

Connecting *to* RECOVERY



We will begin in just a few minutes. This event will be recorded and is subject to public disclosure.



Stephanie Bowman,
Port of Seattle
Commissioner





Lance Lyttle Managing Director Seattle-Tacoma International Airport



We rolled up our sleeves.

- **Maintain a safe, healthy airport environment**
- Restore confidence in air travel
- Return passenger volumes and economic vitality
- Renew enthusiasm for travel
- Position for future public health emergencies



Photo credit: Angela J. Kim, Mommy Diary blog

Multi-Layered Approach



FACE COVERINGS ARE REQUIRED



650+ PROTECTIVE BARRIERS



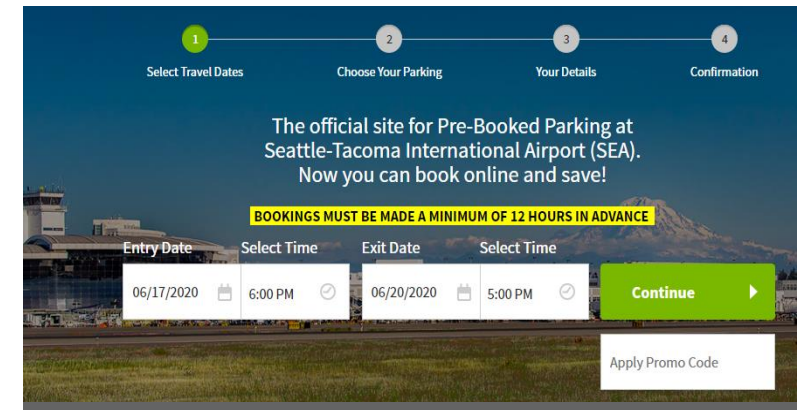
DINING AND RETAIL PROTOCOLS



FREQUENT SANITATION



280+ HAND SANITIZERS



NO TOUCH TECHNOLOGY



Improvements coming 2021

- 3 new live music zones
- 8 new domestic gates
- 54 new dining and retail options
- 549 new charging

See where
we're going.

destinationSEA.org







Even during the pandemic, SEA launched new international services.



**Qatar Airways
Seattle-Doha
January 29, 2021**

**American Airlines
Seattle-London
March 30, 2021**





Kazue Ishiwata
Senior Manager
Air Service Development

What airports have seen the greatest impact from the pandemic?

