# Edinburgh Airport Consultative Committee

*Chief Executive's Report*
*[Provided in confidence]*

| | |
|---|---|
| **Meeting date** | 1 May 2023 |
| **Period covered** (Year/Quarter/covering months) | 2023, Q1 January, February, March |
| **Prepared by and date** | Greg Maxwell Head of Corporate Affairs 24 April 2023 |
| **Approved by and date** | Robert Fairnie Digital Content Editor 24 April 2023 |

# 1. Traffic figures

- All percentages are reported to one decimal place.
- Any negative figures or decrease in percentages are reported in red.

## 1.1 Passenger figures

| Passenger figures | Jan '23 | Feb '23 | Mar '23 | Q1 '23 Total | Q1 '23 % of Total | Q1 '19 % of Total | % change '23 vs '19 | Q1 '22 % of Total | % change '23 vs '22 |
|---|---|---|---|---|---|---|---|---|---|
| Domestic | 262,494 | 284,586 | 336,794 | 883,874 | 33.1% | 42.4% | -29.7% | 38.0% | 53.9% |
| International | 561,445 | 551,049 | 672,640 | 1,785,134 | 66.9% | 57.6% | 4.4% | 62.0% | 90.3% |
| **Total** | **823,939** | **835,635** | **1,009,434** | **2,669,008** | **100.0%** | **100.0%** | **-10.0%** | **100.0%** | **76.5%** |

## 1.2 Aircraft movements

| Aircraft movements | Jan '23 | Feb '23 | Mar '23 | Q1 '23 Total | Q1 '23 % of Total | Q1 '19 % of Total | % change '23 vs '19 | Q1 '22 % of Total | % change '23 vs '22 |
|---|---|---|---|---|---|---|---|---|---|
| Domestic | 3,445 | 3,316 | 3,882 | 10,643 | 45.6% | 55.4% | -30.8% | 48.5% | 34.0% |
| International | 4,172 | 3,853 | 4,670 | 12,695 | 54.4% | 44.6% | 2.3% | 51.5% | 50.3% |
| **Total** | **7,617** | **7,169** | **8,552** | **23,338** | **100.0%** | **100.0%** | **-16.0%** | **100.0%** | **42.4%** |

## 1.3 Aircraft traffic mix

| Passenger traffic mix | Jan '23 | Feb '23 | Mar '23 | Q1 '23 Total | Q1 '23 % of Total | Q1 '19 % of Total | % change '23 vs '19 | Q1 '22 % of Total | % change '23 vs '22 |
|---|---|---|---|---|---|---|---|---|---|
| Scheduled | 817,728 | 828,768 | 1,002,954 | 2,649,450 | 99.3% | 98.2% | -9.0% | 97.9% | 78.9% |
| Charter | 5,813 | 6,279 | 5,658 | 17,750 | 0.7% | 1.7% | -64.6% | 1.5% | -38.5% |
| Other | 398 | 588 | 822 | 1,808 | 0.1% | 0.1% | -57.9% | 2.3% | -24.9% |
| **Total** | **823,939** | **835,635** | **1,009,434** | **2,669,008** | **100.0%** | **100.0%** | **-10.0%** | **100.0%** | **76.5%** |

## 1.4 Cargo figures in KG

| Cargo figures in KGs | Jan '23 | Feb '23 | Mar '23 | Q1 '23 Total | Q1 '23 % of Total | Q1 '19 % of Total | % change '23 vs '19 | Q1 '22 % of Total | % change '23 vs '22 |
|---|---|---|---|---|---|---|---|---|---|
| **Mail** | 1,051,462 | 979,290 | 1,194,419 | 3,225,171 | 42.9% | 54.6% | -43.1% | 49.3% | -20.4% |
| **Freight** | 1,289,576 | 1,353,788 | 1,644,167 | 4,287,531 | 57.1% | 45.4% | -9.2% | 50.7% | 3.0% |
| **Total** | 2,341,038 | 2,333,078 | 2,838,586 | 7,512,702 | 100.0% | 100.0% | -27.7% | 100.0% | -8.5% |

## 1.5 Day v night aircraft movements

| Day vs night aircraft movements | Jan '23 | Feb '23 | Mar '23 | Q1 '23 Total | Q1 '23 % of Total | Q1 '19 % of Total | % change '23 vs '19 | Q1 '22 % of Total | % change '23 vs '22 |
|---|---|---|---|---|---|---|---|---|---|
| **Night (0000-0559)** | 275 | 252 | 325 | 852 | 3.7% | 2.6% | 18.7% | 4.5% | 15.4% |
| **Day (0600-2159)** | 6,864 | 6,489 | 7,681 | 21,034 | 90.1% | 91.2% | -17.0% | 87.8% | 46.1% |
| **Evening (2200-2359)** | 478 | 428 | 546 | 1,452 | 6.2% | 6.2% | -15.9% | 7.7% | 15.6% |
| **Total** | 7,617 | 7,169 | 8,552 | 23,338 | 100.0% | 100.0% | -16.0% | 100.0% | 42.4% |

## 1.6 Traffic commentary

- Between January - March 2023, 2.67 million passengers used Edinburgh Airport – that's 76.5% more than the same period in 2022, and just 10% below the same period in 2019.

- Aircraft movements are up 42% versus the same period in 2022, with international growth again outpacing the domestic growth.

- A larger share of aircraft movements were in daytime hours than in the same period in 2022 (90% vs 88% in 2022).

- Cargo weight continues to be reported in Net Weights instead of Gross Weight (i.e. excluding the weight of the ULD's that the mail is placed in). This has a significant impact on the reported weight but aligns with CAA expectations.

