FABEC CUSTOMER SATISFACTION SURVEY

Survey findings

May 2023

CONTEXT AND OBJECTIVES

CONTEXT

- FABEC has organised customer satisfaction surveys (CSS) amongst airlines in 2012, 2015 and 2019 with the objective of gaining more insight into customer views and needs, thus providing a basis for the creation of a FABEC-wide and ANSP specific action plans.
- The surveys focused on investigating the service delivery performance of FABEC ANSPs in the field of Safety, Environment, Capacity, Cost Efficiency and Customer Communication. The methodology used included a quantitative part with a web-based questionnaire and qualitative part with interviews.
- FABEC has since launched the 4th CSS with an objective of collating constructive feedback from airlines to develop a tailored action plan for both FABEC and the FABEC ANSPs. Some continuity with the previous surveys has been kept, but priority was placed on ensuring value add questions were asked and that a balance in the length of the questionnaire was found. Additionally, this survey was designed to have a greater focus on operations than those previously. Interviews with individual airline representatives were held, to develop a deeper qualitative understanding of the issues they face, and improvement ideas they may have.
- Egis was contracted to support FABEC in the undertaking of this survey. This report provides insight into the findings from the 4th CSS survey

SURVEY DEVELOPMENT

The survey development involved a combination of broad and targeted airline stakeholder engagement.

In preparation, the team:

- analysed previous surveys,
- discussed internal FABEC priorities as defined by SC OPS, SC ENV, PMG and SC SAF
- discussed with a British Airways airline representative on what challenges they face and what topics should be addressed by the survey.

The survey was fully reviewed and approved by FABEC before the launch in November 2022.

CONTEXT AND OBJECTIVES

Means of Contact and Response

- A total of 69 airlines were invited to take part in the survey. The way in which these airlines were contacted varied based on which channel was deemed the most effective to contact them; some were contacted directly whereas other were contacted through IATA, through support from CM AOG or through personal contacts at VFE WS and NM AOG.
- After receiving an initial response from several airlines, follow-up chasers were sent to non-respondents, with a focus on chasing airlines with a large share of flights in the FABEC area
- In total 29 airlines responded to the survey (a response rate of 42%) including a mix of carrier types such as major airlines, low cost, cargo, business aviation. Out of the top 16 most flown airlines (en-route) in 2022, only Easy Jet Europe, Eurowings, Swiss, Jet2 and Transavia didn't respond to the survey
- Out of the most flown home carriers all responded except for Swiss and Brussels Airlines. These airlines were reminded through a variety of means of their opportunity to respond to the survey
- The survey covered 4 key topic areas: General Satisfaction, Information Flow, Improved Flight Planning and Long-Term Priorities
- At the end of the survey airlines were asked to indicate their willingness to take part in a follow-up interview or workshop
- The 10 airlines who indicated they'd take part in an interview were subsequently contacted to see if an interview could be arranged. Interviews took place with 2 airlines (Tui and Easyjet Switzerland)
- 26 of the 29 airlines who responded indicated they'd like to receive feedback on the overall survey results

AO ID	AO NAME	ENTRY TRAFFIC
RYR	RYANAIR	537,478
DLH	DEUTSCHE LUFTHANSA	370,076
UNK	UNIDENTIFIED	357,367
AFR	AIR FRANCE	267,208
KLM	KLM ROYAL DUTCH AIRL	193,811
EJU	EASY JET EUROPE AIRLINE GMBH	171,117
EZY	EASYJET	167,631
BAW	BRITISH AIRWAYS	135,264
EWG	EUROWINGS AG	121,171
WZZ	WIZZ AIR	108,614
SWR	SWISS INTERNATIONAL	103,509
VLG	VUELING AIRLINES SA	100,013
THY	TURKISH AIRLINES	98,410
EXS	JET2.COM	83,145
TVF	TRANSAVIA FRANCE	73,681
BCS	DHL EXPRESS	58,032
TOM	THOMSON FLY LTD	54,892
Total		**5,114,151**

GENERAL INFORMATION REQUESTED FROM RESPONDENTS

We identified three areas which are key to our clients for further exploration

- **Improving information flow between the parties**
  - we believe that the lack of simplified information flow between us ANSPs and the airspace users is a key challenge. We would like to improve our understanding of your perspectives and desires regarding your communication with us.
- **Focus on improved flight planning**
  - one pillar of the survey will focus on discussing flight planning challenges and related possible improvements to ensure that our activities meet your needs
- **Setting out an agenda for long term improvement and work**
  - We believe that it would be valuable to engage you in discussions which would allow us to shape our service improvement agendas for the next 5-10 years.

