

# SEA-TAC AIRPORT INTERNATIONAL AIR SERVICE

February 23, 2016

# International Air Service Overview

- **Long-haul international service in 2015**
  - 18 services
  - 12 unique destinations
  - 3.0 million passengers
  - 11 carriers
- **Long-haul international air service fastest-growing traffic segment**
  - 18.1% growth in 2015 over 2014 (vs. 12.5% for North American traffic)
- **Each long-haul international service brings the Port \$1.5 million in annual direct revenue**
  - Does not include increased non-aeronautical from parking, retail & dining, etc.
- **Each long-haul international service creates \$75 million in annual economic activity to the Puget Sound region** *(source: 2013 John Martin & Assoc. study).*
- **Major corporations cite the availability of a globally-connected hub airport as being key when selecting cities in which to site new operations.**

**Long-haul international flights bring significant economic benefits to the Port and to the entire region**

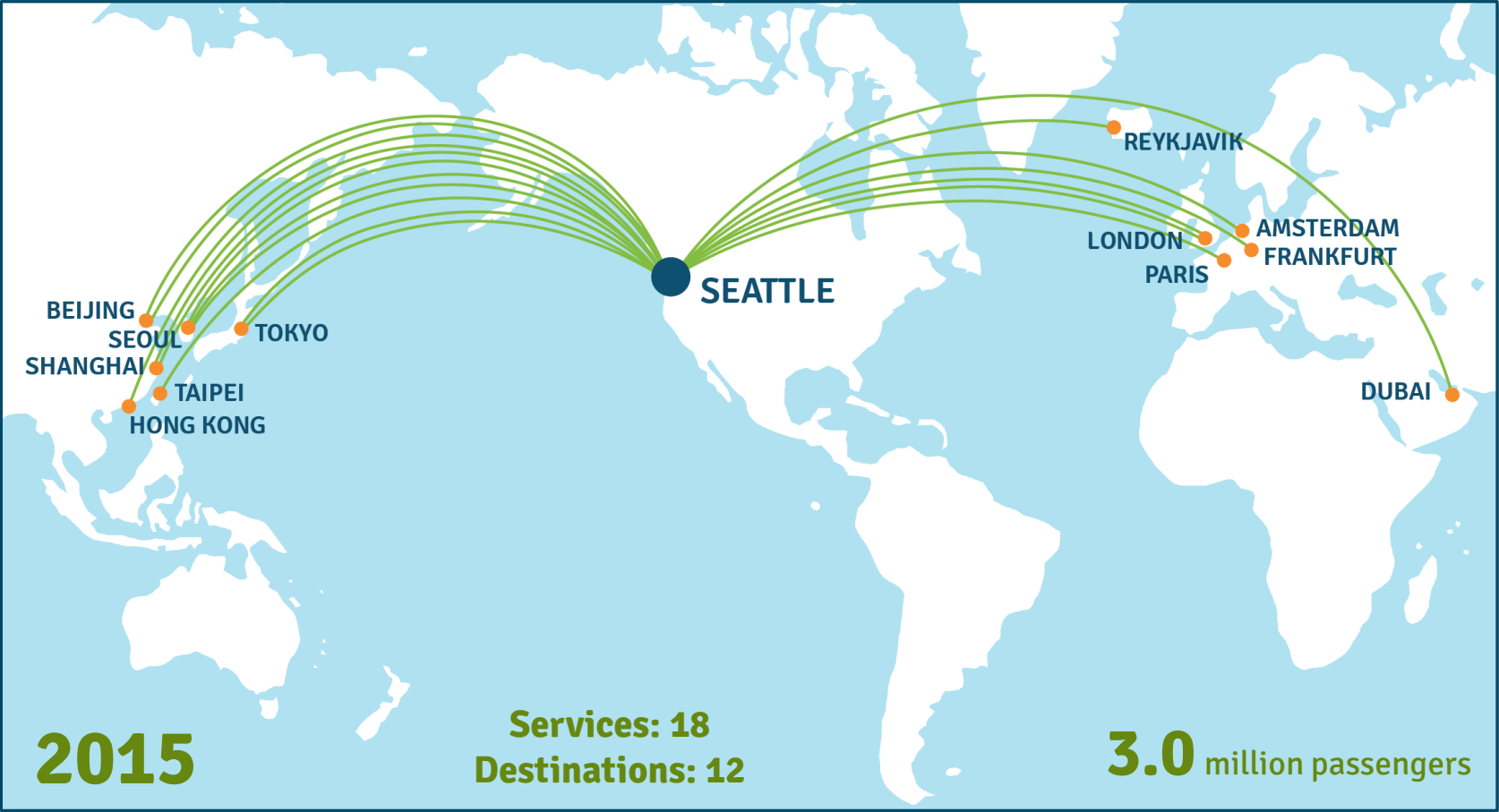
# Seattle's Nonstop Long-haul International Services in 2005



Does not include international services to Canada or Mexico

# Seattle's Nonstop Long-haul International Services in 2015

Significant growth in the past 10 years



Does not include seasonal service or services to Canada or Mexico

# Sea-Tac's Air Service Development Strategy

- Air Service Development is primarily about developing data-based business cases for new air service.
- Partnerships with Alaska Air Group are key to attracting and successfully maintaining diverse foreign flag service to Seattle, which benefit from connecting traffic.
- International network hub of Delta Air Lines provides the global connectivity that is necessary for the region's growing economy.
- Commission-approved New Air Service Incentive Program is used as a tool to attract and promote successful new services.

**Air Service Development Strategy leverages Seattle's strengths as a hub for both Alaska Air Group and Delta Air Lines**

# Air Service Development Challenges

## There is no more room for international flights at the peak time

- Widebody gates
- Common-use ticket counters
- Common-use lounge space
- FIS arrivals facility
- Airline office space

## West Coast Airport Competition

- Other airports are actively competing with Seattle for new services to serve as the preferred gateway for international travelers.
- Recent or ongoing projects addressing international facilities include Vancouver (\$1.8 billion), San Francisco (\$1.0 billion), and Los Angeles (\$1.9 billion).

**Sea-Tac's facilities have not kept pace with the airport's strong traffic growth**