



COVID-19

UK Political Analysis

By Tim Hames, Senior Adviser | 31st July, 2020



Travel Trouble. The summer holiday season and controlling the virus.

It has been a difficult week for ministers in their attempt to keep public opinion on side in lifting the lockdown whilst controlling the virus. The decision made last Saturday to reimpose quarantine on those returning from Spain was made with very short notice, involved considerable inconvenience both for those who were in that country already and others who had intended to visit it, and prompted a diplomatic dispute with the administration in Madrid. It raised the possibility that the whole of the summer holiday season could be subject to moves of this kind, thereby dealing a body blow to a sector that has already suffered more than most during the coronavirus crisis. There are also serious practical issues in attempting to enforce a 14-day quarantine on so many people. To a considerable degree, the risk of at least some local second spikes in infection rates is no longer as firmly in the hands of Whitehall as ministers and officials would like it to be.

EXECUTIVE SUMMARY

- Overseas travel was always likely to be one of the most challenging aspects of lifting the lockdown without an unacceptable rise in the overall R number.
- There were highly specific factors relating to Spain which explain why this action was taken in the manner that it was.

- The fundamental concern at work was less the state of public health measures in Spain (which are arguably more robust than in the UK) than the risk of relatively fit and disproportionately asymptomatic British residents abroad passing on the virus while in Spain to their older and more vulnerable counterparts.
- With the possible exception of Portugal, there are no other countries in Europe which attract large numbers of UK tourists where the same conditions apply.
- As such, bar a sharp resurgence of the virus across the continent, it is unlikely that there will be multiple episodes involving several countries of this kind.

The British like to travel. The holiday season is considered a fundamental right. A very large number of people choose to remain in the UK, but the total number who take a trip abroad either for leisure or business has been increasing steadily. According to the Office of National Statistics (ONS), in 2019 there were 72.6 million overseas trips taken; up from 56.5 million in 2012. That is more trips than the estimated population of the UK (68,870,000). The discrepancy is explained by the fact that some people are serial travellers – in fact, in a typical year, only about two-thirds of adults in the UK have had a foreign holiday in the previous three years. There is a strong bias in the overall numbers around age, with those who are in their late teens and early twenties far more likely to travel abroad than those who have passed beyond the age of eighty. These groups often choose different locations for their excursion. The pattern of UK tourism abroad is a quite complex one.

There are, however, certainly some distinctive features to our travel. The table below is the top twelve countries overseas as measured by the number of UK visitors (not the total number of visits).

Table One. Top Twelve Destinations by UK Visitors (2019).

Spain	15.62 million
France	8.56 million
Italy	4.16 million
USA	3.47 million
Ireland	3.42 million
Portugal	2.87 million
Germany	2.82 million

The Netherlands	2.72 million
Poland	2.67 million
Greece	2.35 million
Turkey	2.29 million
Belgium	2.20 million

In assessing this table there are a number of further points that we should take into consideration. The first, to repeat the above, is that this a measure of individual visitors and not overall visits. In a measure of overall visits, Spain would come in even higher (at 18 million). The second is that business and leisure are bundled together, though as a crude rule the proportion of all trips from the UK that are purely for business tends to be higher for the USA and nations in northern Europe than it is for southern Europe.

There are also a couple of anomalies, in the sense of nations who score highly on this list for reasons other than the classic personal holiday. Ireland ranks fifth, but that is because of cross-border traffic with the North and the presence of 332,000 Irish citizens in the UK who will move back and forth to see family and friends; it is not the fifth highest preference for those who are travelling primarily for a recreational break. The other rogue in here is Poland (ninth on the list). This is overwhelmingly because there are an estimated 902,000 Polish citizens in the UK and they too tend to fly home on a regular basis. This is a large figure but is actually down by 100,000 since the Brexit referendum. This might have been due to uncertainty as to whether they would be allowed to stay after the UK had left the EU (and whether or not they would still feel welcome here) or the more economic effect of the sharp devaluation of sterling in 2016-2017 (many a Polish builder appears to have decided they would be better off plying their trade in Germany instead of the UK). In any case, while visits to Krakow are rising, it is not valid to assert that Poland is the ninth most popular location for British nationals to holiday.

The most striking feature of the list, beyond its quirks, is that Spain is so firmly at the top of it. It has more visitors than France and Italy combined and almost exceeds France, Italy and the United States accumulated. This factor alone, in the context of seeking to control the virus, meant that it would be watched like a hawk within Whitehall. Travel of any kind runs the risk of the reproduction number increasing. Travel abroad to a nation where there are signs of even localised second spikes is an area of exceptional concern.

There are huge economic implications which flow from UK overseas tourism. In 2019 we spent an estimated £48 billion in our travels, an increase from £32.4 billion in 2012. For context, this is slightly more than the UK Government spent last year on national defence. Table Two sets out where it is spent and how much expenditure is involved. Note that there are some subtle differences between this information and that which was outlined in Table One.

Table Two. Top Twelve destinations by UK visitor expenditure (2016).

