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# Travel: The Long Road to Recovery Must Start Now

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# Contents

|   |    |
|---|----|
| Overview                                  | 3  |
| Public Health Comes First                 | 5  |
| No Delays: Protecting the Travel Industry | 11 |
| What We Must Do. Now.                     | 13 |

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## Overview

Planes grounded, hotels closed, cruise ships docked. It's been a long pandemic for the travel industry, and for those wanting to go on holiday or see family and friends abroad. We've already seen job losses and debt incurred by companies big and small in the sector, while trips have been put on hold or cancelled for customers. These disruptions are the direct effects of a global pandemic that doesn't respect borders. Indirectly, there is a huge supply chain that relies on a functioning – and ideally flourishing – travel sector.

Protecting our travel sector is not an ignoble aim. At a point in history when our country is redefining its place in the world, a truly global Britain needs to be on the move. And it can be. As this paper sets out, prohibitive restrictions, including a ten-day quarantine period for anyone returning from a country designated as “amber” by the UK government, could and should be removed for people who are fully vaccinated – a status shared by six out of ten people and growing every day.<sup>1</sup> It is welcome news that the government is *considering* this, but really it must happen at least by or on 19 July.

Every week matters. And every week that passes costs the sector millions of pounds, with the World Travel and Tourism Council estimating restrictions will cost the UK at least £639 million per day if they remain in place throughout July.<sup>2</sup> We are now entering the summer season, which is critical to the travel sector in any given year let alone one that follows a year of pandemic-related closures and restrictions. The success of the UK's vaccination programme presents an opportunity to get things moving again in a safe and low-risk way, saving potentially hundreds of thousands of jobs while allowing visits to family abroad (and holidays) for fully vaccinated Brits.

Instead there is hesitancy. This is understandable, given the threat of new variants and fear of rising transmission. It is important to decouple these two risks:

First, new variants. These should be dealt with by designating a country as “red” and dissuading travel to and from these countries via hotel quarantines and rigorous travel testing. A red list is an important public-health tool, and of the variants of concern that have arrived in the UK, all came from countries currently listed as red.

Second, is the risk of transmission and therefore risk of rising hospitalisations and death. Vaccines have proved incredibly effective and have had a dramatic impact on cases – even in the UK where the most prevalent variant is the highly transmissible Delta variant. Analysis of research from Public Health England (PHE) shows that full vaccination is estimated to be between 70 and 90 per cent effective against infection<sup>3</sup>, and with about 60 per cent of the UK's population fully vaccinated,<sup>4</sup> the risk of reopening borders is much lower now than it was when they reopened last summer.

Reopening travel by 19 July for the fully vaccinated would be to exercise a broader, important principle in the handling of the pandemic: we must calculate risk on a consistent basis. Compared to the situation in Portugal when it was added to the green list in May, or the rules in place when borders reopened last summer, the risk of fully vaccinated individuals contracting or transmitting the virus – even with the Delta variant – is lower.

Ultimately, this is about learning to live with Covid – not just through the summer holiday season but also to a potential winter wave. Vaccinations, supported by a robust and secure proof of vaccination status, will be a far more incisive tool for managing the risk of transmission than blunt and expensive quarantine and testing measures.

## Public Health Comes First

Reworking the current travel system will neither jeopardise the progress the UK has made with the vaccination programme nor substantially increase cases or pressure on the NHS. Vaccines reduce the likelihood of infection and limit transmission, which – when coupled with the already low likelihood of transmission on an aircraft<sup>5</sup> – minimises the risk a fully vaccinated individual poses when travelling.

The aim of vaccinations is to prevent individuals from becoming severely ill and dying, and the Covid-19 vaccines currently approved and in use in the UK have proved very successful on this front. Even against the Delta variant, which now makes up the vast majority of cases in the UK, in fully vaccinated individuals the vaccines are more than 80 per cent effective.<sup>6</sup> Just 5 per cent of Delta variant cases have been reported in the fully vaccinated population in the UK.<sup>7</sup> While PHE is conducting further research on the level of protection the vaccines provide against mortality from the Delta variant, this is expected to be high (as it is with other variants).<sup>8</sup>

Data from the ZOE COVID Symptom Study, a not-for-profit initiative that has 4 million contributors globally and is the world's largest ongoing study of Covid-19, also shows how vaccines reduce the risk of infection. According to ZOE, the current risk of new daily infections is as follows<sup>9</sup>

- 1 in 2,908 in the unvaccinated
- 1 in 7,091 in the partially vaccinated (one dose)
- 1 in 22,455 in the fully vaccinated (two doses)

It is also becoming increasingly clear that vaccinated individuals are less likely to catch and transmit the virus. In April, PHE published the results of a large-scale study of Covid-19 transmission involving more than 365,000 households that consisted of both vaccinated and unvaccinated individuals.

