiently. The travel network of a destination is thus shaping the size and composition of the visitor base a region can attract.

Section 3 quantified the value added and employment generated at Geneva Airport and along its supply chains. A full assessment of the airport's economic relevance, however, requires looking beyond the airport perimeter. As the hub connecting the Geneva region to global markets, Geneva Airport shapes the conditions under which firms, international organisations, and visitors engage with the city and its surroundings. These catalytic effects operate through four channels, examined in turn in the subsections below: the connectivity the airport provides (Section 4.1), the role of this connectivity for the regional business community (Section 4.2), its weight for International Geneva (Section 4.3), and the airport's function as a gateway for inbound tourism (Section 4.4).

4.1. The accessibility facilitated by Geneva Airport

The following analysis presents results based on a model developed by INFRAS for calculating and comparing accessibility by air travel across different regions. The model calculates two accessibility values for all regions in Europe: The accessibility to all regions within the continent (accessibility within Europe) and the accessibility to the rest of the world (accessibility outside Europe). A brief description of the model can be found in Box 2 (for more information see Annex A3. and the literature cited there). The model focuses on business travel, which is particularly relevant for catalytic effects as part of the economic impact of an airport, as it is discussed in the report.

The INFRAS Accessibility model

The most important model characteristics of the INFRAS accessibility model are presented below. For a detailed explanation of the methodology, see Annex A3. and the literature cited.

The model calculates accessibility via air connections for all regions of Europe at the NUTS 2 level[24] (284 regions). For Swiss cantons and selected Departments of France (NUTS 3 level), accessibility has been calculated, too. The index reflects the average accessibility from one region to all included destinations (outbound accessibility). As destinations, for the accessibility within Europe, the 284 NUTS 2 regions are taken as destinations. Outside Europe, the world has been divided into 116 regions, with larger and economically important countries divided into several regions (e.g., the USA, Canada, China, Australia, India) and in other cases several countries combined into one region (e.g., in Africa).

Not all regions in Europe have an airport (all global destinations have at least one), at the same time some regions have several airports. Within Europe, 135 airports were incorporated, including Geneva Airport. The airports were selected predominantly according to passenger volume, considering the geographical distribution of airports in Europe as well. For the accessibility to the world outside Europe, an additional 130 airports outside Europe were added.

The INFRAS accessibility model focuses on business travel. Therefore, economically attractive destinations get higher weights (measured by GDP). As travel time is the most important component of the costs of business travel, shorter travel times are more attractive. The model calculates the shortest possible travel time to all destinations, taking airport access time and typical times need at airports for check-in etc. into account. Furthermore, the frequency of connections is accounted for by analyzing several timeslots.

[24] NUTS 2 classification: NUTS (Nomenclature des unités territoriales statistiques) refers to a system for the identification and classification of regional units in Europe (or the European Union), whereby regional units at the same NUTS level occupy a functionally similar position and are usually roughly comparable.

An algorithm based on real flight schedules combined with further data sources is used to calculate the shortest travel times between regions: for each pair of regions, the algorithm determines the fastest connections including flight times (if necessary, including connecting flights with up to two transfers and the realized transfer times) as well as access times to the airport, check-in times, and the time required for check-out and reaching the destination. The calculations cover two calendar weeks, one with summer flight plan and one with winter flight plan.

To incorporate the economic value of the destination reached in a trip, GDP is used. The calculation reduces the economic attractiveness of a destination (GDP) with a logarithmic scaling according to travel times: Within Europe, an additional travel time of 3 hours halves the attractiveness of a destination. Intercontinental connections generally require longer travel times, and the corresponding number is 8 hours.

The accessibility value presented is an average for all destinations and across time slots (if not stated otherwise), normalized as index between zero and one, with higher values reflecting better accessibility.[25]

4.1.1. Accessibility of European regions 2025

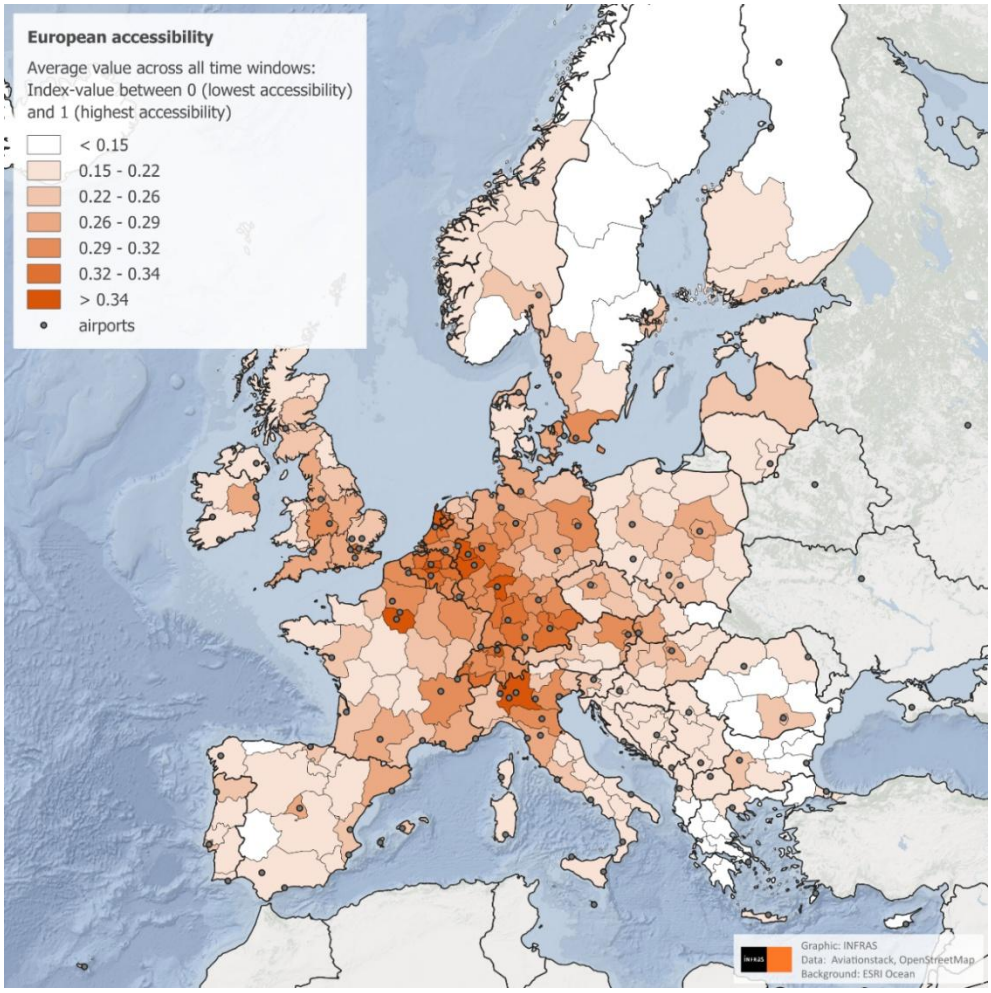
Figure 17 and Figure 18 show a cartographic overview of the accessibility of European regions within Europe and to the world outside Europe respectively.

The highest accessibility is found in the geographical center of Western Europe, within the area also known as the "Blue Banana"[26], which has the highest population density and economic power in Europe. Accessibility is highest in the general area starting in Northern Italy, passing Switzerland, western Germany (e.g. Düsseldorf and Frankfurt), parts of Belgium (Brussels and Flemish Brabant) and the Netherlands (Amsterdam), and including Paris and London. The main influencing factors are geographical location and thus proximity to regions with high economic performance, particularly for the accessibility within Europe. But efficient, well-connected airports (preferably by direct flights) are important, too.

For the accessibility outside Europe, the importance of major hubs is evident: The highest accessibility is found for several regions in the Netherlands including Amsterdam, for Frankfurt, Ile-de-France (Paris), and London – all in close proximity of the four major European hub airports. Zurich follows in fifth position. Istanbul, which has lower accessibility in the European context due to its peripheral location, has however high global accessibility.

[25] One corresponds to the (theoretical) case where all destinations could be reached with a travel time of zero minutes; a value of zero would result in case that all destinations are only reached with infinite travel times. A value of 0.5 results if all destinations could be reached exactly within the half-value period (3 hours within Europe and 8 hours globally), the value 0.25 at two times the half-value period, etc.
[26] See for example Blue Banana - Wikipedia, accessed 20.10.2025.

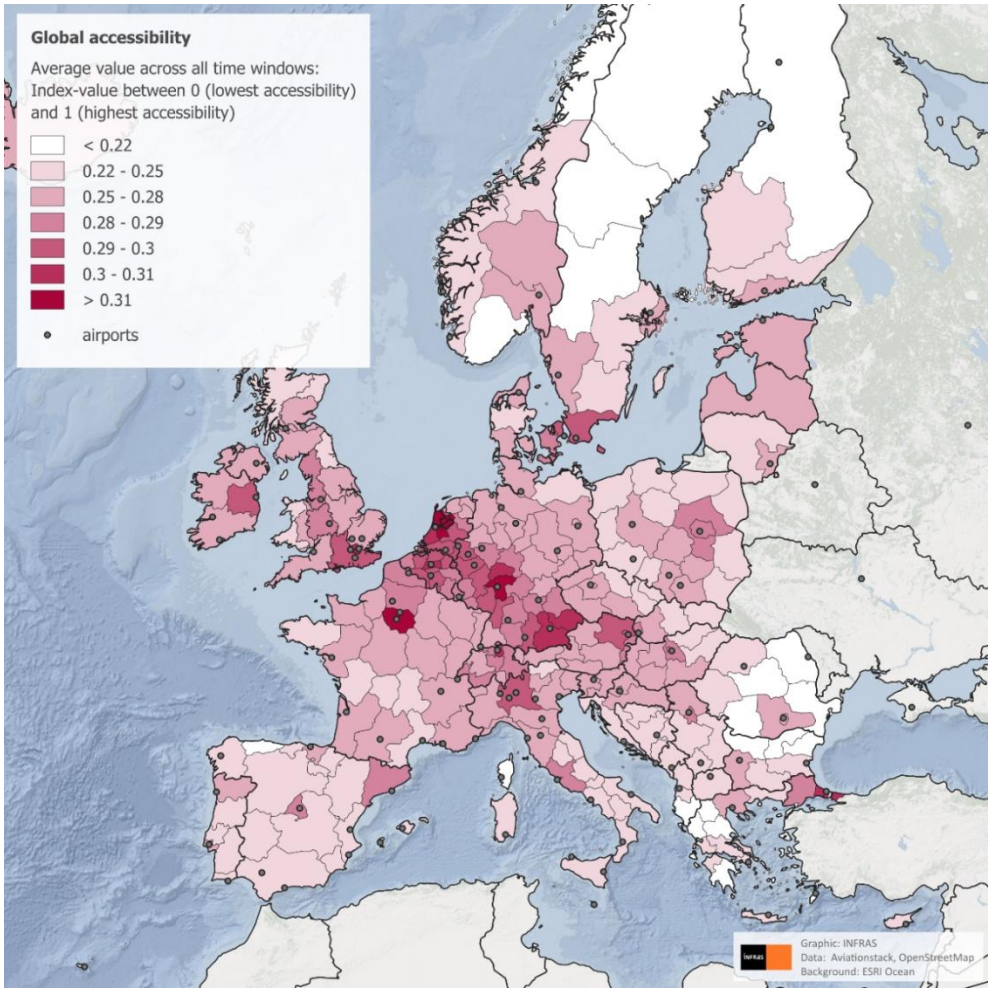
Figure 17: Accessibility of the regions of Europe within Europe



Regions according to NUTS 2 classification. Average value across all time windows. Additional dot symbols for the airports included in the calculation.

Figure INFRAS.

Figure 18: Accessibility of the regions of Europe beyond Europe



Regions according to NUTS 2 classification. Average value across all time windows. Additional dot symbols for the airports included in the calculation.

Figure INFRAS.

4.1.2. Closeup on accessibility of the regions surrounding Geneva Airport

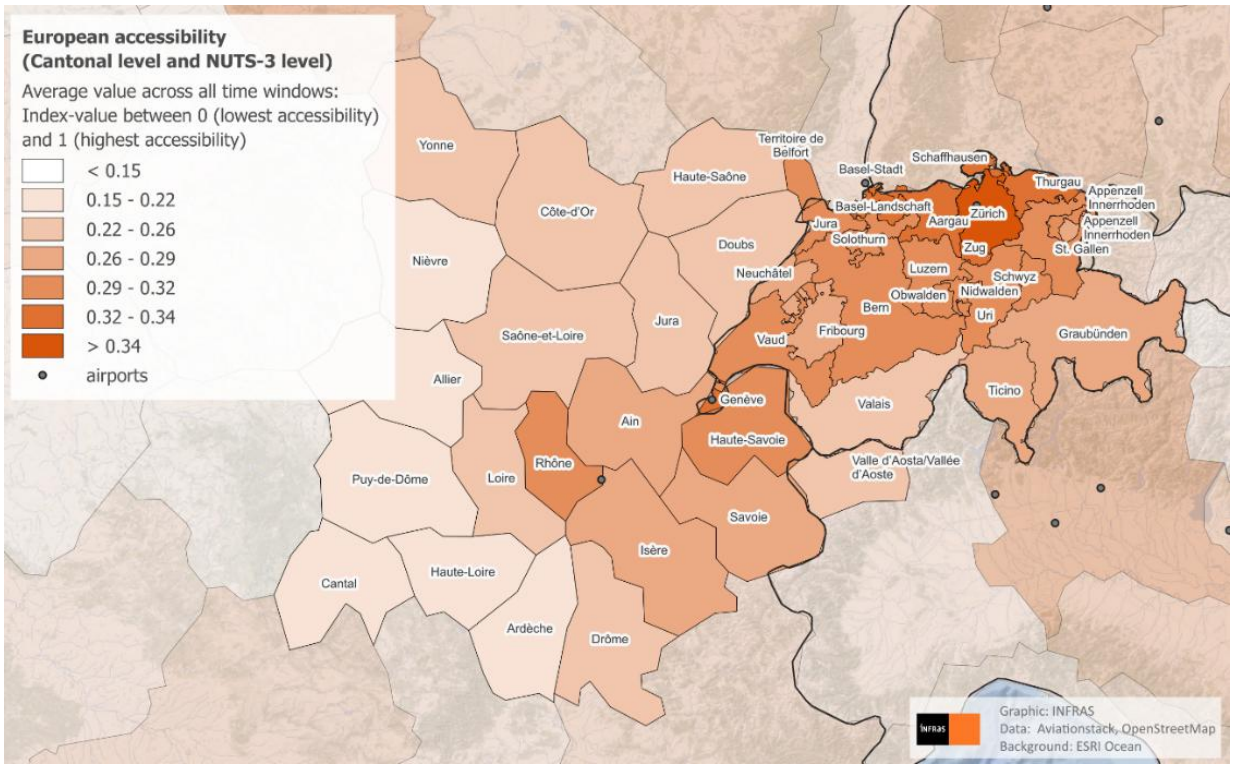
Geneva Airport is located at the eastern tip of Switzerland, in the Lémanique region. The airport is a key provider of accessibility for the city of Geneva as well as the surrounding regions. With an access time of just 8 minutes[27] it is a very attractive starting point for journeys from the city of Geneva. With an access time of less than two hours, Geneva Airport also offers interesting connections for Espace Mittelland with the center Bern and Rhône-Alpes with the center Lyon. Furthermore, the regions Franche-Comté with the center Besançon and Valle d'Aosta with the center Aosta can access Geneva Airport in less than 2.5 hours.

Figure 19 and Figure 20 show the accessibility of regions in the vicinity of Geneva Airport at a more granular level—within Europe and beyond Europe, respectively. The

[27] Access times are calculated by car at times with no congestions.

analysis is conducted at the cantonal level for Switzerland and at the NUTS 3 level for neighboring regions in France and Italy. Within Europe, specifically the cantons of Geneva, Vaud, Valais, Fribourg, Bern and Neuchâtel rely on Geneva Airport for their accessibility[28]. Across the border in France, Geneva Airport is of particular importance for the departments Ain, Isere, Haute-Savoie, Savoie and Jura. Most of these regions are well accessible and well positioned compared to other European regions. For many of these regions, Geneva Airport contributes to European as well as global accessibility as their key access point, as will be shown below.

