

# Turbulence Ahead

*Global Study of Airport Passenger Traffic – 2007 Edition*



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# Executive summary

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In 2007 growth in global airport passenger traffic is expected to exceed 6%, following growth of 4.9% in 2006 and 6.2% in 2005. Likewise, most of the world's regions with the exception of Asia Pacific are expected to grow faster than in 2006.

This white paper presents the conclusions of a global study led by Arthur D. Little, based on an extensive analysis of the traffic figures from over 1,000 airports throughout the world, including 82 intercontinental and continental hubs.

## 2007 key results

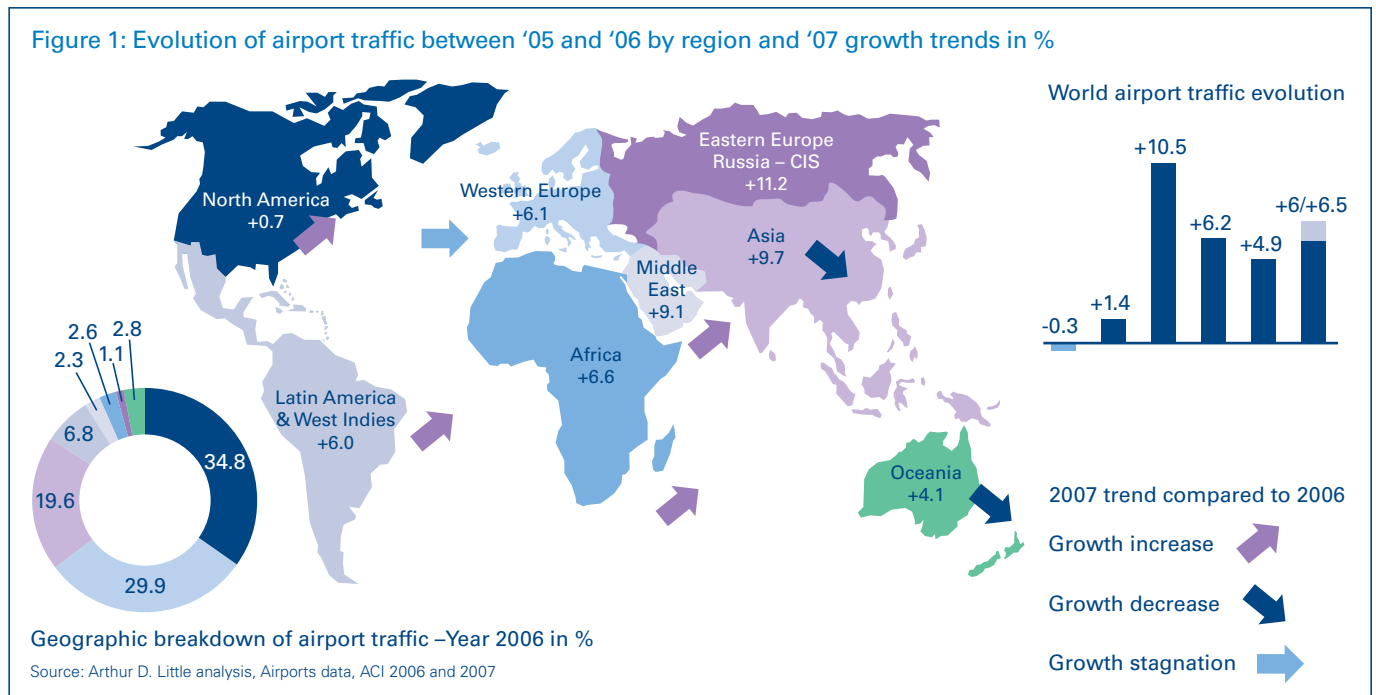
- The economy is slowing slightly (world GDP is forecast to increase by 3.3% to 3.6% in 2007 compared with +4% in 2006 and +4.2% in 2005). However international tourism continues to grow with an estimated growth rate of +5.7% in 2007 following growth of 5.4% in 2006 and +5.5% in 2005. In most regions, increases in airport traffic are in line with economic growth. European countries have outperformed their weak economic performance and the strong Euro.
- On a global level, European airports (+6.1%) and Asian airports (+9.7%) accounted for over 75% of world airport growth in 2006. Growth was driven globally by European and Asian regional platforms (+7.1% and +9.2% respectively) as well as Asian intercontinental hubs (+9.8%). Beijing was the fastest growing hub. It moved up six places in 2006 to become the world's ninth busiest airport after its traffic rose by 7.5m passengers. The airport expects an additional 5m passengers in 2007.
- Growth in European airport traffic is likely to exceed 6% in 2007, as it did in 2006. The regional platforms led the 2006 increase, benefiting from dynamic low-cost carriers (LCCs) and regional airlines and several saturated intercontinental hubs.
- Asia and South Pacific airports are expected to grow by more than 8%, marginally down on their 2006 performance (+9%). The sustained growth rate actually masks mixed performances: top performers such as India and China achieved growth rates of +32% and +15% respectively in 2006, while the worst performers such as New Zealand and Japan achieved just -0.2% and +0.8%. The deregulation of the aviation sector, especially in India, made a major contribution to the growth in traffic.
- North American airports are expected to recover from their weak 2006 performance (estimated +4% in 2007 against +0.7% in 2006). Despite economic expansion, 2006 records were dragged down by the rationalization effort undertaken by a number of airlines in 2005 and 2006, which in turn affected several intercontinental hubs (-1.4%). Delta's and Northwest's hubs suffered the most. However regional and low-cost carriers boosted the traffic at continental hubs (+2.7%) and regional platforms (+1.3%).
- Middle East airports are likely to enjoy a new record year with an increase in traffic expected to exceed 10%, following growth of +9.1% in 2006.
- The impact of low-cost carriers on airport activity was strong in North American but seems to be weaker in Europe in comparison with past years, especially in the more mature markets. In Asia, the low-cost effect was very similar across all platform types.

