



TOURISM SUMMIT - PARLIAMENT

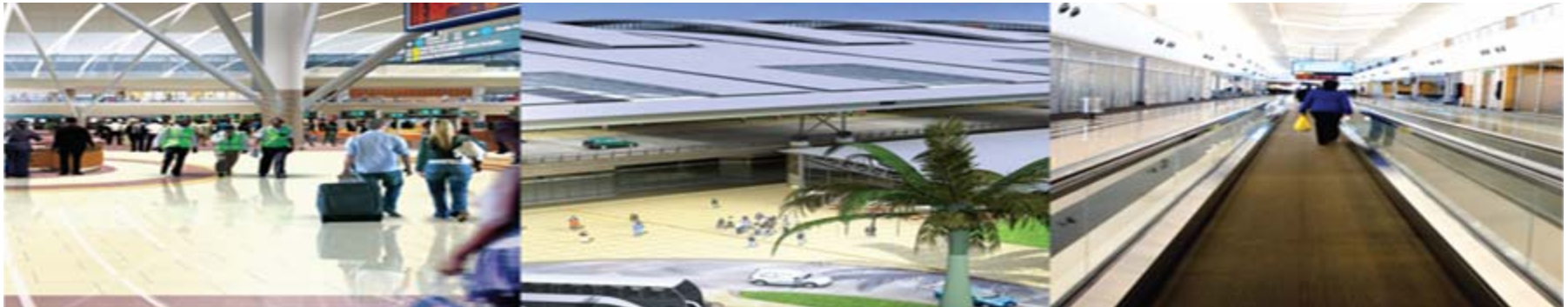
Presenter: Deon Cloete
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Airports Company South Africa

General Overview



- ACSA owns and operates 10 of the countries airports
- Airports transformation
 - *Visible infrastructure expansion*
 - *Successful commercial principles*
 - *Strong customer and people focus*
- 32,8 million passengers per annum
 - *OR Tambo 18 million passengers per annum*
 - *Cape Town International Airport 8 million passengers per annum*
 - *King Shaka International Airport 4 million passengers per annum*
- Several international award winning airports
- Management Contract: Mumbai International Airport



Airports Company South Africa Infrastructure Investment Overview

R20 billion in the
last five years

R5 billion in 2009
- 2010 alone



King Shaka International Airport



Cape Town International Airport



O.R. Tambo International Airport

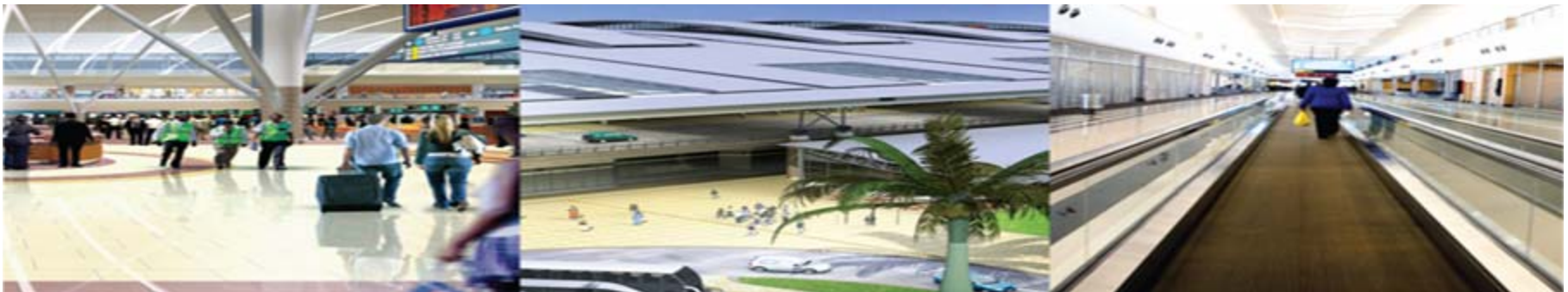
Airports Company South Africa Major Capital Projects



Airport Infrastructure	Capital Investment
King Shaka International Airport (New airport - Green field project)	R7,000,000,000
Cape Town International Airport Central Terminal Building Second Parkade Upgrade of Road Network	R1,500,000,000 R 400,000,000 R 120,000,000
OR Tambo International Airport Central Terminal Building Domestic Terminal Building International Pier and Aprons	R2,300,000,000 R 591,000,000 R 533,000,000