## 2. Capital Investment

### 2.1 Projects in development, design & delivery

| Project / Initiative Name | Value £m | Stage | End Date |
|---|---|---|---|
| 31393 - Terminal Infrastructure Expansion | 77.00 | Development | Jan-30 |
| 31235 - Major Runway Rehab | 23.86 | Development | Jan-26 |
| 30713 - East Access Road | 21.24 | Development | Jan-27 |
| 31253 - Water Quality | 19.50 | Development | Jan-26 |
| 30875 - Security Futures | 18.00 | Design | Jan-26 |
| 31247 - Global Air Park | 5.48 | Design | Jul-26 |
| 31344 - Echo Taxiway Bay Rehabilitation | 4.08 | Development | Jan-25 |
| 31343 - Car Parking Futures Phase 2 | 2.87 | Design | Jan-25 |
| 31299 - Terminal Roof Slab Failure & Reconstruction | 2.23 | Delivery | Jan-24 |
| 30809 - AOS (Chroma) Strategy | 2.15 | Development | Jan-26 |
| 31340 - WDF Main Extension | 1.94 | Development | Jan-25 |
| 31342 - Airside Coach Vehicle Replacement 2022/23 | 1.78 | Delivery | Oct-24 |
| 31225 - FEGP Phase 3 | 1.50 | Design | Jan-25 |
| 31325 - Pick-Up & Drop-Off 2022 | 1.48 | Delivery | Jun-23 |
| 31382 - HVAC Asset Replacement Phase 1 | 1.15 | Development | Jan-25 |
| 31333 - Street Lighting SMART Upgrade | 1.05 | Design | Jan-25 |
| 31334 - Low Carbon Heat Network | 1.02 | Development | Mar-26 |
| 31376 - Fuel Capacity | 1.00 | Development | Jan-26 |
| 31361 - IT Hosting 2023 | 1.00 | Development | Jan-25 |
| 31314 - Finance Systems | 0.92 | Development | Jan-25 |
| 30972 - Fire Appliance Replacement | 0.82 | Delivery | Dec-24 |
| 31352 - Check-in Futures Phase 1 | 0.77 | Design | Sep-23 |
| 31359 - Replacement LED Lighting Secondary areas | 0.74 | Development | Jan-25 |
| 31375 - Vehicle Asset Replacement (Specialist AFS) 2023 | 0.69 | Development | Jan-26 |
| 31318 - Flood Prevention Strategy (Capital) | 0.63 | Delivery | Aug-23 |
| 31362 - AGL Phase 3 | 0.62 | Development | Nov-24 |
| 31386 - Archimedes Storm Screw | 0.60 | Development | Jan-25 |
| 31379 - Contingency Road Resurfacing | 0.58 | Development | Jan-25 |
| 31365 - Specialist Vehicles 2023 | 0.57 | Development | Jan-25 |
| 31201 - Airport Control Futures | 0.57 | Delivery | Sep-23 |
| 31353 - Aircraft Stands LED Lighting Upgrade 2022 | 0.54 | Delivery | Aug-23 |
| 31326 - Specialised Vehicle Replacement 2022 | 0.48 | Delivery | Jan-24 |
| 31392 - CCRC Car Wash Asset Replacement | 0.47 | Development | Oct-24 |
| 31338 - Waste Out | 0.42 | Development | Jan-24 |
| 31371 - Fire Training Area | 0.38 | Development | Jan-25 |
| 31380 - Airside Specialist Equipment Building | 0.38 | Development | Jan-25 |

| Project / Initiative Name | Value £m | Stage | End Date |
|---|---|---|---|
| 31297 - Long Stay Walkable | 0.37 | Design | Jan-25 |
| 31372 - Engineering Reactive Capital 2023 | 0.27 | Delivery | Jan-24 |
| 30945 - SKIDATA Car Parking Resilience | 0.26 | Design | Oct-23 |
| 31388 - Security ETD Phase 2 & Control Posts | 0.25 | Development | Jul-24 |
| 31377 - Electric Charging Futures Phase 1 | 0.25 | Development | Jan-25 |
| 31313 - Retail Changes FY22 | 0.23 | Delivery | Jun-23 |
| 31335 - Data Warehouse Upgrade 2022 | 0.22 | Development | Jan-24 |
| 31339 - WDF 2nd Hit Store | 0.20 | Delivery | Oct-23 |
| 30664 - Baggage Hall Futures (aka Baggage Standard 3) | 0.20 | Delivery | Sep-23 |
| 31346 - LED Lighting – Plant & Switch Rooms | 0.18 | Development | Jul-23 |
| 31349 - Fire System Asset Replacement | 0.17 | Development | Oct-23 |
| 31385 - Taxi rank controls | 0.17 | Development | Jan-25 |
| 31360 - US Pre Clearance | 0.17 | Development | Jan-24 |
| 31366 - Airport E-Commerce 2023 | 0.15 | Delivery | Jan-24 |
| 31033 - Energy LCITP | 0.14 | Delivery | Jun-23 |
| 31370 - Vehicle Asset Replacement (Day to Day) | 0.13 | Development | Jan-25 |
| 31384 - Security LED's 2023 | 0.12 | Delivery | Sep-23 |
| 31389 - NTK Fixed Noise Monitors | 0.12 | Development | Jan-25 |
| 31336 - BMS Hardware Replacement 2022 | 0.11 | Development | Jul-23 |
| 31391 - Accessibility Regs & Compliance Ph1 | 0.11 | Development | Jan-25 |
| 31378 - North Cargo Link Road | 0.11 | Development | May-23 |
| 31296 - Airspace Change FY21 | 0.10 | Delivery | Oct-23 |
| 31320 - Machine Learning Pricing 2022 | 0.10 | Design | Jan-25 |
| 31381 - Solar Farm Ground Maintenance Equipment | 0.09 | Development | Aug-23 |
| 31327 - Day to Day Vehicle Replacement 2022 | 0.09 | Delivery | Feb-25 |
| 31369 - IT Operational Hardware 2023 | 0.09 | Delivery | Sep-23 |
| 31351 - Central Search Upgrade 2022 | 0.08 | Development | Oct-23 |
| 31341 - Human Detection (Baggage) | 0.07 | Delivery | Oct-23 |
| 31387 - AGL Asset Care Equipment | 0.06 | Development | Oct-23 |
| 31347 - TEX Anti-Back Track Improvements 2022 | 0.06 | Delivery | Jul-23 |
| 31367 - Digital Apps 2023 | 0.05 | Delivery | Jan-24 |
| 31368 - FIDS Hardware refresh 2023 | 0.04 | Delivery | Jan-24 |
| 31383 - EASL Equipment Phase 1 | 0.04 | Delivery | Mar-23 |
| 31309 - Strategic Planning 2022 | 0.03 | Delivery | Oct-23 |
| 31373 - Cleaning Equipment | 0.03 | Delivery | Jul-23 |
| 31374 - Fire Service Watch room | 0.02 | Development | Sep-23 |
| 31328 - Non-Pax Vehicle Replacement 2022 | 0.01 | Delivery | Aug-23 |
| 31324 - Cyber Security Enhancements 2022 | 0.01 | Design | Apr-23 |
| 31390 - EDI Videography Equipment | 0.00 | Delivery | Jun-23 |

## 2.2 Summary of key projects

**Terminal Infrastructure Expansion (Value £77m)**
The Terminal Expansion project is a long-term project to address operational capacity issues across connectivity, gate rooms, immigration, check-in and retail. The project will be delivered in multiple phases over the next 7 years.

