

Heathrow PAX remains low relative to European competitors



Once the busiest airport in Europe, Heathrow is now 10th. Schiphol, Paris and Frankfurt are all recovering at a much quicker pace, for passengers and cargo both

As has been reported recently by Forward Keys, UK passenger numbers are the lowest in Europe relative to 2019, and Heathrow is no exception with passenger numbers 71% down in August versus the same month pre-pandemic. Ever-changing restrictions, expensive and unnecessary testing requirements and lack of a common approach across borders continue to hinder the UK's economic recovery.

August 2021

Terminal Passengers (000s)	Aug 2021	% Change	Jan to Aug 2021	% Change	Sep 2020 to Aug 2021	% Change
Market						
UK	198	120.0	834	-24.3	1,193	-56.3
EU	1,002	19.9	2,873	-53.7	4,715	-69.0
Non-EU Europe	190	4.7	623	-55.6	1,003	-69.1
Africa	86	189.1	526	-38.8	815	-59.8
North America	356	303.4	1,061	-69.5	1,442	-85.2
Latin America	56	482.2	146	-56.5	241	-69.5
Middle East	208	96.9	771	-59.6	1,325	-70.9
Asia / Pacific	137	74.2	759	-68.7	1,250	-79.6
Total	2,232	57.4	7,591	-57.2	11,984	-73.0

The Government's Global Travel Taskforce is set to review the UK's travel regime in the coming weeks. Heathrow airport is urging Ministers to streamline the system with the aim of getting travel levels and the economic activity safely back to pre-pandemic levels, "otherwise the UK will continue to lose trade and face lower levels of foreign tourism, impacting jobs and slowing the UK's economic recovery."

Air Transport Movements			Jan to		Sep 2020	
	Aug 2021	% Change	Aug 2021	% Change	Aug 2021	% Change
Market						
UK	1,765	120.1	9,103	-17.6	13,215	-47.3
EU	8,708	5.6	32,323	-46.2	54,550	-57.4
Non-EU Europe	1,484	6.8	6,413	-49.8	10,574	-60.8
Africa	635	82.5	4,723	-2.8	7,324	-26.1
North America	2,779	43.9	19,090	-25.9	28,024	-47.3
Latin America	381	129.5	1,448	-27.9	2,403	-39.3
Middle East	1,462	50.6	9,721	-14.3	15,016	-31.0
Asia / Pacific	1,790	29.5	13,797	-17.5	21,738	-32.5
Total	19,004	24.7	96,618	-33.2	152,844	-49.2

Supported by major airlines and the wider travel and tourism industry in the UK, Heathrow's proposals are:

- For the Government to remove the amber list and create a safe but simple two-tier system – a green list and red list, retaining hotel quarantine.
- Ministers must recognise the success of the global vaccination programme and move from a country-based approach to a risk-based one, based on individuals' vaccination status.
- Fully vaccinated travellers should not be required to take a test, while those who are not vaccinated should continue to take a pre-departure and arrival test using lateral flow, following up with a PCR test if positive.
- As passenger numbers grow, Border Force must ensure they have adequate resources and processes in place to ensure travellers receive a warm welcome into the UK. Recent scenes of passengers waiting for hours to be processed through the UK border are totally unacceptable. Border Force can and should deliver both a secure UK border and an efficient service for passengers.

Heathrow CEO John Holland-Kaye stated: "The Government has the tools to protect the UK's international competitiveness which will boost the economic recovery and achieve its Global Britain ambitions. If Ministers fail to take this opportunity to streamline the travel rules then the UK will fall further behind as trade and tourists will increasingly by-pass the UK."