### Looking ahead

Considering the results of 2007, airports should be ready to deal with several issues in 2008:

- Capacity is a major issue for many airports in Europe, Asia and North America and they will have to optimize the use of their resources or increase capacity in order to meet growing demand.
- Overcapacity may be an issue for some airports such as those in the Middle East; airports and investors will have to consider future demand carefully before financing new capacity.
- Sustainable growth is a question for those markets, especially in Europe and North America, that have based their terrific past development on LCCs and whose future growth is now jeopardized by market maturity.
- Airports will need to adapt in order to meet the needs of new airline business models. The largest regional platforms will have to address the emergence of long-haul point-to-point carriers whereas hubs will have to increase their efforts to support their home-based majors or attract new carriers such as low-cost ones. In particular, US hubs will have no choice but to adapt to the shift of US majors' seats from domestic to international routes.
- Airports need to be proactive in addressing growing environmental questions before strong environmentally-driven constraints and detrimental taxes are placed on airport activity. For example, an "eco tax" on air tickets to and from the Netherlands is to be implemented on 1 July 2008.

Figure 1: Evolution of airport traffic between '05 and '06 by region and '07 growth trends in %



# Worldwide

With an estimated increase in traffic of over 6%, 2007 is set to be another record year for airports. Most regions are expected to exceed the rate of growth they experienced in 2006 when global airport traffic increased by 4.9%. Only Asia and Oceania are expected to be slightly down on their 2006 rate. (See Fig.1).

Africa and Middle East airports are forecast to record the highest growth in 2007, followed by Latin America and Asia-Oceania. Europe's growth should reach the world average while North America's growth is set to remain at least 2% below the world average despite a significant recovery from 2006.

Preliminary traffic figures for 2007 confirm the return to traffic growth in line with economic indicators. Global traffic actually grew 1.3 times as fast as world GDP in 2006 and is expected to grow 1.7 to 1.9 times in 2007 and approaches the historic correlation factor of 2.

For the third year in a row, airports in Western Europe outperformed the region's weak economy as traffic rose between 6% and 7.5% while GDP growth was less than 2% and the Euro was at its highest level.

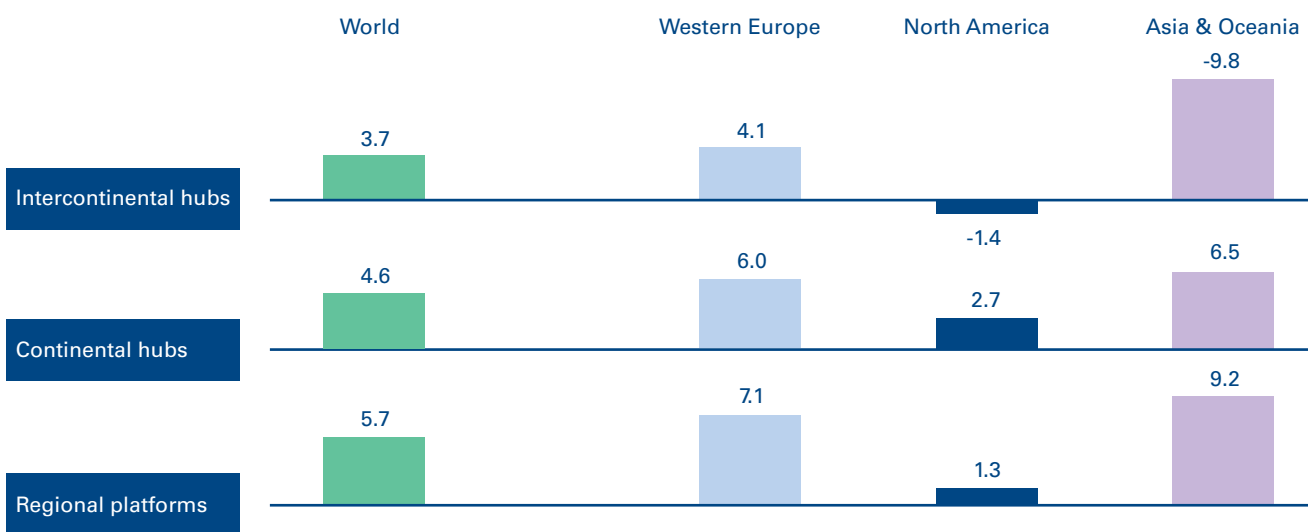
International tourism was a major driver for airport growth especially in the developing destinations of Asia, the Middle East and Africa and in the emerging outbound markets of Brazil, Argentina, Korea and Russia.