**Major Runway Rehab (Value £24m)**
The major Runway Rehabilitation project will relief the runway for the next 10-15 years. A full resurfacing exercise will be undertaken in winter 2025-26.

**EAST Access Road (Value £21m)**
The EAST Access Road project will provide resilience to the airport, creating a 2nd access from the Gogar Roundabout interchange. The project is currently on hold following the rejected planning application.

**Water Quality (Value £20m)**
EAL are working closely with SEPA on the Water Quality project which provides an enhanced ability to capture de-icing runoff, it will improve the water quality across all adjacent watercourses.

**Security Futures (Value £18m)**
The Security Futures project is scheduled to commence construction in Q2 2023. The project will complete in early 2025 and provide enhanced security control within the passenger search area.

**Global Airpark Phase 1 (Value £5m)**
The Global Airpark project will provide additional cargo capacity at the east of the campus near Turnhouse. Phase 1 is due to complete in 2026.

**Echo Taxiway Rehabilitation (Value £4m)**
The Echo taxiway rehabilitation project has passed through TG2. A temporary relocation of the taxiway centreline will be completed in Q1 2023 to mitigate further damage to the pavement concrete along the centreline. Full scale removal and reinstatement of the taxiway is scheduled for winter 23-24 after design has completed.

## 2.3 Projects commentary

- In 2022 the final year capital expenditure figure was £16m, an increase of £6m from 2021. A total of 80 separate capital projects where underway in the period. A significant amount of development and design work has been undertaken in 2022 that will allow a substantial number of projects to move into delivery in 2023.

- Moving into 2023 the number of projects increases to 132, 76 of these are already underway, the forecast capital expenditure increases to £47m. The increase in the number of projects that the team are now looking at is a clear demonstration of the airport's commitment to continue to improve and develop areas.

- The team continue to future proof the airport and map out projects to improve the airport longer term but are also heavily involved in solutions to immediate issues when and where they require input.

## 3. Community Investment

- *The Community Fund budget is generated from the drop off fee and increases in line with passenger numbers.*
- *The Community Fund board meet three times a year and is chaired by Alex Cole-Hamilton, MSP for Edinburgh Western.*
- *Application information can be found at edinburghairport.com/community*

### 3.1 Community Fund

- In 2023, the Community Fund has up to £140,000 to distribute to projects that align with the four pillars of our Greater Good sustainability strategy.

- 2023 meetings are to be held on 28th April, 25th August, and 24th November.

- The April round of funding has received 60 applications so far, 27% more than this time in 2022, and the greatest number for a Spring meeting since 2015. The Application window closed on Friday the 14th of April.

- The Community Fund Board voted to appoint two new board members for 2023. Heather McCulloch and Finley George from Edinburgh Napier University will take their seats at the board meetings to assist in the selection of projects to fund.
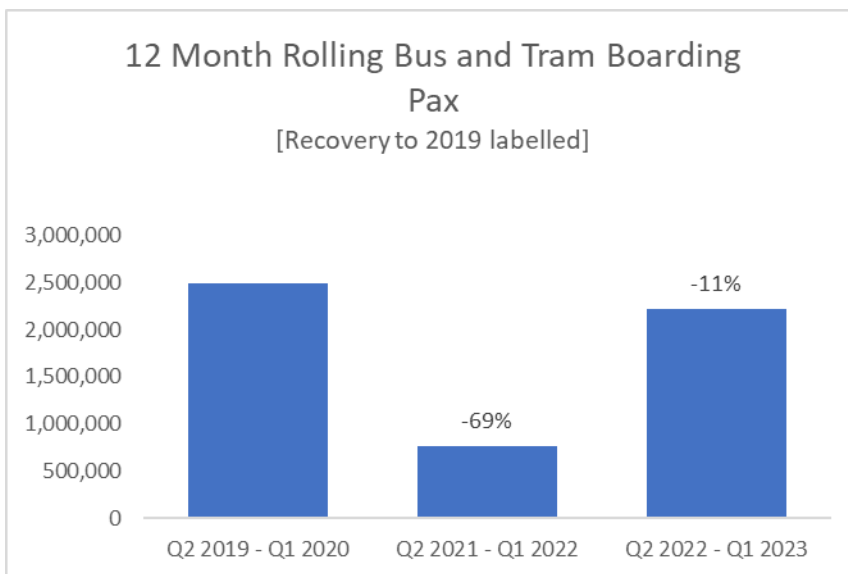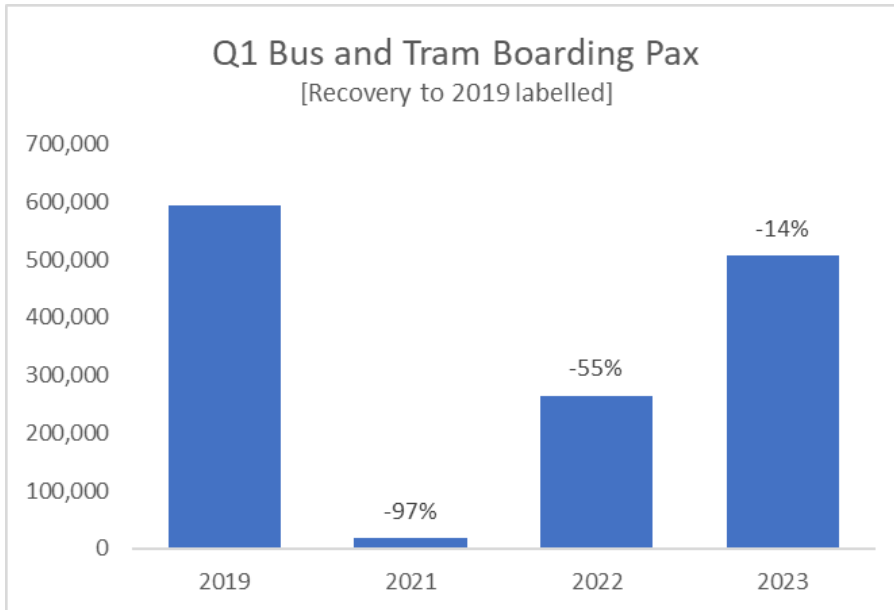
### 3.2 Charity Work