Summary Per Topic Area

GENERAL SATISFACTION

** - mentioned by more than 10 airlines
* - mentioned by multiple airlines
Without (*) - mentioned by 1 airline

Under the general satisfaction area of the survey, airlines were asked to provide the key issues they are facing in both a general and ANS specific context. A summary of the key points raised is presented below:

Flight Efficiency/Route Restrictions:

- Not enough initiatives regarding flight efficiency given all the restrictions that are in place and the increased complexity of them (Luxembourg mentioned specifically)
- Difficulty in finding a correct routing due to RAD restrictions, the ability to plan direct routings would be welcomed and it should also be ensured that RAD info is up to date *
- Complexity of FABEC airspace - Airspace modernisation is crucial for whole sector as it may be most feasible source of carbon reduction. Single European Sky needs to speed up *
- Vertical flight efficiency - Unsuccessful attempts to bring CDO to EBBR *
- Suggestion to introduce "shortcuts" at major European Airports to promote CDO/CCO/Horizontal Flight Efficiency. For example: Efficient Flight Profile Concept. - Optimise horizontal and vertical profiles to and from major airports, especially in the congested airspace in the core areas of Europe. -implement RNAV1 STAR (standard arrival route for aircraft with high-performing navigation equipment offering an accuracy of 1 NM) with level constraints, which is intended to be even shorter and enable a continuous descent approach (CDA)
- German airspace restrictions and the military impact on German airspace resulting in capacity issues (EDUU in particular) and higher fuel costs *
- 4D-trajectory based operations

Resourcing: **

- Staffing shortage at Karlsruhe *
- French industrial action *
- Shortage of resources by ANSP is paid twice by AO, in navigation taxes plus more fuel/flight time
- ATC capacity limitations * - Since Covid outbreak there have been no operational improvements for coping with more traffic. Less traffic seen since 2019 but with a much higher degree of delay. FABEC haven't given feedback on this

Coordination:

- Coordination between ANSPs, more people with pragmatic/everyday use of the sky (pilots) and less bureaucratic people
- Inconsistency of communication frequency across individual FABEC ANSPs

Other issues:

- Significant cost inefficiency for skeyes
- High ATFM delays in the summer
- CPDLC issues
- 4flight implementation at Reims *

Positives:

- Wonderful support from Reims ACC
- Good collaboration from DSNA and MUAC on flight efficiency
- New ATCO training

Summary Per Topic Area

IMPROVED FLIGHT PLANNING (1/2)

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Key Flight Planning Challenges:

RAD restrictions: **

- The biggest concern for airlines by a considerable margin is RAD routes, with difficulties mentioned with the tool used for finding the most efficient and legal routes. Specific areas of difficulty are internal flights in Germany, cross-border France Germany/Swiss and access to ELLX.

How can FABEC help with this?

- Simplify RADs and or create a system similar to NAR system
- Propose better routes to dispatch back offices that can be used on a daily basis
- Harmonization of airspaces, continuous work on cross-border FRA & reduction of RAD measures to a minimum
- Advise on required re-routings and provide detailed information about restrictions and regulated areas
- Open more east/west routing over France

NOTAMs:

NOTAM rules need to be reviewed.

How can FABEC help with this?

- Support OPS GROUP in reviewing NOTAM policy

CFSP: *

Issues relating to CFSP were raised by many airlines. The issues include:

- Difficulty in catching the best flight planning opportunities with CFSP (Lido) which is becoming obsolete
- Complex traffic flow requirements. No harmonised standard of publication of complex traffic flow requirements
- Challenges with flight plan update based on new weather forecast
- When areas managed by AUP/UUP include conditions (e.g. ‘area closed except for…’), presently unable to code them into airline flight planning system

How can FABEC help with this?

- Continue to publish airline operator and CFSP's briefing information, in order to address transparency for any kind of constraints
- Help AOs to put pressure on CFSP so that they modernise.
- Workshops to help flight planners understand FRA implementations and changes
- More support on airspace updates to trigger flight planning automated calculations
- Provide ATC with more capability to update flight plan on pilot request

Information that could generate improvements:

- Close collaboration with CFSP's and NM to publish least required but most effective traffic flow requirements.
- When military restricted airspace is handed back sooner than planned, informing the CFSPs as soon as possible to recalculate the route could be valuable, if it's 10min before departing there is insufficient time to refill
- Complex airspace design due to restrictions and RAD leads to creative planning by CFSPs. More simple/clear data sharing could improve outputs

IMPROVED FLIGHT PLANNING (2/2)

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Key Flight Planning Challenges continued:

Other flight planning issues mentioned:

- Dispatcher workload - Prediction of payload (affecting the MTOW and aircraft performances) - Various operational issues to deal with (weather below minima, unscheduled maintenance)
- Ambiguity in AIM information
- The need to contact the company in order to update flight plan in case of delays should not be necessary

Other ways FABEC can help with flight planning?

