

# CEDA – Airport Infrastructure Development 4 October 2007



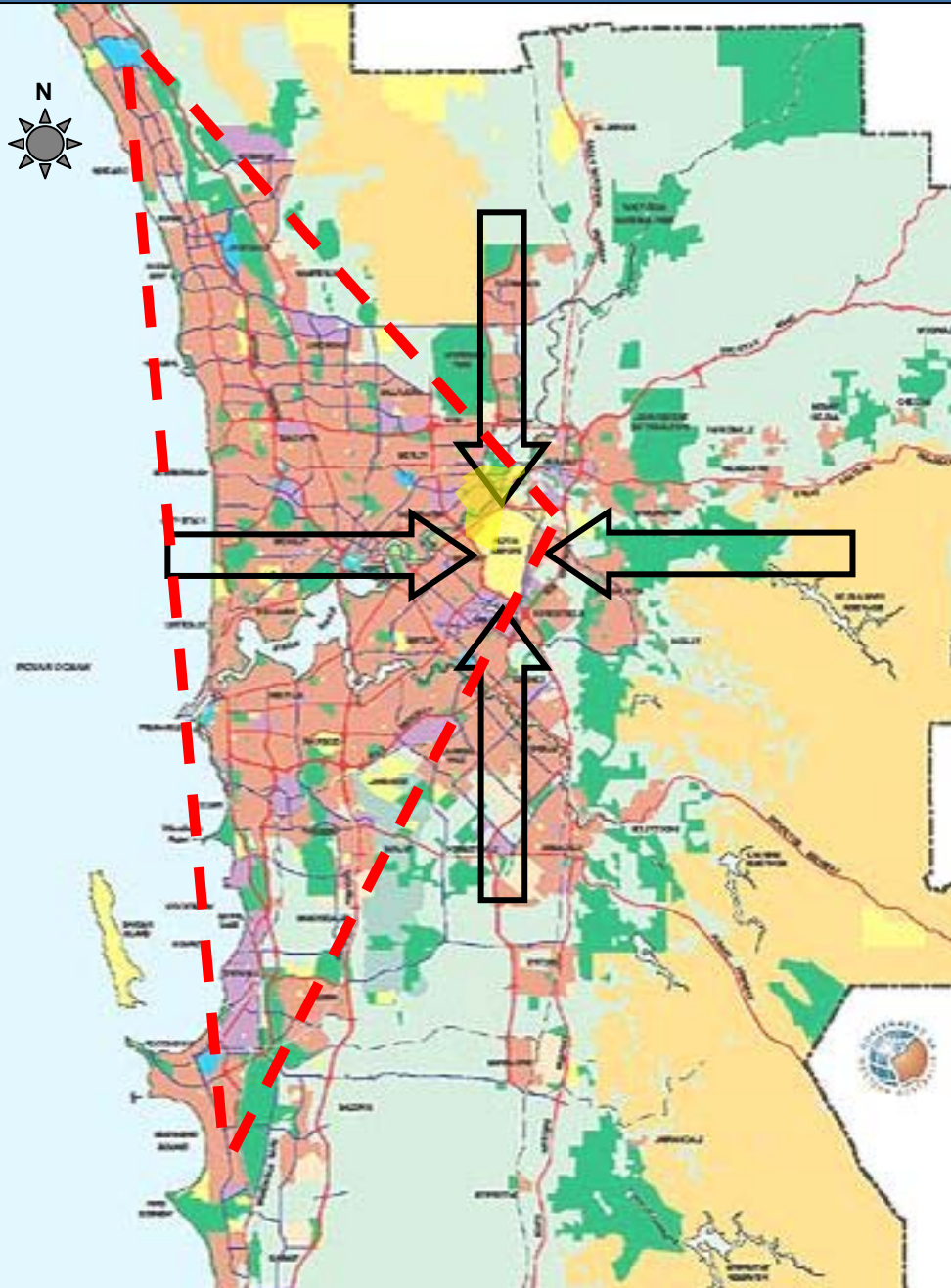
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# aviation business overview



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- Australia's 4<sup>th</sup> busiest airport - fastest growing capital city airport
- Unique market features (fly-in/fly-out & inter-state "back of the clock")
- Australia's western international gateway – well placed relative to Asia & Middle-East
- Balanced markets (in-bound/out-bound)
- Good yield characteristics (business, vfr)



At Apex of  
“metropolitan triangle”

Largest single active  
& contiguous land  
use on the MRS map.