Passenger Growth Trends

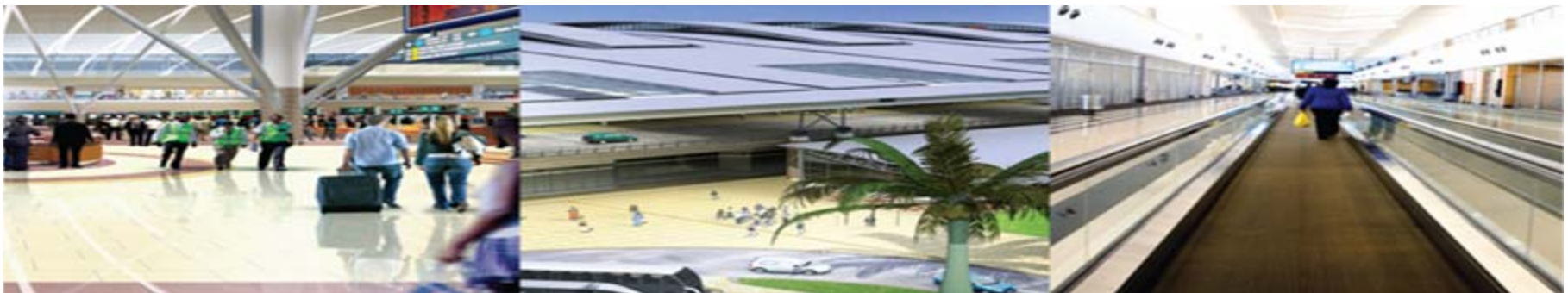
- ACSA Network of Airports Consolidated – 36 million passengers in 2008
- Then came the Economic Crunch – We effectively lost two years worth of passenger and traffic growth
- Impact at network level– lost 3 million passengers per annum
- As an example, Cape Town International Airport in 2008 processed 8 million passengers, initial forecasts for annual passenger numbers by 2010 was 10 million passengers, actual annual passenger numbers for 2010 was 8 million passengers
- Trends normalising and turning – Domestic passenger growth averaging 5%, International growth still showing negative growth albeit at a reduced level



Key Strategic Focus Areas going forward



- Optimum utilisation of created capacity and drive for efficiencies
- Growth Initiatives
- Business Excellence
- Customer Service
- Safety & Security
- Long term sustainability – Business & Environment
- Master Plan and future developments



Optimum Utilisation of Newly Created Capacity

- Flexible and inter-changeable Infra-structure – Integrated Terminals
- Deployment of Technology i.e. Self Service Kiosks & Home Check-in
- Industry Collaboration – Airlines, Handling Companies, Government Agencies and Service Providers – Establishment of the Airport Management Centres at Oliver Tambo International Airport & Cape Town International Airport
- Key Focus: On-time performance & End-to End Management
- Avoid onerous delay costs and create a high level of predictability



Growth Initiatives

- Involvement and participation in relevant policy formulation i.e. the national Airlift Strategy
- Create and offer efficient and fit-for-purpose facilities, airport infrastructure and services, locally and abroad
- Industry Collaboration with Tourism Authorities and Associations at National & Regional level
- Incentivise new services, focus on countering seasonality
- International Business - Explore new opportunities, Africa & BRIC
- Exponential growth to drive the creation of jobs



Business Excellence including Customer Service



- Operate within recognised business principles and governance parameters
- Achieve & Exceed recognised Industry Benchmarks & Performance Business Indicators
- Add shareholder value
- Maintain low tariffs through competitive development costs and further mitigation through strong commercial performances in Property & Retail
- Participate, Compete & Excel within recognised global industry programs i.e. Skytrax & ACI Airport Service Quality programs

