



The importance of night flights at Heathrow

Flights taking place at night and in the early morning are an increasing feature at airports worldwide. But such flights are usually limited to protect the local communities around these airports. Airlines operating at Heathrow airport adhere to an agreement whereby no flights arrive before 04:30 and no flights depart before 06:00. Nevertheless, there are a small but economically crucial number of flights during the wider “night period” of 23:00 to 06:00. In 2015 the Airports Commission suggested a total ban on flights

for a six and a half hour period during the night and early morning. Airlines believe this proposal, if implemented, would seriously damage UK economic competitiveness.

In particular, flight arrivals in the early morning are vital for passengers’ business connections into London and the UK regions. Late night departures enable business connections in export markets as well as enabling crucial overnight freight dispatch.

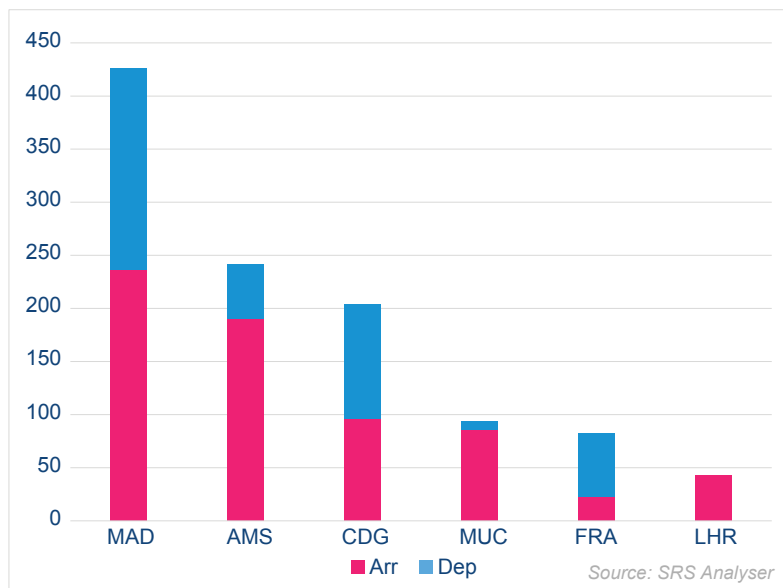


Chart 1: weekly flights to/from selected European airports 23:00-05:30 local time

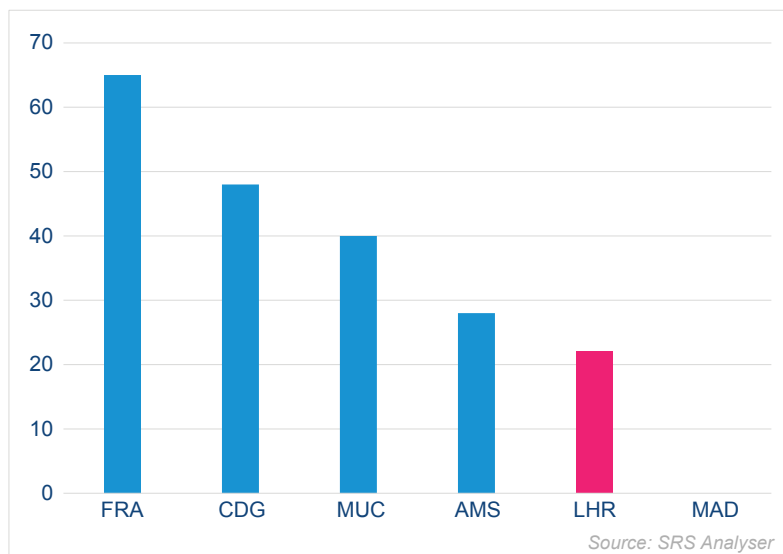


Chart 2: weekly arrivals from Asia to selected European airports 05:30 GMT/06:30 CET

Heathrow has fewer overnight and early morning connections than its rivals

For the purposes of this report, we have assumed the proposed flight ban would operate from 23:00 to 05:30. Chart 1 shows that Heathrow is already at a competitive disadvantage compared to key hub airports in Europe in terms of aircraft movements in this time period. Our comparison here shows Heathrow (LHR), with 42 weekly arrivals and no departures, has fewer flights than Madrid (MAD) Amsterdam (AMS) Paris (CDG) Munich (MUC) or Frankfurt (FRA). Madrid has an incredible ten times the number of flights per week.

UK time difference further disadvantages Heathrow

The competitive disadvantage is magnified when the UK’s hour time difference to mainland Western Europe is taken into account. Effectively, these European hubs have an hour’s head-start, with 05:30 in London equating to 06:30 in Paris, Frankfurt and Madrid. When flights arriving by 06:30 to European hubs are analyzed, Heathrow’s competitive disadvantage is even worse. This is particularly important for flight arrivals from fast-growing Asian economies. Chart 2 shows Heathrow captures fewer arrivals from Asia than any other European hub during this time period. Frankfurt has more than three times as many arrivals per week than Heathrow. If a ban on flights before 05:30 were in place, routes from Asia would be disproportionately affected – nearly half of the weekly flights that would be lost would be from these vital markets.