- The Larder is based in West Lothian and works to provide training for young people around issues such as employability, health, wellbeing, and life skills while using food to promote social change. The social enterprise provides direct work experience for young people within its cafes, which also provide nutritious and affordable food for people within local communities.

- Our charity partner of the year collaboration with The Larder was extended into 2023. This revamped 2-year partnership model will allow us to maximise the benefits of the partnership for both the charity and the airport's people.

- Including gifts in-kind, as well as all the other fundraising activities throughout the year, £92,744 was raised for The Larder in 2022.

- As well as foreign coin collections, gifts in kind, advertising space, and promotion, EDI continues its fundraising for the Larder throughout 2023 with holiday related donation drives, sports challenges, raffles, and much more planned for the rest of the year.

- EDI has relaunched its Match Funding programme to supplement amounts raised by airport staff for charitable causes. EDI will match a donation of up to £250 for those raising funds for The Larder, or up to £100 for those fundraising for any other charity.

- We are pleased to be hosting 6/7 interns this summer after the successful launch of our own internship programme. Opportunities were open to College and University students in any year of study. This was to ensure the programme was as accessible as possible, seeing 216 applications across teams including Communications, Finance, Engineering and Capital Projects.
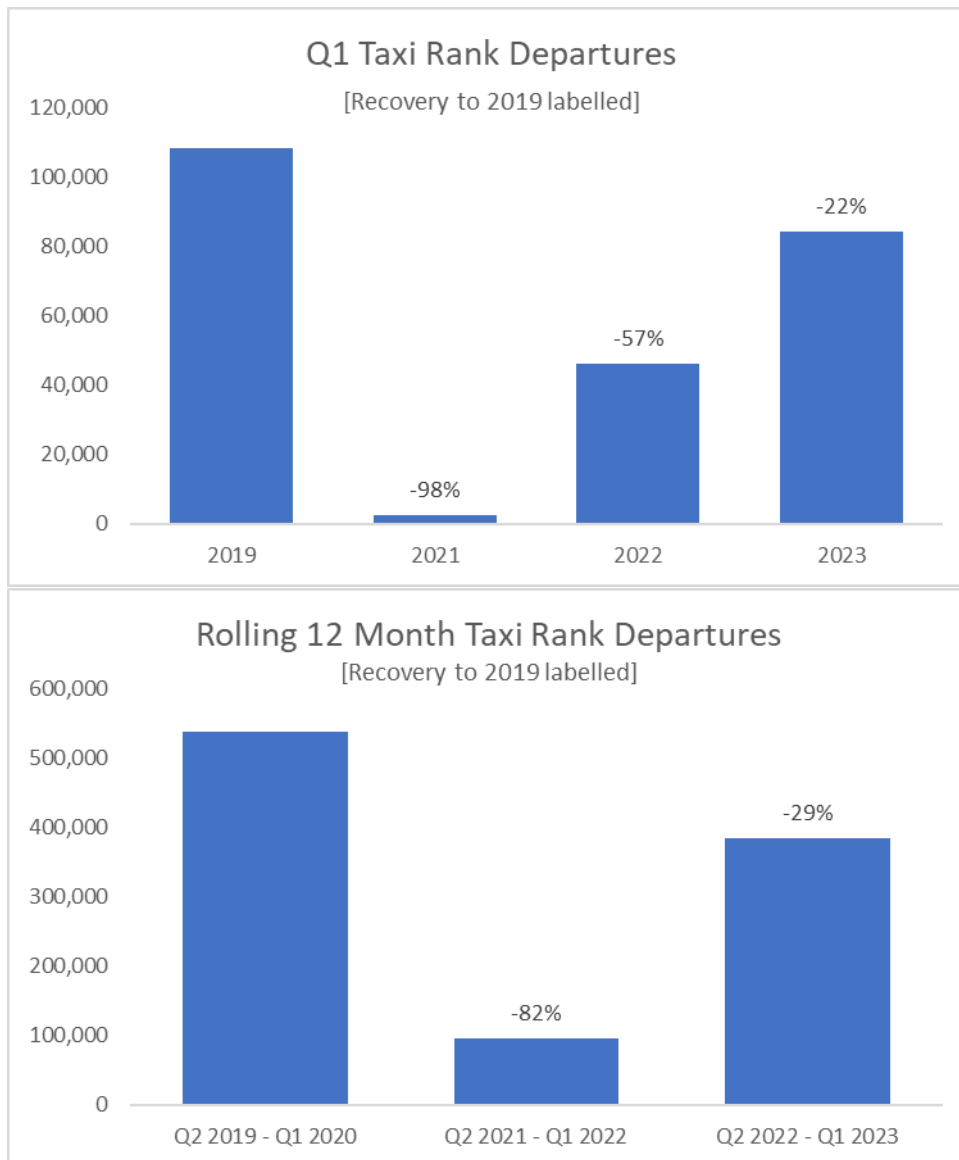
# 4. Surface access

## 4.1 Bus and tram services

### Q1 Bus and Tram Boarding Pax
[Recovery to 2019 labelled]

A bar chart titled "Q1 Bus and Tram Boarding Pax [Recovery to 2019 labelled]" showing values for:
- 2019: ~590,000
- 2021: ~20,000 (-97%)
- 2022: ~265,000 (-55%)
- 2023: ~510,000 (-14%)

### 12 Month Rolling Bus and Tram Boarding Pax
[Recovery to 2019 labelled]

A bar chart titled "12 Month Rolling Bus and Tram Boarding Pax [Recovery to 2019 labelled]" showing values for:
- Q2 2019 - Q1 2020: ~2,480,000
- Q2 2021 - Q1 2022: ~770,000 (-69%)
- Q2 2022 - Q1 2023: ~2,230,000 (-11%)

- Public transport mode share in Q1 was 37.8%, slightly down on Q4 2022 at 38.1%.
- A new bus service operated by Citylink launched in Q1; the 902 to Airdrie via Glasgow and Livingston. The service replaces part of the route that was lost when the First 600 stopped.