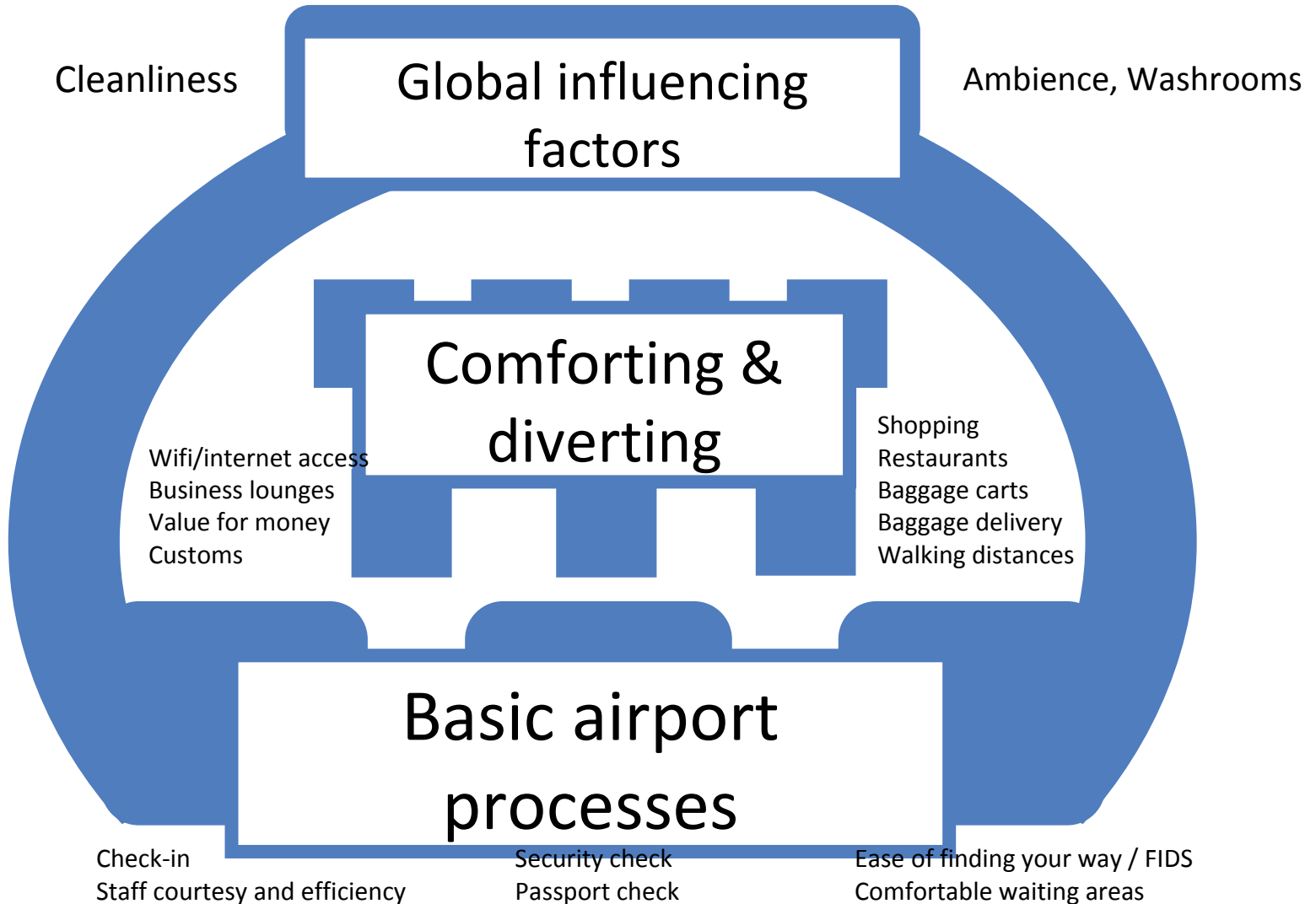


Customer Service

- Understand your Customer
- Understand the Drivers for Customer Satisfaction
- Survey to understand your current performance
- Benchmark your performance to other global industry players
- Focus on areas where your performance is not aligned with the main drivers for Customer Satisfaction and other industry players
- Take corrective action
- Start the cycle again, Survey, track performance, take corrective action