Why can’t the flights simply arrive or depart in the daytime?

It is not possible to move these flights to daytime operational hours. Heathrow is already full. Even with a new runway, moving the flights may not work because the feasibility of the flight may be reduced, connections lost, and there may not be room at the origin airports to move the flight due to their own slot constraints.

Regional Connectivity is heavily impacted

Early morning arrivals are particularly important for onward connections for same-day appointments and meetings, or for rapid freight delivery. Map 1 shows the first wave of departures from Heathrow to UK regions, Scotland and Northern Ireland. Currently, six routes operate from Heathrow that arrive before 09:00. If the night flight arrivals at Heathrow were banned, it would not be possible for connecting passengers to be on these flights. Morning business appointments and early cargo deliveries would be impossible. The economic viability of these regional connections might even be called into question without these transfer passengers. LHR also provides a hub for European passengers to travel between Asia, Middle East and North America onward to Europe. But this could be



Map 1: regional connections from Heathrow, arriving before 09:00



Map 2: international connections arriving in Frankfurt by 06:30, and connections available to German regional airports arriving before 09:00

destroyed if the options at other European hubs become far more attractive in terms of connecting time and arrival time from LHR.

The comparison with Germany (Map 2) is instructive. Not only are there more early morning arrivals into Frankfurt each day but they connect to more domestic routes, feeding routes to 12 German cities each day.

The Export Story

Overnight delivery has become an increasingly important element in the global supply chain. Just-in-time manufacturing processes, lack of consumer patience to wait for goods, and time-and-temperature sensitive shipments such as pharmaceuticals and fresh produce, mean air cargo is a crucial link in the transport chain.

Late night departures are important for UK business, facilitating these vital cargo exports. 33% of UK exports by value and 26% of UK imports to/from non-EU countries passed through Heathrow in 2017. For some high-value sectors, air cargo is even more important. For pharmaceuticals, precision instruments and electrical machinery, 49%, 46% and 43% of exports by value pass through Heathrow. Any ban on night flights would have a major impact.

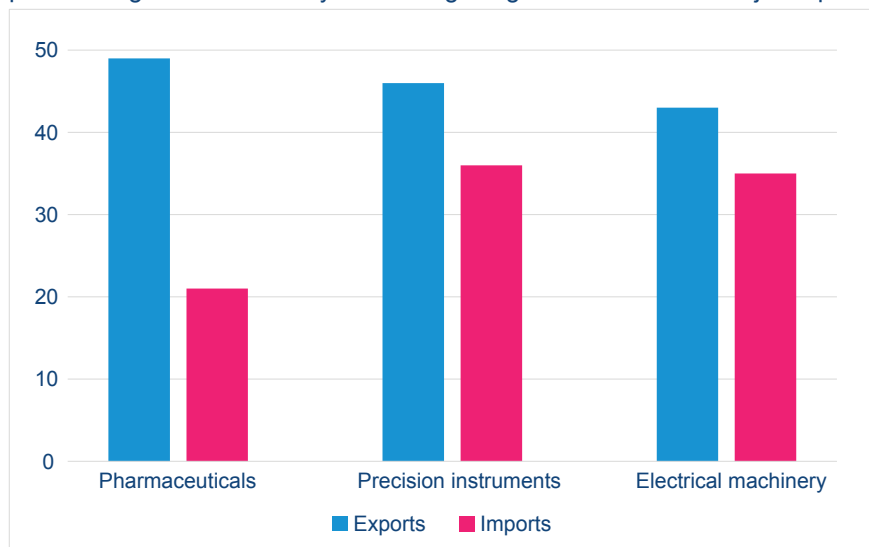


Chart 3: % share of total UK imports and exports by value, selected sectors, via Heathrow

Objectives of the UK aviation strategy

In April 2018 the UK Government published “Beyond the Horizon” a paper outlining the next steps towards a UK Aviation Strategy. The objectives for the strategy include proposals to:

- Help the aviation industry work for its customers
- Build a global and connected Britain
- Encourage competitive markets
- Support growth while tackling environmental impacts

Airlines believe that a complete night ban on flights at Heathrow would be inconsistent with these objectives.

Conclusion: Night flights at Heathrow are crucial to the UK economy. Any ban on flights in the period 23:00-05:30 would further disadvantage UK regions and damage key export industries.

As the plan to expand Heathrow with a third runway moves forward, the possibility of the “night ban” in the period 23:00-05:30 has been raised. To do so would create significant economic damage both to London and the wider UK economy. Heathrow already has far fewer flights in this period than key continental rivals, a problem exacerbated by the UK’s one-hour time delay.

In fact, a third runway could allow for continued operational flexibility and provide for greater predictable noise respite for the communities around Heathrow, through alternative and innovative runway use.

If the UK wishes to promote ‘global Britain’ and seek new markets beyond the EU, a ban on night flights at Heathrow will significantly weaken the economic opportunities to link the UK to fast-growing economies in Asia and elsewhere.

We urge the government to retain the current operational flexibility at the airport to enable it to maximize its role in delivering economic and social value to the UK.