

Flights taking off again

Airlines UK presentation to TTI Spring Conference
March 2022



With Covid travel restrictions withdrawn, a meaningful recovery is now underway

From Friday 18th March all remaining Covid-19 travel restrictions were removed.

EasyJet chief still expecting full capacity recovery in summer 2022

Ryanair sees 'dramatic recovery' in bookings over past two weeks

Easing of pandemic curbs has boosted interest in travel

© Wed, Feb 9, 2022, 17:29 Updated: Wed, Feb 9, 2022, 20:14



Ryanair's aircraft are flying about 75% full and could reach 90% of capacity by the peak of the summer high season, said chief executive Michael O'Leary. Photograph: Brian Lawless/PA Wire

British Airways owner IAG closes losses as it heads towards recovery

FRIDAY 25 FEBRUARY 2022 8:07 AM

CHARLIE CONCHIE



British Airways owner International Airlines Group (IAG) said a "recovery is underway" today as it closed losses for the year and reported a rise in passengers.

Jet2.com and Jet2holidays report bookings increase of 150% after travel restrictions are eased

Jet2holidays

06th January 2022 • Posted in [Announcements](#)

Jet2holidays, the UK's leading tour operator to many leisure destinations across Europe, the Mediterranean and Canary Islands, together with leisure airline, **Jet2.com**, have reported a surge in bookings following the easing of travel restrictions by the UK Government.



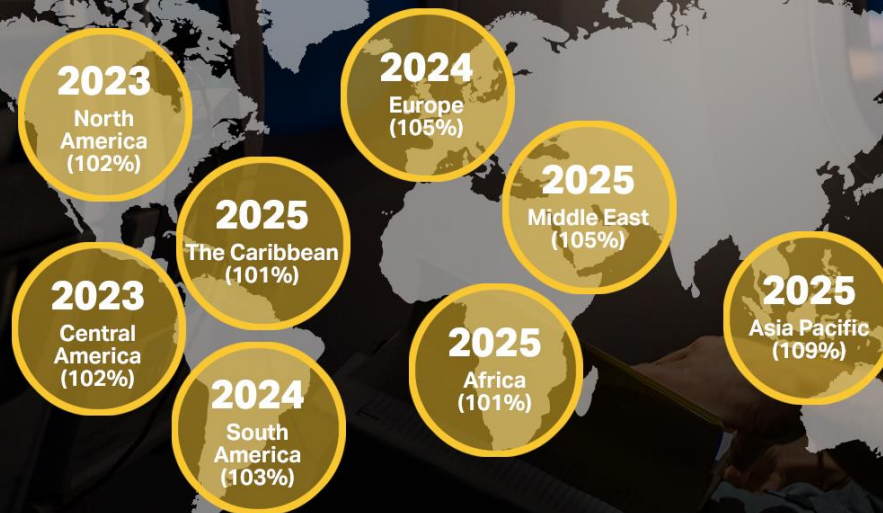
Virgin Atlantic resumes full range of US routes and adds key new services

Airline will add frequencies and reintroduce services to key US gateways, from April, with transatlantic bookings increasing