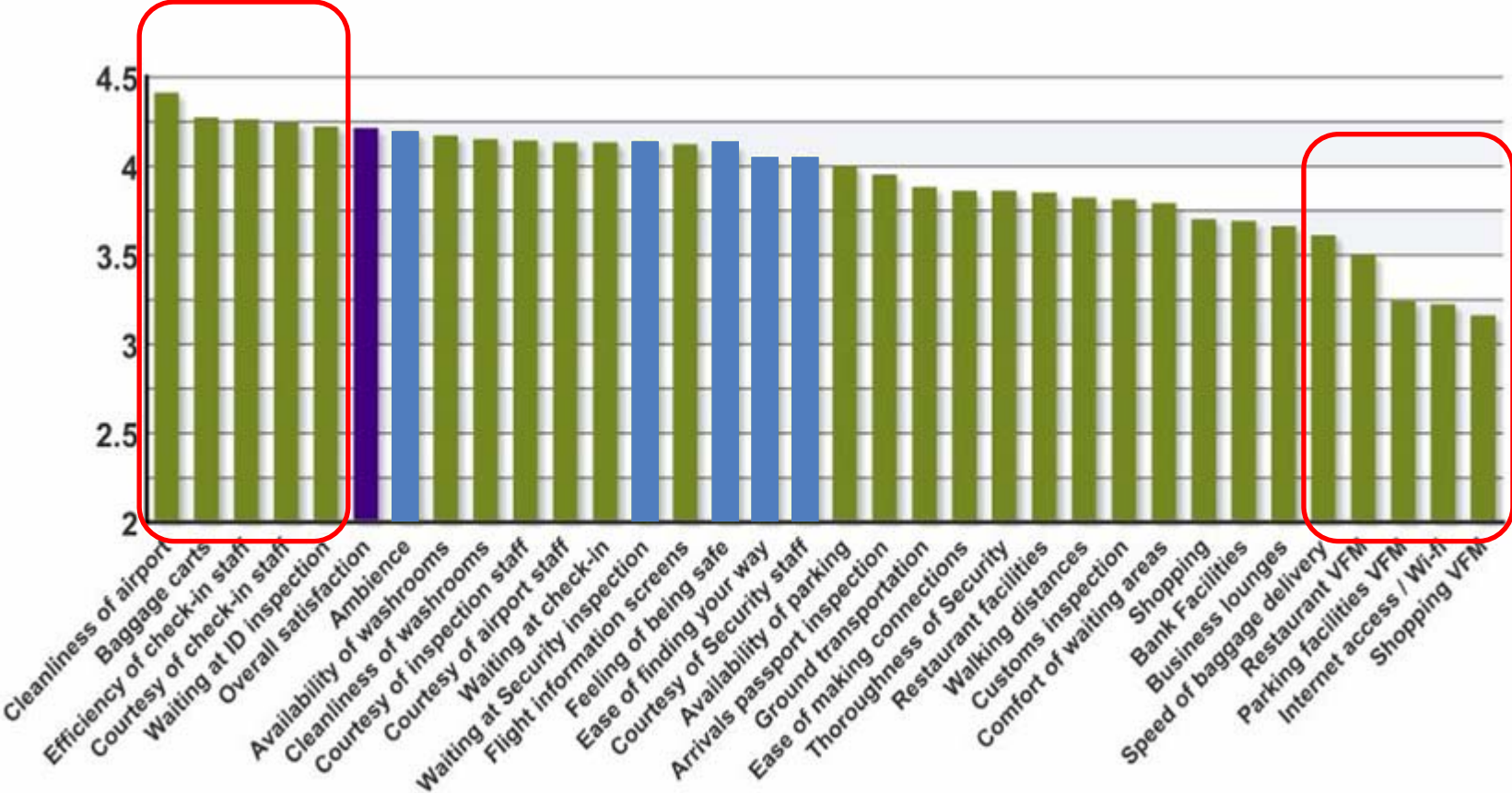


Basic rules

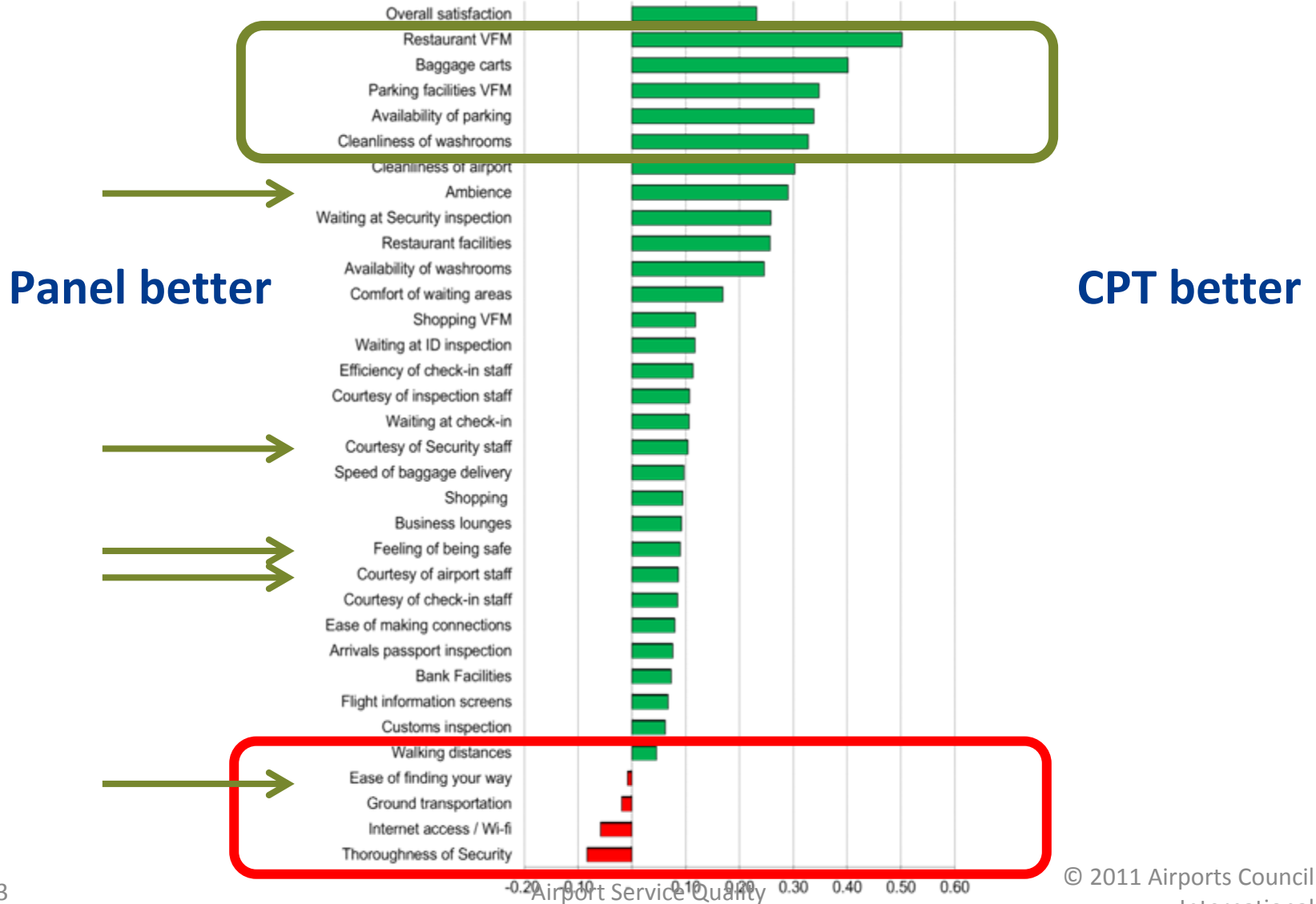


CPT Business mix

What passengers think is best about CPT 2010



CPT vs Panel 2010



Executive Summary CPT

To improve overall passenger satisfaction, the key priorities, in order of importance, for Cape Town Airport to focus on are:

Cape Town Airport's strengths compared to its benchmark panel are:

- 1) Courtesy of airport staff
- 2) Feeling of being safe
- 3) Ease of finding your way
- 4) Ambience
- 5) Courtesy of security staff
- 6) Cleanliness of airport
- 7) Walking distances
- 8) Thoroughness of security
- 9) Comfort of waiting areas
- 10) Courtesy of check-in staff

Safety & Security

- Highly regulated environment
- Annual Audits and Licensing
- Recommendations & Standards
- Approach: Beyond compliance
- Continued review of industry standards with Regulators and Industry Stakeholders to ensure progressive standards



Long Term Sustainability – Business & Environment

- Ensure responsible and sustainable expansion of airport infrastructure
- Focused approach on reducing the carbon footprint by utilising alternative sources of energy
- Ensure successful integration of airport infrastructure with other key transport infrastructure and public transportation i.e. Road and Rail
- Ensure successful integration with local spatial framework development plans
- Be a good and responsible neighbour to local communities and business



Master Plan & Future Developments

- Ensure that all developments and investments are aligned to the long term Master Plan
- Ensure that Airport Master Plan is integrated with the Master Plans of other Transport entities i.e. SANRAL & PRASA
- Ensure that all key investments and developments are triggered timeously to ensure available capacity for continued growth
- Ensure competitive development costs and fit-for-purpose infrastructure



Closing Remarks



- The Airports Company of South Africa (ACSA) is and will continue to be a key player in the sectors of Transport & Tourism
- ACSA will execute its mandate and apply itself through partnerships and collaboration with industry stakeholders, this at both national and local level



The End



AIRPORTS COMPANY
SOUTH AFRICA