- Support to help standardise and increase training of weather services to publish correct weather forecast.
- Facilitate better coordination between ANSPs
- Implement one portal covering all services offered through portals of FABEC ANSPs (ATMP, CDM@DSNA etc...) at NM level
- Aid implementation of current and forecasted ATFM delays, military activity and weather all graphically represented on the same tactical map.
- Work with flight planners to improve CDO update

Flight planning priorities:

- Overall, most airlines prioritise total cost when planning flights.
- However, some airlines stated that factored into total cost is time and route efficiency.
- A few airlines ranked safety as being the highest flight planning priority
- For some airline's, the priority varies depending on the route.

Airline views on CCO/CDO?

This was the area of the survey with the least responses. However, the feedback that was received was detailed.

- Challenges on behalf of ANSPs to implement CDOs
- Should be recognised that these CCO/CDO concepts apply for smaller airports as well, and work should be extended to all to pursue optimised profiles whenever possible, using new ATIM technologies
- Rules in RAD that avoid CCO and CDO must be reduced (Switzerland!)
- CCO and CDO are a big challenge, especially with Charles De-Gaulle and Orly. Some works are in progress with DSNA
- Optimisation of CCO & CDO is in the flight planning stage – ATC can help by offering as few restrictions as possible
- New aircraft SLS (Satellite Based Landing System) technology, which contributes to further improvement in operational efficiency and reduced fuel consumption, only make sense if FABEC ANSP can support and deliver the right profiles. Also provide Optimum flight level, particularly in France. Provide accurate track mileage and leave descent management to pilot discretion.
- Continue close cooperation with airline operator for procedure design and cockpit<>ATCO communication.
- Adjust PTRs (Profile Tuning Restrictions) and SLAs

Deadline for flight plan update:

- The deadline for submitting a flight plan update varied considerably across the airlines. Some airlines monitor the flight plan even after take-off, whereas the earliest deadline indicated was 10 hours prior to departure.

Summary Per Topic Area

LONG-TERM PRIORITIES

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Capacity: **

This was an issue raised by many airlines in the context of long-term priorities

- **Capacity constraints, especially for some specific city-pairs. The normalisation of operating very near full capacity causes a capacity crisis when additional problems arise, i.e adverse weather events**
- **Capacity improvements required across the network, including flexible allocation for airspace capacity in order to react in due time for flow changes and demand requirements**
- **CTOT allocation**

Single European Sky: *

- **There is no 'Single Sky' in Europe, deliver Single European Sky with a target to obtain a 10% overall fuel reduction in Europe. Merge ATC centers to have one center for Europe**
- **Inability to provide sufficient efficiency and ATC Capacity, as airlines will keep adding more and more flights the challenges we face today are going to add up without a real SES and FRA airspace**

ATC Delay: *

- **Ensure that delay related to air traffic control at congested aerodromes/airspace is reduced (if any). Find ways to improve the ATC usage and make it more efficient even with resources available currently**
- **Resilience to strikes/lack of staff**

Efficiency Gains:

This sub-topic groups together several issues raised by airlines that all relate to efficiency

- **Cross-boarder FRA within entire FABEC airspace and Datalink (FOC) ***
- **Encourage sharing of knowledge – example provided (Recently a person from Flight Operations came to an ATC Class to share experience and informed/trained them about rules and regulations)**
- **Increased cost efficiency**

Flight Communication:

- **More use of CPDLC to avoid radio congestion. (Feedback from interviewing pilots on this issue was that ANSPs should actively suggest the use of CPDLC through ATC when it is available to ensure pilots know it is available) ***
- **Erase callsign similarities**

Other long-term priorities indicated:

- **Environmental footprint reduction - ANSPs should actively commit to support reduction of emissions.**
- **4D –Trajectory operations. Full CCO/CDO, EDTO operations/CDO, CDO**
- **Regulations and weather impact**
- **Flight safety**
- **Access to airports, other than main hubs and difficulties on getting landing slots to main hubs**

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

- The best performing area of FABEC's service delivery is safety
- The worst performing area is capacity, which is also the biggest area of concern for airlines in the long-term
- Many airlines have flight planning concerns relating to RAD restrictions and CFSP
- The impact on ATC capacity of ANSP resourcing is a concern, particularly the resilience of ANSPs to strikes
- MUAC was rated the most favourably by airlines, DSNA was viewed the most negatively (industrial action is likely to have contributed significantly to this)
- Communication frequency with FABEC varies, most airlines would like to communicate more with FABEC if it adds value
- Positive feedback includes good support from Reims ACC, effective collaboration between DSNA and MUAC on flight efficiency and impressive new ATCO training

CONTACTS

Mike Shorthose

mike.shorthose@egis-group.com

Charles Devereux

charles.devereux@egis-group.com

www.egis-group.com