The data found that being vaccinated with either the Pfizer or AstraZeneca vaccine (the only two vaccines in widespread use in the UK at the time), reduced the likelihood of onward virus transmission by 40 to 60 per cent. This means that if someone became infected after being vaccinated, they were only around half as likely to pass their infection on to others compared to infected unvaccinated individuals.<sup>10</sup>

An analysis of the UK government's current traffic-light system for travel by Robert Boyle of Gridpoint Consulting puts into context just how low the risk posed by vaccinated travellers is when compared to the case rates used to determine travel-safe countries last summer. Using the estimated factors for the level of protection against infection and additional maths, Boyle estimates the likely average case rate by vaccination status as follows:<sup>11</sup>

**Figure 1 – Breakdown of EU case rates (weekly cases per 100,000) by vaccination status**

| <b>Vaccination Status</b> | <b>Percentage of Population</b> | <b>Case Rate</b> |
|---------------------------|---------------------------------|------------------|
| Unvaccinated              | 55.3%                           | 41.5             |
| Single dose               | 20.1%                           | 24.9             |
| Two doses                 | 24.7%                           | 12.4             |
| Weighted average          | 100%                            | 31.0             |

Source: <https://www.gridpoint.consulting/blog/travel-freedom-for-the-double-jabbed>

Based on the analysis above, allowing fully vaccinated individuals to travel to the UK from the EU without quarantining would be the equivalent risk to allowing someone from a country with a case rate of 12.4 weekly cases per 100,000. This would be far below the rate of 32.7 weekly cases per 100,000 in Portugal in May, when the country was deemed low-risk enough to be designated as green on 17 May. The 12.4 case rate is even lower than the 20 per 100,000 rate that applied to travel destinations last summer. For additional reference, the EU announced in May this year that for restrictions on non-essential travel to be lifted for a given third country, the number of Covid-19 cases per 100,000 inhabitants over 14 days would be raised from 25 to 75. <sup>12</sup>

**Figure 2 – Breakdown of EU case rates (weekly cases per 100,000) by vaccination status adjusted for transmission risk (TR)**

| Vaccination Status | Percentage of Population | Case Rate | TR Adjusted |
|--------------------|--------------------------|-----------|-------------|
| Unvaccinated       | 55.3%                    | 41.5      | 41.5        |
| Single dose        | 20.1%                    | 24.9      | 14.9        |
| Two doses          | 24.7%                    | 12.4      | 7.5         |
| Weighted average   | 100%                     | 31.0      | 27.8        |

Source: <https://www.gridpoint.consulting/blog/travel-freedom-for-the-double-jabbed>

The figures above indicate that a policy of waiving quarantine for fully vaccinated travellers arriving from the EU would be equivalent to travellers arriving from a country with a case rate of 7.5 – this poses just 37.5 per cent of the risk that last summer’s 20 per 100,000 threshold posed.<sup>13</sup>

Although there has been an increase in cases across the UK recently, the rise is primarily among younger age groups, a large proportion of which have not been vaccinated. From 1 February to 14 June 2021 there were a little over 60,000 Delta variant cases recorded in the UK. Of the 53,163 cases that were able to be compared to vaccine status, PHE reported that 35,521 cases were among the unvaccinated and just 4,087 cases were reported among fully vaccinated individuals.<sup>14</sup>

Vaccination also makes a difference if someone becomes infected. For example, PHE data as of 14 June found that of the 806 people that had been admitted to hospital with the Delta variant, 527 people were unvaccinated and only 84 had received both doses.<sup>15</sup> Even with the recent increase in Delta variant cases, it holds true that the fully vaccinated pose less of a risk to public health, as the vast majority of people catching the virus and subsequently being admitted to hospital have been unvaccinated or have had underlying conditions.

According to the Office for National Statistics, Covid-19 positivity rates were the lowest in older age groups, but hospital admission rates and deaths were highest in those aged 85 and older – most likely due to the increased likelihood of underlying conditions. Positivity rates were highest among young people, the group that has the lowest vaccination coverage due to the fact that vaccination appointments were only recently extended to include the youngest eligible age groups.<sup>16</sup> Additionally, NHS leaders have said that those who die after being fully vaccinated are also suffering from "profound co-morbidities".<sup>17</sup>

As this section sets out, lifting some restrictions, especially quarantine, for fully vaccinated travellers arriving from green- and amber-list countries is not at odds with the need to keep public health a top priority. It would, however, signal a catchup with our neighbours, as many countries around the world have already granted additional freedoms to fully vaccinated travellers.

