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

FACE COVERINGS ARE REQUIRED

650+ PROTECTIVE BARRIERS

DINING AND RETAIL PROTOCOLS

FREQUENT SANITATION

280+ HAND SANITIZERS

NO TOUCH TECHNOLOGY

ORDER ONLINE FOR NO-CONTACT PICK-UP

The official site for Pre-Booked Parking at Seattle-Tacoma International Airport (SEA). Now you can book online and save!

BOOKINGS MUST BE MADE A MINIMUM OF 2 HOURS IN ADVANCE

Select Travel Dates
Choose Your Parking
Your Details
Confirmation

Every Date
Select Time
Exit Date
Select Time

06/17/2020 6:00 PM
06/20/2020 5:00 PM

Apply Promo Code

Continue
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?

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

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

Does not include services that have been announced but are not yet operating
SEA’s top international markets have changed due to COVID

<table>
<thead>
<tr>
<th>2019 Rank</th>
<th>Market</th>
<th>Region</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>London</td>
<td>EMEA</td>
</tr>
<tr>
<td>2</td>
<td>Tokyo</td>
<td>Asia</td>
</tr>
<tr>
<td>3</td>
<td>Seoul</td>
<td>Asia</td>
</tr>
<tr>
<td>4</td>
<td>Toronto</td>
<td>Canada</td>
</tr>
<tr>
<td>5</td>
<td>Los Cabos</td>
<td>Mexico</td>
</tr>
<tr>
<td>6</td>
<td>Shanghai</td>
<td>Asia</td>
</tr>
<tr>
<td>7</td>
<td>Cancún</td>
<td>Mexico</td>
</tr>
<tr>
<td>8</td>
<td>Beijing</td>
<td>Asia</td>
</tr>
<tr>
<td>9</td>
<td>Guadalajara</td>
<td>Mexico</td>
</tr>
<tr>
<td>10</td>
<td>Puerto Vallarta</td>
<td>Mexico</td>
</tr>
<tr>
<td>11</td>
<td>Manila</td>
<td>Asia</td>
</tr>
<tr>
<td>12</td>
<td>Paris</td>
<td>EMEA</td>
</tr>
<tr>
<td>13</td>
<td>Calgary</td>
<td>Canada</td>
</tr>
<tr>
<td>14</td>
<td>Frankfurt</td>
<td>EMEA</td>
</tr>
<tr>
<td>15</td>
<td>Amsterdam</td>
<td>EMEA</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2020 Rank</th>
<th>Market</th>
<th>Region</th>
<th>Rank Change</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Guadalajara</td>
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<tr>
<td>2</td>
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<tr>
<td>3</td>
<td>Cancún</td>
<td>Mexico</td>
<td>▲ 4</td>
</tr>
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<td>Puerto Vallarta</td>
<td>Mexico</td>
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<tr>
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<td>Vancouver</td>
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<td>Tokyo</td>
<td>Asia</td>
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</tr>
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<td>Delhi</td>
<td>Asia</td>
<td>▲ 6</td>
</tr>
<tr>
<td>14</td>
<td>Kyiv (Kiev)</td>
<td>EMEA</td>
<td>▲ 26</td>
</tr>
<tr>
<td>15</td>
<td>Nairobi</td>
<td>EMEA</td>
<td>▲ 31</td>
</tr>
</tbody>
</table>

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

Ian Jeffries, Edelman SVP, Travel & Tourism Lead

Nisreene Atassi, Expedia Brand Sr. Director, Global Head of PR and Social

Denella Ri’Chard, Executive Producer, Traveling With Denella Ri’chard
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
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

Findings from Destination Analysts Research & Skift’s Recovery Index
SQUAD TOURISM

2
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
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

Findings from 2021 Edelman Trust Barometer
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
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
Connecting With Nature

U.S. Virgin Islands

The Bahamas

Jamaica
Connecting With Nature

The Bahamas
Support Small Businesses
Call A Travel Advisor
Round 2 Questions
David Blandford
Executive Director
Washington Tourism Alliance
Connecting to RECOVERY