In 2006, the regional platforms were the fastest growing airports (+5.7%) thanks to the performance of European regional platforms (see Fig.2), such as Istanbul's secondary airport, Sabiha Gokcen airport (+186%), and Grenoble's secondary airport close to Lyons (+60%).

The continental hubs experienced a global rise in traffic of 4.6% with the Chinese hubs such as Kunming (+22.3%) and Chengdu (+17.1%) being the most impressive.

Intercontinental hubs recorded the weakest global growth (+3.7%) despite their strong performance in Asia (+9.8%), which has five out of the ten fastest growing intercontinental hubs in the world, including Delhi (+28%) and Mumbai (+23%). In 2006, Beijing added 7.5m passengers, doubling its traffic over the last five years (from 24m passengers in 2001 to 48m passengers in 2006 and over 53m passengers in 2007) and moving up 22 positions to ninth place in the world's busiest airports ranking.

Figure 2: Airport traffic growth by regions and airport types – '06 vs.'05 in %



Source: Arthur D. Little analysis, Airports data, ACI 2006 and 2007



# Europe

Western European airport traffic grew by 6.1% in 2006, an addition of 75m passengers over 2005. 2007 figures are expected to be in line with 2006 ones, slightly down compared with 2005 (+7.4%).

International tourism to Europe (+4%) was a strong driver for growth in 2006, boosted by several major events such as the Winter Olympic Games and the FIFA World Football Cup. Tourism is forecast to continue supporting traffic in 2007 despite the strength of Euro. The enlargement of the European Union (EU) accounted for 20% of traffic growth at European airports in 2005 and had a weaker effect in 2006. Only Poland actually benefited from EU expansion in 2006.

During 2006, regional platforms kept driving the growth in Western Europe, recording a strong 7.1% increase in traffic (see Fig.2).

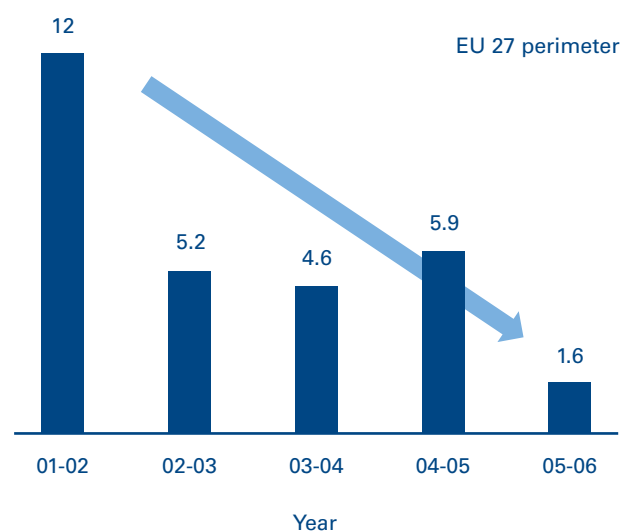
The regional platforms benefited from the dynamism of both the regional carriers (+8.2% for ERAA airlines members) and the low-cost carriers (+20%).

Hubs grew at a slower pace (+6% for continental hubs and +4.1% for intercontinental ones), driven by three main factors:

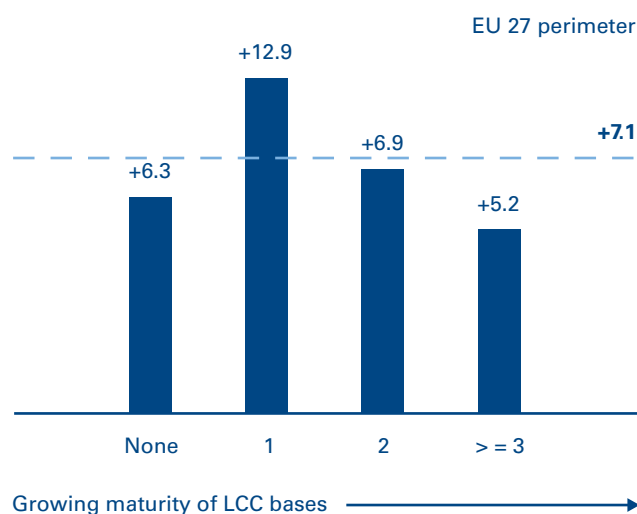
- Hubs benefited to a lesser extent from the low-cost carriers' effect on traffic.
- The strong Euro affected the demand for long-haul flights in particular, penalizing the intercontinental hubs.
- Capacity shortages, traffic disruptions and environmental restrictions constrained traffic at three major hubs (LHR -0.6%, FRA +1.1% and AMS +4.4%).