## 4.2 Taxi services



**Q1 Taxi Rank Departures**
[Recovery to 2019 labelled]

- 2019
- 2021: -98%
- 2022: -57%
- 2023: -22%

**Rolling 12 Month Taxi Rank Departures**
[Recovery to 2019 labelled]

- Q2 2019 - Q1 2020
- Q2 2021 - Q1 2022: -82%
- Q2 2022 - Q1 2023: -29%

- Q1 saw the announcement of a new taxi rank operator. The previous contract saw two operators – City Cabs providing black cabs, Capital Cars providing private hires – the new contract sees Capital Cars providing both.

- There is still a shortfall in provision of vehicles at EDI with both Hackney Taxis and Private Hires having issues with recruiting drivers back into the trade. This is a problem experienced in cities across the UK.

- The following table details the transport mode split for passengers for Q1 of 2023. The table was requested by the EACC at the first meeting of 2023.

|  | Car Parking | Buses | Tram | Taxi | Coaches | Car Rental | Other |
|---|---|---|---|---|---|---|---|
| **2019** | 40.6% | 21.4% | 12.3% | 11.0% | 7.1% | 6.7% | **0.9%** |
| **2022** | 40.3% | 22.0% | 12.1% | 13.3% | 4.3% | 5.0% | **3.1%** |

## 5. Aircraft noise

- *Our Service Level Agreement (SLA) is to respond to noise complaints within five days.*
- *All percentages are reported to one decimal place.*
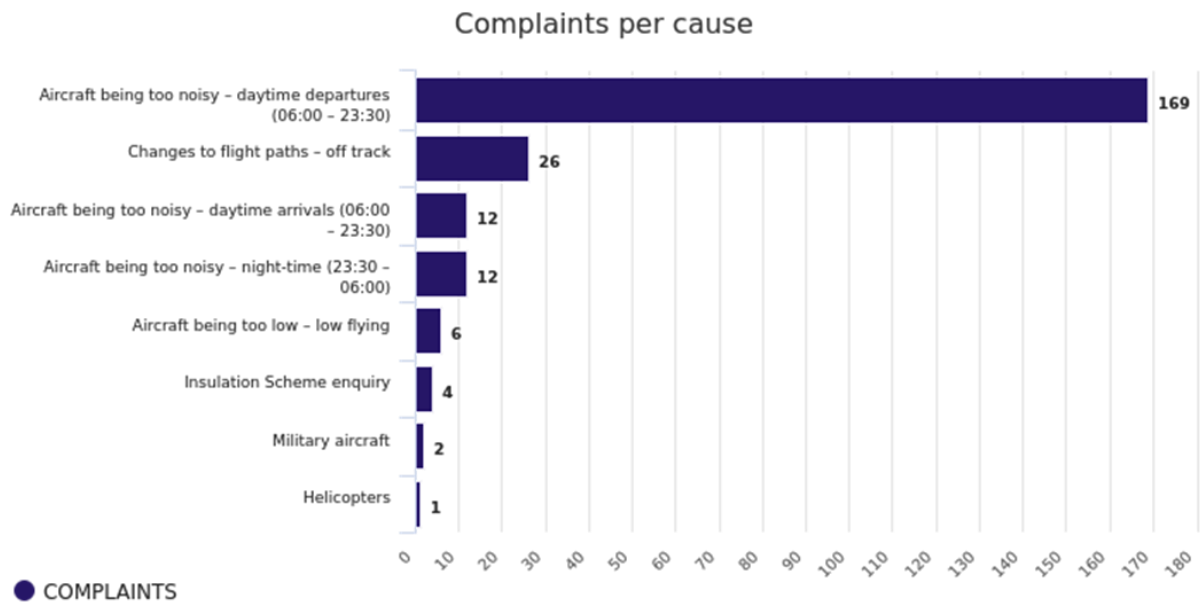- *Any negative figures or decrease in percentages are reported in red*

### 5.1 Noise complaints received

|  | Jan-23 | Feb-23 | Mar-23 | Q1/2023 total | Q4/2022 total | % change Q1/2023 v Q4/2022 | % change Q1/2023 v Q1/2022 |
|---|---|---|---|---|---|---|---|
| Noise complaints | 54 | 59 | 119 | 232 | 153 | 51.6% | 84.1% |
| Complainers | 10 | 09 | 10 | 20 | 28 | -40.0% | -15.0% |
| Answered in SLA | 94.4% | 100.0% | 94.1% | 95.7% | 91.5% | 4.6% | 1.3% |

### 5.2 Runway use

|  | Jan-23 | Feb-23 | Mar-23 | Q1/2023 total | Q4/2022 total | % change Q1/2023 v Q4/2022 | % change Q1/2023 v Q1/2022 |
|---|---|---|---|---|---|---|---|
| Runway 06 | 156 | 1169 | 3050 | 4375 | 5434 | -19.5% | 49.4% |
| Runway 24 | 7433 | 5979 | 5472 | 18884 | 19505 | -3.2% | 41.0% |

## 5.3 Complaints by type of enquiry

### Complaints per cause

| Cause | Complaints |
|---|---|
| Aircraft being too noisy – daytime departures (06:00 – 23:30) | 169 |
| Changes to flight paths – off track | 26 |
| Aircraft being too noisy – daytime arrivals (06:00 – 23:30) | 12 |
| Aircraft being too noisy – night-time (23:30 – 06:00) | 12 |
| Aircraft being too low – low flying | 6 |
| Insulation Scheme enquiry | 4 |
| Military aircraft | 2 |
| Helicopters | 1 |