Figure 19: Accessibility of the regions in the vicinity of Geneva Airport within Europe

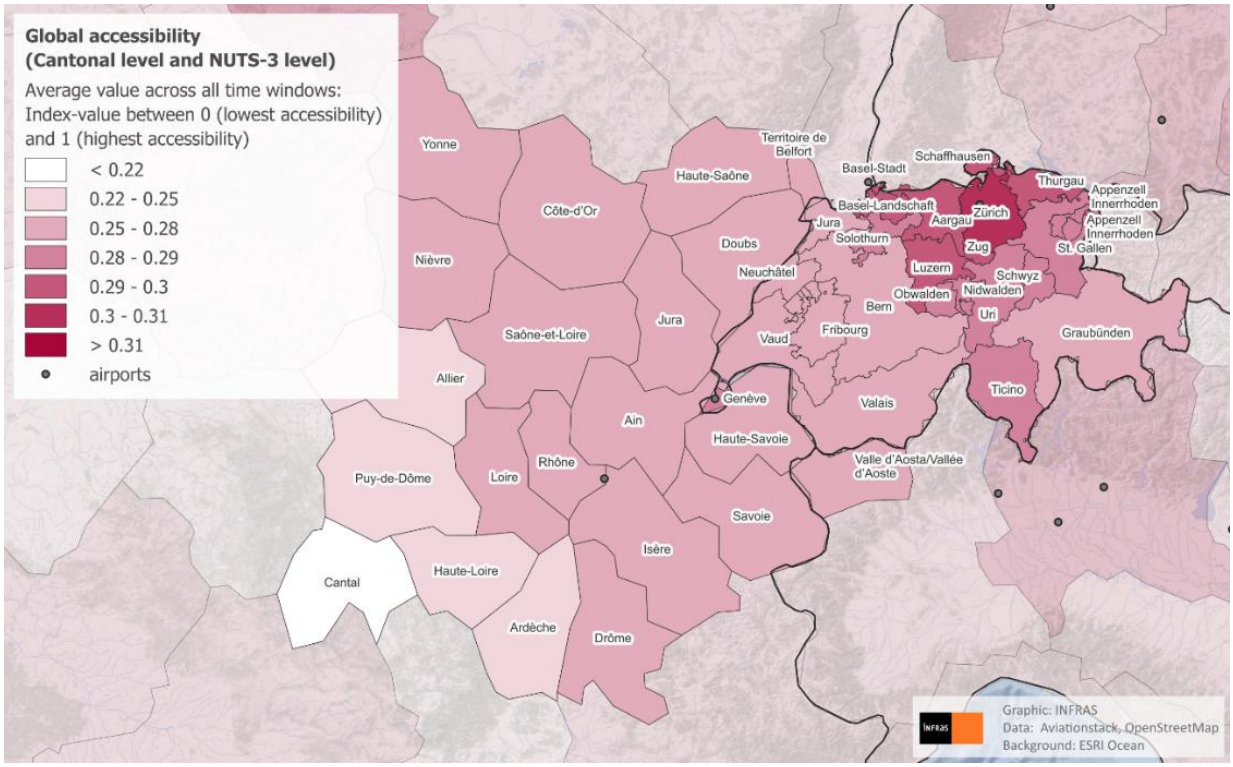


Regions according to NUTS 3 classification and cantons. Average value across all time windows. Additional dot symbols for the airports included in the calculation.

Figure INFRAS.

[28] Accessibility information is a point-related information, and the economic centre of a region is used as point. Therefore, accessibility for the Lémanique region (NUTS 2) is identical to the accessibility for the canton of Geneva (NUTS 3) and the city of Geneva.

Figure 20: Accessibility of the regions in the vicinity of Geneva Airport beyond Europe



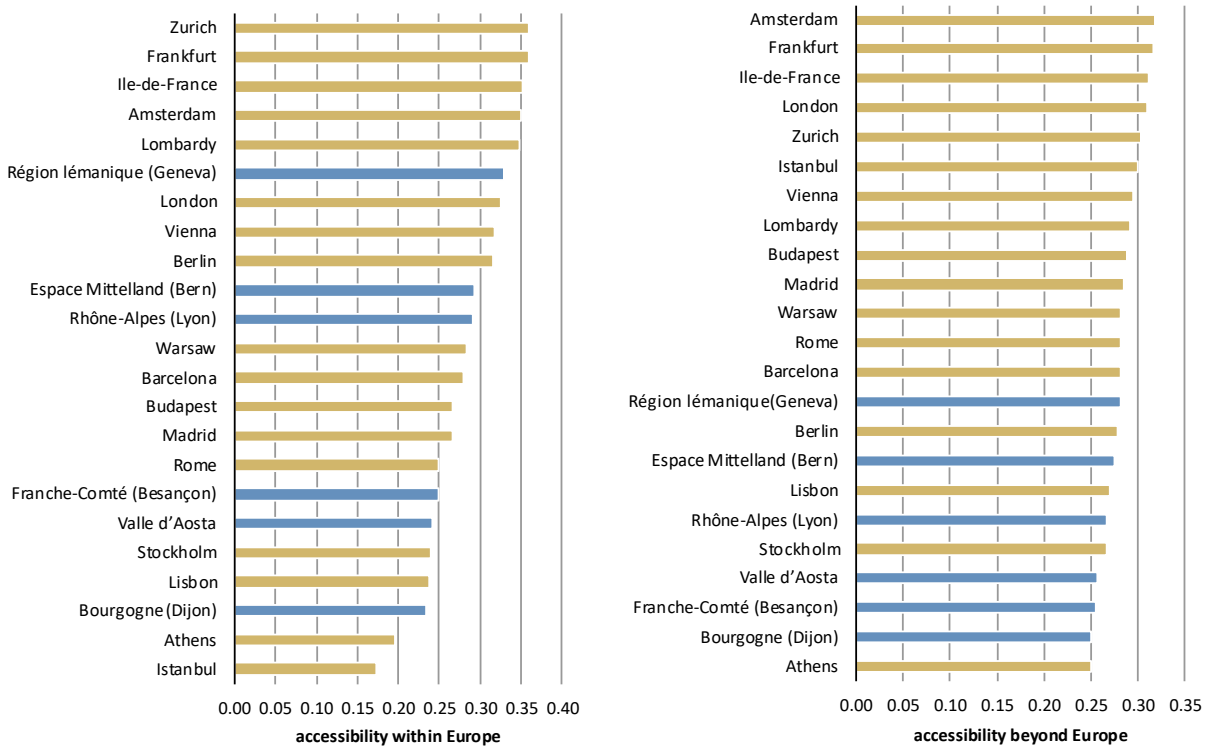
Regions according to NUTS 3 classification and cantons. Average value across all time windows. Additional dot symbols for the airports included in the calculation.

Figure INFRAS.

Figure 21 shows a comparison of the accessibility of the regions in the vicinity of Geneva Airport (blue) with the selected European metropolitan areas (yellow), for both accessibility within Europe and outside of Europe. For accessibility within Europe, the Zurich region ranks first among all regions in Europe with a value of 0.36. With a value of 0.33, the Lémanique region is almost as accessible as the Lombardy region and slightly more accessible than London or Vienna. Among all 284 regions, the Lémanique region ranks 19th for accessibility within Europe. The neighboring regions Franche-Comté, Valle d' Aosta and Bourgogne show lower accessibility, with values of around 0.25. Still, they are as well connected as, for example, Rome.

In terms of global accessibility, regions with major hubs achieve the highest accessibility. These are Amsterdam and Frankfurt with values of 0.32, followed by Paris and London. The Lémanique region has somewhat lower accessibility, with a value of 0.28. Nevertheless, the region achieves a similar level of global accessibility to Berlin, Barcelona or Rome. Among all 284 regions, the Lémanique region ranks 65th for accessibility beyond Europe.

Figure 21: Comparing accessibility of regions in the vicinity of Geneva Airport with selected European metropolitan regions – accessibility within Europe (left) and beyond Europe (right)



Selected regions according to NUTS 2 classification. Average value across all time windows.

Figure INFRAS.

4.1.3. The usage of Geneva Airport

Geneva Airport as starting point for travel within Europe

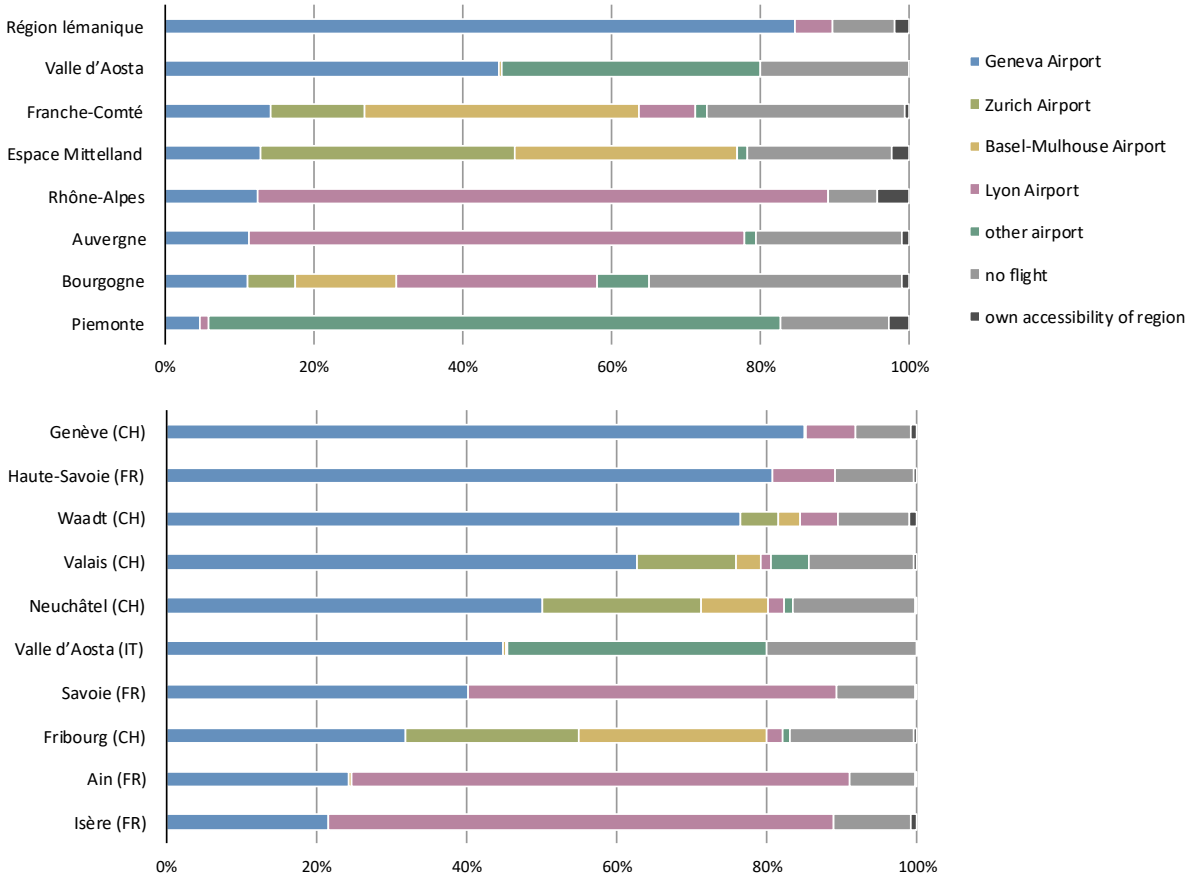
Figure 22 demonstrates the importance of Geneva Airport as access point for continental travels from Geneva and the surrounding regions (NUTS 2 level above, NUTS 3 and cantonal level below). It presents the share of accessibility (weighted GDP) which is reached by a trip starting at Geneva Airport for several regions. For the Lémanique region resp. canton of Geneva, 85% of accessibility relies on connections at Geneva Airport. The remaining share is mostly covered by connections from Basel-Mulhouse and by connections that do not require a flight.[29]

Geneva Airport is not only important for the city of Geneva and its region, but also for the border regions in France and Italy. For Valle d'Aosta, 45% of accessibility is generated via connections at Geneva Airport. For Franche-Comté, Espace Mittelland, Rhône-Alpes, Auvergne, and Bourgogne the share is between 10 and 14%. On the more detailed level (NUTS 3 and cantons), Geneva airport accounts for 80% of

[29] Methodological note: For connections where travel by car is faster, this time is used instead of flight connections. This is necessary to ensure comparability across all regions.

accessibility to the Haute-Savoie department. The contribution is also high for the cantons of Vaud and Valais at 76% and 63% respectively. Geneva Airport also contributes more than 20% to the accessibility of several other departments and cantons.

Figure 22: Regions with highest accessibility within Europe through Geneva Airport on NUTS 2 level (above) and department / cantonal level (below)



Summer week Monday, 6 a.m. to 8 a.m. Sorted in descending order. Shares differentiated according to Geneva, Zurich, Basel-Mulhouse, Lyon and other airports, routes without flights (lower travel time by car) and own accessibility of the region.

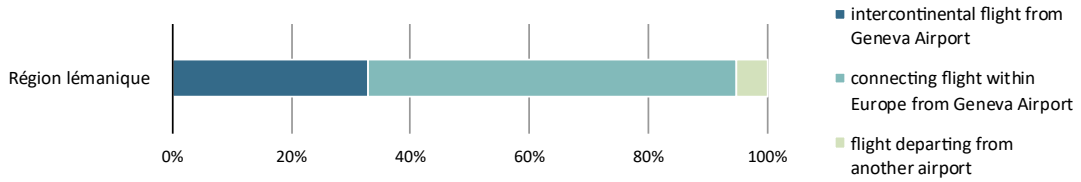
Figure INFRAS.

Importance of intercontinental flights from Geneva Airport on global accessibility

Figure 23 focuses on the importance of global connections to destinations outside Europe offered at Geneva Airport. It presents the proportion of destinations outside Europe that are reached from Geneva with intercontinental flights from Geneva airport. With about one third of all destinations globally, the intercontinental connections offered at Geneva Airport are quite important for the accessibility of Geneva to destinations outside Europe (note that this includes direct flights to transfer airports outside Europe, it is not necessarily a direct connection to the final destination). Most of the remaining destinations use intra-European feeder flights from Geneva, only a small

proportion relies on travels starting at other airports (like for example Zürich, Lyon, or Milan).

Figure 23: Share of destinations served with intercontinental flights from Geneva airport for Région lémanique



Summer week Monday. Without weighting by GDP.

Figure INFRAS.

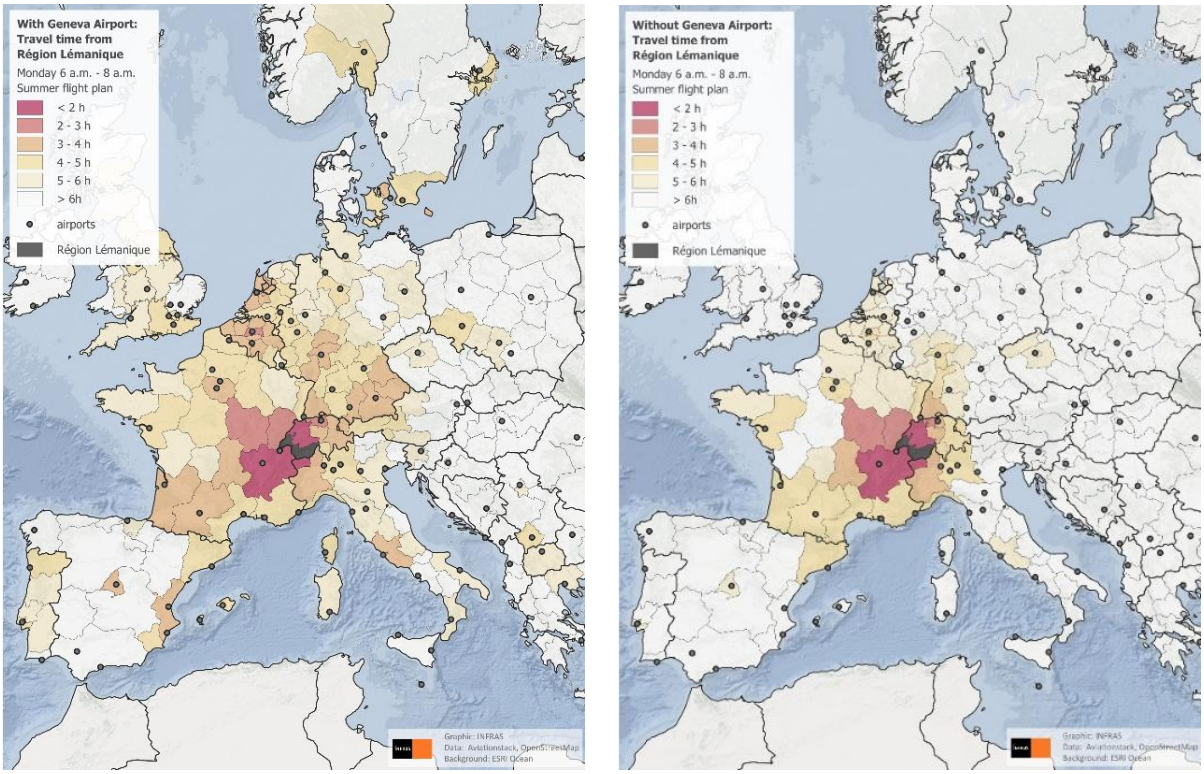
4.1.4. A simulation: Accessibility without Geneva Airport

To demonstrate the contribution of Geneva Airport to the accessibility of the region, a hypothetical scenario has been calculated: How would accessibility change if Geneva Airport would not provide any connection.[30] Figure 24 shows the results: in the left part it shows the current travel times required to reach European regions originating from the Lémanique region (isochrone map). In the right part, the hypothetical travel times without Geneva Airport are displayed.