Figure 3: Low cost effect on European regional airports in %

Yearly growth differential on regional airports between those with based LCCs and others



Traffic growth on regional platforms by number of based low carriers - '06 vs. '05



Source: Arthur D. Little analysis, Airports data, ACI 2006 and 2007

Photo, left: Barajas Airport, Madrid

In terms of passenger numbers, Madrid-Barajas is looking to enter the world's top ten airports as a result of an impressive growth in 2007.

Several European hubs were not supported at all by their home airlines and did not experience the same degree of growth as the home airlines. These hubs were: Madrid, Milan-Malpensa, Rome and Stockholm-Arlanda.

Excluding Frankfurt and Heathrow, the other intercontinental hubs recorded an honorable 6.7% increase in traffic in 2006. In particular, Madrid-Bajaras led the growth (+8.5%), adding 12m passengers between 2001 and 2006. In 2007, Madrid, which has recorded impressive growth of 14% over the first eleven months of the year, is expected to pass Schiphol and challenge Frankfurt airport in terms of passenger numbers, entering the world's top ten airports as a result.

*“Nevertheless, Arthur D. Little has observed that the effect of low-cost carriers on European airports seemed to weaken in 2006, especially on the bases with numerous LCCs.”*

The low-cost effect continued to drive growth at European airports and especially the regional ones (see Fig.6). Arthur D. Little estimates that European low-cost carriers carried about 155m passengers in 2006, an increase of about 20% over 2005. In addition, LCCs entered several major hubs such as Madrid and Milan-Malpensa, offering these hubs alternative and strong growth drivers.

Nevertheless, Arthur D. Little has observed that the effect of low-cost carriers on European airports seemed to weaken in 2006 (see Fig.3), especially on the bases with numerous LCCs:

- For the first time in several years, the European regional platforms that host based LCCs grew only a little faster than other regional airports (+7.9% vs. +6.3%).
- EU27 regional airports with two and more LCCs grew at the same pace as the regional airports without any LCC (+6.3%).

Four countries – Spain, Italy, Germany and the United Kingdom – accounted for about 50% of European growth in 2006. For the second year in a row, Spain made the largest contribution to growth (+12m passengers) and the United Kingdom was not in Europe's top three. Spain continued to benefit from strong LCC growth on the Spanish coasts and from new facilities and infrastructure in Barcelona and Madrid. In 2006, the two leading Spanish airports recorded the strongest growth among the European hubs (+10.6% and +8.5% respectively) and are reportedly improving their outstanding performance in 2007 (+14.6% and +10% respectively based on November year-to-date results).

Despite a good performance in 2006, the major French airports (+4.9%) are increasingly lagging behind European leaders in Italy (+8.9%) and Spain (+6.6%) in particular.

# Asia and Oceania

Asian airports experienced a strong 9.7% increase in traffic in 2006 and although growth will continue in 2007, the rate is expected to be slightly lower. Several factors have contributed to growth in demand in Asia:

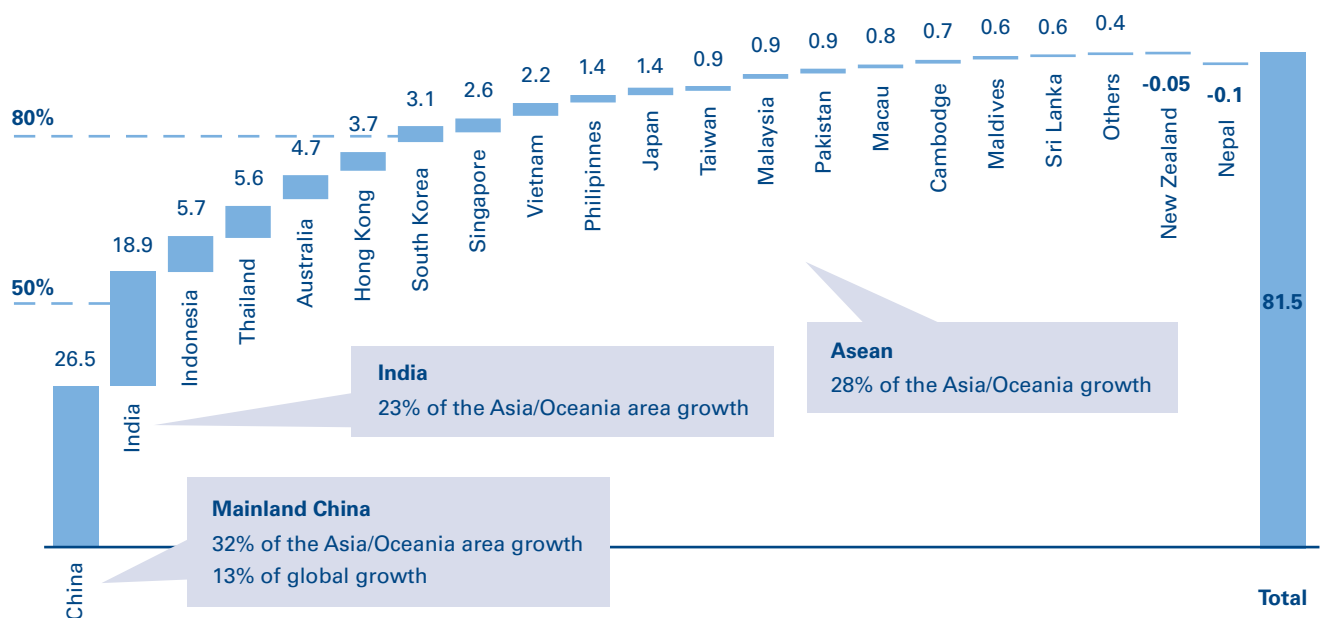
- Strong economic development, particularly in China and India, fueled by an emerging upper class.
- An increase in international inbound tourism (+7.6% in 2006) as well as outbound.
- Progressive deregulation of the aviation industry: domestic deregulation in India (+32% in 2006), the opening of new traffic rights resulting in the ongoing development of low-cost carriers.

