



Seattle-Tacoma
International
Airport

Passenger Activity Outlook

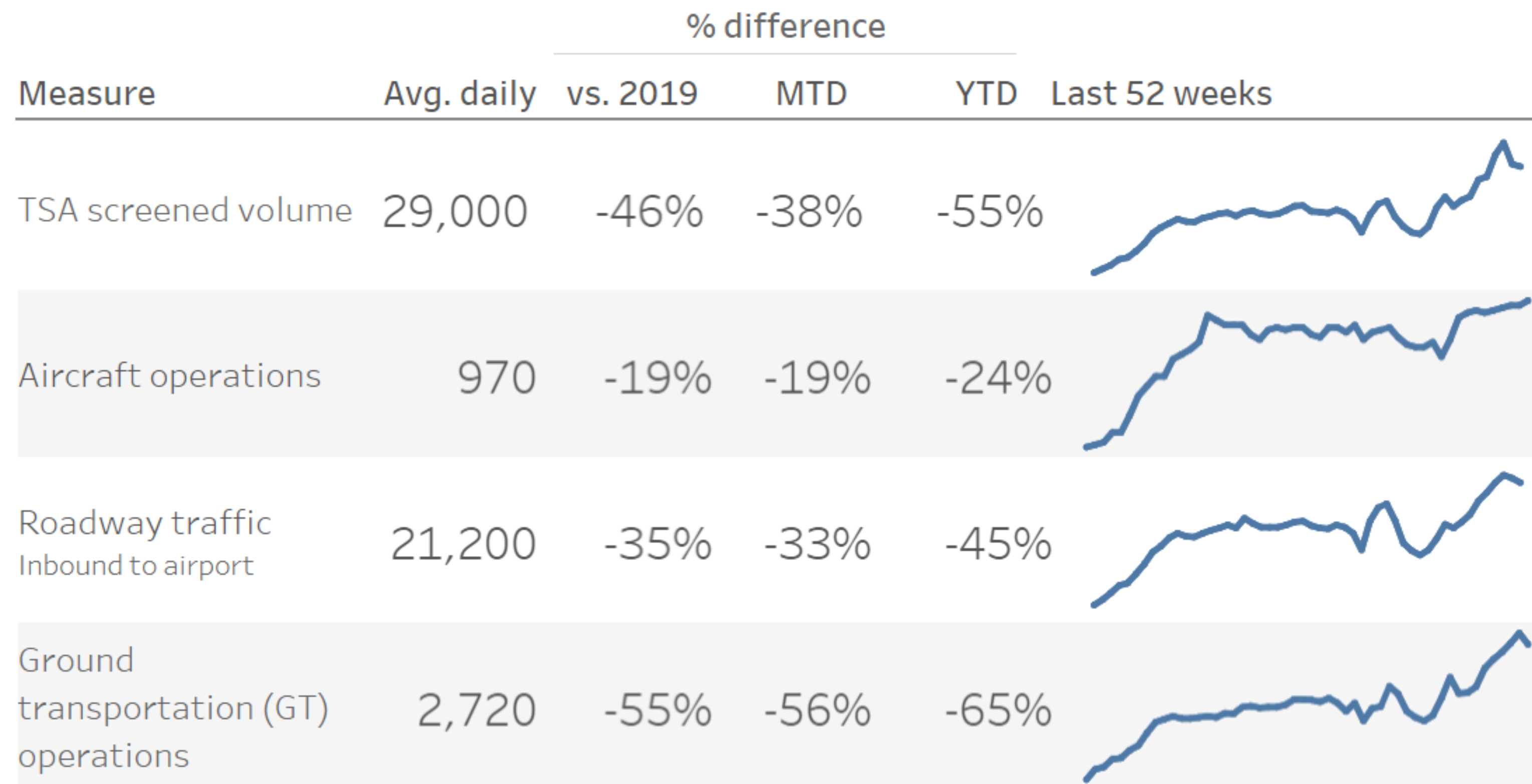
Michael Drollinger, Business Intelligence

SEA Stakeholder Advisory Round Table
April 28, 2021

Activity recovery status

Passenger volume at about 55% of 2019 level, aircraft operations at almost 80%.

SEA activity measures: Week 17 (beg. April 18, 2021)



Available online at: <https://public.tableau.com/profile/portofseattlebi#!/vizhome/SEAactivitymeasures/SEAactivitymeasures>

Financial planning activity scenarios approach

Inputs (data)

- Published advance airline flight schedules (seats)
- Travel restrictions limiting domestic and international activity
- Airline service announcements (additions, reductions, aircraft mix)
- Consultations with airline and travel industry representatives
- Post-recovery annual growth trends (master plan)

Assumptions

- Time to return to 2019 (pre-COVID-19) levels
- Shape, length, and extent of a recovery
- Passenger load factors (percent of occupied seats) trends
- Average aircraft size (average seats per operation)

Activity scenarios

- Multiple scenarios (“high, baseline, low”)
- Passengers (domestic/int’l)
- Aircraft operations
- Benchmark to industry recovery scenarios

Improving traffic demand in Q1 2021 expected to accelerate in Q2.