Travel times in destinations close to Geneva do not change. This is because they are reached faster by land transport anyway. But otherwise, the maps show that travel times increase substantially to all of Europe (note that, in some cases, the changes are not visible in the map due to scaling). For example, the travel time (incl. access time etc.) from the Lémanique region to Frankfurt would increase from three to almost five hours, and from six to ten hours to Istanbul. In some cases, even travel times for other European regions increase if the best connection includes a transfer in Geneva: Travel times to Galicia from several Greek regions would increase by 2.5 hours.

[30] Technically, all connections to and from Geneva Airport are deleted from the flight plans before accessibility is calculated. Note that this is not a forecast of what would happen or a realistic scenario: Without Geneva Airport, in the real world the travel network would adopt to the new conditions, probably providing new travel opportunities. The hypothetical scenario demonstrates the contribution of Geneva Airport to accessibility in the status quo, not an alternative world.

Figure 24: Travel times to European regions originating from the Lémanique region. A comparison of the current situation (left) with the situation if Geneva Airport was not served (right).



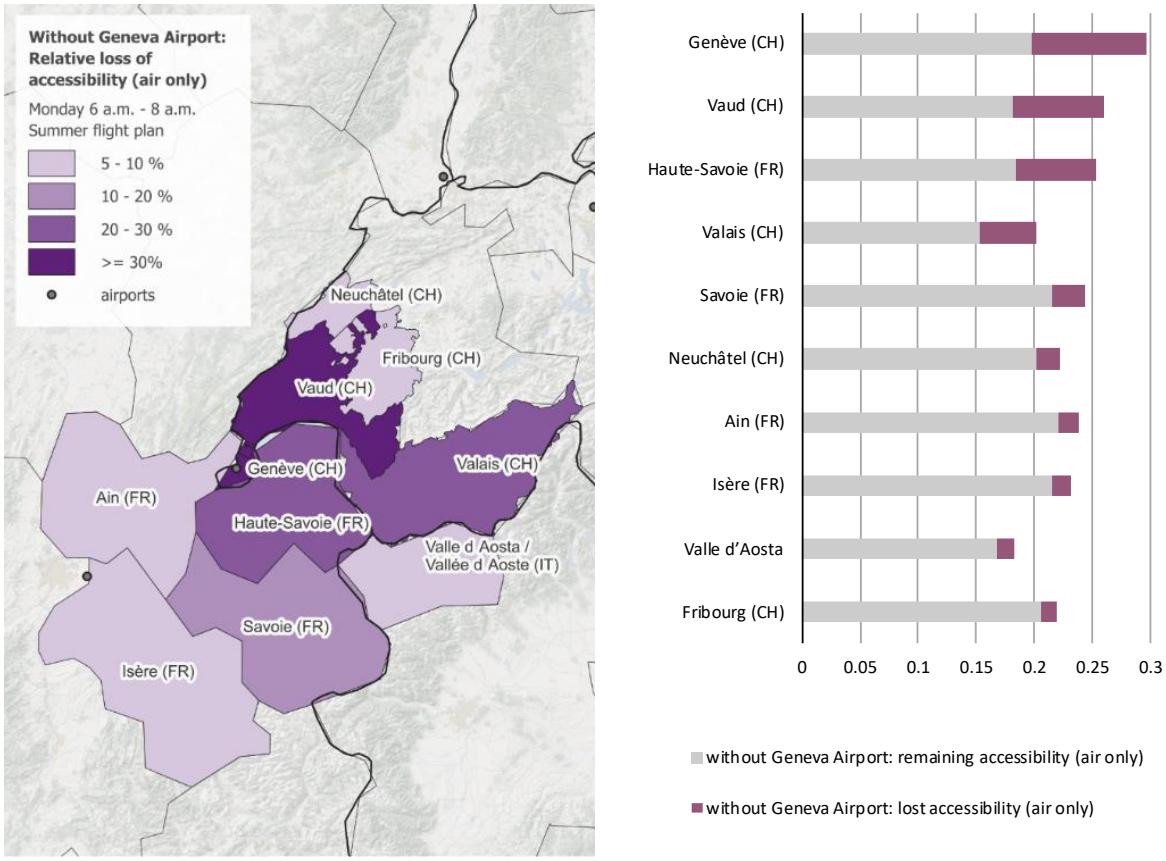
Regions according to NUTS 2 classification. Summer week Monday, 6 a.m. to 8 a.m. Additional dot symbols for the airports included in the calculation.

Figure INFRAS.

The extended travel times have, of course, a negative effect on accessibility, too. Figure 25 shows the reduction of air accessibility if Geneva Airport did not exist for the canton of Geneva and on the granular regional level for the surrounding regions (only air accessibility[31]). For the canton of Geneva, the accessibility index drops by a third, from 0.30 to 0.20. Instead of accessibility within Europe comparable to the accessibility level of London, Lémanique would drop to the level of Athens. The air accessibility of the canton of Vaud would register a loss of 30%, and the canton of Valais of 24%. Additionally, the border regions in France and Italy would experience significant reductions in air accessibility: Haute-Savoie (FR) by 28%, Savoie (FR) by 12% and Ain (FR), Isère (FR) and Valle d'Aosta (IT) by almost 10% each.

[31] The concentration on air accessibility allows to focus on the relevant changes due to the lost connections at Geneva Airport. "Air accessibility" means that destinations which are reached by land transport are not considered in the analysis. A consequence of this approach is that the resulting numbers for accessibility can not be compared with the numbers discussed above, as here accessibility is calculated for another set of destinations.

Figure 25: Without Geneva airport – regions with largest loss of accessibility (air only)



Regions with highest loss of air accessibility if Geneva Airport was not served (destinations that are reached by land transport are not considered). Summer week Monday, 6 a.m. to 8 a.m.
CH: Cantonal level, FR and IT: NUTS 3 Level.
Left: Mapping of regions colored according to relative loss (CH: Cantonal level, FR and ITs: NUTS 3 Level).
Right: Regions sorted in descending order of absolute loss of accessibility. The sum of remaining and lost accessibility amounts to real accessibility.

Figure INFRAS.

4.2. Geneva Airport as a location factor for business

The economic importance of an airport extends well beyond the jobs and value added generated on the airport premises (i.e. the production-side effects discussed in Section 3). And the accessibility of Geneva because of the airport, which is illustrated in the preceding section, is not an economic benefit for the region by itself. Rather, it is indirectly useful if it leads to economic benefit for the region.

One way for this kind of economic benefits is through the business sector. Accessibility can improve the performance of the companies present in the region. There are various mechanisms which can lead to such benefits. For the Geneva economy, three main channels can be identified (INFRAS and BAK Economics 2017) through which

airport-based accessibility affects a regional economy. Further mechanisms are at work as well, but these three seem to be most influential for the Geneva economy and illustrate well why accessibility is of crucial importance for a modern internationally oriented economy like Geneva's.

Three main channels of impact of accessibility on the Geneva economy

First, accessibility reduces transaction costs and expands markets. Shorter travel times make business trips cheaper and more efficient – for a firm's own employees travelling to clients, for suppliers and partners as well as for clients and investors visiting the region. This lowers the cost of maintaining business relationships and opens access to markets that would otherwise be too expensive to service. For a region like Geneva, where a large share of economic activity is internationally oriented, this mechanism is particularly relevant.

Second, accessibility supports innovation. In knowledge-intensive industries, a significant part of commercially relevant knowledge is tacit. It cannot be fully transmitted through publication or video calls but requires face-to-face interaction. Participation in global knowledge networks, whether in research, product development, or deal-making, depends on the ability to meet in person at reasonable cost and time. A well-connected airport enables firms and research institutions to stay embedded in these networks.

Third, accessibility contributes to quality of life and thereby to talent attraction. Highly qualified, internationally mobile professionals consider connectivity when choosing where to live and work. The ability to visit family or travel for leisure equally matters. Low-cost carriers, which are readily available at Geneva Airport, broaden this effect by making the region accessible for younger, more price-sensitive employees.

These three channels – cost efficiency, innovation, and talent – are not independent from each other. Rather, they reinforce each other: a region that is accessible attracts knowledge-intensive firms, which attract talent, which generates innovation, which makes the region more productive and competitive – and, in turn, more attractive for knowledge-intensive firms, due to cluster effects.

The connection between accessibility and economic growth

These theoretical mechanisms on how accessibility drives economic activity are supported by a substantial body of empirical research. Studies have examined the impact of growth in air traffic on economic performance and employment. In the long run, improved accessibility has a positive effect on employment, productivity, competitiveness, the number of start-ups, and the standard of living in a region (Cristea 2023). According to Blonigen and Cristea (2015), a 50% increase in air traffic over a 20-year period leads to an average increase in real GDP of 7.4%. SEO Amsterdam Economics (2024) has shown that a 10% increase in direct flights leads to a 0.5% increase in GDP and a 1.6% increase in employment. However, the marginal utility of connectivity could decline, i.e., additional connections would bring less benefits. Lieshout et al.

(2015) quantify the growth in GDP per capita at 0.2% in the following year if connectivity is increased by 10% through direct flights. According to ECAD (2008), a 1% improvement in air transport connectivity leads to a 0.2% increase in employment levels.

The impact of a location's accessibility on its economic performance can also be quantified. Pot and Koster (2022) estimated the long-term elasticity at 0.11, a result indicating that a 10% increase in accessibility leads to a 1.1% increase in GDP per capita. Cristea (2023) found that a 10% increase in accessibility[32] within three years leads to a 0.4% growth in total employment and a 0.3% increase in the number of firms.

Several studies have demonstrated a bidirectional causal relationship between air traffic and economic performance due to feedback effects. Increased accessibility not only boosts economic performance, but in the long term, increased economic activity also leads to more passengers, which can trigger higher infrastructure investment and an expansion of flight offerings. Hu et al. (2015) show that a 1% increase in passenger numbers leads to a 0.9% increase in GDP, and a 1% increase in GDP in turn leads to a 1.4% increase in demand for air travel. A new study by New Economics Foundation (2025) goes even further by showing that in many European regions, economic growth precedes the demand for air travel. According to the study, the causal relationship runs primarily from economic performance to connectivity, not the other way round. In regions that are already highly developed and well-connected, the additional economic benefits for further improvements to air transport links are correspondingly lower.

Geneva as an internationally oriented economy

Whether and how strongly a region benefits from airport accessibility also fundamentally depends on its economic structure. Sectors that are internationally oriented, knowledge-intensive, or dependent on face-to-face client relationships benefit most. Geneva's economy is disproportionately composed of exactly these sectors. According to the cantonal production accounts (OCSTAT 2026b), the tertiary sector accounts for 83.4% of gross value added in the canton of Geneva and 86% of all employment (in FTE). Within this, several sectors stand out for their size and their dependence on international connectivity. "Wholesale Trade", which includes Geneva's globally significant commodity trading cluster, accounts for 17.0% of cantonal value added – an extraordinarily high share by any European or Swiss comparison. The sector "Financial Services and Insurance" contributes 12.8 %, while "Professional, Scientific and Technical Services" accounts for 7.2%. On the industrial side, "Watchmaking" alone makes up 5.8% of gross value added, which is a sector that depends on the airport both for high-value freight and for client-facing sales activities worldwide. "Chemical and Pharmaceutical Industries" add 2.7%.

[32] The measure of accessibility used in the study does not correspond to the measure used in the present study. Pot and Koster (2022) use the number of passengers handled as a proxy for the accessibility of an airport but take into account the land-side effort required to reach the airport from different population centres.

This sector structure is reflected in the international orientation of a large part of Geneva's economy. Looking at multinational firms specifically, Fondation pour Genève[33] (2024) found that in 2019 roughly 2'100 multinationals generate direct value added of 21 bCHF in the canton of Geneva and are responsible for more than 107'000 FTEs, which corresponds to almost a third of all employment in the canton of Geneva. The international nature of Geneva's economy is highlighted by the fact that, historically, more than 10% of all Swiss exports have originated from Geneva, exceeding Geneva's share of the national GDP. Although the proportion of exports has fallen recently, Geneva still accounted for 7.7% of all exports in 2024. Half of the 23 bCHF of exported goods come from the watchmaking industry, which has by far the largest share of all exports (OCSTAT 2025a).

It's not only its international firms that highlight the importance of the airport. The airport itself and its services reflect the role of Geneva as an international business location. For example, General and Business Aviation accounts for roughly 20% of aircraft movements at Geneva Airport (internal sources from the airport administration). Furthermore, the proximity between the city centre and the gate is a competitive advantage important for businesses (access time of 8 minutes from the city centre to the airport [see section on accessibility] and a total time of 20-40 minutes to the gate, according to interviewees). Geneva is a compact location with a high density, and Geneva Airport is part of that compactness.

The airport is seen as a crucial factor by local businesses

To better understand the airport's role for the business community, we conducted several interviews with key stakeholders: The Groupement des Entreprises Multinationales (GEM), SuisseNégoce, the Fédération des Entreprises Romande (FER), the Chambre de Commerce, Industrie et Services de Genève, AERIA+[34] and experts from the canton of Geneva.[35] We additionally analysed inputs from an external survey (AERIA+ 2025) and firm-level testimonials from members of an industry group (GEM 2026).

The interviews revealed an almost unanimous consensus that the Geneva Airport is of utmost importance for the regional economy, both to deliver and buy goods and as a way of reaching and receiving clients. While its relevance was affirmed routinely, Geneva Airport is to be understood as a necessary condition for fruitful economic condition but not as its cause. The survey (AERIA+ 2025) provides a quantitative backdrop to the qualitative findings from the interviews. 82.5% of respondents rated Geneva Airport as a major asset for regional business attractiveness. Almost 90% of respondents consider a high-performing business aviation sector essential for Geneva to

[33] Fondation pour Genève is "a private institution of recognized public interest, that aims to enhance Geneva's renown, attractiveness and openness to the world, in particular by working closely with the federal and cantonal authorities to promote Geneva's international development" (Fondation pour Genève 2026)
[34] AERIA+ (Associations romande pour une infrastructure aéroportuaire performante) seeks to promote and defend the presence of an efficient airport infrastructure supporting western Switzerland's economy
[35] It has to be noted that we selected the interviews together with the Airport of Genea. The views presented are a selective collection of individual opinions and experiences. They are not – and they are not meant to be – a representative sample of opinions. Rather, they were chosen as selected examples and to illustrate the importance of the airport for the business community.

maintain its position as a hub for finance, trade and all multinationals. More than three quarters of respondents even deem it absolutely essential. The testimonials add firm-level evidence (GEM 2026). According to them, more than 75% of all internationals business travel goes through Geneva Airport. One trading firm with 630 employees in Geneva and 1'000 worldwide reported approximately 6'500 flights via Geneva Airport in a single year. A chemical firm even provided detailed route data showing the relevance for connectivity within Europe and overseas. These are not occasional business trips - they reflect the daily operations of internationally active firms.

Companies consistently described the airport as compact, efficient and easy to navigate – like the canton itself. These are crucial qualities when travelling frequently. On the critical side, respondents flagged infrastructure quality outside the new international terminal, congestion at passport control for non-EU (i.e. non-Schengen) travellers and outdated security screening equipment compared with other airports (such as London Heathrow).

A central finding across most interviews is that the airport is not the primary reason firms choose Geneva. Companies locate here for other reasons: the regulatory environment, the talent pool, the presence of other international organisations, or sector-specific clusters. But no interviewee could imagine Geneva as a credible international business location without the airport. As such, the airport does not compete with tax policy or labor market conditions as a location factor: without it, the other factors lose much of their relevance. As one interviewee put it, Geneva without an airport would not simply be smaller – it would be qualitatively different and closer to a regional centre than a global hub, as it is now.