China and India accounted for 55% of the 82m additional passengers traveling through Asian airports in 2006 (see Fig.4).

The intercontinental hubs experienced the fastest increase in traffic in Asia (+10.7% in 2006), with five of the world's ten best-performing intercontinental hubs being in India and China (see Fig.5): Delhi (+28%), Mumbai (+23%), Beijing (+18%), Shanghai (+13%) and Guangzhou (+11%).

The tremendous growth of the Chinese hubs was driven mainly by Chinese carriers. The "Big 3", China Southern, China Eastern and Air China, have accounted for about 60% of the seat increase at the main Chinese hubs since 2004. The other Chinese airlines represented about 25% of the growth and the foreign carriers made a small 15% contribution. The situation was quite different in India where low-cost carriers have accounted for 90% of the seat increase at the main Indian hubs in recent years. Air India, Indian Airlines and foreign carriers have played a small role in airport development.

Figure 4: Incremental passenger volume per country in Asia – '06 vs. '05 in Mpax



Source: Arthur D. Little analysis, Airports data, ACI 2006

The continental hubs experienced the slowest growth (+7% in 2006) due to the weak performance of some of the largest Asian continental hubs, such as Tokyo-Haneda (+3.1%) and Seoul-Gimpo (+2.4%).

The Asian low-cost carriers had a very strong impact on traffic in 2006 and their development boosted growth at all types of airport. Several factors are favorable to the development of low-cost carriers in Asia:

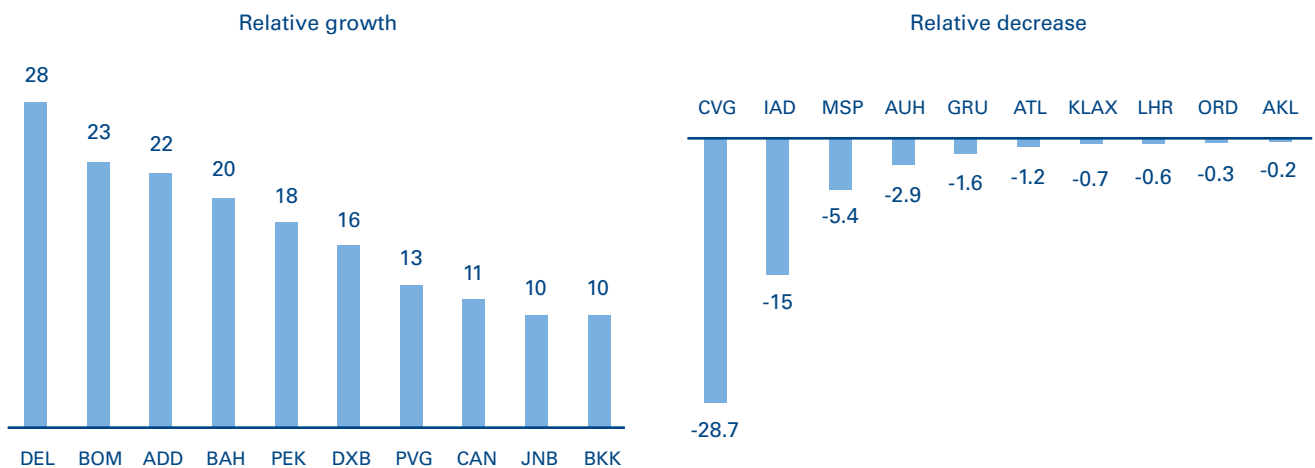
- Trade and tourism growth in the Asia/Oceania region.
- The proactive role of governments: extension of open-sky agreements, creation of new airlines and building of new terminals.

As a key milestone in 2006, both Kuala Lumpur and Singapore airports opened terminals dedicated to low-cost carriers. The effect on traffic is still unclear as both airports grew below the regional average in 2006 and 2007 (SIN: +8% and KUL: +4%) in 2006.

*“Oceania hubs in general suffered from a more mature market and a strong currency which gave rise to slower growth in international tourism.”*

Oceania airport traffic grew by 4% in 2006. As in past years, regional platforms led growth (+5.7%) as the established hubs such as Sydney (+3.2%), Melbourne (+3.4%) and Auckland (-0.2%) lagged behind. The top-performing regional platforms were Perth (+13%) and Adelaide (+9%) airports. Oceania hubs in general suffered from a more mature market and a strong currency which gave rise to slower growth in international tourism.