Top US/Canadian Airports by Passenger Volume, 2020

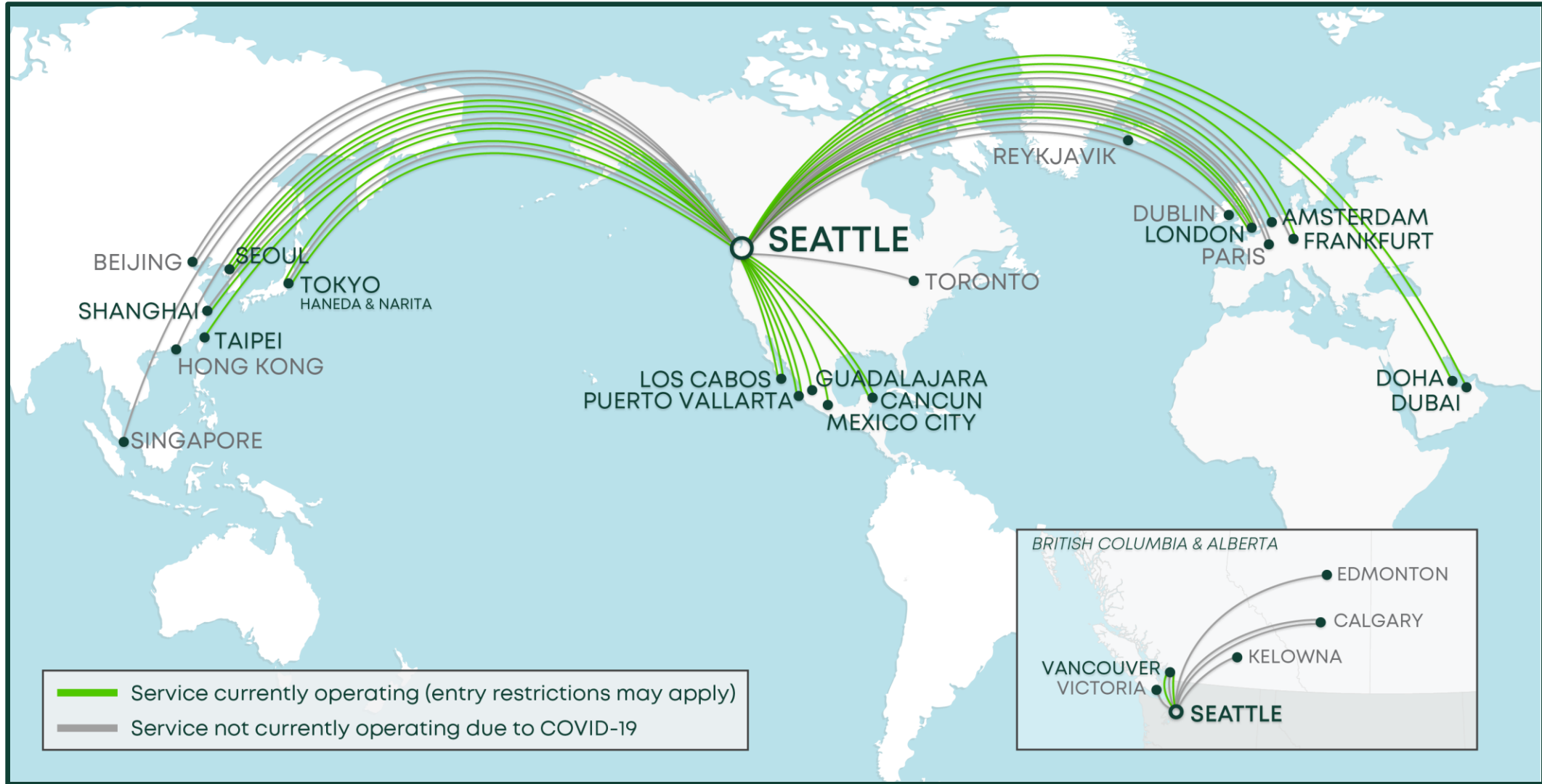
2020 Rank	Airport	Code	Total Pax 2020	% Change	Rank Change
1	Atlanta	ATL	42.9 m	- 61%	—
2	Dallas/Ft. Worth	DFW	39.4 m	- 48%	▲2
3	Denver	DEN	33.7 m	- 51%	▲2
4	Chicago (O'Hare)	ORD	30.9 m	- 64%	▼1
5	Los Angeles	LAX	28.8 m	- 67%	▼3
6	Charlotte	CLT	27.2 m	- 46%	▲6
7	Las Vegas	LAS	22.2 m	- 57%	▲2
8	Phoenix	PHX	21.9 m	- 53%	▲6
9	Orlando	MCO	21.6 m	- 57%	▲1
10	Seattle	SEA	20.1 m	- 61%	▼2
11	Miami	MIA	18.7 m	- 59%	▲4
12	Houston (Intercontinental)	IAH	18.2 m	- 60%	▲4
13	New York (Kennedy)	JFK	16.6 m	- 73%	▼7
14	Newark	EWR	16.5 m	- 65%	▼1
15	Fort Lauderdale	FLL	16.4 m	- 55%	▲5
16	San Francisco	SFO	16.4 m	- 71%	▼9
17	Minneapolis/St. Paul	MSP	14.9 m	- 62%	▲1
18	Detroit	DTW	14.1 m	- 62%	▲1
19	Toronto	YYZ	13.3 m	- 74%	▼8
20	Boston	BOS	12.6 m	- 70%	▼3
32	Vancouver	YVR	7.3 m	- 72%	▼7
33	Portland	PDX	7.1 m	- 64%	—

Source: Passenger numbers reported by individual airports

SEA's Currently Operating International Services

Half of SEA's pre-pandemic services have resumed

- Aer Lingus
- Aeromexico
- Air Canada
- Air France
- Alaska
- American
- ANA
- Asiana
- British Airways
- Cathay Pacific
- Condor
- Delta
- Emirates
- EVA
- Hainan
- Icelandair
- Japan Airlines
- Korean Air
- Lufthansa
- Norwegian
- Qatar Airways
- Singapore
- Virgin Atlantic
- Volaris



— Service currently operating (entry restrictions may apply)
— Service not currently operating due to COVID-19