Businesses use the airport primarily for the movement of people. Across all interviewees and survey responses, business travel - both outbound (staff visiting clients, partners, production sites) and inbound (receiving clients, investors, officials) – dominates. Even though internal meetings have largely shifted to online post-COVID, client-facing travel has remained stable and crucial.

Freight is secondary in volume but strategically important for specific niches. The luxury and watch industry relies on secure, certified air freight with complex customs documentation. Firms from these sectors based all over western Switzerland maintain offices in Geneva to be close to the airport for shipping purposes. Pharma and MedTech firms use overnight air shipments for sample vials and time-sensitive materials. Precious metals are transited through Geneva Airport in significant volumes.

The most frequently voiced criticism concerned the lack of direct long-haul connections, particularly to Asia. Since the collapse of Swissair, Geneva has lost direct routes to several major business destinations. The need to transit via Zurich or Frankfurt to reach key destinations in Asia (e.g. Singapore, Tokyo and Shanghai) is seen as a real competitive disadvantage. A less frequently raised complaint was about the physical infrastructure at the airport (bus boarding at remote stands, passport control bottlenecks, lounge quality), which relates to passenger experience rather than the route network.

The airport's importance extends beyond multinationals. On the one hand, Geneva's large international firms generate substantial demand for local SMEs (small and medium enterprises) from various sectors. Amongst them are, for example, legal services, accounting, logistics, hospitality (see Section 4.4), events and specialised consulting. They profit indirectly from the Airport along the value chain generated by the presence of the Multinationals. A report by Fondation pour Genève has documented these cascade effects (2024): the indirect economic impact of multinationals on Geneva SMEs is considerable, and the airport is one of the channels through which it operates. On the other hand, locally based SMEs in turn use the airport themselves, particularly export-oriented firms in the Machinery, Electrical and Metals (MEM) sector.

Talent attraction reinforces the relevance of the airport, an issue that was raised by several interviewees. For professionals considering a move to Geneva, the ability to fly home quickly and maintain personal connections matters. Low-cost carriers (notably easyJet's strong presence at Geneva Airport) make Geneva accessible and attractive for younger, mobile employees.

The evidence from interviews and survey shows a clear picture. Geneva airport is essential to the functioning of the regional economy – "the lung of the regional economy" as an interviewee called it –, but as a prerequisite, not as the primary driver. No firm relocates to Geneva because of the airport on its own. But equally, few of the firms that make Geneva what it is today would remain if the airport were not there, or if the airport's connectivity and thus its services were to deteriorate substantially. The airport is the infrastructure that makes much of it possible. According to the interviewees, maintaining and developing it is not a luxury, but a condition for Geneva's continued competitiveness as an international business location.

4.3. International Geneva

Geneva is a global hub for multilateral diplomacy and international governance without parallel among cities of its size. As of 2025, the canton hosts 42 intergovernmental organisations, 250 international non-governmental organisations with at least one employee and 185 permanent missions to the United Nations (OCSTAT 2025c). This non-commercial sector alone generated approximately 5 bCHF in direct value added and around 28'600 FTE jobs in the canton according to a study by Fondation pour Genève (2024). Geneva has also been described as "a daily Davos" – a place where high-level events unfold continuously, most of them invisible to the general public.

Few cities approach Geneva's concentration of international institutional activity. New York hosts the UN General Assembly and Security Council, but its international organisations are embedded in vast, one-of-its-kind metropolitan economy. Brussels anchors EU governance but draws on a narrower institutional mandate. Geneva's distinctiveness lies in the density and diversity of its international presence across health, labour, trade, humanitarian affairs, human rights and disarmament - all within a compact, highly interconnected ecosystem where organisations, missions, NGOs,

scientific institutions, and private actors operate in close proximity. That proximity is itself a productive asset: it lowers the transaction costs of multilateral negotiation and enables the kind of informal, cross-institutional exchange that formal meetings alone cannot replicate.

This section qualitatively examines the airport's role specifically within this community, drawing on a structured expert interview conducted in February 2026 with senior representatives of organisations at the intersection of International Geneva's public and private sectors. The section is analytically distinct from the preceding section on international business: the two dimensions of Geneva's international character overlap but are not identical.

There is a strong historical connection between Geneva Airport and International Geneva. Following the Second World War, Geneva Airport was among the very few undamaged and operational airports in continental Europe. This gave Geneva a decisive early advantage in hosting the newly established United Nations institutions. Their delegates and officials required international connectivity at a moment when it was scarce elsewhere. The presence of those early institutions in turn attracted further organisations, diplomatic missions and private sector actors, compounding Geneva's international character over subsequent decades. The airport did not create International Geneva on its own, but it was a founding prerequisite, which continues to hold true to this day.

International organisations are structurally dependent on the movement of people. Their core functions – negotiating treaties, coordinating humanitarian responses, setting technical standards, convening member states – require the physical presence of delegates, officials, and experts drawn from across the world. Unlike multinational firms, whose travel needs are shaped by commercial relationships and supply chains, international organisations travel to exercise their mandates: a WHO technical committee, a human rights council session, or an ILO tripartite negotiation cannot be reduced to a video call without material loss of function. Conferences, diplomatic missions, and expert consultations are not ancillary to what these organisations do, but central to their existence and meaning.

This structural dependency translates directly into demand for air connectivity. Geneva-based organisations convene member states spanning every region of the world. Senior officials travel frequently to field operations, partner governments and other multilateral hubs. Visiting delegates arrive for events that, while individually short, accumulate into a near-continuous flow throughout the year. According to interviewees, at least 90% of people in the International Geneva community arrive by air through Geneva Airport. For most destinations beyond Zurich and Paris, travel by air is the default.

Travel is concentrated at the executive level. It is primarily heads of organisations and their immediate deputies who travel regularly; lower-level staff do so far less. The airport thus functions as a high-frequency, high-value corridor for senior international

officials and delegations, which shapes the nature of demand more than its aggregate volume.

The economic contribution of this community to Geneva extends well beyond the direct employment figures. International organisations and their staff generate substantial induced demand in the local economy: hospitality, catering, events management, security, legal and financial services, and real estate. Visiting delegates contribute through hotel stays, dining, and ancillary spending. The presence of the international complex also sustains Geneva's reputation as a centre of expertise and global relevance. All this reflects an intangible asset that influences the location decisions of scientific institutions, NGOs, and private-sector actors alike, and that is inseparable from the city's ability to attract and retain talent.

When international organisations are asked which factor matters most for their location decisions besides the presence of other international organisations and institutions, the airport is consistently among those named, alongside political stability, quality of life, the broader Geneva ecosystem and taxation. The airport functions as a prerequisite, not the sole reason any organisation chooses Geneva, but something whose absence would make Geneva unrecognisable as a host city. Without its airport, International Geneva would lose its relevance, and the entire complex would be at risk of relocating.

Travel patterns within International Geneva have however shifted since the pandemic. The number of visiting delegates has declined relative to pre-COVID levels, but those who do travel tend to stay longer, with visits more specific and purposeful across the year. According to an interviewee, there has been a decline in overnight stays attributable not to shorter visit durations, but to reductions in permanent staff at Geneva-based organisations - a distinction that matters for the interpretation of the airport’s traffic evolution. The crisis in multilateral cooperation has put International Geneva under further pressure (see Box 2).

Box 2: International Geneva under pressure

The financial and institutional context for International Geneva has shifted sharply since early 2025. From January 2025, the Trump administration froze and subsequently cut more than 80% of US foreign assistance (Geneva Solutions, 2025). The US had historically contributed more than a quarter of public donations to major Geneva-based UN agencies; USAID alone accounted for almost all of US funding flows to organisations in Geneva and Switzerland, with over 50 organisations holding active US grants at the time of the freeze. The consequences were immediate and severe. UNHCR announced approximately 3’500 redundancies, WHO more than 2’300 positions and WFP around 6’000 (Refugees International, 2026). In January 2026, a presidential executive order announces US withdrawal from 66 international organisations, including UNCTAD and the IPCC, both with Geneva presences (Geneva Solutions 2026).

The Swiss Federal Council responded with a substantial package of support. On 20 June 2025, it allocated 269 mCHF to International Geneva for various short- and long-term measures. The Federal Council frames the package explicitly as a response to “radical upheaval in the multilateral system, funding contributions cuts and outstanding payments by member states” (Federal Department of Foreign Affairs 2026).

The expert interviewees were frank about the trajectory: International Geneva is amid structural upheaval and there is great uncertainty as to how it will emerge once these turbulences have passed. Crucially, no causal link is drawn between this institutional turbulence and the airport’s continued relevance. The airport is expected to retain its paramount importance for International Geneva regardless of how the complex evolves and repositions itself.

Alongside these behavioural shifts, structural connectivity gaps persist – and for International Geneva, they carry weight. The community’s travel need is inherently intercontinental; member state delegations arrive from all over the world; senior officials travel to field operations and partner governments in regions far beyond Europe. The limited number of intercontinental routes (e.g. Tokyo and Singapore) reduces Geneva’s attractiveness as a host city for organisations with a globally distributed membership and operations. Customs congestion and the airport’s approach to its operational limits as an international terminal are also raised as a source of friction. For an international community whose mobility is predominantly channelled through a single airport, the quality and reach of that airport’s network is a direct determinant of Geneva’s competitive position as a host location.

Taken together, these elements point to a clear conclusion: Geneva Airport is not simply a transport node for International Geneva, but rather a structural enabler of the entire complex. The organisations, missions and NGOs that constitute International Geneva generate directly and indirectly a substantial share of cantonal employment and value added, sustain a dense ecosystem of local suppliers and service providers, and anchor Geneva’s reputation as a global centre for governance. That economic and institutional weight depends, in the first instance, on the ability of delegates, officials and experts to reach Geneva efficiently from anywhere in the world. In this sense, the airport’s catalytic effect operates through International Geneva as a transmission mechanism: the airport enables the complex, the complex sustains the economy and any erosion of air connectivity – whether through insufficient intercontinental routes or capacity constraints – translates with a lag, into pressure on Geneva’s position as one of the key host cities for multilateral institutions.

4.4. Inbound Tourism

Tourists are an important factor in modern economies. With their expenditures, they provide revenue to local businesses, and serving their needs ensures employment. The hospitality sector (accommodation and food services) in fact plays an important role in the economy of the canton of Geneva, both by generating value added and as a place of employment. In 2023, the almost 2'400 establishments in this sector generated more than 1.2 bCHF in value added and employed more than 20'000 employees (approx. 16'900 FTE). By providing employment for more than 5% of the total workforce, the hospitality sector is a key sector for the canton (OCSTAT 2025b, 2026b). The importance of the tourism sector is even more pronounced for other regions within the catchment area of Geneva Airport, namely the alpine destinations in Western Switzerland and adjoining France and Italy.

As the opportunity to get to the destination are an essential element for tourism, airports play an important role as nodes in the travel network. Therefore, the business enabled by tourists visiting a region by traveling via the airport is an important component of catalytic effects. Note that this includes business opportunities generated by leisure tourism as well as the expenditures of business travellers or, specifically in the case of Geneva, visitors in relationship with the International Institutions present in Geneva.[36]

This section examines the economic importance of Geneva Airport for tourism in the canton of Geneva, the rest of Switzerland, and the neighbouring French border region[37]. The objective is to quantify the revenue generated by foreign overnight visitors[38] entering Switzerland via Geneva Airport and the associated total economic effect for Switzerland and the considered French border region.

To assess the economic importance of Geneva Airport as a gateway for inbound tourism in the region, a four-step analytical approach is necessary:

1. Identifying the number of foreign tourists arriving via Geneva Airport

In the first step, we determine how many foreign tourists enter the region through Geneva Airport. Data were taken from public statistics on tourists in the region and passenger statistics from Geneva Airport. This data was then additionally adjusted: Tourists arriving in the region by train, car, or bus were excluded, regardless of whether air transport was used in their travels or not. All people living in Switzerland, in the surrounding areas in France and Italy were excluded as well. The same was true for people traveling via Geneva Airport with a destination outside the region. Finally,

[36] Business travellers are important in another component of catalytic effects as well, namely by enabling international cooperation in the business which they are traveling for (see section on 4.2 "Geneva Airport as a location factor for business"). Here not the reason for their travels but the expenditures do have during the traveling are the relevant activity.

[37] The French border region includes the departments of Haute-Savoie, Savoie, Isère, Rhône, Ain, Saône-et-Loire, Jura, and Doubs.

[38] We assume that visitors from Switzerland do not use air transport to visit Geneva. For simplicity, we further assume that only visitors staying overnight generate a relevant expenditure in the tourism industry.

all Swiss nationals were excluded, assuming that Swiss nationals are never inbound tourists traveling via Geneva Airport. By combining the different sources, we identified the number of international passengers arriving through Geneva Airport by their countries of origin.

2. Estimating the number of nights spent in the region

Next, the analysis aims to estimate how many nights these incoming foreign tourists spend in the canton of Geneva, rest of Switzerland or the French border region. Using data on the average length of stay by country of origin and by accommodation type, we calculate the total number of overnight stays from visitors arriving through Geneva Airport.

3. Calculating total spending per country of origin

Data on the average daily spending of visitors allow revenues to be estimated, with differentiated figures for each source market (country of origin).

4. Calculating the total economic effect from tourism spending

Combining all the information described above, the total revenue generated by tourists arriving through Geneva Airport can be calculated. This is the base to calculate the economic effects for the region, including direct, indirect, and induced effects on gross value added and employment by tourists arriving through Geneva Airport. Together, this encompasses the catalytic effect of inbound tourism for the Airport of Geneva.

Detailed information on the methodology and the datasets used is provided in Annex A3.

4.4.1. Number of incoming tourists through Geneva Airport

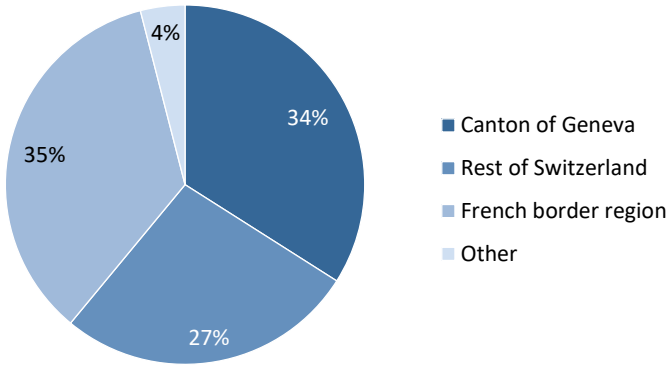
The first step of the analysis consisted of determining the number of incoming tourists arriving through Geneva Airport. In 2024, Geneva Airport recorded almost 18m passengers. Assuming an equal number of arrivals and departures, this corresponds to approximately 9m arriving passengers. A substantial share of these individuals are residents returning to their homes within the airport's catchment area. They are consequently excluded from the analysis, as we only consider non-resident incoming tourists. Based on passenger survey data, approximately three million incoming tourists travelled via Geneva Airport. We additionally account for the fact that some foreign visitors stay with friends or family and therefore do not appear in official accommodation statistics. This results in an estimated **2.9m incoming passengers** who arrive through Geneva Airport and generate overnight stays in the wider region.

Using the airport's passenger survey, the likely destination of these visitors can be approximated. As illustrated in Figure 26, 34% of the incoming tourists remain in the canton of Geneva, 27% travel to other destinations within Switzerland, and 35% continue their journey to France. The total number of incoming passengers staying in

Geneva, the rest of Switzerland or in France thus amounts to 2.75m in 2024. Tourists travelling to other countries will be excluded in the following analysis. In absolute numbers, this means:

- approx. 1m foreign visitors stayed in the canton of Geneva
- 0.75m international guests travelled to the rest of Switzerland and
- slightly more than 1m tourists travelled to France.