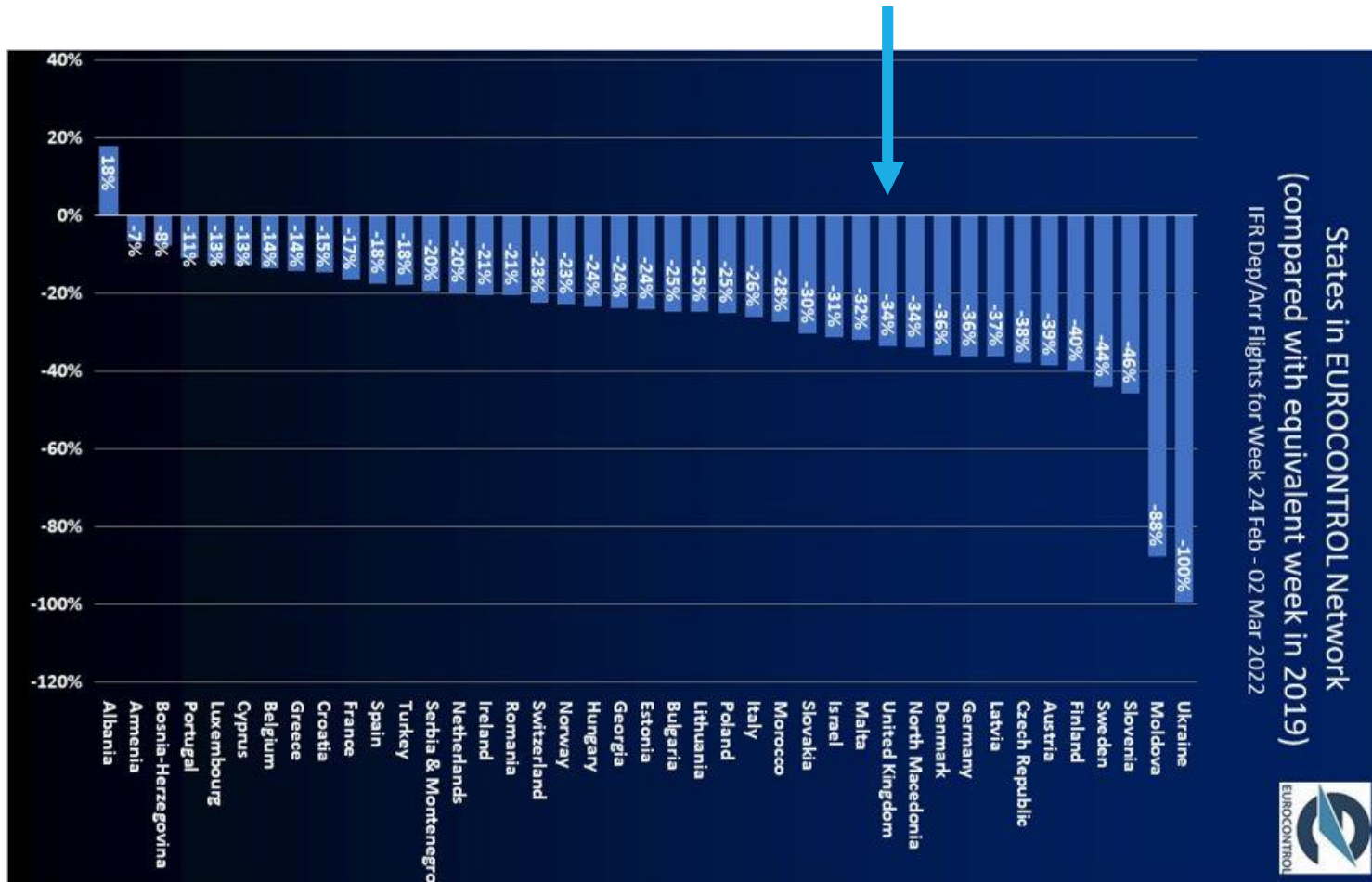
However - full recovery not expected until 2024

**Not all markets or market sectors
will recover at the same pace.**

Full recovery* to 2019 levels:



The UK cannot be complacent – our recovery has been one of the weakest in Europe



Now is the time to support the recovery and the future of our sector



- The removal last week of the final Covid-19 travel restrictions, including measures for the unvaccinated and the Passenger Locator Form (see right), was a major step.
- Future variants of concern should be managed by a 'toolkit' using a targeted Red List – with no return to hotel quarantine, or universal testing (see next slide).
- The Government's imminent 'Strategic Framework' to support the recovery of our sector must focus on the essentials, and aim to keep the UK a competitive, international travel hub.

Passenger Locator Form

STATUS: **AMBER**

VACCINE STATUS: NO/NOT DECLARED



The code contains personal information. By sharing the code, you will be sharing your passenger locator form data.

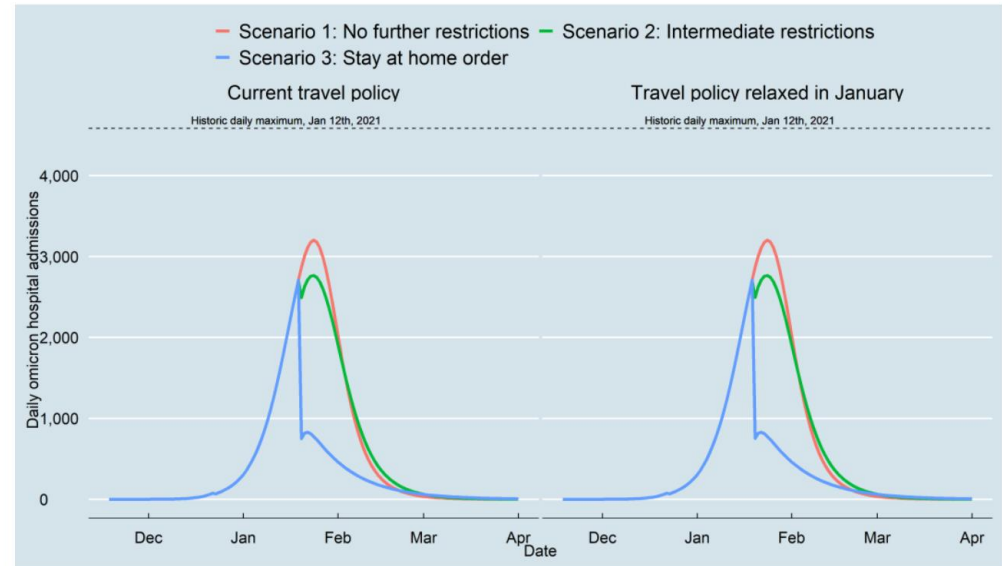
Summary

Name	[REDACTED]
Passport number	[REDACTED]
Which company are you travelling with?	KLM NV (ROYAL DUTCH AIRLINES)
What is the flight number, train service or ship name that you will arrive on?	KL0987
Reference	[REDACTED]
Status	AMB
What are your travel plans?	Stay in the UK
Are you required to self-isolate when you arrive in the UK?	I need to self-isolate when I arrive in the UK, unless I was fully vaccinated in the UK or I have only been in green list countries or islands
Are you required to book a COVID-19 test package for when you arrive in the UK?	Yes
Covid test booking reference	ONCOL [REDACTED]
Test to release provider	n/a
Arrival location	London City (LCY)
Date of arrival	30 July 2021 09:30 British Summer Time (BST)
Date of submission	28 July 2021 12:45 British Summer Time (BST)