● COMPLAINTS

| Defined terms - As perceived by complainant not EDI defined | |
|---|---|
| Ground running | Complainant considers noise source to be engine testing operations or noise of aircraft on ground within the airport grounds |
| Helicopter | Complainant considers noise source to be EDI related helicopter movement complaints – generally not Edinburgh Airport movements |
| General/non-specific | Complainant wishes to report a non-noise related complaint – still logged as it is received to noise line or noise email address |
| Off track | Complainant considers the aircraft to be flying out with the SID or NPR |
| Low flying | Complainant considers noise source to be due to the altitude of aircraft being too low |
| Arriving aircraft noise | Daytime (06:00 – 23:30) noise level complaints for Arrivals |
| Departing aircraft noise | Daytime (06:00 – 23:30) noise level complaints for Departures |
| Daytime Noise Levels | Daytime (06:00 – 23:30) noise level complaints – Arrivals and Departures |
| Night flight noise | Night time (23:30 to 06:00) noise level complaints |
| ACP | Enquiries regarding noise levels relating to proposed new flight paths not yet flown |
| Military flight noise | Noise complaints regarding military aircraft not associated with Edinburgh Airport |

## 5.4 Complaints by area sorted by number of complainants

**Complaints by Area**

| Area | Complaints | Complainants |
|------|-----------|--------------|
| West Calder | 1 | 1 |
| Inverkeithing | 1 | 1 |
| Blackness | 1 | 1 |
| Balerno | 2 | 1 |
| Port Seton | 2 | 1 |
| Dalkeith | 2 | 1 |
| Dalgety Bay | 22 | 1 |
| Glenlee Avenue | 26 | 1 |
| Livingston Village | 37 | 1 |
| Torphichen | 126 | 1 |
| Ecclesmachan | 3 | 2 |
| Edinburgh | 3 | 3 |
| Cramond | 6 | 5 |
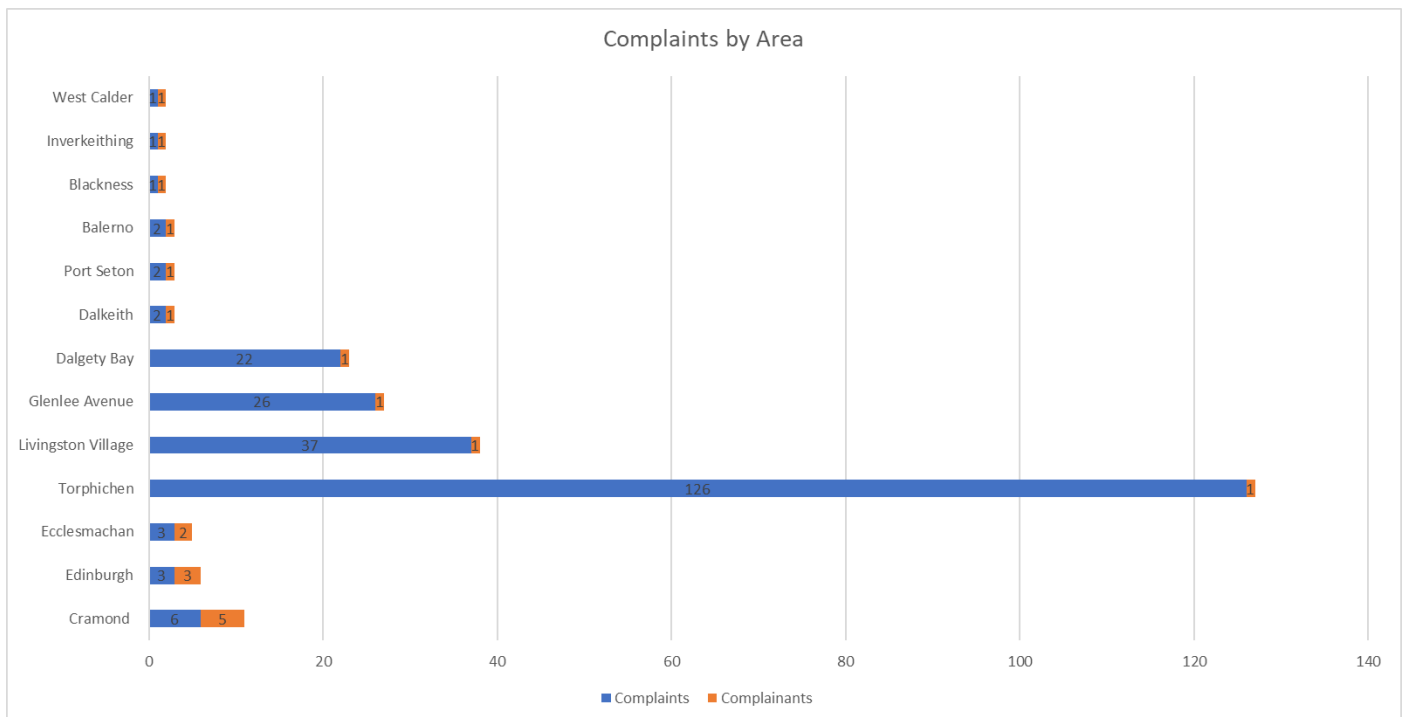
- Of the 232 complaints filed, 211 were made by 4 complainants.
- 126 of those were made by one complainant in Torphichen – 54% of the overall total for the quarter. No other complaints were received from this area.
- Although the number of complaints has increased against Q4 of 2022, the actual number of complainants has reduced.
- Operations at EDI continue to recover towards pre Covid levels and this recovery should bring us towards parity with 2019 operation levels as we enter the summer period. With that in mind we would expect complaints to continue to rise.

# 6. Route Development

## 6.1 Route commentary

**Airline Operational Challenges:**

- Capacity limits at major European Airports (Amsterdam, Frankfurt) continued into Q1, but are expected to ease by the end of June 2023.
- Pent-up demand for travel, shortages of aircraft and crew, and heightened fuel prices continue to drive up air fares. Bookings are reportedly still strong, despite the increased cost of living.

**EDI Recovery:**
- For Winter 2022-23, we had 145 routes to 109 destinations recovered compared to 152 routes to 113 destinations in Winter 2019-20.
- For Winter 2022-23, we had 27 airlines operating scheduled services (in line with the 27 airlines in Winter 2019-20).