Figure 26: Destination of the incoming passengers from Geneva Airport, 2024

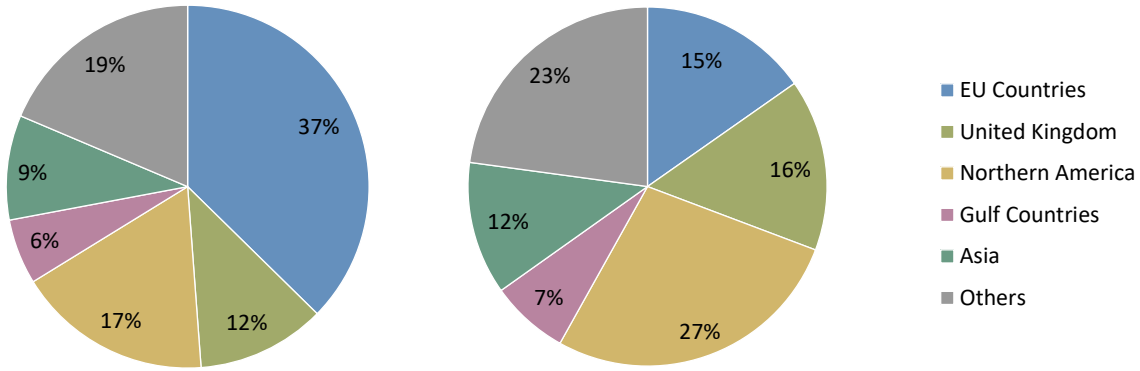


The total number incoming passengers staying in Geneva, the rest of Switzerland or in France amounts to 2.7m in 2024. Tourists travelling to other countries will be excluded in the following analysis.

Figure INFRAS. Sources: Aéroport International de Genève 2025a, Aéroport International de Genève 2025b

Figure 27 presents the distribution of foreign guests in the canton of Geneva. While the left graph shows the origin of *all* foreign guests in Geneva staying in an official accommodation, the right graph shows the origin of the guests arriving to Geneva *via Geneva Airport*.

Figure 27: Origin of foreign guests in the canton of Geneva, 2024



From the 1.4m foreign guest arrivals in official accommodations (hotels, holiday apartments, youth hostels), we estimate that approx. 1m guests arrived via Geneva Airport.

Figure INFRAS. Source: FSO 2026 for HESTA and FSO 2025 for PASTA.

Especially the number of guests from EU countries changes substantially between the two graphs, dropping from 37% to 15%. There are two explanations for this: guests from EU Countries are more likely to take day-trips without spending a night in Geneva than guests from other regions or that they arrive by other means of transport than air. The United Kingdom and North America constitute key source markets in terms of the number of arrivals via Geneva Airport and even surpass EU countries in terms of total arrivals. The same estimation was carried out for visitors travelling onward to other Swiss cantons, while visitors heading to France were treated as a single, undifferentiated group due to data limitations[39].

4.4.2. Number of nights spent by tourists arriving through Geneva Airport

Using the official accommodation statistic allows us to generate specific average visitor profiles for each nationality. For example, 97% of guests from the United Kingdom in the canton of Geneva stay in hotels and spend an average 1.8 nights. 3% stay in other accommodation types, staying 2.8 nights on average. Applying this profile to the number of incoming UK guests via Geneva Airport, we estimate approximately 281'000 overnight stays in the canton of Geneva.

Extending this approach across all source markets (countries of origin) results in an estimated **2.1m overnight stays** in the canton of Geneva attributable to foreign guests who entered Switzerland through Geneva Airport.

Table 2 presents the results of this analysis, including for the rest of Switzerland and the French border region: In total, **6.1m nights** can be attributed to foreign visitors arriving through Geneva Airport. Of all overnight stays generated by visitors arriving through Geneva Airport, **34%** take place in the canton of Geneva, **30%** in the rest of Switzerland, and **36%** in the French border region.

[39] Please refer to Annex A3 for details on calculation for rest of Switzerland and France.

Table 2: Comparison of the number of nights and duration of the stay between hotels and other accommodation establishments

	Hotels & camping		Other accommodation (e.g. holiday homes and collective accommodation)		All accommodation types
	Nb. of nights	**Avg. duration**	**Nb. of nights**	**Avg. duration**	**Total nights**
Canton of Geneva	2.0m (96%)	2.1 nights per stay	0.1m (4%)	3.0 nights per stay	2.1m
Rest of Switzerland	1.5m (83%)	2.1 nights per stay	0.3m (17%)	4.0 nights per stay	1.8m
French border region*	1.8m (83%)	1.8 nights per stay	0.4m (17%)	3.5 nights per stay	2.2m
Total	5.3m	-	0.8m	-	6.1m

Only shows nights from guests in the Canton of Geneva for the year 2025
** Nights in holiday homes or collective accommodation are not part of the French tourism statistics. We therefore assume an identical split between hotels & camping and other accommodation as in the Rest of Switzerland. For the length of stay, an average between Geneva and the rest of Switzerland was assumed.*

Table INFRAS. Source: Own calculations.

In the canton of Geneva, a vast majority (96%) of the nights are spent in hotels. This share is higher compared to the rest of Switzerland, where only 83% of foreign overnight stays take place in hotels and 17% in other types of accommodation such as holiday apartments or youth hostels. This contrast reflects the distinctly urban character of Geneva and its strong orientation toward business and conference tourism.

To contextualise the importance of Geneva Airport for overnight tourism, the overnight stay attributed to Geneva Airport can be compared to the total number of registered foreign overnight stays. Figure 28 illustrates the importance of Geneva Airport for overnight tourism in the canton of Geneva: 70% of all foreign overnight stays in the canton can be attributed to visitors arriving via Geneva Airport. When taking into account all the nights spent in the canton of Geneva – including Swiss guests – more than half can be attributed to Geneva Airport (54%).

Figure 28: Percentage of the nights that are generated by a guest arriving via Geneva Airport, 2024

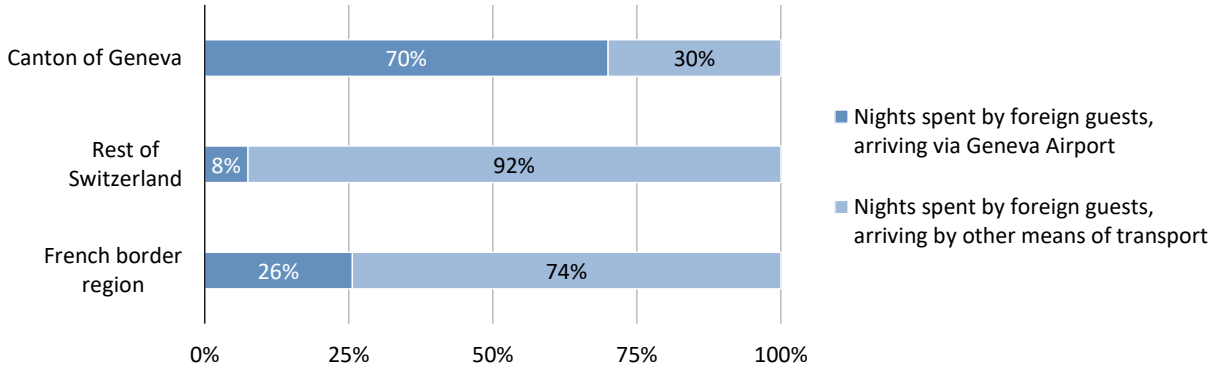


Figure INFRAS. Source: Own calculations.

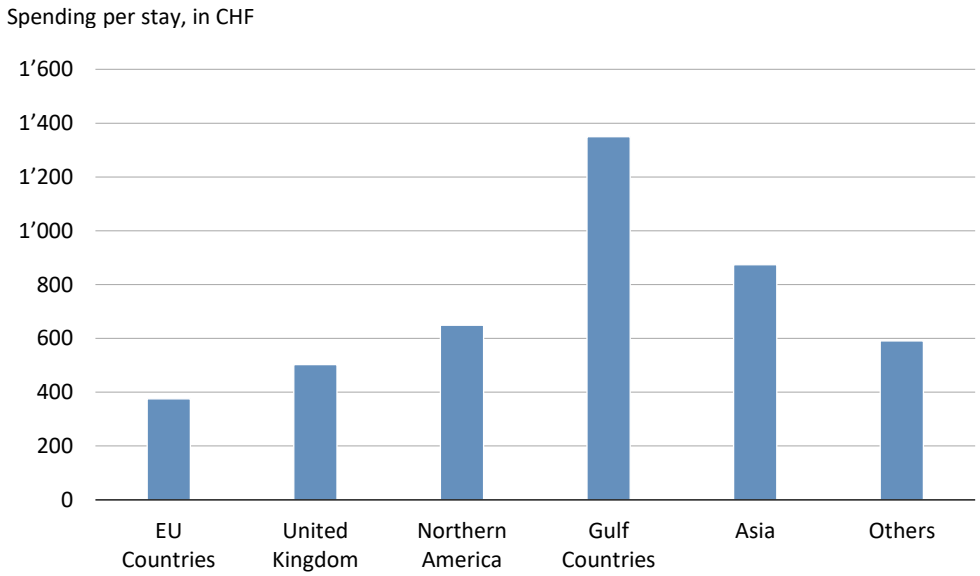
Unsurprisingly, for the rest of Switzerland, Geneva Airport is less relevant and accounts for only around 8% of total foreign overnight stays. In the French border region, Geneva Airport also plays a considerable role: just above a quarter (26%) of all overnight stays in this area can be traced back to visitors who travelled through Geneva Airport.

4.4.3. Expenditures and the total revenue generated

According to the Tourism Monitor Switzerland (TMS), foreign visitors across all nationalities spend 220 CHF per day on their trip[40]. While European visitors spend less on average (around 150 CHF per day), visitors from Asia or the Gulf Countries spend on average between 300 and 400 CHF per day. The origin of guests is, therefore, relevant for the economic impact of total tourism spending. Some further adjustments provide data specific for Geneva; for the French border region a more basic approach was developed due to data limitations (see Annex A3 for details).

As shown in Figure , the average spending per person per stay varies considerably. The most notable outlier are visitors from the Gulf countries, who spend on average 1'350 CHF per stay. They are followed by guests from Asian markets spending roughly 870 CHF, and visitors from Northern America, who spend around 650 CHF during their stay in the canton of Geneva.

Figure 29: Average spending by visitors during their stay, 2024



[40] Daily expenditure as assessed in the TMS is defined as the costs for accommodation and all other goods and services during the stay. While the TMS does not specify the share of each expenditure category, we know from the tourism satellite account that roughly 80% of total expenditure is spent on accommodation.

Figure INFRAS. Source: Own calculations.

With all underlying components quantified, we can now determine the key figure for the economic impact of inbound tourism for Geneva Airport: the revenue generated by international visitors. The results are presented in Figure 30. In total, almost **1.7 bCHF of tourism expenditure** can be attributed to guests of Geneva Airport: approx. 630 mCHF in the canton of Geneva, 500 mCHF in other Swiss cantons and roughly 540 mCHF in the French border region.

Figure 30: Revenue generated by foreign visitors arriving via Geneva Airport

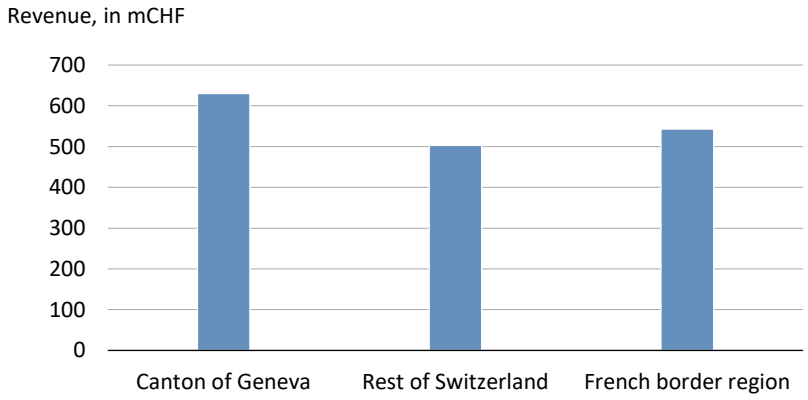


Figure INFRAS. Source: Own calculation

As shown in Figure 31, for the canton of Geneva, guests from Northern America spent the most: these guests were responsible for more than 170 mCHF of expenditures, followed by guests from Asia (over 100 mCHF) and from the Gulf Countries (more than 90 mCHF).

Figure 31: Revenue generated in the canton of Geneva by foreign visitors arriving via Geneva Airport according to country of origin, 2024

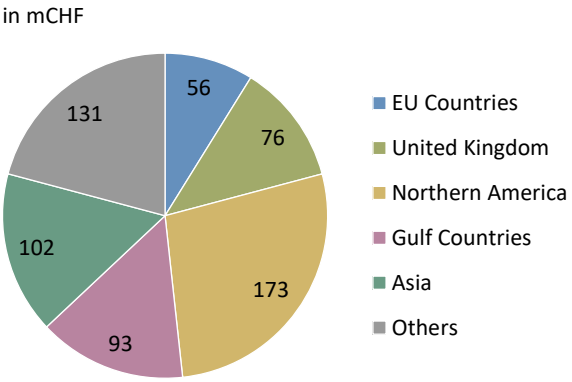


Figure INFRAS. Source: Own calculations.

Focusing on the average expenditures by visitors illustrates important differences across source markets.

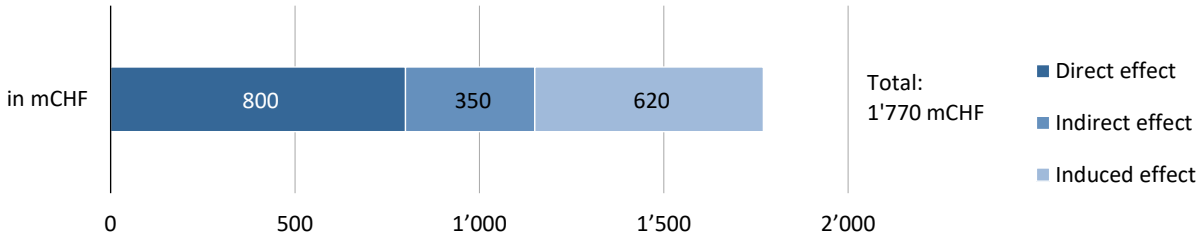
Overall, the results illustrate the importance of Geneva Airport for tourism spending in the region, giving insights into different spending patterns and travelling behaviour for tourists from different regions.

4.4.4. Total economic effect for the region

The spending of inbound tourism is, however, not equal to the total economic impact for value added and employment in the region. As in the section on production-side effects, the total economic effect encompasses direct, indirect and induced effects. The direct effects of inbound tourism by air correspond to the value added that results from tourist spending and the employment involved in the production of this value added. The indirect and induced effects follow according to the established methodology in Section 3.3. The results are presented for Switzerland and the French border region.[41] The contribution of each individual region is discussed qualitatively.

Figure shows the direct, indirect and induced effect from tourist spending flying into Geneva Airport. The total spending of 1.7 bCHF (see Section 4.4.1) translates to a total effect of 1.8 bCHF of value added and an accompanying employment effect of more than 16’800 FTE. Almost half of this is due to the direct effect, which accrues at the places of tourist expenditure - mainly accommodation and hospitality. For employment, the dominance of the direct effect is even greater, which can be explained by the comparatively low labour productivity in the tourism sector compared to the rest of the economy.

Figure 32: The total economic effect of tourist spending by inbound tourists flying to Geneva Airport



[41] Indeed, we calculate the total economic effects from the spending in the canton of Geneva, the rest of Switzerland and the French border region. We only consider the economic effect that accrue within each system boundary and sum them up to arrive at the result for Switzerland and the French border region as a collective.

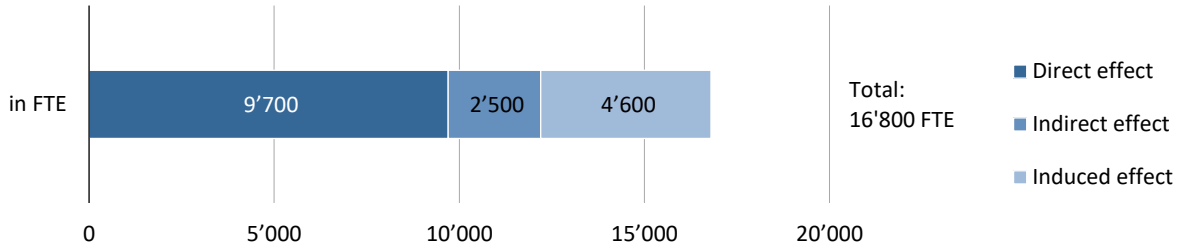


Figure INFRAS.

This analysis demonstrates the importance of catalytic effects by inbound tourism specifically when analysing the economic impact of an airport for its home region. In total, the economic effect that can be attributed to tourists flying to Geneva Airport is more than half of the total production-side effects of Geneva Airport estimated in Section 3.

When comparing the total spending of tourists flying to Geneva Airport across the three regions we consider, 43% of all spending is done in the canton of Geneva, 22% in the French border region and the 35% in the rest of Switzerland. As Figure illustrate, this distribution changes considerably when turning to the resulting economic effects.