BRITISH COLUMBIA & ALBERTA
 VANCOUVER
 VICTORIA
 SEATTLE
 KELOWNA
 CALGARY
 EDMONTON

Does not include services that have been announced but are not yet operating

SEA's top international markets have changed due to COVID

SEA's Top International Markets, 2019 vs. 2020

Asia
Canada
EMEA (Europe, Middle East, Africa)
Mexico

2019 (Q2-Q4)		
2019 Rank	Market	Region
1	London	EMEA
2	Tokyo	Asia
3	Seoul	Asia
4	Toronto	Canada
5	Los Cabos	Mexico
6	Shanghai	Asia
7	Cancún	Mexico
8	Beijing	Asia
9	Guadalajara	Mexico
10	Puerto Vallarta	Mexico
11	Manila	Asia
12	Paris	EMEA
13	Calgary	Canada
14	Frankfurt	EMEA
15	Amsterdam	EMEA

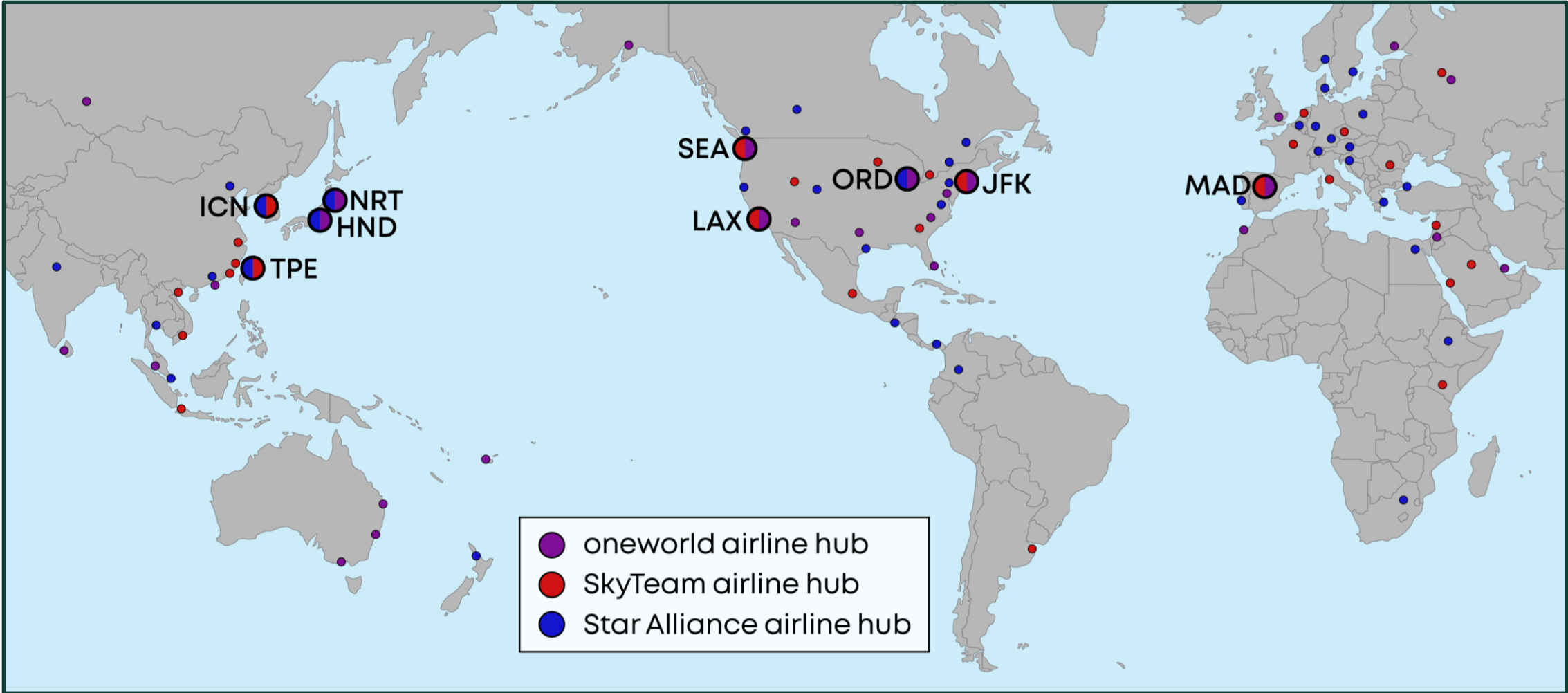
2020 (Q2-Q4)			
2020 Rank	Market	Region	Rank Change
1	Guadalajara	Mexico	▲ 8
2	Los Cabos	Mexico	▲ 3
3	Cancún	Mexico	▲ 4
4	Puerto Vallarta	Mexico	▲ 6
5	Seoul	Asia	▼ 2
6	Vancouver	Canada	▲ 11
7	Tokyo	Asia	▼ 5
8	Mexico City	Mexico	▲ 18
9	Manila	Asia	▲ 2
10	London	EMEA	▼ 9
11	Taipei	Asia	▲ 7
12	Amsterdam	EMEA	▲ 3
13	Delhi	Asia	▲ 6
14	Kyiv (Kiev)	EMEA	▲ 26
15	Nairobi	EMEA	▲ 31