Figure 5: World’s top 10 and worst 10 performer intercontinental hubs – ‘06 vs. ‘05 in %



Source: Arthur D. Little analysis, Airports data, ACI 2006

# North America

North American airport traffic stagnated in 2006 (+0.6%) but is expected to pick up again in 2007 (close to +4%). North America remained the busiest region, accounting for 35% of global airport traffic.

In 2006, the wealthy economy (US GDP: +3.4%) and the increase in international arrivals (US: +3%) fueled by the low dollar were not enough to support a growth in traffic.

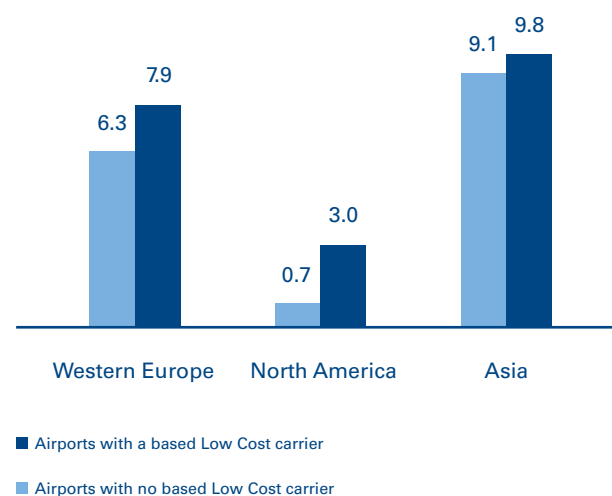
The North American intercontinental hubs (-1.4%) were hit strongly by the poor economic conditions at several American airlines:

- The bankruptcy of Independence Air resulted in a 15% decrease in Washington-Dulles traffic.
- The dramatic turnaround strategies led by the US majors, in particular Delta Airlines and Northwest, severely affected the hubs. Between 2004 and 2007, Delta reduced its seat offer by 20% at Atlanta and by more than 50% at Cincinnati as Northwest cut capacity by 10% at both Detroit and Minneapolis.
- The change in network strategy operated by the US majors, shifting aircraft from domestic routes to international ones, accompanied a strong decrease in seat volume. For instance, over the last four years, Delta Airlines has added only one international seat at its hub for every 12 domestic seats removed.

As a consequence, in 2006, six of the world's ten worst-performing intercontinental hubs were US ones (see Fig.5). The situation is expected to improve in 2007 as the US majors posted a 2% increase in domestic traffic on the first semester, reversing a -0.2% loss in 2006.

Continental hubs (+2.7% in 2006) and regional platforms (+1.3%) did better, benefiting from the strong performance of regional carriers (SkyWest (+17%), Express Jet (+12%), American Eagle (+7%)...) and low-cost carriers (JetBlue (+26.1%), Frontier (+21.6%), Air Tran (+20.6%), Southwest (+8.9%)...) although Independence Air went bankrupt.

Figure 6: LCC effect on regional airport traffic '06 vs. '05 in %



Source: Arthur D. Little analysis, ACI 2006, Airports data

In this period, with significant capacity cutbacks by US majors, the low-cost effect was actually observable across all platform types. In particular, the North America regional platforms that host based low-cost carriers experienced a significant growth advantage (3% vs. 0.7% for other regional platforms, see Fig.6).

*“The situation is expected to improve in 2007 as the US majors posted a 2% increase in domestic traffic on the first semester, reversing a -0.2% loss in 2006.”*

# Middle East

Middle East airports, while still small in terms of relative numbers (2.3% of global traffic), kept growing strongly in 2006 (+9.1%) and faster than average global growth. Even stronger growth, exceeding +10%, is expected in 2007.

Persian Gulf intercontinental hubs, especially in the United Arab Emirates, in Oman and in Bahrain, were the fastest growing platforms in the Middle East. The busiest and fastest growing hub in the Middle-East, Dubai (+16%), ranked only 37th in 2006 but even so 34 places ahead of its 2001 rank.

Airports in the Persian Gulf (Oman, Bahrain, Qatar, UAE) were able to rely strongly on their home carrier to generate growth. For instance, Etihad accounted for about 70% of the seat offer development at Abu Dhabi from 2004 to 2007 and Qatar Airways represented 60% of Doha's development. As a consequence, the airports without any home-base carrier delivered below average performance (+5.9% for the regional platforms in 2006).

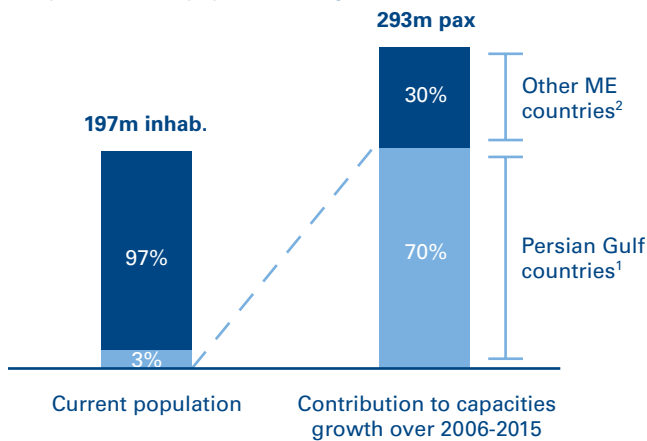
Platforms outside the Persian Gulf had to turn to foreign airlines to sustain traffic: El Al, MEA and Saudi Arabian Airlines accounted for less than 5% of the seat offer increase at their main base.