No material health benefits from the travel restrictions

- Manchester Airports Group & Airlines UK commissioned analysis from Oxera and Edge Health looking at the value of the Government's current travel measures.
- This found continuing with travel restrictions through January would make no material contribution to reducing the spread of omicron in the UK (see graph right).

Figure 2.3 Trajectory of future Omicron hospitalisations in the UK, based on different domestic policies



Source: Edge Health and Oxera.

The figure above demonstrates that across all domestic restriction scenarios, there is no benefit to maintaining the current travel policy indefinitely compared to removing travel restrictions in January.

Sustainability is the generational challenge

A UK Sustainable Aviation Fuel industry: creating jobs and enabling a green recovery across the UK



UK Potential

+ £929m GVA annually

+6,500 jobs

3.6million tonnes of CO₂ saved per year

Research shows the potential for 14 Sustainable Aviation Fuel (SAF) plants across 7 locations in the UK. These have the existing infrastructure and skills to support a range of innovative technologies converting wastes and residues into SAF and other sustainable products. Government support is critical to realising this levelling up opportunity to create new jobs and green economic growth at SAF plants and feedstock locations.

North West

£92-219m

+640-1,520

The local refinery already produces over 16% of the UK's transport fuels.

South Wales

£133-146m

+920-1,020

The site of a UK refinery and the location where Lanzatech is developing plans for a commercial alcohol-to-jet SAF plant at Port Talbot.

Phase 1 feedstocks for SAF

Existing production infrastructure

Phase 2 feedstocks for SAF

Waste that cannot be recycled (commercial and domestic)

Site Refinery

Carbon capture cluster

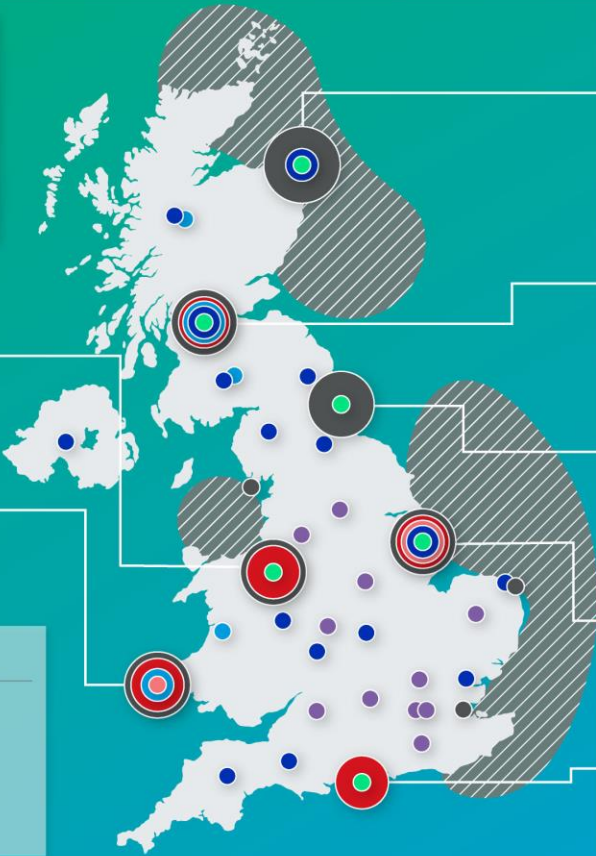
Forestry Residues

Potential Green H₂ Cluster

Renewable offshore wind

Agricultural Residues

Carbon waste gases



St Fergus

£46m-£133m

+320-920

Already identified as an important site for low carbon energy, supporting Scotland's Net Zero ambitions with blue and green hydrogen and carbon capture capability.

Grangemouth

£107-199m

+740-1,390

Home of the UK's only refinery with a hydrocracker and the only refinery in Scotland.

Teesside

£62m-£162m

+430-1,130

Already an important industrial cluster for the UK and has access to blue and green hydrogen and carbon capture capability.

Humber

£133m-£219m

+920-1,520

The Humber is already home to two UK refineries as well as being the planned site for the Altalto Immingham waste-to-jet SAF plant which is expected to be operational from 2025.

Hampshire

£66m-£157m

+460-1,090

The refinery is currently responsible for 20% of the UK refinery capacity.