Figure 33: Comparison of share of contribution of Canton of Geneva, Rest of Switzerland and French border region in terms of total spending, value added and employment effects.

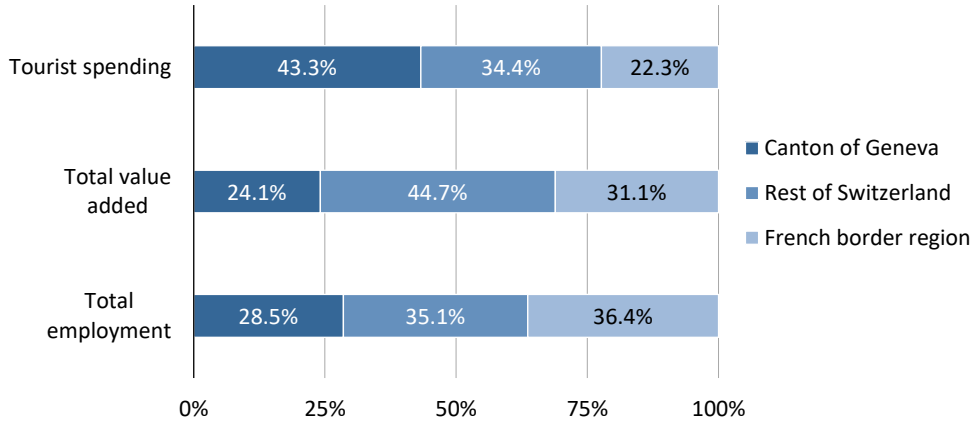


Figure: INFRAS.

The canton of Geneva has a substantially lower share of value added and of employment compared to spending. This is due to the system boundaries: supply procurement outside Geneva and particularly the high number of commuters from other cantons and from France are key factors in reducing the economic effect of the catchment area from the tourism spending in Geneva compared to the other regions. Meanwhile, the employment effect per CHF spent is largest in the French border

region, driven particularly by low labour productivity, resulting in more employment per unit value added generated directly and indirectly by tourism spending.

5. Conclusion

Geneva Airport is a substantial economic asset for the canton of Geneva, the surrounding French border region and the rest of Switzerland. The analysis presented in this report quantifies this contribution along two complementary dimensions:

- the **production-side effects,** generated by the companies located at the airport as well as via their supply chains and their employees' consumption, and
- the **catalytic effects** (demand side effects), brought about by the use of these air transport services and the international accessibility the airport provides to the economy and the population of the surrounding regions.

On the production side, Geneva Airport and the 268 companies operating at or in direct relation to its site generated in 2024 a total of 3'300 mCHF of value added and around 21'930 FTE, when direct, indirect and induced effects are taken together. This includes the effects across Switzerland and in the surrounding French border region. About half of this — 1'660 mCHF of value added and 9'800 FTE — is due to the direct effect, which stems from companies located at the airport itself. This corresponds to approximately 2.6% of the GDP of the canton of Geneva. Indirect and induced effects extend this contribution along the supply chain and through the income spending of employees, not only in Geneva itself but extending to the rest of Switzerland and the French border region.

The regional distribution of these effects reflects the airport's dual role as both a cantonal and a national transport infrastructure and a relevant economic actor with the regional economy. By definition, the direct effect accrues entirely to the canton of Geneva. The indirect effect is shared primarily between the canton of Geneva and the rest of Switzerland, reflecting the economic structure of suppliers of the companies at the airport: only a small portion of intermediate inputs is sourced from the French border region. By contrast, the induced effect has a pronounced cross-border impact, driven by the large number of French residentials employed at the airport and along the supply chain.

The key business of the airport – and the most important drivers of its economic impact – are commercial passenger services. Nevertheless, further disaggregating the results by type of air-travel service illustrates the breadth of activities the airport supports. For example, around 30 companies are exclusively or partially involved in general and business aviation. All effects taken together, this accounts for 330 mCHF of value added and 2'410 FTE – about one-tenth of the total production-side effects related to Geneva Airport. Meanwhile, cargo and Freight activities, which spread across more than 90 companies, generate a comparable effect of 350 mCHF of value added and 2'400 FTE.

In addition to these production-side effects, Geneva Airport's economic significance extends well beyond the economic impacts that result from activities on the airport and the wider knock-on effects in the region. As the hub connecting the Geneva

region to global markets, the airport shapes the conditions under which firms, international organisations, and visitors engage with the city and its surroundings. It raises the accessibility of the region it serves, with knock-on effects for a location's attractiveness for (multinational) business, international institutional presence, and tourism flows. These catalytic effects are not ancillary to the airport's production-side contribution. They are a distinct and arguably at least equally important channel of economic impact of Geneva Airport on its home region. Via the catalytic effects the airport contributes to shaping the long-run economic trajectory of the region.

The foundation of these catalytic effects is the international connectivity Geneva Airport enables. As measured by the accessibility analysis, Geneva Airport is a key infrastructure asset for the Lémanique region as well as its cross-border catchment areas in France and Italy. With support of the airport, Geneva is one of the best accessibly regions in Europe: Lémanique region ranks 19th out of 284 European NUTS 2 regions, reflecting strong integration of Geneva into the European economic core. Globally, its 65th-place ranking indicates a solid — though not leading — position in intercontinental connectivity.

Geneva Airport is central for the region with 85% of the region's European accessibility relying on outbound flights at Geneva Airport. For global accessibility to destinations outside Europe, the intercontinental connections offered directly from Geneva Airport are similarly important: about one third of all destinations globally are accessed the fastest from Genva by using an intercontinental flight from Geneva. For the remaining destinations, feeder flights to other airports in Europe or land travel to airports like Zurich or Milano are the fastest options. A simulation of a hypothetical scenario without Geneva Airport further highlights its critical importance of the region's airport. European air accessibility for the canton of Geneva would reduce to about two thirds of the current value; travel times to most European destinations, and particularly the major economic centres, would increase substantially. Geneva Airport is therefore not readily substitutable — its connectivity function underpins the Lémanique region's strong integration into the European and global economic networks.

Building on this connectivity, the airport acts as a key location factor for Geneva's business community. Geneva's economy is disproportionately composed of internationally oriented, knowledge-intensive sectors — commodity trading, financial services, professional services — for which air connectivity is a structural necessity rather than a convenience. The roughly 2'100 multinational companies in the canton of Geneva generate direct value added in the canton of Geneva of 21 bCHF and are responsible for more than 107'000 FTEs, which corresponds to almost a third of all employment in the canton (Fondation pour Genève 2024). Within this, the airport plays a central role. Stakeholder and interview evidence gathered in the project converges on a consistent picture: the airport is not the primary reason firms choose the canton of Geneva, but no interviewee argued that Geneva could serve as a credible international business location without it. Maintaining and developing it is thus not a luxury, but a prerequisite for Geneva's continued competitiveness.

The same holds true, in an even more pronounced form, for International Geneva. The complex of intergovernmental organisations, permanent missions and international NGOs hosted in the canton is structurally dependent on the movement of people. Interviewees estimate that at least 90% of this movement passes through Geneva Airport. This given, the airport can be seen as the structural enabler of the entire international complex. In turn, the complex then sustains the economy. According to the interviewees, any erosion of air connectivity — whether through insufficient intercontinental routes or capacity constraints — would translate, with a lag, into pressure on Geneva's position as one of the world's foremost host city for multilateral institutions. The airport did not create International Geneva, but it was a founding prerequisite – and remains one today.

The airport has another key role as an enabler, namely for inbound tourism. In total, almost 1.7 bCHF of tourism expenditure can be attributed to overnight visitors arriving through Geneva Airport: approx. 630 mCHF in the canton of Geneva, 500 mCHF in other Swiss cantons and roughly 540 mCHF in the adjacent French departments. The spending by inbound tourism is, however, not equal to the total economic impact for value added and employment in the region, which is even larger - generating a total economic effect of CHF 1.8 billion of value added and more than 16’800 FTE.

This illustrates the importance of accounting for catalytic effects when analysing the economic impact of a regional airport. The effect of inbound tourism traveling via Geneva Airport in the region is about half of the total production-side effects of Geneva Airport. This covers only one of the various catalytic effects introduced here, as the impact of the airport on business, international Geneva and overall accessibility cannot be readily quantified. It nonetheless underscores the importance of assessing catalytic effects when comprehensively evaluating the economic impact of an airport.

Taken together, the results of this project underline that Geneva Airport's production-side effects with direct, indirect, and induced impacts are substantial in their own right. At the same time, its catalytic effects — particularly via general accessibility, enabling (multinational) business to choose the region as its location which fosters economic activity, as well as the effect on International Geneva and inbound tourism — are arguably of comparable or even greater weight for the long-run economic prosperity of the region. Maintaining and developing the airport's connectivity is therefore not a sectoral matter, but a condition for the continued competitiveness of one of Europe's most internationally oriented economies.

As a final note, this study has focused on the economic impacts of Geneva Airport. A full assessment of the airport's overall societal impact would need to account for other issues as well, particularly related to external costs (climate impact, air quality, and noise) and the additional services it offers to the region’s population (e.g. recreational opportunities, quality of life). These effects, however, fall outside the scope of the present mandate.

Annex

A1. Survey

Geneva Airport not only provides transport services for its customers but is also a place of business. Hundreds of companies with employees operate here, and their employees contribute directly to regional value creation. In order to be able to fully assess the economic impact that comes from this created added value, we need to have a comprehensive picture of the extent of their business practices. Specifically, we need to know how many employees work at the companies that are active on the airport premises and how much revenue and value added these companies create. This data is, however, neither readily available and nor known publicly or to the airport administration.

To fill these data gaps, we conducted a workplace survey in autumn 2025 among the companies located at the airport. The focus was on employment and financial data, such as revenue, value added and intermediate consumption, which are key factors for analysing the airport's economic importance. The data collected further helps the airport administration in their infrastructure planning, as well as regarding the transport management and planning.

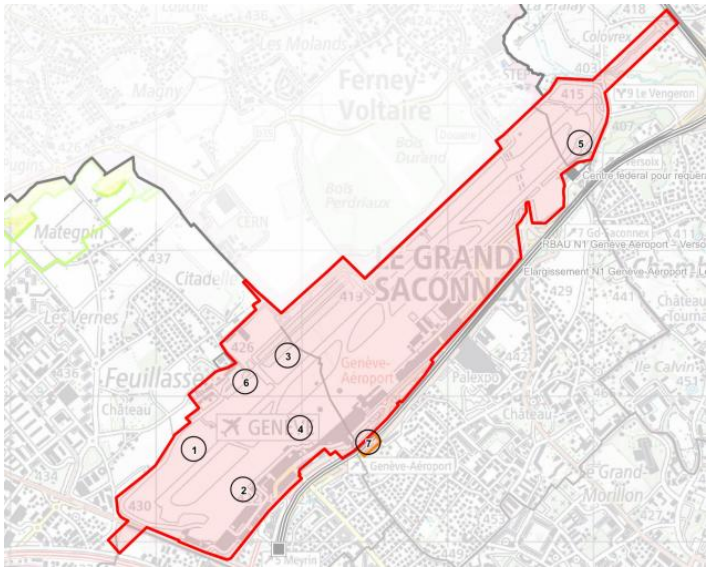
Scope of the survey

The survey aims to capture all economic activity and employees working on the airport premises, as laid out by the PSIA, and those providing services directly related to airport or flight operations, even if they are based outside the perimeter[42]. The same applies to financial data.

As shown in Figure 34, the Geneva Airport perimeter includes the terminals, the runway, and workplaces along the airport and freight roads. The perimeter also includes the train platform, which is why all companies on the CFF station (stores, shops, etc.) are included in the survey.

[42] For example, if an airline has an office in downtown Geneva (i.e. outside the airport perimeter), but employs people that work in HR handling employees relevant to flight operations at Geneva Airport, we include the economic activity (both employment and revenue / value added).

Figure 34: Geneva Airport perimeter



Source: FOCA (2018, p.45)

All companies present on the airport premises were contacted for the survey. The list was provided by AIG along with the contact information. At the time of the survey, this amounted to 268 companies.

Survey organisation

We invited these companies to participate in personal interviews or a survey via Survalyzer[43] in autumn 2025. To maximise response quality while minimising the burden on participating companies, we distinguished between three groups of companies when undertaking the survey:

- Seven key companies: We conducted in-depth personal interviews with key companies at the airport. The companies were chosen in collaboration with AIG to capture the most relevant, both in terms of their size and relevance for airport operations, and straddled several sectors: two handling agents, one airline, one air navigation service provider, one maintenance company, one catering-on-air company, and the airport operator.
- The next 40 largest companies (in terms of employment): These companies were asked for the same information as with the seven key companies, but via a detailed online questionnaire instead of a personal interview.
- All other companies: These companies received a more limited online questionnaire focusing on employment data.

[43] Survalyzer is an online survey software INFRAS uses regularly for surveys (https://survalyzer.com/de/).

Information collected

All companies were asked to fill in employment figures as of 31.12.2024. The companies were asked about their number of employees, including their place of residence and gender, and whether there are any shift workers or interns.

In addition, the seven key companies and the next 40 largest companies were asked questions on financial data (corresponding to the fiscal year 2024):

- Gross revenue: the total value of goods/services sold excluding VAT
- Value added: The total value added includes personnel costs, taxes/duties, depreciation/amortisation and any additional financial costs. We also asked for the share of personnel costs, as this allows us to identify the level of consumption that is enabled through the employees' salaries (i.e. for the induced effects).
- Intermediate consumption: total goods and services purchases, including cost of goods, third-party services, energy and material costs, rent, and other operating expenses
- We also asked the companies where they buy their intermediate inputs from. We distinguished between five categories:
  - Intermediate inputs from other companies at the airport
  - Intermediate inputs from the canton of Geneva
  - Intermediate inputs from the rest of Switzerland
  - Intermediate inputs from the French border region[44]
  - Intermediate inputs from the rest of France and other countries

This distinction is important to identify where the economic activities at the airport lead to additional indirect effects along the value chain. It enables us to provide regional results for Geneva and the French border region and to exclude effects that are generated outside the system boundaries (i.e. rest of France and other countries) or already accounted for (i.e. inputs from other companies at the airport). We use this information to calculate the production-side effects in Section 3.

Company segments

The surveyed companies comprise 268 companies[45] in 19 sectors, which we then categorised into four segments. Figure 35 shows how the companies are distributed across the various segments. Table 3 lists the number of companies per sector per segment.

[44] The French border region includes the departments of Haute-Savoie, Savoie, Isère, Rhône, Ain, Saône-et-Loire, Jura, and Doubs.
[45] The term 'companies' is also used to refer to different types of organisations, such as the police and customs.

- **Airline-related** (140 companies): This includes all sectors directly related to flight operations, such as air cargo, airlines, catering-on-air, fueling, general aviation, handling, logistics and maintenance.
- **Airport-related** (30 companies): This includes sectors that are crucial to airport operations, such as air traffic control, airport operation, facility management[46], public authorities, security and transportation.
- **Retail/Gastro/Services-related** (53 companies): This includes other sectors that operate at the airport and offer services that are relevant to airport users, but which are not directly connected to airport or flight operations: car rental, restaurants, retail and travel agents.
- **Other** (45 companies): This is a collective category for companies that cannot be clearly assigned as well as companies in other sectors (although the activities of these companies might have no direct connection to airport or flying operations, they are included as they are in the airport perimeter).

Figure 35: Number of companies per segment

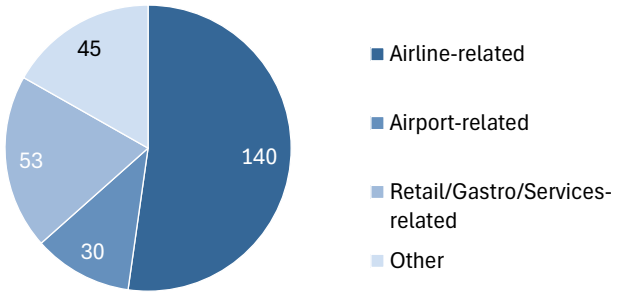


Figure INFRAS.

[46] This segment includes facility management companies whose focus is on managing airport premises. However, one company focusing on aircraft cleaning was included in the airline-related segment instead.