Persian Gulf countries are reportedly expanding their airport facilities and are planning to quadruple their current capacity, from 64m passengers in 2006 to about 270m passengers in 2015. Overcapacity could be an issue for some of the airports (see Fig.7); airports and investors will have to consider future demand and capacity carefully before financing new capacity.

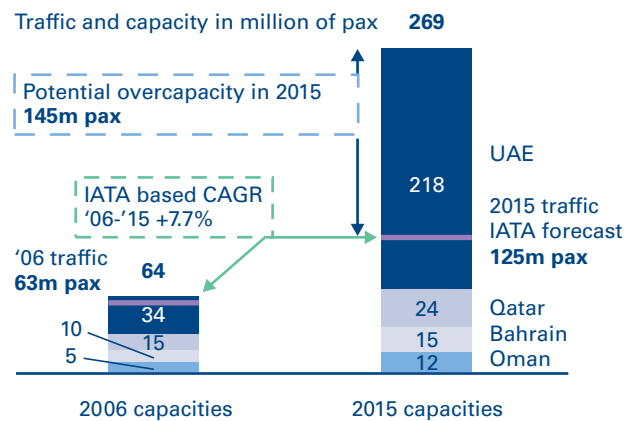
*“Persian Gulf countries are reportedly expanding their airport facilities and are planning to quadruple their current capacity, from 64m passengers in 2006 to about 270m passengers in 2015.”*

Figure 7: Persian Gulf airports potential overcapacity

Persian Gulf airports<sup>1</sup> contribution to capacity growth compared to their population weight



Capacities evolution of Persian Gulf airports<sup>1</sup> over '06-'15



Assumption: ADL estimate is based on approved investment projects that have been planned over the period 2006-2015.

'IATA based' growth forecast is derived from IATA forecast for the period '07-'11

<sup>1</sup>Persian Gulf countries: UAE, Qatar, Bahrain and Oman

<sup>2</sup>Egypt, Turkey, Lebanon, Jordan, Saudi Arabia, Kuwait and Israel

Source: IATA 2007, ACI, Mombberger information

## The World's Top 100 airports

Rank	Code	Country	Airport name	PAX 2006	Growth %
1	ATL	UNST	Atlanta	84,846,639	-1.2
2	ORD	UNST	Chicago – O'Hare	76,282,212	-0.3
3	LHR	UNKG	London – Heathrow	67,530,223	-0.6
4	HND	JAPN	Tokyo – Haneda	65,225,795	3.1
5	KLAX	UNST	Los Angeles	61,048,552	-0.7
6	DFW	UNST	Dallas / Ft.Worth	60,226,138	1.8
7	CDG	FRAN	Paris – Charles De Gaulle	56,808,967	5.7
8	FRA	GERF	Frankfurt	52,810,683	1.1
9	PEK	CHIN	Beijing	48,501,102	18.3
10	DEN	UNST	Denver	47,324,844	9.3
11	KLAS	UNST	Las Vegas Mocarran	46,194,882	4.3
12	AMS	NETH	Amsterdam	46,088,221	4.4
13	LEMD	SPAN	Madrid – Barajas	45,500,469	8.5
14	HKG	HONG	Hong Kong	44,020,000	9.3
15	BKK	THAI	Bangkok	42,799,532	9.8
16	JFK	UNST	New York – Kennedy	42,629,470	4.3
17	IAH	UNST	Houston	42,628,663	7.3
18	PHX	UNST	Phoenix	41,439,819	0.6
19	DTW	UNST	Detroit – Wayne	36,356,446	-0.1
20	MSP	UNST	Minneapolis / St.Paul	35,612,133	-5.4
21	EWR	UNST	New York – Newark	35,494,863	7.5
22	SIN	SING	Singapore	35,033,083	8.0
23	MCO	UNST	Orlando, Florida-Intl	34,830,914	2.1
24	LGW	UNKG	London – Gatwick	34,172,489	4.3
25	SFO	UNST	San Francisco	33,574,807	0.5
26	MIA	UNST	Miami	32,533,974	4.9
27	NRT	JAPN	Tokyo – Narita	31,824,411	0.9
28	PHL	UNST	Philadelphia PA / Wilm'ton	31,766,537	0.8
29	YYZ	CAND	Toronto – Pearson	30,966,483	3.5
30	CGK	INDO	Jakarta – Soekarno	30,863,806	10.4
31	MUC	GERF	Munich	30,757,978	7.5
32	FCO	ITAL	Rome – Da Vinci	30,100,486	5.2
33	SYD	ASTL	Sydney	30,008,994	3.2
34	BCN	SPAN	Barcelona	29,999,937	10.6
35	SEA	UNST	Seattle / Tacoma	29,988,573	2.4
36	CLT	UNST	Charlotte	29,693,949	5.3
37	DXB	UNAR	Dubai	28,788,726	16.2
38	ICN	KORR	Seoul – Incheon	28,360,723	8.2
39	BOS	UNST	Boston	27,726,252	2.4
40	PVG	CHIN	Shanghai – Pudong	26,790,826	13.0
41	CAN	CHIN	Guangzhou	26,222,057	11.3
42	LGA	UNST	New York – La Guardia	25,800,074	-0.1
43	ORY	FRAN	Paris – Orly	25,622,152	3.1
44	MEX	MEXC	Mexico City	24,727,296	2.5
45	KUL	MALB	Kuala Lumpur	24,142,134	4.0
46	STN	UNKG	London – Stansted	23,686,785	7.7
47	IST	TURK	Istanbul	23,259,577	10.1
48	TPE	TAIW	Taipei	22,857,445	5.3
49	IAD	UNST	Washington – Dulles	22,813,125	-15.0
50	MAN	UNKG	Manchester	22,442,855	0.2