# recent aviation business growth



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	% of Aircraft Movements	% of Pax Movements	% Growth FY 05/06 v FY 04/05	% Growth FY 06/07 V FY 05/06
<b>Domestic (T2 &amp; T3)</b>	48%	69%	<b>9.2%</b>	<b>14.9%</b>
<b>General Aviation</b>	41%	~7%*	<b>45%</b>	<b>47%</b>
<b>International</b>	11%	24%	2.5%	<b>9.6%</b>

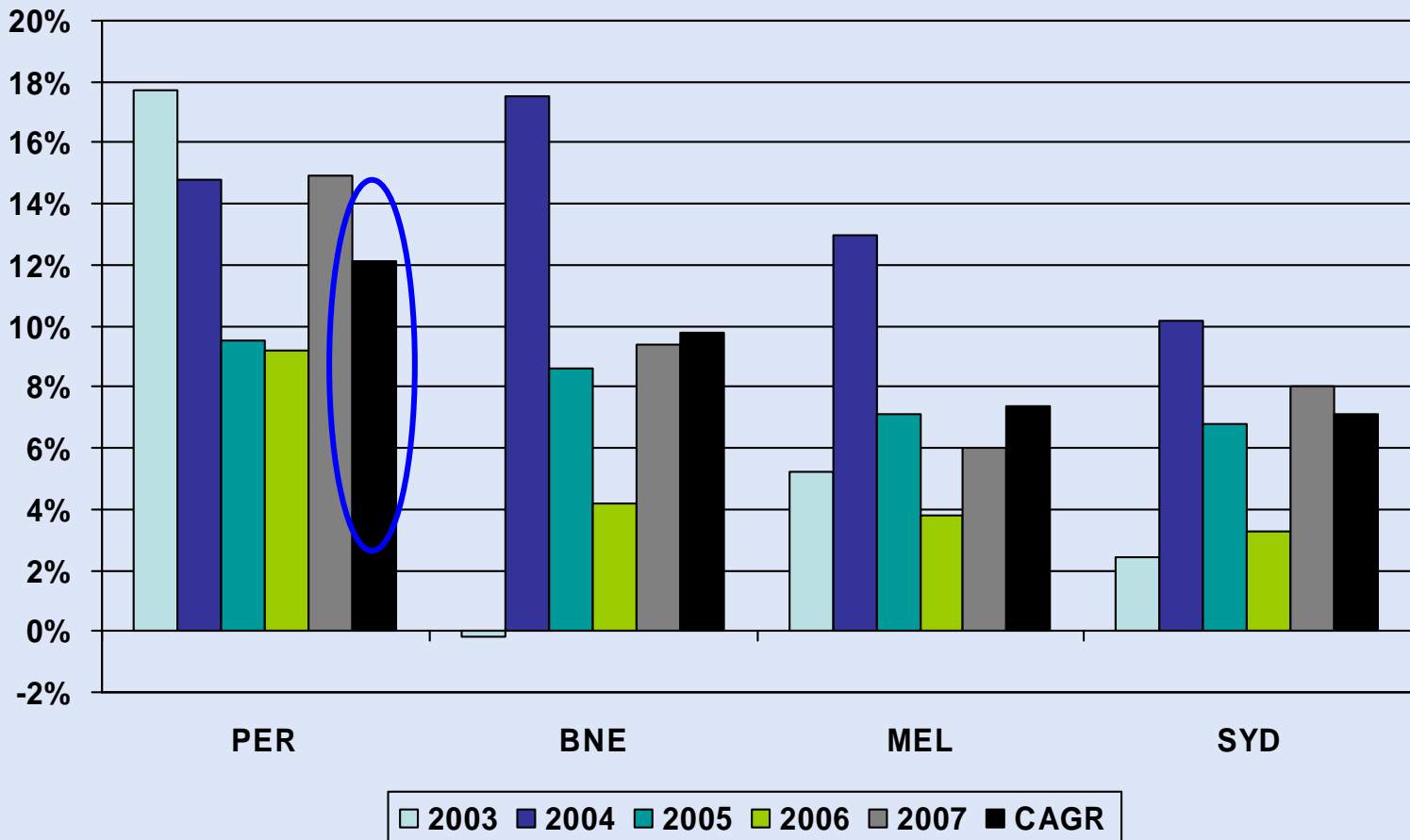
\* WAC does not receive pax data for GA, so this is an estimate only



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# 12% CAGR – fastest growing capital city airport