Spain	£7.94 billion
USA	£4.80 billion
France	£3.65 billion
Italy	£2.36 billion
Greece	£1.62 billion
Portugal	£1.58 billion
Ireland	£1.21 billion
Germany	£1.04 billion
The Netherlands	£0.97 billion
UAE	£0.91 billion
Poland	£0.81 billion
Austria	£0.59 billion

Once again Spain is comfortably at the top of the league, but the USA jumps over France and Italy (largely because visitors there are likely to stay longer than the average for all UK holidays abroad – which was 9.8 days in 2019 – and they tend to spend more in the US than the overall average sum of £661 in 2019). Greece and Portugal also move up in status. To reinforce the significance of UK tourism to Spain and hence the economic and political sensitivity of the reintroduction of quarantine on those returning from there, Table Three sets out the top twelve nations by visits (not visitors) to Spain last year.

Table Three. Top Twelve nations by visits to Spain (2019).

United Kingdom	18.08 million
Germany	11.18 million
France	11.16 million

Nordics (combined)	5.55 million
Italy	4.54 million
The Netherlands	3.70 million
USA	3.57 million
Belgium	3.54 million
Portugal	2.44 million
Ireland	2.18 million
Switzerland	1.82 million
Russia	1.51 million

It is now clear why the Spanish Prime Minister was so publicly aggrieved by the decision that the UK Government made last week. If large numbers of UK tourists who were planning to come to Spain in August now do not do so for worry that they might either increase their chances of catching coronavirus or have to quarantine on their return, then the impact on the Spanish tourism industry will be enormous. The unemployment rate would surge regardless of what happened to the infection rate. In that case, why did ministers in Whitehall determine that they had to take a course of action which would win them few friends among their own citizens and do such damage to relations with Spain too?

The two critical elements that assist in explaining this are to assess how hard a country was hit by the virus during its first wave and the most recent data available on the 14-day cumulative number of COVID-19 cases per 100,000 of the population. These will be outlined in Table Four and then Table Five. Both are from this week.

Table Four: Estimated COVID-19 deaths of top 12 destinations (per 100,000 people).

Belgium	85.73
Spain	60.63
Italy	58.15
France	45.05
USA	44.91
Ireland	35.97
The Netherlands	35.53
Portugal	16.70
Germany	10.98
Turkey	6.63
Poland	4.38

Greece	1.87
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If the United Kingdom were on this list it would rank second, at 68.63. Of the countries that are popular with British tourists, Spain and Italy were hit the hardest in the opening wave of the virus; France somewhat less so, and Portugal and Germany vastly less so. Greece and Turkey escaped comparatively lightly. Conversely, there has been a lot of coronavirus in Spain, but that would not matter much if one were convinced that it was now all but eradicated. The data in Table Five, which has moved strongly against Spain in the course of July, suggests that one cannot assume that the virus is now a thing of the past in that country.

Table Five: 14-day cumulative number of COVID-19 cases per 100,000 people (July 28).

Spain	47.2
Portugal	33.9
Belgium	29.1
USA	19.7
France	16.0
Poland	13.7
The Netherlands	11.9
Germany	8.8
Ireland	5.2
Italy	5.1
Turkey	5.1
Greece	3.7

These are stark numbers. If the UK were on the list it would come in at a figure of 15.0, all but identical to France and two-thirds lower than that of Spain. The virus began to take hold in the UK back in February largely because of sizeable levels of returning citizens who had been on skiing holidays in Italy, and by the time the threat was realised it was too late to quarantine them. Lockdown soon became an inevitability. It would be a very brave (indeed reckless) minister who was prepared to take the risk of history repeating itself with a second surge courtesy of millions (not tens of thousands as had been the figure five months or so earlier) of people coming back from a country that, although wildly different to the figures at the peak of the pandemic, was almost top of the table in terms of a short-run issue with the resurgence of the virus. Once Whitehall

had seen the numbers in Spain start to rise, they had to make a decision and had to do so very swiftly. Whether it will work depends on the level of compliance with quarantine.

None of this has impressed Madrid very much. The argument made by the authorities in Spain is that they are far more stringent on matters such as facemasks than in the UK and that the vast majority of the new incidents are amongst the young, with very few of them having to be sent to hospital (let alone dying). Furthermore, the clear majority of the instances are in Aragon, then Catalonia, and not Andalucía, the Balearic Islands or the Canary Islands where the British are most likely to make an appearance. A national ban on travel to Spain without quarantine on return to the UK seems an overreaction.

Except that, with all sympathy to the Spanish tourism sector, it is not excessive. A facemask is not a suit of armour. Young people can transmit the virus to older persons. The residents of Aragon (one of the wealthiest regions in Spain) also take holidays, and many of them will choose to do so in Spain, including visits to Andalucía, the Balearic Islands and the Canary Islands. The risk of transmission to British tourists is a real one. A strategy based only on quarantine being opposed on regional “hotspots” is flawed.

The case against Spain was thus a strong one. It is by far the largest market for UK tourists. It had been struck heavily during the first wave. There had been a recent spike in cases. That this had been in Aragon was immaterial, because many of those who may catch the virus will be asymptomatic and through internal travel in Spain could spread it.