Table 3: Overview of companies per sectors for each segment

Segment	Sector	Number of companies
Airline-related	Airlines	52
Airline-related	Logistics	27
Airline-related	Air Cargo	24
Airline-related	General Aviation	18
Airline-related	Handling	6
Airline-related	Maintenance	6
Airline-related	Catering-on-air	4
Airline-related	Fueling	2
Airport-related	Public Authorities	10
Airport-related	Security	9
Airport-related	Facility Management	8[47]
Airport-related	Transportation	2
Airport-related	Air Traffic Control	1
Airport-related	Airport Operator	1
Retail/Gastro/Services-related	Retail	28
Retail/Gastro/Services-related	Restaurants/Hotels	12
Retail/Gastro/Services-related	Car Rental	10
Retail/Gastro/Services-related	Travel Agents	3
Other	Other	45

Table INFRAS. Source: own illustration

Response rate and extrapolation

Of the 40 companies that received the detailed questionnaire, 55% responded. The response rate for the simple survey, which was sent to the remaining companies, was slightly lower at 34%. Together with the seven companies that we interviewed, around 100 of the 268 companies took part in the survey and shared some data. In

[47] See Footnote 46

terms of employment, the survey respondents account for approximately three quarters of total FTE at the airport.

The survey data were used to extrapolate to the full company population at the airport, drawing on other complementary sources (i.e. internal surveys from AIG, company-specific data on access rights to the airport, and previous studies by INFRAS).

In general, we used the original results filled out by companies. If only headcounts and no FTE data were provided, we calculated a sector-specific ratio of FTE/headcount to extrapolate FTE based on headcount. If headcount data were also missing, the results were compared to those of two other surveys on employment at Geneva Airport (Mobility Survey 2025 and Cargo Survey 2025)[48] and data gaps were filled in, either directly or using sectoral averages, provided the results were plausible. Finally, if no data were available, auxiliary shares were calculated based on a study of the economic importance of civil aviation in Switzerland (INFRAS 2025b), which includes Geneva Airport, and multiplied by sectoral averages to estimate the number of FTE and headcount. Specifically, weighted sector-specific shares were formed by dividing the number of FTE from the survey by the employment data estimated in INFRAS (2025b) for companies that had filled out the survey. These auxiliary shares were then multiplied by the employment data in INFRAS (2025b) for companies that did not complete the survey to fill in the data gaps.

Another approach was used for companies at the train platform, because data were not available in either the current or previous studies. We relied on input from the property management team responsible at Geneva Airport, that provided us the total number of companies and amount of office space leased. Using national statistics on the number of people working per m2 of company site, we were able to extrapolate the FTE and headcount.

Results

Employment

Figure 36 shows that the airline- and airport-related segments account for the majority of jobs at Geneva Airport. The airline-related segment employs around 5'500 people (4’700 FTE), followed by around 3'600 people (3’000 FTE) employed in the airport-related segment. Around 1'300 people (1’100 FTE) are employed in the retail/gastro/services-related segment, while the remaining segment “Other” is the smallest category with around 1’200 employees (1’000 FTE).

The prevalence of part-time work is fairly similar across all segments with an average ratio of FTE to headcount of 0.85.

[48] The mobility and cargo surveys are conducted annually by Geneva Airport. The mobility survey collects information on the number of employees and their place of residence across all companies, while the cargo survey focuses on the number of employees working in the freight hall at Geneva Airport.

Figure 36: Number of employees in headcount and FTE per segment

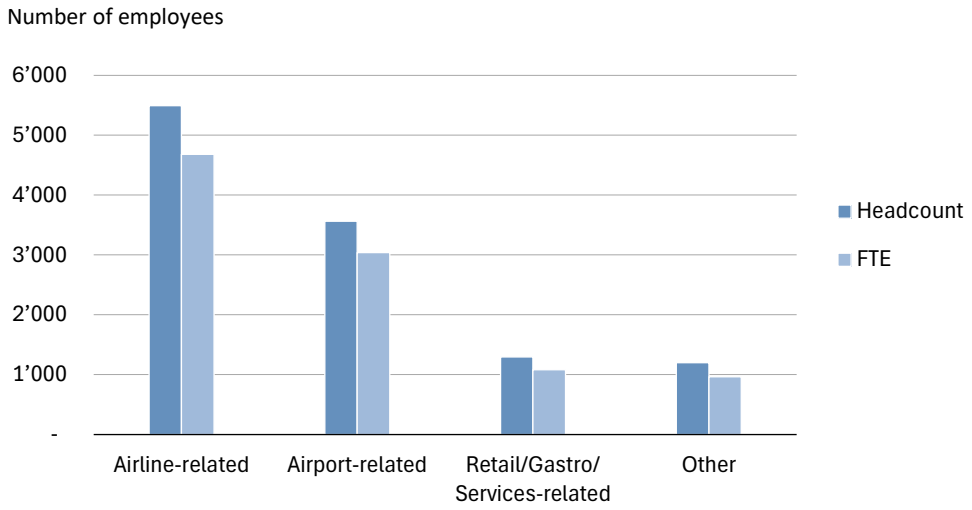


Figure INFRAS.

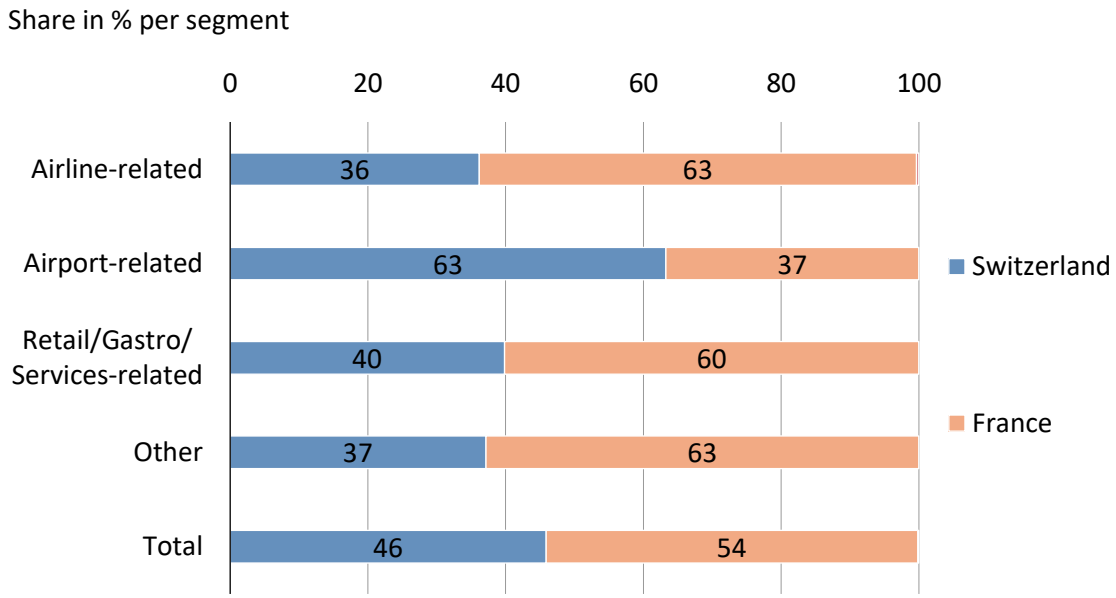
Place of residence of employees

In addition to the number of employees, we collected information on the place of residence of employees. Although not all companies disclosed the place of residence of their employees, the reported data encompass almost three quarters of all employees at Geneva Airport.

In total, around 46% of employees live in Switzerland, almost 54% in France, and 0.2% in other countries[49], as shown in Figure 37. The results vary based on the segment. Airline-related sectors have the highest portion of employees living in France, with around 64%. Furthermore, the airline-related segment is the only one with employees from other countries. The segment “Other” as well as the retail/gastro/services-related segment show a similar distribution, with 63% and 60% living in France respectively. In contrast, 63% of employees in the airport-related segment live in Switzerland.

[49] The figures for Switzerland and France both refer to the whole country.

Figure 37: Place of residence of employees per segment in Switzerland and France



For the sake of brevity, people living in other countries were excluded from the graph.

Figure INFRAS.

Further analysis of the results at the cantonal and departmental levels shows that 32% of the employees reside in the canton of Geneva, as shown in Figure 38. 14% live in other Swiss cantons. In the analysis of the production-side effects in Section 3, we focused on the canton of Geneva and the rest of Switzerland as a whole. The majority of employees (54%) lives in France. Most of them live in the departments bordering the canton of Geneva. Haute-Savoie has the largest share with 33%, followed by Ain with 17%. Of the other departments included in the survey, both Jura and Savoie account for around 1% of the employees, while the remaining departments barely record any employees working at Geneva Airport.

Figure 38: Place of residence of employees

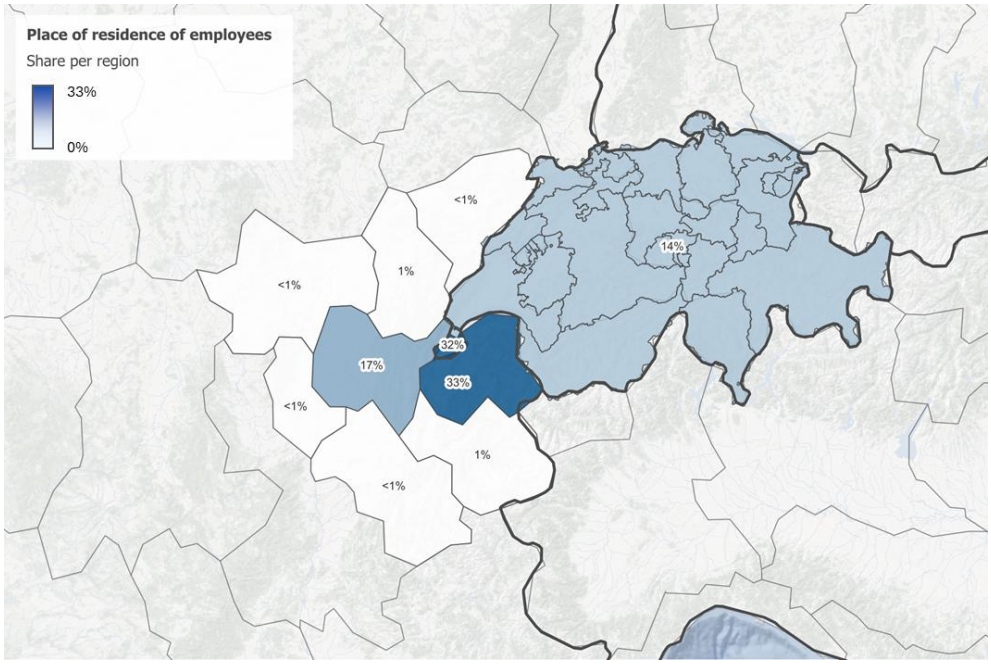


Figure INFRAS.

Further employment data

In addition to data on employment and place of residence, we collected information on characteristics of the workforce, such as gender as well as the number of shift-workers and apprentices.

Figure 39 shows that, in total around 68% of the workforce at Geneva Airport is male and 32% female. Meanwhile, a total of 65 companies reported having shift-workers, with a combined total of 5'600 shift workers. Within these companies, 77% of employees are shift-workers, as illustrated in Table 4.

A total of 19 companies reported having apprentices, with a total of around 130 employees airport wide. The apprentices make up 4% of the employees within those companies.

Figure 39: Gender of employees

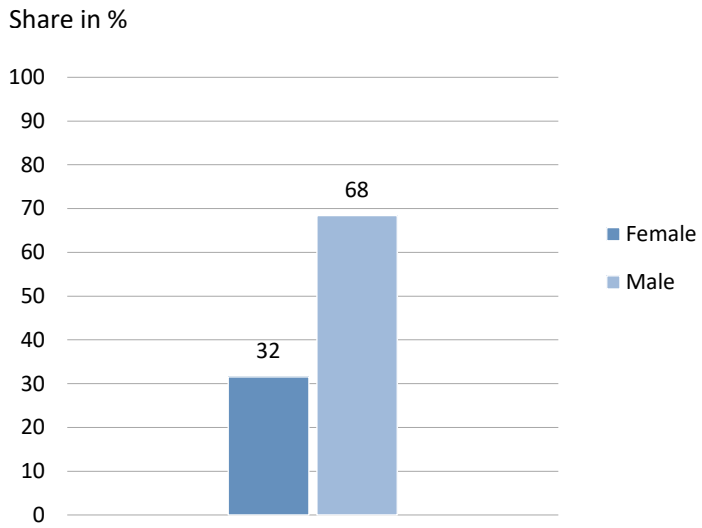


Figure INFRAS.

Table 4: Workforce characteristics

	Headcount	Number of companies	Share of employees at the companies with reported shift-workers/apprentices
Number of shift-workers	5'600	65	77%
Number of apprentices	130	19	4%

Table INFRAS.

A2. The economic impact of Geneva Airport

A2.1. Method

This section describes the methodology for calculating the production-side effects, including the data used.

Quantitative assessment of production-side effects of Geneva Airport

Data

The starting point for the calculation of the production-side effects is the companies based at the airport. We estimate their economic impact in terms of value added and employment. For the estimation of total effects, detailed data on the number of

employees (headcount and FTE), place of residence of employees and financial data, such as intermediate consumption and the source of the intermediate goods, are also needed. We collected this information via the survey detailed in Annex A1.

Furthermore, the calculations of the economic effects are based on several additional statistical sources. These national statistics are used to validate the collected data in the survey, but also for calculating multipliers required for the estimation of indirect and induced effects, which are described in detail below. In particular, the following sources were used:

- the production accounts of the Swiss economy (FSO 2024b);
- statistics on labour productivity (FSO 2024c);
- foreign trade statistics (FOCBS 2024);
- the Swiss input-output table 2017 (FSO 2023);
- the energy and transport-differentiated input-output table (Nathani et al. 2025).

Calculation

The calculation of the three components of the production-side effects is described below.

- **Direct effects** result from employment and the associated value added by companies operating on airport premises or performing activities directly related to flight operations. This information was directly collected during the survey. To fill in data gaps for companies that did not respond to the survey, employment data were extrapolated following the methodology described in A1. Similarly, if companies were not able to fill out data on value added, national statistics combined with other studies including Geneva Airport (INFRAS 2025b, INFRAS and BAK Economics 2017) were used to estimate value added based on revenue, if available, or national sector-specific productivity statistics (value added / FTE).
- **Indirect effects** are calculated using multipliers that consider the interdependence of industries in the upstream value chain. This results in the value added and employment associated with suppliers' revenue when manufacturing and delivering products and services to companies operating within the airport site. Inputs purchased within the airport are excluded in order to avoid double counting. Similarly, if inputs are imported, they are not considered in accordance with the selected system boundaries. In the previous study (INFRAS and BAK Economics 2017), Swiss average values were used for the calculation of indirect effects. With better data availability and resulting methodological improvements, the multipliers are now based on sector-specific intermediate consumption linkages. The same applies to industry-specific labour productivity.
- **Induced effects** are also estimated via multipliers. Depending on the system boundary, Swiss or French average multipliers are used to calculate the value added and associated employment effects from consumption demand by employees. This is in line with the standard procedure used in previous calculations.

However, the calculation of the available income, to which the multiplier is applied, is more detailed. In contrast to the previous study, we now use sector-specific data to determine the resulting income more accurately. We also take into account the fact that not all income is available for consumption (due to factors such as social security contributions and taxes), nor is it necessarily used for consumption (e.g. the savings rate).

Finally, we consider the relationship with other countries, taking into account cross-border commuters and consumption that takes place abroad. For example, when production-side effects are estimated for Switzerland and the French border region, cross-border commuters from the rest of France and the rest of the world are excluded. Focusing on the income that is actually available for domestic consumption reduces the basis for calculating the induced effects compared with earlier studies.

Approach for the regional production-side effects

The regional assessment of production-side effects relies on the same logic as in the main analysis, in which the sum of the canton of Geneva, the rest of Switzerland and the French border region is shown. Given the regional perspective, the focus is on the economic effects that remain exclusively within the given geographical boundaries. The differences in the calculations for each region are described below.

Canton of Geneva

The direct effect is identical to the direct effect for Switzerland and the French border region as a whole. This is because the airport is in the canton of Geneva. However, the following aspects need to be considered for the regional assessment of indirect and induced effects.