## Annual Growth in Domestic Passengers

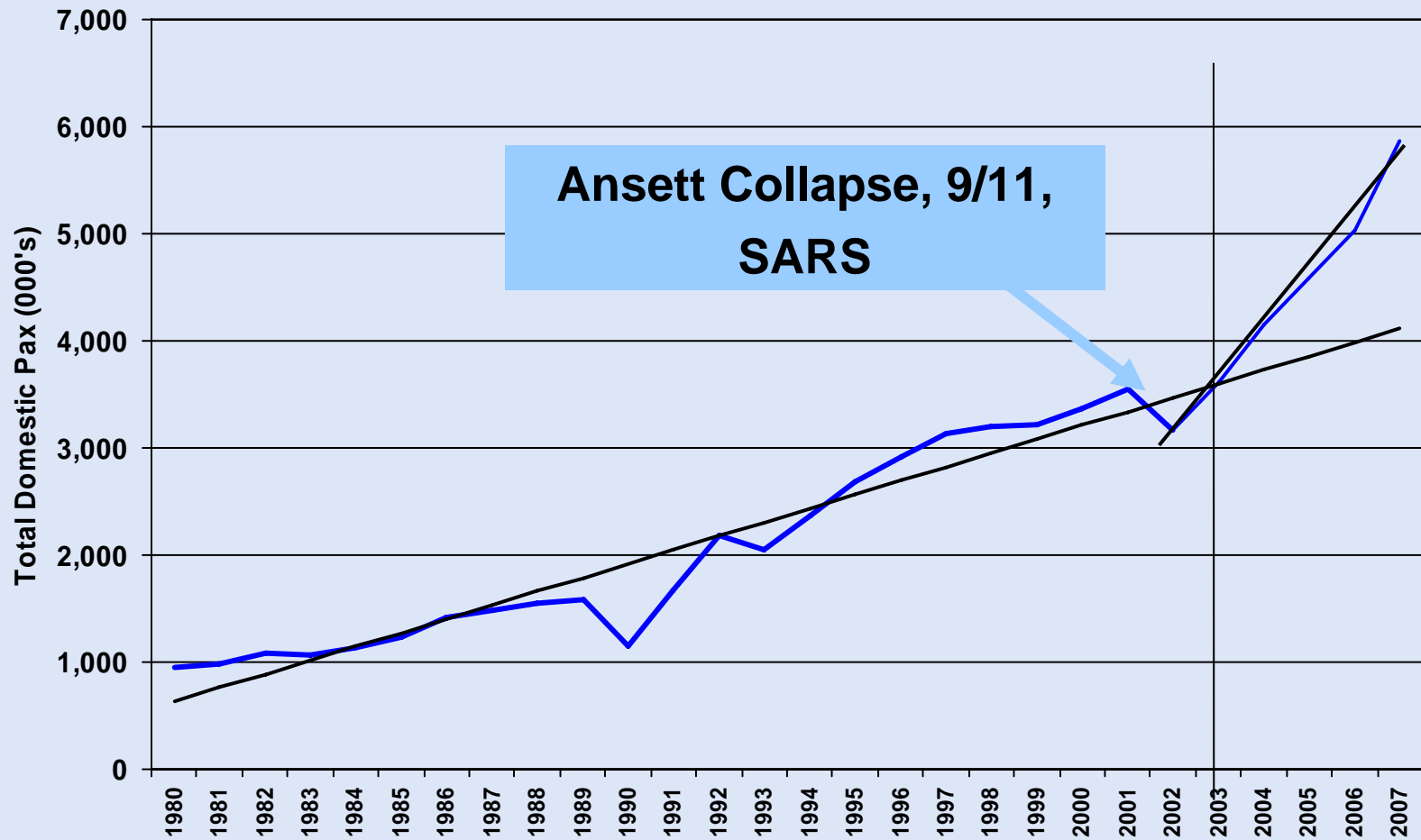


Source: ACCC Monitoring Report 2005-06, Airport Websites

# historic demand – domestic rpt



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Source: BTRE, WAC

# reliable, safe, secure services



At Perth Airport we are proud that we have:

- provided safe, secure & reliable airport services for 8 million passengers last year;
- supported an 82% increase in domestic activity in the past 5 years;
- supported 100% increase in regional aviation in past 2 years &
- have generally provided a good level of service according to independent passenger surveys

# unprecedented growth - capacity constraints WA economy & Perth Airport:



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- Broader economy:
  - labour
  - construction timing & costs
  - accommodation (room stock)
  - taxis
- Perth Airport:
  - overnight aircraft parking
  - runway & aprons - peak times (6 - 7.30am)
  - T2 & T3 terminals
  - car parking