**Airline Updates:**

- **Ryanair:** An 11th based aircraft arrived at the start of the Summer 2023 season, driving further growth for the carrier at Edinburgh Airport.  New routes to Bournemouth, Belfast International, Rhodes and Venice Marco Polo Airports (Venice as a replacement for Treviso Airport).
- **easyJet:** Ninth aircraft to be based at Edinburgh Airport from June 2023. Much of the growth being delivered by easyJet is in its domestic network (new route launched to Jersey), but they also launch 3 new international routes, commencing in Summer 2023: Santorini, Catania and Antalya.
- **Qatar:** Commenced operation of 10 weekly flights in early February 2023, and still plan to increase to 2x daily in July 2023.
- **Air Canada:** For the first time ever, Air Canada will operate in winter season with 3x weekly service until early January 2024 with a 7 week pause before restarting the operations again in early March 2024.
- **Westjet:** Announced a new Calgary route from May 2023, which will replace the lost Toronto route.
- **SunExpress:** Will increase in Antalya's capacity (up to daily in Autumn 2023).
- **Edelweiss:** Will grow capacity and operate up to 8 weekly flights in Summer 2023 (up to 7 weekly in Summer 2019)
- **Flybe:** Ceased operations at the end of January 2023.  Some of the lost capacity has been backfilled by other carriers.
- **Wizz Air:** Cancelled their Warsaw route from Summer 2023, but Warsaw will still be served (4 times weekly to/from Warsaw Modlin airport) by Ryanair. Wizz has also cancelled Budapest route in April – May 2023 before it restarts operations in June.
- **Air France:** Will operate up to 3x daily for most of the summer season (increase from 2x daily in 2022)
- **Loganair:** Increasing Southampton to 5x daily and Exeter to 2x daily from mid-July 2023.

# 7. Passenger satisfaction analysis

## 7.1 Complaints, compliments, enquiries and suggestions
*Received via email, phone call, webform, letter and live chat.*
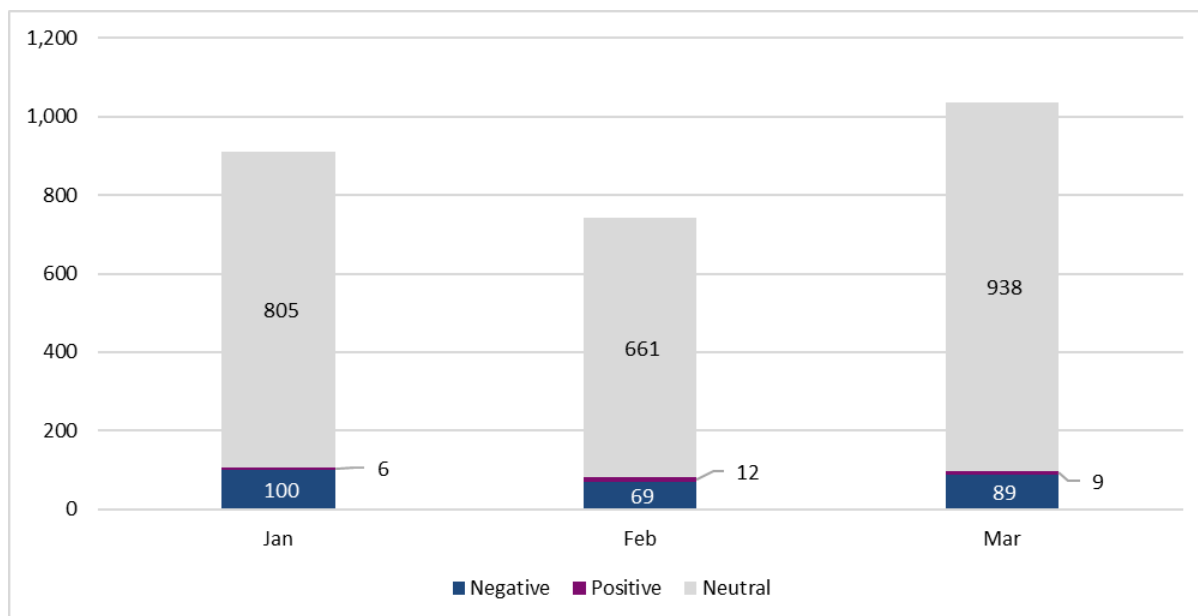


|  | Jan-23 | Feb-23 | Mar-23 | Total Q1 '23 | Q1 '23 vs Q4 '22 % change | Total Q1 '22 | Q1 '23 vs Q1 '22 % change | Total Q1 '19 | Q1 '23 vs Q1 '19 % change |
|---|---|---|---|---|---|---|---|---|---|
| Complaints | 100 | 69 | 89 | 258 | 0% | 258 | 0% | 447 | -42% |
| Compliments | 6 | 12 | 9 | 27 | -59% | 17 | 58% | 45 | -40% |
| Neutral | 805 | 661 | 938 | 2,404 | -10% | 2,676 | -10% | 162 | 1384% |
| **Total** | **911** | **742** | **1,036** | **2,689** | **-9%** | **2,951** | **-9%** | **684** | **293%** |

## 7.1.2 Commentary
- Our most popular method of contact remains as phone call, with 40% of our contact in Q1 coming in via this channel
- February closed with our lowest recorded complaint numbers per 10k pax, with 0.83 complaints per 10k – surpassing our reporting of 0.99 complaints per 10k in November 2022
- As the table indicates, we have seen a 9% decrease in cases in Q1 2023, vs Q4 2022 and this is driven by:
  - o Decreased pax numbers (winter schedule)
  - o Increased support from airlines – we have seen several contact centres expand their support offering, or increase their channel offerings which has decreased traffic to the support team