### Catching Up With Other Countries

The UK would not be the first country to allow fully vaccinated travellers to be exempt from quarantine. In fact, given the pace of the UK's vaccine rollout, the UK has fallen behind other countries in updating travel restrictions to account for the efficacy of vaccines. Many countries with similar vaccine uptake and case rates have already removed burdensome quarantine measures for vaccinated travellers.

**Figure 3 – Countries that have updated the rules for vaccinated travellers**

| <b>Country</b> | <b>Exemptions for fully vaccinated travellers</b>             |
|----------------|---|
| <u>Spain</u>   | No need for pre-arrival test and no quarantine                |
| <u>France</u>  | Pre-arrival PCR test required; no quarantine required         |
| <u>Ireland</u> | No need for pre-arrival test and no quarantine (from 19 July) |



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Israel Pre-arrival PCR test required; no quarantine required (from 1 July)

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Poland Pre-arrival PCR test required; no quarantine required

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Canada Pre-arrival PCR test required; no need for quarantine (from 5 July)

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Greece Pre-arrival PCR test required; no need for quarantine

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Seychelles Pre-arrival PCR test required; no need for quarantine

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Bahrain No need for pre-arrival test and no quarantine

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Germany Pre-arrival PCR test required; no need for quarantine

Figure 3 (above) shows that removing quarantine and adjusting other requirements is happening around the world. The United States has made it clear that fully vaccinated individuals will not be subject to quarantine – something that could become central to the new post-Covid UK-US Atlantic Charter, signed by US President Joe Biden and UK Prime Minister Boris Johnson following the G7 Summit, and the subsequent travel taskforce that looks to open up travel between the two countries. And within the EU, plans for a vaccine passport are in full swing.<sup>18</sup>

The EU, US and many other countries have recognised that successful vaccine rollout programmes create opportunities to safely reduce restrictions and that widespread vaccination renders quarantine redundant in many situations. Given the success of the NHS vaccine rollout programme, the UK has been in a position to lead on this front. However, by retaining the costly and burdensome quarantine system, the UK risks falling behind our closest trading partners as they adapt and update their rules for

international travel to reflect the efficacy of the vaccines. By reopening travel for the fully vaccinated, the UK can demonstrate it is the agile, problem-solving nation that is central to the government's Global Britain ambitions.

Critics may see this plan as potentially unfair for those who have yet to be fully vaccinated, but these concerns can be addressed. First, there should be exceptions for anyone who cannot receive a vaccine for health reasons. Second, these equity concerns make it doubly important that testing prices are reduced in tandem, helping not only those who cannot receive a vaccine, but also families travelling with small children. In addition, the UK must continue to support local and community-based initiatives that are working to overcome misinformation and distrust of the vaccines in religious or ethnic-minority communities with relatively low vaccination rates.<sup>19</sup> Ultimately though, this is a plan for the entire United Kingdom, a plan that reflects the high degree of compliance with restrictions and participation in the excellent vaccine rollout.

## No Delays: Protecting the Travel Industry

Continuing through the summer with the travel system operating in its current state will impact more than just the people who would like to book a holiday. If reopening is delayed, even until August, the UK's travel industry will face long-term complications that could damage the UK's aviation industry for years to come.

A report from March 2021 estimated that the cost of delaying reopening international travel until September could equate to around £55.7 billion in lost trade and £3 billion in tourism GDP and put around 574,000 jobs at risk.<sup>20</sup>

The toll of the previous 15 months of continuous and changing travel restrictions has forced travel-sector companies to lay off thousands of employees and take on large sums of debt.<sup>21</sup> Prior to the pandemic, the UK's aviation industry was the third largest in the world, behind the US and China.<sup>22</sup> Now, with larger domestic markets steady recovery in the US and China, and EU developments on a travel pass feeding a potential summer surge that the UK has not yet seen, the UK is at risk of falling behind.<sup>23</sup>

Although travel has technically been "reopened" via the green list, this has not been enough to substantially increase demand for travel. According to the chief executive of the travel association ABTA, Mark Tanzer, green-list destinations account for less than 0.5 per cent of UK outbound tourism.<sup>24</sup> Quarantine for UK travel has reduced demand to less than 20 per cent of pre-Covid levels and is unsustainable – without relaxing restrictions on passengers, the UK will remain permanently lagging behind the EU and US.<sup>25</sup>

Take for example London's Heathrow Airport, the UK's largest, which has seen a significant drop in passenger numbers since the pandemic began.

In late April, Heathrow revised its 2021 traffic outlook from the December 2020 forecast of 37.1 million passengers to a range of 13 million to 36 million passengers. Since then, Heathrow has had to further update the forecast to factor in the ongoing political caution around border controls and the expected gradual addition of countries to the UK government's green list over the rest of the year.