Top markets based on passengers' ultimate destination (regardless of connections) and include passengers traveling in either direction (i.e., itineraries beginning or ending in SEA)

Q1 excluded to provide a fair comparison of travel patterns before and after the onset of the pandemic in March 2020

Source: Cirium Fmg

SEA serves as hubs for both SkyTeam and oneworld alliances



Seoul (ICN) and Madrid (MAD) anticipated to lose dual-hub status due to airline mergers in progress (Korean Air/Asiana and Iberia/Air Europa)
Includes airports designated an official hub by an alliance member airline that has at least 15% of the airport's market share

Opportunities: SEA is well-positioned for recovery and will likely be less affected than many other U.S. airports



Resilient local business market

Major employers like Microsoft and Amazon are doing well through the crisis and have historically generated significant travel volumes



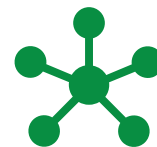
High propensity to travel

Not only is Seattle an attractive destination for inbound travel, the region's diversity and propensity to travel will be enhanced



Diverse and inclusive population

Pent-up demand to reconnect with distant friends and family will make this segment one of the first to return



Hub for two strong alliances

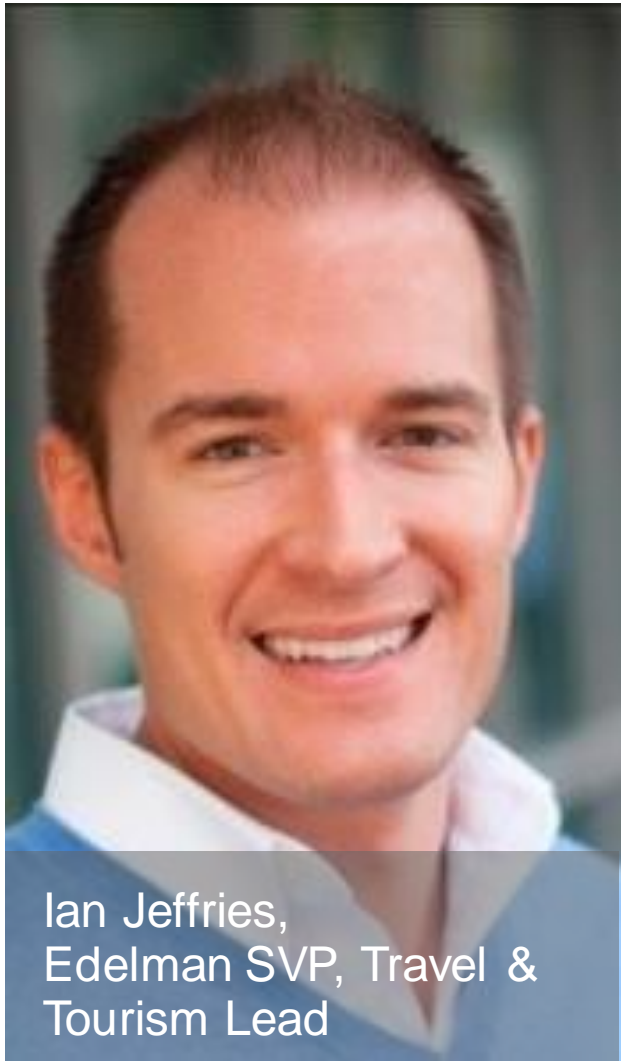
As a hub for two major global alliances, SEA will do well as airlines focus on connectivity and rebuilding strong networks