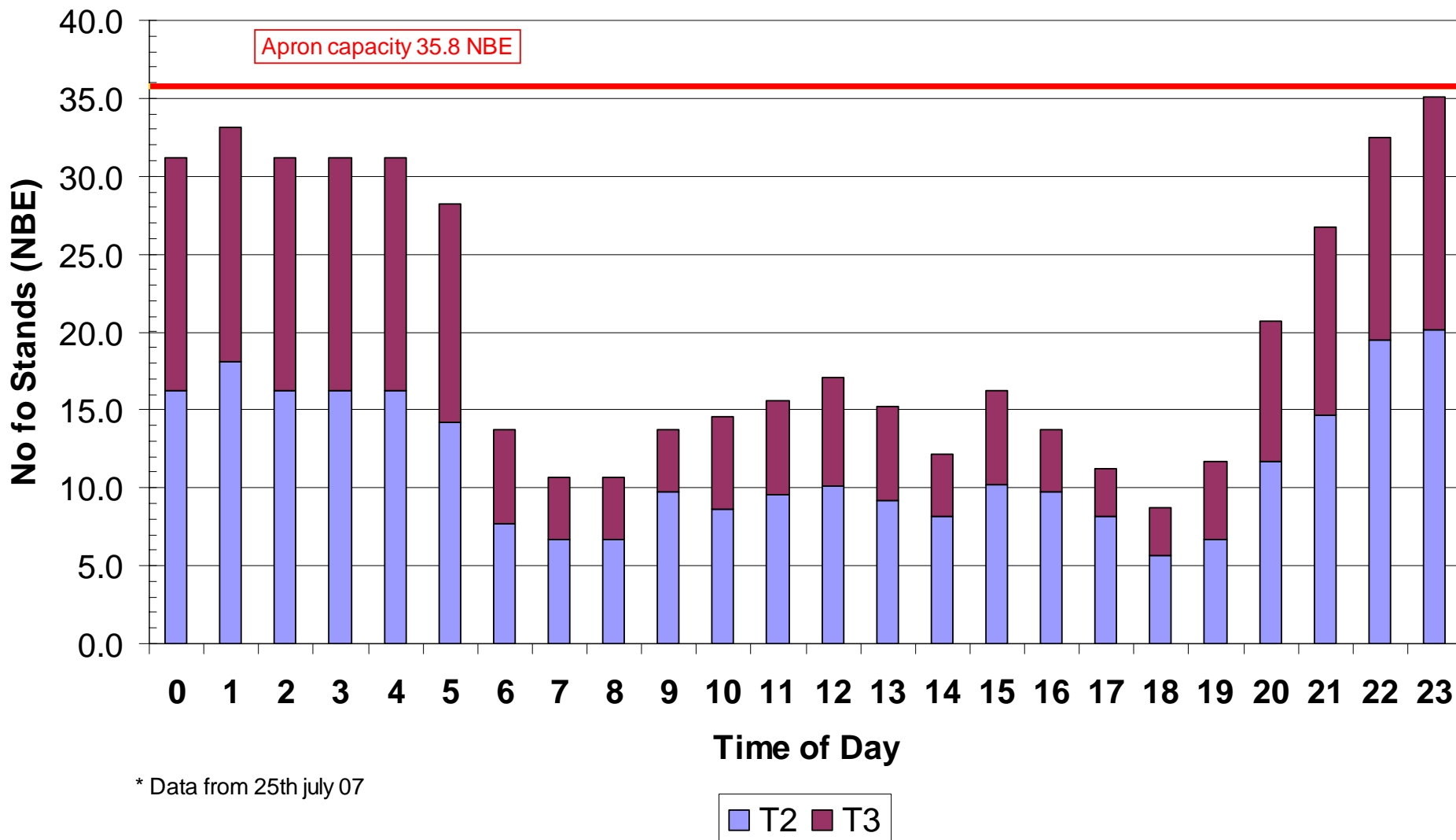




# existing domestic RPT stand demand



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# immediate capacity improvements (18 months)



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- Additional car parks
- Terminal modifications
- New taxiways
- New aircraft parking positions



# Qantas domestic terminal upgrade



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\$50m+ investment in Terminal 2 announced by  
Qantas:

- more check-in space
- extra security screening facilities
- expanded departure lounge & QANTAS club
- extra baggage reclaim belt
- new aerobridges



# intermediate capacity improvements: proposed new regional terminal



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A purpose-built Regional/Intra-State Terminal is being assessed:

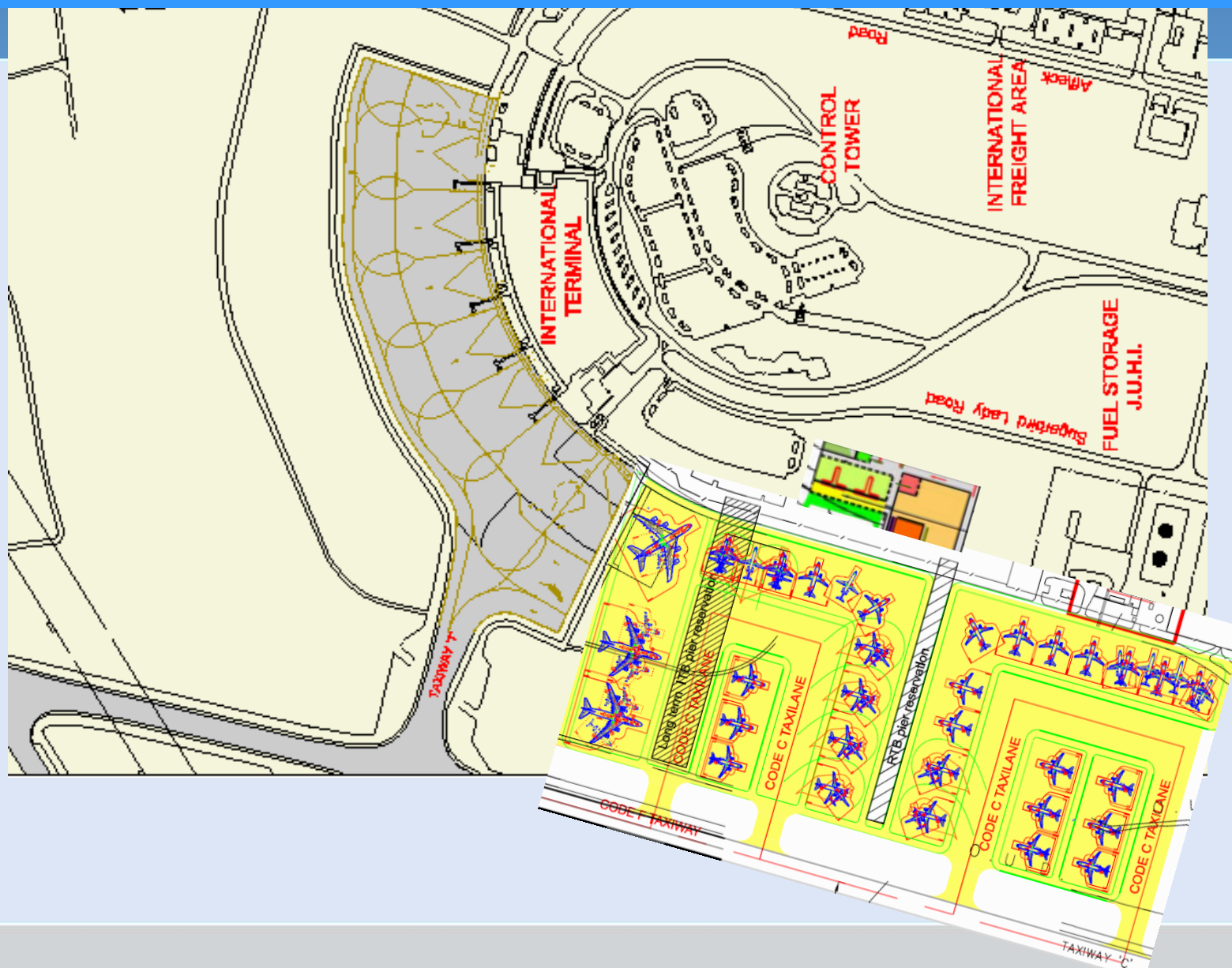
- Adjacent to international terminal
- Can be delivered in 18 months
- Ease congestion at Terminal 3



# regional/intrastate terminal concept



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# major airport redevelopment (5 years)



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- Assessment of options underway
- Two options:
  - Expand current separate facilities
  - Transition all RPT to International precinct
- 4 year lead time (exacerbated by broader economy constraints)

# ancillary infrastructure improvements



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- Car parking
- Road network planning
- Public transport assessment/planning
- Urban design & airport planning

# challenge:

## too much/too early v. too little/too late



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- Master Plan (2004) forecasts have been significantly exceeded
  - 2007 aircraft movements = Master Plan forecast for 2020
  - 2007 domestic passengers = Master Plan forecast for 2015
- Master Plan endorsed by all stakeholders after significant consultations & input from airlines on future passenger growth
- Environment for airports and airlines in 2003/04





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# increased attention to stakeholder interaction

- Airline Consultative Group
- Individual Airline Negotiations
- Perth Airport Advisory Board (3 tiers of govt, industry, airlines)
- Perth Airports Municipalities Group (interact with local councils)
- WA Government – Planning & Infrastructure (roads, public transport & urban design)

# Thank You !



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