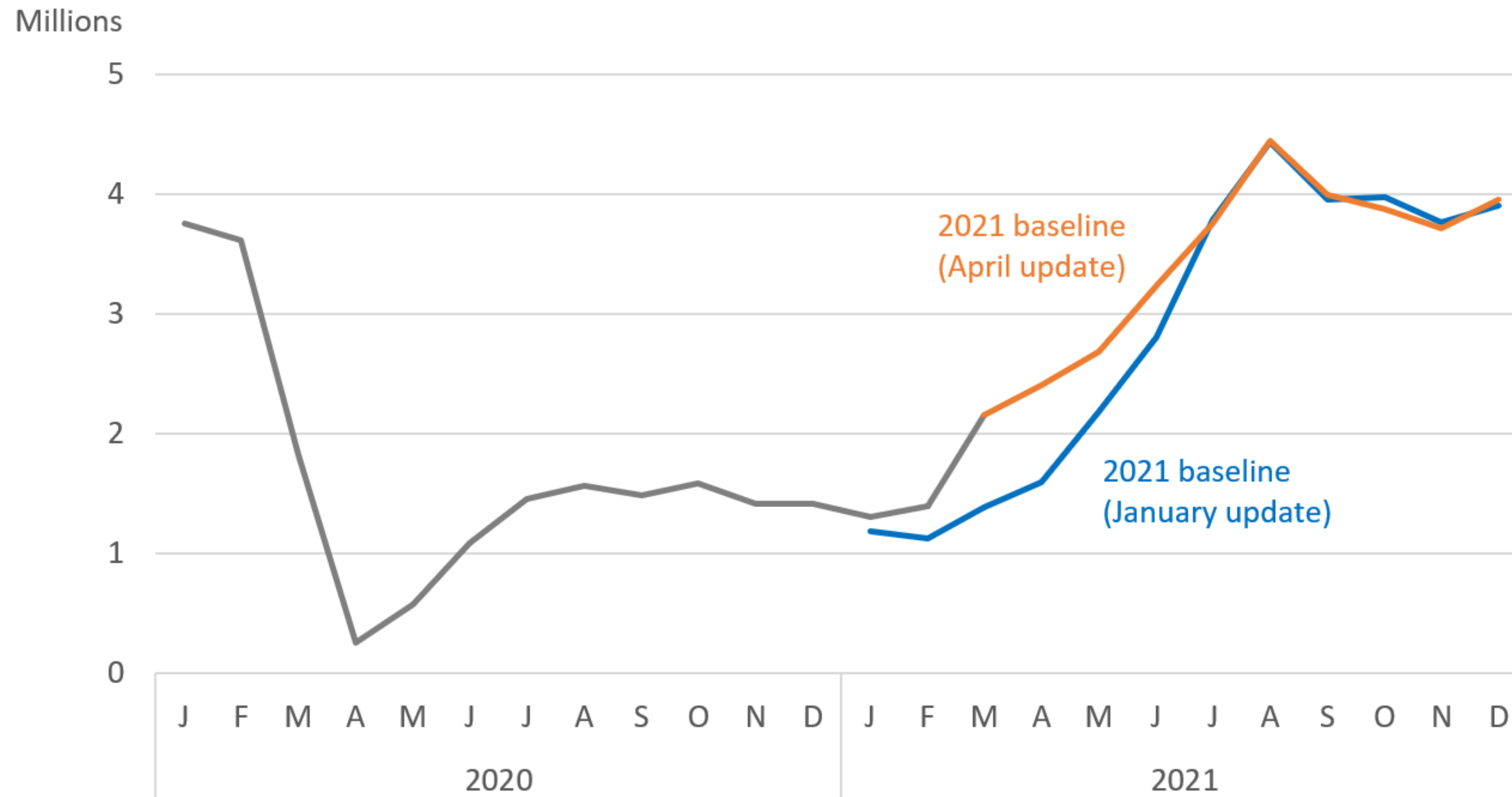
Month	Passengers	Diff. vs. Jan baseline scenario
January (actual)	1.3M	+130K
February (actual)	1.4M	+275K
March (actual)	2.1M	+700K
subtotal	4.8M	+1,105K
Forecast based on TSA data:		
April	2.5M	+900K
May	2.7M	+500K

Year-to-date passenger traffic exceeding baseline activity scenario prepared in January.