Round 1 Questions



Tom Norwalk
President & CEO
Visit Seattle

Travel Trends Panel



3 TRAVEL TRENDS

TO WATCH IN 2021



3 TRAVEL TRENDS

TO WATCH IN 2021

1

Carpe Diem



2

Squad Tourism



3

**Trust
Leads the Way**



1



CARPE DIEM



CARPE DIEM

What to watch:

- Massive pent-up demand
 - 75% of Americans currently planning travel
- Covid still a concern, but...
 - 72% have “ready to travel” mindset
 - 88% have travel booked
- Human connection is key



A group of people are gathered in a vineyard, raising their wine glasses in a toast. The scene is overlaid with a blue tint. In the center, there is a white icon of three people and the text 'SQUAD TOURISM'. Above the icon is a large white number '2'.

2



SQUAD TOURISM



SQUAD TOURISM

What to watch:

- 79% of Americans have been on multiple group trips in the last five years
- Reconnecting with family and friends a top priority
- Massive opportunity for group travel planning



3



TRUST
LEADS THE WAY



TRUST LEADS THE WAY

What to watch:

- Trust in news sources is at a record low
- Business is seen as the only ethical and competent institution
- Travelers will rely on trusted brands
 - 53% believe corporations should fill information void





Expedia

Returning to Travel
Trends and Predictions

Vacation Deprivation

- Expedia's 2021 Vacation Deprivation study confirmed that there is a lot of pent-up travel demand out there
- Americans plan to take an additional week of vacation in 2021 to make up for lost time
- 81% of working adults worldwide are placing more value on vacation, ready to start checking experiences off their bucket lists – which have been growing since the pandemic started
- Vaccination roll-out and travel restrictions lifting are helping people feel more confident about making plans



Queue the Bucket Lists

- Our research indicates travelers intend to travel more post-pandemic, and that they've been saving up money for longer, bucket-list style trips
- 61% of people are willing to put more budget into their bucket list vacation in 2021 than originally planned
- 66% of people globally were inspired to create a travel bucket list for the first time
- 34% said they plan to spend their tax return on travel



Travel Trends in 2021

- Booking windows are lengthening & travelers are staying longer
- Top destinations reveal travelers are sun-seekers: Mexico, Caribbean, Florida, Hawaii
- 2020 trends such as road trips and nature will continue into the summer, with National Parks and domestic drive-able beach destinations remaining popular
- For Q3, top-searched city destinations include Orlando, Las Vegas, Miami, NYC, and Los Angeles



What Travelers Want

Price used to be king, but post-COVID travelers weigh their priorities differently.

- Flexibility
- Relevant, timely information
- Transparency and reassurance
- Value
- Simplicity





Traveling

WITH DENELLA RI'CHARD

Rediscover the World: What's New





Travel Entry Requirements

1. Pre-approval Before You Travel
2. COVID Testing
3. Health Safety Terms & Conditions

Check Your Health Visa Application Status

-  **Green | Approved Health Visa**
Must present confirmation on arrival
-  **Yellow | Pending Health Visa**
Application requires additional review
-  **Red | Denied Health Visa**
Entry not permitted



COVER YOUR FACE*

BY ORDER OF THE GOVERNOR OF THE US VIRGIN ISLANDS

ALL VISITORS (Adult and Child) and EMPLOYEES of this establishment are required to wear a **FACE COVERING** at all times.

Violators of this rule, established by the Government of the Virgin Islands and other agencies, are subject to refusal of service, request to leave, establishment closure, additional restrictions, and fines covered under the guidelines of the Department of Licensing and Consumer Affairs and the Virgin Islands Police Department.

*When entering a business, an individual is only permitted to cover one's mouth and nose. Sunglasses, hats, ski masks or anything that may be used to cover your eyes and head are NOT PERMITTED.

OR NO SERVICE

MAINTAIN PROPER SOCIAL DISTANCING RULES

REPORT VIOLATORS:
(340) 713-DLCA (3522) • (340) 714-DLCA (3522)
REPORT SCAM: (340) 727-7226 • (340) 771-7226

Accommodations



Connecting With Nature



U.S. Virgin Islands



The Bahamas



Jamaica

Connecting With Nature



The Bahamas



The Bahamas

Support Small Businesses



Call A Travel Advisor



Round 2 Questions



David Blandford
Executive Director
Washington Tourism Alliance

Connecting

to

RECOVERY

SEA Seattle-Tacoma
International
Airport