## 7.2 Passenger Satisfaction

Based on the steps of the passenger journey, the following graph shows how many items of feedback we have received for each area;
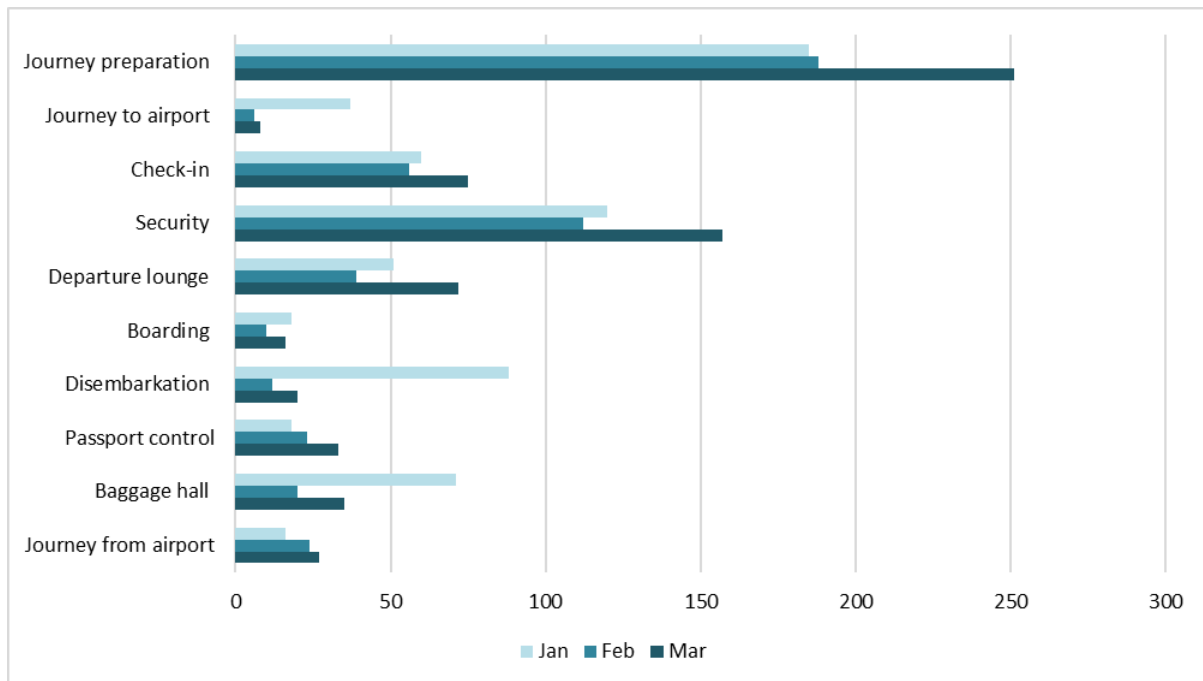


*The graph does not include any enquiries that have been received via live chat.*

- In Q1, the area with the most items of enquiries and feedback is 'Journey Preparation', and this is closely followed by 'Security' and 'Departure Lounge'. Journey Preparation and Security feedback was led by enquiries from customers planning their journey

  - We are beginning to see queries regarding advanced security screening technology and the accompanying rules, and we anticipate these contact numbers will slowly rise over the coming months

- The team are continuing to handle reviews of three stars and below that are posted on Reviews.io, Trustpilot and Google. At present, we are unable to solicit airport related reviews, but we are working with the operations and digital teams to scope out options for solution

  - In Q1 we have maintained acceptable scores, with an average of 4/5 across our supported platforms

## 7.3 Happy/Sad

**Security - Happy and Neutral Customers**
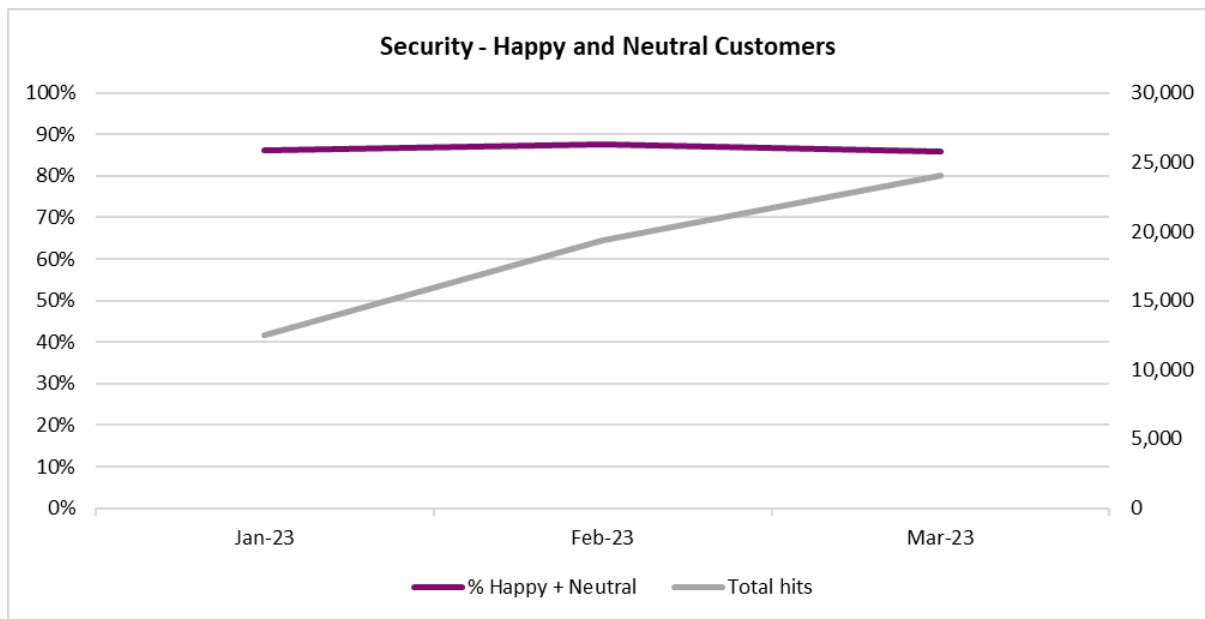


*this data is collected via one iPad at the exit of the Security hall*

- In Q1, the monthly average for Security happy and neutral customers was 87%
- We are continuing to work with our teams to improve the HappyOrSad offering online, leveraging our Wi-Fi sign ups. We are seeing increased data collection on this platform and hope to be able to report on this soon
- 2023 will see the expansion of HappyOrSad across the campus, where we plan to target individual areas of the airport journey. This expansion will give us real-time, measurable and comparable results that we will be able to report on and use to support business changes
    - Phase one saw FastPark as the first area with an additional iPad which was deployed at the end of March. Phase two will be rolling out to all other car parks in the coming weeks.