There are a number of other factors specific to UK tourism in Spain that do not apply to other locations, or do not entail the same degree of risk in other locations.

The first is that a very large proportion of British tourists in Spain stay in very busy locations: sitting on beaches, drinking in bars, eating in restaurants, all of which will potentially be crowded. They will have a very large number of ‘contact points’ in the vernacular of the coronavirus crisis. This is not like undertaking a walking holiday in Bavaria. The level of exposure, even if the people concerned are young, is very high.

The second is where UK visitors to Spain choose to rest their heads and how likely they are to move around. The vast majority of British tourists in Spain stay in hotels. It is, therefore, probable that this will increase their number of contact points further. This is

less true for Portugal, where a higher percentage of people rent villas (although despite its best efforts it was not on the July 3rd list of approved countries). The hotel factor is true for Greece and Turkey, but those countries were not struck especially hard during the first wave of the virus and are not currently experiencing a second shock. Unless there is hard evidence that they are on the verge of doing so, then insisting upon a quarantine for anyone who returns from a Greek island or a comparatively remote coastal resort in Turkey would appear to be an exaggerated response. France and Italy are also different to Spain in that a much larger proportion of UK tourists there rent houses or villas. This lowers the number of contact points that they might have by a considerable margin.

Location also impacts on mobility. Those staying in a hotel are likely to move around on foot and hence, though perhaps only theoretically, come across a lot of other people. Those in properties in the Dordogne or in Tuscany will probably travel about by car, which limits their interactions with other people. Being by a lake in rural Germany is better still.

The final and absolutely essential aspect to UK tourism in Spain is the high chance of intergenerational intermingling between those visitors. Spain has been a popular holiday destination for the British since the 1960s. Those who first went there when they were young are often still inclined to return there on holiday now when they are much older. There is a substantial expatriate community (the official total is about 250,000, but this would exclude those who have a home in Spain yet still spend the majority of their time in the UK) which (in normal times) would periodically travel back to the United Kingdom. This is not as true for Greece and Turkey, or Portugal (if it had been on the schedule of approved countries). It does not apply to the same extent to France or Italy either.

It is entirely conceivable that young people could fly to Spain with the virus whilst asymptomatic or with such mild symptoms that they think they have a cold, or acquire the virus in Spain via another young person (be they British, Spanish or another nationality), and then pass it on to older and more vulnerable people (once again British, Spanish or another nationality). Because the standard period of time between infection and symptoms with this unique example of a coronavirus is six days, that person would

come back to the UK and interact with other people here before they started to feel unwell and realise that somehow, somewhere, they had picked up the virus.

The scenario outlined above is what has spooked Whitehall about Spain. It may mean (unless the numbers in Spain suddenly take a significant turn for the better) that the quarantine restrictions that have been applied to it will last for the entire duration of the summer holiday period.

All of these considerations allow us to construct an informal guide as to which of the twelve most popular overseas destinations for British tourists are the most likely to have quarantines or other sorts of intrusive, inconvenient regulations imposed upon them.

Spain, for all the reasons outlined here, is in a category of its own. Belgium is the strong contender for an unwanted silver medal because it also has a short-term challenge with coronavirus, despite having been the worst affected nation in Europe. An atypically large amount of UK travel to Belgium is, however, for business. Not that many British residents flock to the Belgium coastline anyway (even though, very usefully, there is a tram route that runs along the entire 67km of it). Neither France nor Italy are particularly likely to have prohibitions put on them, though based on present evidence Italy is the more secure of the two if one wishes to avoid quarantine being introduced on coming back. Portugal was not on the “white list” to start with and if it hoped that it would see the UK quarantine requirement on it lifted soon to boost tourism there it may be disappointed.

After that, the list should be more predictable. Germany is as safe as houses. That is almost as true for The Netherlands, except that the city of Amsterdam does have some risk of intergenerational interaction between the different age groups of British people who visit it. Greece and Turkey are much more popular with the young than the old, and where this is not true the young and the old tend to select different islands or resorts to stay in. This, plus a low overall coronavirus fatality rate and few examples of short-term spikes, should keep them away from an unwanted initiative by the Home and Foreign Offices. Ireland and Poland are, as noted earlier, somewhat special cases in terms of travel, but neither appear to have major challenges with a possible second spike at the moment. The United States is off the radar because Donald Trump is letting so few outsiders in (plus it has never been on the approved list anyway, so the 14-day

quarantine already applies). Were he to relent, New York would now be much safer than Florida or California.

These matters have a certain importance today because we are in peak travel season, but they will still be there in some form beyond September. It will be hard to engage in what was once deemed to be 'normal' business and leisure international travel this side of a vaccine. Even internal travel and tourism has its risks (parts of Cornwall have a similar demographic profile in terms of in-bound tourists to the Costa del Sol). It will not be the case that the British will make 72.6 million individual trips abroad in 2020. There is some chance of further quarantine rules being inflicted on countries beyond Spain. It would be wise to re-read this FTI UK Political Analysis before packing.

Tim Hames

Senior Adviser

Strategic Communications

Tim.Hames@FTIConsulting.com



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