- **Origin of intermediate inputs:** Only intermediate inputs sourced within the canton of Geneva are taken into account. In other words, all suppliers not located in the canton of Geneva are excluded. We therefore also exclude any goods and services that are sourced from other cantons in Switzerland and the French border region. The proportion varies depending on the business segment. On average, airport companies source around 50% of Swiss intermediate goods from the canton of Geneva.
- **Import intensity of supplies**: In the regionalised calculation, value added and employment effects are excluded if they stem from sourcing from other cantons. According to our survey results, companies situated at the airport source on average around 50% of their intermediate inputs from the rest of Switzerland or abroad. Meanwhile, at the Swiss level, roughly 20% of all intermediate inputs stem from abroad. We therefore adjust the multiplier to discount for the additional intermediate goods that are sourced from other cantons. This results in lower indirect and induced effects, as both capture value added and employment effects along the supply chain, even though from different initial impulse (production at the airport vs. employees' consumption)

- **Employees' place of residence:** Only the employees (both at the airport and along the supply chain) living in the canton of Geneva are included. The survey revealed that approximately 70% of Swiss employees live in the canton of Geneva. We also exclude any employees commuting to the canton of Geneva from other cantons.
- **Consumption share:** In contrast to the total effects, we use a specific local consumption share for the canton of Geneva, which is lower than the domestic consumption share, based on the Swiss Household Budget Survey for 2023 (FSO 2025a).

French border region

Similarly, the system boundaries change in the calculation of regional effects for the French border region. The focus is on intermediate consumption sourced from suppliers located in the neighbouring French border region, as well as on the employees living there.

By definition, there is no direct effect, as the value added and employees at the airport site are allocated to Geneva. For the indirect and induced effect, the approach is identical to the regional assessment of the canton of Geneva. Only intermediate inputs sourced from the French border region are considered and any value added and employment effects from outside the French border region are excluded. We also adjust the multiplier to discount for the additional intermediate goods that are sourced from other French departments. Finally, only the employees (both at the airport and along the supply chain) living in the French border region are included and French statistics on domestic consumption were applied (INSEE, 2025).

The rest of Switzerland

The total economic effects of Geneva Airport in the rest of Switzerland are calculated as a residual between the main results and the results for the canton of Geneva.

A2.2. The production-side effect of Geneva Airport: further results

In the following, we display additional results of the production-side effects of Geneva Airport, namely the regional effects for the canton of Geneva (Figure 40) and the French border region (Figure 41) per segment for value added and employment, respectively.

Figure 40: Regional effects for the canton of Geneva per segment

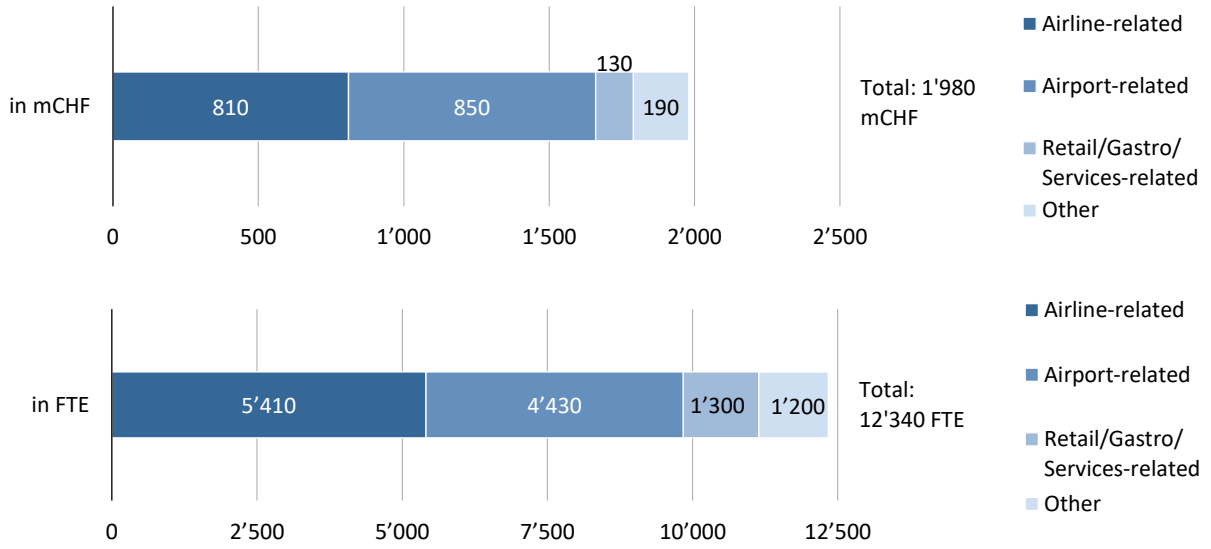


Figure INFRAS.

Figure 41: Regional effects for the French border region per segment

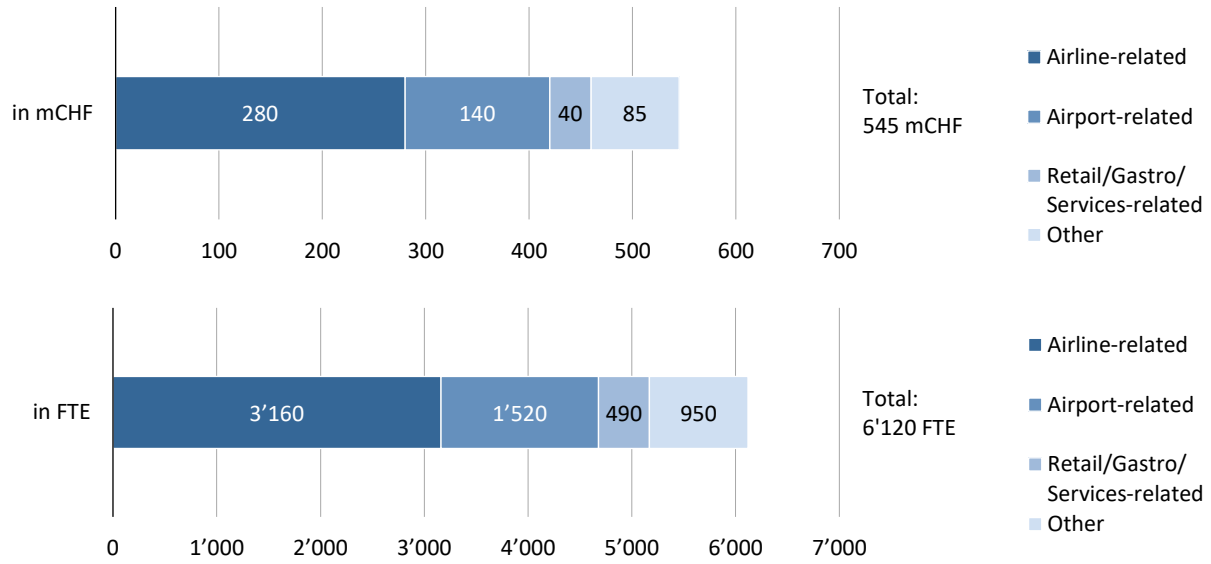


Figure INFRAS.

A3. Methodology for accessibility analysis

The goal is to determine the accessibility of regions via air travel as a measure of their quality. The methodology is based on Bleisch (2005). Relevant to the accessibility of a region is the time it takes to reach other regions by passenger flights (time spent is

considered the most relevant cost factor for travel, which is likely to be the case especially for business travel). The destination points are weighted by the economic performance (GDP) of the destination region (corresponding to the attractiveness of the destination). The methodology for calculating intra-European accessibility and accessibility to the world outside Europe is briefly described below. A more detailed description can be found in the study for INFRAS (2025b).

Selection of Airports and Regions

As a first step, the airports and regions relevant to the analysis are identified. Airports in Europe with more than approximately one million passengers per year are selected, geographical distribution of airports is considered in the selection as well to cover less well-connected regions (total 135 airports). To calculate global reachability, approximately 130 non-European destination airports are selected so that every major world region is covered by at least one airport. However, reachability is determined for regions, not airports. The regions are classified as follows:

- Europe: Divided into 284 regions according to the NUTS 2 classification (for the United Kingdom, the division is based on ITL regions).
- Global: Divided by country into 116 regions (larger countries are split into multiple regions, and smaller countries are grouped into a single region). These are destination points only.
- Greater Geneva Region: Division according to NUTS 3 classification (21 regions in neighboring countries) and by cantons (26 regions in Switzerland). These are starting points only.
- By differentiating between NUTS 3 regions and cantons, a spatially more detailed analysis of the European accessibility of the area surrounding Geneva Airport can be conducted.

Selection of time windows

Accessibility is always determined for a specific time window. To account for potential differences, we use multiple time windows (with the first flight departure time relevant for determining the time window). For accessibility within Europe, these are as follows:

By time of day	By day of the week	By week
▪ 06:00-08:00 ▪ 08:00-10:00 ▪ 10:00-15:00 ▪ 15:00-18:00 ▪ 18:00-24:00	▪ Monday ▪ Thursday	▪ Weekly Summer Schedule 09.06.2025 – 15.06.2025 ▪ Week Winter Schedule 24.11.2025 – 30.11.2025

Global availability is determined for each weekday for both the summer and winter weeks (no differentiation by time of day).

Flight Data Query

All flight data are collected for the selected time windows. Queries are performed using the Aviationstack API. The queries yield the departure and arrival times of all flights originating from the specified airports (both European and non-European airports) during the selected time periods.

Calculation of travel time

For each time window, the shortest travel time between all selected airports is determined. Connections with up to two layovers are considered, with the minimum layover time depending on the airport's size, any passport control requirements, and whether the flight is intra-European or intercontinental.

For the accessibility of a region, not only the flight time but the total travel time between regional centres is relevant. In addition to flight time and any transfer times, the total travel time includes the drive to the airport by car (starting from the region's economic centre), check-in and waiting time (including any time required for passport control), exit time at the destination airport, and the car drive from the destination airport to the regional centre. Check-in and waiting times vary depending on airport size and whether the flight is intra-European (Schengen) or intercontinental.

Depending on the time window, a region may be served by a different airport, and the routes may therefore follow different paths. If the travel time between two regions by car is less than by air, the travel time by car is relevant.

Accessibility of the Regions

Finally, the accessibility of each region for each time window is calculated based on the determined travel times between the regions and their total GDP. The accessibility of a region (Ai) corresponds to the sum of the travel-time-weighted GDP of all destination regions:

$$A_i = \sum_{j=1}^{n} X_j \cdot e^{-\beta c_{ij}}$$

mit:	A_i	=	Erreichbarkeit des Ursprungsortes i
	X_j	=	Attraktivität des Zielortes j
	c_{ij}	=	Raumwiderstand zwischen Ursprung i und Ziel j
	β	=	Parameter

Source: Bleisch 2005.

Here, Xj represents the GDP of the respective destination region, cij represents the total travel time between two regions, and the parameter β represents the half-life. For accessibility within Europe, we assume a half-life of 3 hours (i.e., the attractiveness of a destination halves with every 3 additional hours of travel time). The β value for 3 hours is 0.0038508 (when calculated in minutes). We calculate accessibility to the

world outside Europe using a half-life of 8 hours (β = 0.0014441). Accessibility is then normalized in two steps:

- Normalization based on the sum of the GDPs of all regions considered: This represents the accessible share of a destination region's GDP (the value would be 1 if all destinations had a travel time of 0).
- Standardization based on a reference time window (summer weeks 6 to 8): This takes into account, among other things, the varying lengths of the time windows.

A4. Methodology for inbound tourism

The following section provides additional information on data sources for the calculation of the total expenditures of inbound tourists, as well as on certain data manipulations that had to be done as a result of data limitations.

Data

In the following, the illustration focuses on the calculation of the economic impact on the Canton of Geneva for the year 2024. Specifics for the calculation of the impact for the rest of Switzerland and the French border region follow thereafter.

The data used for the assessment are as follows:

- **Passenger statistics and passenger survey of Geneva Airport**
  Geneva Airport publishes annual data on passenger volumes in its annual report (Aéroport International de Genève 2025a). Moreover, the airport conducted an internal survey to better understand passenger profiles, including their origins, travel purposes, and their final travel destinations (Aéroport International de Genève 2025b). Together, these data sources allow us to identify the number of incoming passengers who neither reside within the airport's catchment area nor travel onward as transit passengers from the total number of passengers.
- **Tourist accommodation statistics for Switzerland**
  The tourist accommodation statistics (HESTA) of the FSO (2026) provide comprehensive information on foreign visitors in Switzerland staying in hotels, health establishments, and camping sites. HESTA allows for detailed analysis of the number of arrivals, overnight stays, and average length of stay, segmented by visitors' country of residence. Other important accommodation categories—such as group accommodations, holiday apartments, and youth hostels—are not included. The PASTA (*Parahotellerie-Statistik*) dataset addresses this data gap by providing insights into non-hotel accommodation types such as commercially-run holiday homes and collective accommodation[50]. Overnight stays booked via platforms such as Airbnb are only partially covered by the PASTA, which records supply and

[50] While data from HESTA is available on a cantonal and national level, PASTA only contains information on a regional and national level.

demand only for commercially operated holiday homes and collective accommodation. For private or occasional short-term rentals offered via platforms such as Airbnb participation in the PASTA survey is voluntary. Therefore, these stays are not comprehensively captured in official overnight statistics (FSO 2025).

- **Tourism Monitor Switzerland (TMS):**
  The Tourism Monitor Switzerland (TMS) is based on a nationally representative survey conducted by Switzerland Tourism (Switzerland Tourism, 2023). The most recent edition is from 2023, with more than 22'700 participants taking part in the survey. The TMS focuses on leisure overnight tourism and includes responses from both domestic and international guests in Switzerland. Participants were asked about various aspects of their trip, including their accommodation type, travel and spending behaviour, as well as the means of transport they used to enter Switzerland. The TMS data set allows us to estimate the number of arrivals via Geneva Airport by nationality and contains information on average daily expenditure by country of origin.

Additional data sources were used to further refine the analysis and results. The Tourism Satellite Accounts published by FSO, for example, offer indications of tourist expenditure across various categories, including accommodation, food services, and activities. Furthermore, we account for differences in the spending patterns in Geneva compared to average Swiss values by using the average prices of hotel nights across different star categories as an indicator[51].

For the rest of Switzerland, the same data sources were used as for the canton of Geneva, with national numbers adjusted by subtracting the Geneva-specific values. The underlying assumptions remained largely consistent, except for an adjusted average daily expenditure to account for differences in the distribution of hotel star categories between Geneva and the rest of Switzerland.

For the French border region, the available data were less granular. INSEE (the French statistical office) offers several datasets containing the number of arrivals and nights spent by non-residents in hotels and in camping sites on the level of the French departments, which can then be aggregated. A key limitation was the absence of information on guests' countries of origin, as this influences total revenue estimates. Given the lack of data, the calculations were based on an overall average across all visitor origins. Another limitation is that the French accommodation statistics only report numbers from official hotels and camping sites, while information about holiday apartments or youth hostels, is missing and could therefore not be taken into account.

Despite these regional differences in data availability and the resulting need for different assumptions, the overarching analytical approach remains consistent across the Canton of Geneva, the rest of Switzerland, and the neighbouring French departments.

[51] The prices of hotel nights were obtained from a comparative platform (www.combien-coute.net)

Data limitations for estimation of incoming tourists

We assume the distribution of arrivals by country of origin is the same for visitors staying in the Canton of Geneva and those travelling to other parts of Switzerland. This assumption rests on the observation that the origin mix of incoming tourists is primarily shaped by the airport's route network – i.e. which countries and regions are served by direct flights – rather than the visitors' final destination within Switzerland.

For passengers continuing their journey to France, however, such an estimation was not possible as there is no detailed breakdown of visitor origins in France. Consequently, visitors heading to France were treated as a single, undifferentiated group.

Data manipulations and limitations for estimation of tourism spending in Switzerland and France

The TMS provides Swiss data but does not capture Geneva-specific spending behaviour. However, Geneva combines several factors that make an adjustment for the regional conditions necessary. First, Geneva's hotel market structure is more upscale than the Swiss average: 50% of all nights are spent in 4- or 5-star hotels, compared with 41% in the rest of Switzerland (Genève Tourisme 2026). Second, the canton of Geneva is a major business hub, attracting many high-spending international business visitors, including those arriving by private jet. International Geneva adds to this pattern of high-spending visitors. Based on these two observations, we adjust daily expenditure upward to reflect the canton of Geneva's more upscale and business-driven hotel structure[52]. Finally, we assume that the average length of stay reported in accommodation statistics slightly underestimates the real duration of a trip. By adding 0.5 nights to the average length of stay, we aim to represent the spending associated with the full duration of visitors' stays.

For France, almost no reliable information on daily tourism expenditure was available. The only accessible data referred to French residents travelling within France, which provides only limited insight for our purposes. Based on this constraint, we adopted a broad approximation, distinguishing only between expenditure levels of hotel guests and campsite guests. For the visitors residing in other accommodation types such as holiday homes, we used an average of spending in hotels and on camp sites. In addition, we also considered that foreign tourists generally spend more abroad than residents of the same country.

[52] This was done by applying information on spending patterns for different kinds of accommodations to estimate such an adjustment factor.

Figures

Tables

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