## The World's Top 100 airports

Rank	Code	Country	Airport name	PAX 2006	Growth %
51	PMI	SPAN	Palma, Mallorca Island	22,401,749	5.5
52	MEL	ASTL	Melbourne	21,903,775	3.4
53	MXP	ITAL	Milan – Malpensa	21,767,267	11.0
54	SLC	UNST	Salt Lake City	21,490,218	-3.4
55	BOM	INDA	Bombay	21,375,051	23.1
56	FLL	UNST	Ft.Lauderdale	21,263,975	-5.0
57	DUB	IRLD	Dublin	21,196,862	14.9
58	BWI	UNST	Baltimore	21,184,208	4.9
59	CPH	DENM	Copenhagen	20,799,352	4.5
60	DEL	INDA	Delhi	19,373,415	28.4
61	SHA	CHIN	Shanghai (Zsss, Pvg)	19,338,485	8.7
62	HNL	UNST	Honolulu	19,285,707	-4.4
63	ZRH	SWTZ	Zurich	19,194,184	7.5
64	MDW	UNST	Chicago – Midway	18,868,388	5.6
65	TPA	UNST	Tampa / St.Petersburg	18,867,541	-0.9
66	DCA	UNST	Washington – Reagan	18,545,671	3.9
67	CGH	BRAZ	Sao Paulo, Sp – Congonhas	18,469,004	7.4
68	CTS	JAPN	Sapporo – Chitose	18,390,233	2.9
69	SZX	CHIN	Shenzhen	18,215,779	15.2
70	FUK	JAPN	Fukuoka	18,212,705	-2.4
71	OSL	NORW	Oslo	17,672,179	11.2
72	ARN	SWED	Stockholm – Arlanda	17,667,501	2.5
73	MNL	PHIL	Manila	17,660,697	8.9
74	SAN	UNST	San Diego	17,481,942	0.6
75	JNB	SOUF	Johannesburg	17,333,076	9.9
76	YVR	CAND	Vancouver	17,138,388	3.4
77	BNE	ASTL	Brisbane	17,082,419	5.6
78	ITM	JAPN	Itami	17,050,440	-10.0
79	VIE	AUST	Vienna	16,855,725	6.3
80	BRU	BELG	Brussels	16,649,856	3.3
81	DUS	GERF	Duesseldorf	16,589,937	7.0
82	KIX	JAPN	Osaka – Kansai	16,582,027	2.1
83	GRU	BRAZ	Sao Paulo, Sp – Guarulhos	16,580,842	-1.6
84	CTU	CHIN	Chengdu	16,278,730	17.1
85	CVG	UNST	Cincinnati	16,239,974	-28.7
86	DME	RUSF	Moscow – Domodedovo	15,370,335	10.0
87	STL	UNST	St.louis	15,205,944	3.5
88	LGAT	GREC	Athens**(Hew, Lgat)	15,066,279	0.8
89	AYT	TURK	Antalya	14,756,546	-7.7
90	KMG	CHIN	Kunming	14,448,653	22.3
91	OAK	UNST	Oakland	14,432,270	0.0
92	OKA	JAPN	Naha	14,172,561	5.0
93	PDX	UNST	Portland	14,043,489	1.2
94	GMP	KORR	Seoul – Gimpo	13,766,523	2.4
95	JED	SAUD	Jeddah	13,357,093	0.1
96	AGP	SPAN	Malaga	13,051,951	3.2
97	SVO	RUSF	Moscow – Sheremetyevo	12,764,263	5.1
98	LIS	PORT	Lisbon	12,313,606	9.6
99	CJU	KORR	Cheju	12,109,788	6.6
100	HEL	FINL	Helsinki /Vantaa	12,084,623	9.2

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#### **A view from below the new air traffic control tower at London's Heathrow Airport**

Pictured shortly after its official launch in west London, 13 June 2007. The tower took more than two years to develop and will oversee up to 90 arrivals and departures per hour at the world's most intensively-used airport.

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