Activity upgrade

Rising travel demand reflected in latest 2021 activity scenario update

Forecast monthly total passengers



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Year-end 2021

Passengers: **37 M**

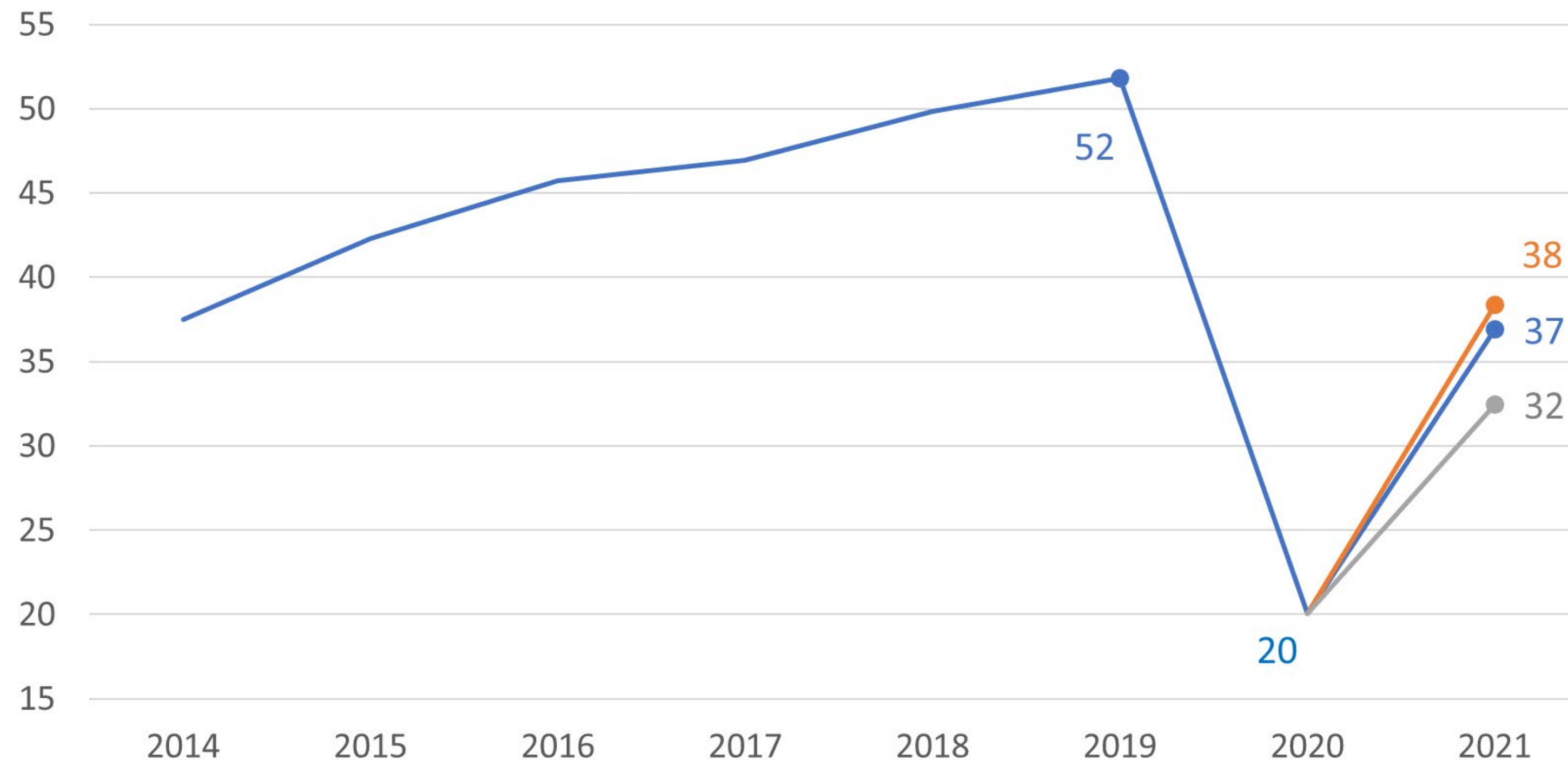
% chg. vs. 2019: **-29%**

Uncertainty remains

Headwinds and tailwinds affecting passengers demand producing significant range in 2021 outcomes

SEA passenger traffic

Millions



2021 Scenarios (4/21 update):

	Passengers (millions)	%diff. vs. 2019
High	38	-26%
Baseline	37	-29%
Low	32	-37%

Recovery to 2019 passenger volume expected in 3-5 years.

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Thank You!



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