The updated base case is that 21.5 million passengers are forecasted to travel through Heathrow in 2021, representing a 2.7 per cent decline compared to 2020 but a dramatic 73.4 per cent decline from 2019. The 15.6 million reduction in passengers compared to the December 2020 guidance reflects the impact of five months of significant travel restrictions and cautious gradual reopening now expected during the months ahead.

Transatlantic routes accounted for around 15 per cent of Rolls-Royce's widebody engine flight hours (EFH) before the pandemic in 2019. In 2020, Rolls-Royce's global widebody EFHs were 43 per cent of the 2019 level and they have remained low, with around 40 per cent of 2019 levels in the first four months of 2021. Intercontinental routes, such as between the US and the UK, were particularly impacted with very low levels of activity.

Challenges aren't limited to the aviation sector. The cruise sector is worth £10 billion annually to the UK economy. At the moment, cruises out of the UK are only able to operate at 50 per cent capacity, and the Foreign, Commonwealth & Development Office still advises against international cruise travel. However, as other countries are allowing international cruise travel to go ahead, the UK cruise sector is losing out every day.

In January, Saga Cruises – the only UK-flagged, UK-owned cruise operator – announced that it would require all passengers to be fully vaccinated in order to come aboard. On top of that, all Saga Cruise employees, crew members and entertainers on the ships are fully vaccinated. Each ship also has Covid-19 protocols in place, with Lloyd's Register providing accreditation.

Yet Saga Cruises is still subject to the same restrictions and guidelines as cruise lines without such rigorous vaccination policies. Because other countries have allowed international cruises to go ahead, UK-based cruise companies are losing out to competitors overseas and UK cruise-goers must look elsewhere to make travel plans.

The impact on the travel sector is huge and unprecedented, and the preceding paragraphs offer only a mere glimpse of the untold damage caused to-date – and which is being exacerbated every day that travel remains closed. Reopening for the fully vaccinated is critical. It is not a silver bullet or the entire solution, but rather marks the beginning of the long road to recovery. The sooner we start that journey, the better.

## What We Must Do Now.

Reopening travel has always been about managing risk, and it need not become a political battleground. The key to the safe reopening of our borders does not require further tinkering with a traffic-light system. Rather, reopening travel simply requires the UK recognising the significantly reduced risk of full vaccination on an individual's likelihood of being infected with or transmitting Covid-19. This is true even with the more transmissible Delta variant, where rising cases are largely among the unvaccinated.

We make the following recommendations:

1. **By 19 July, remove the quarantine requirement for fully vaccinated passengers** travelling from amber-list countries. Passengers from an amber-list or green-list country who have been fully vaccinated – and can prove it – should be allowed to travel freely and be free from burdensome and costly quarantine restrictions when they return to the UK or arrive in the UK to invest in our businesses, buy our products or spend money in our shops and on our tourist attractions.
2. **Replace expensive PCR tests with rapid lateral-flow tests upon arrival to the UK.** Testing will continue to be part of travel as it remains an important control and is key to identifying new variants, but the reality is that we do not need to use the expensive lab-based tests that take days to deliver a result and which can cost a typical family of four up to £600 per trip. Instead, rapid lateral-flow tests – the type of tests that are now commonplace in the UK – should be adopted. Costing a fraction of PCR tests, rapid lateral-flow tests can identify if someone is infectious and keep them out of circulation. Any positives from returning travellers should be immediately retested using a PCR test that can confirm the test result and, if positive, identify the variant that caused infection.
3. **Red status should apply to any country that is identified as having variants of concern.** It is an important public-health tool, and it is vital that travel to and from red countries is restricted.

The logic for providing safe exemptions for fully vaccinated passengers, as well as replacing expensive testing with reliable and effective rapid testing, is simple – and the process achievable. The government should implement these immediately at the next “checkpoint” of its international travel framework. If we can prove credibly that we are not infectious, there is no good reason why we cannot travel. The ability to upload, demonstrate and verify vaccination status (utilising the NHS app that has been so successful <sup>26</sup>) will be essential for this, allowing travellers to prove their status through a QR code – one that preserves privacy and protects data.

This new regime can salvage travel this summer, opening the valve on the pent-up demand we saw earlier in the year. In May, when Gibraltar, Iceland and – briefly – Portugal appeared on the green list, bookings soared to nearly 50 per cent higher than pre-pandemic levels. For those who have loved ones in the US, Europe and elsewhere, this opportunity to travel isn't just about recreational holidays but a chance to see

family for the first time in more than a year. This is the better way forward – for the travel sector and for the public – and one that the UK deserves.

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## Footnotes

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