



City of SeaTac

Tourism Destination Development Plan

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The City of SeaTac brought together a diverse range of government leaders, community organizations and visitor industry stakeholders to inform the development of this Tourism Destination Development Plan. The City of SeaTac wishes to thank everyone who contributed to this process for their thoughtful input and spirit of inclusive community development.

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CONTENTS

EXECUTIVE SUMMARY	4
INTRODUCTION	7
KEY INDUSTRY & COMMUNITY TAKEAWAYS	11
STRATEGIC FRAMEWORK	14
1. Optimize the SeaTac Angle Lake Station Area’s Cultural Assets and Highlight Community-based Experiences	15
2. Develop Tukwila International Boulevard Station Area as a Grand Entrance to SeaTac North and North SeaTac Park	17
3. Activate the Three Light Rail Stations as Experience Platforms to Showcase Local and Regional Culture	19
4. International Boulevard Visitor Experience: Beautify, Brand, and Enhance Mobility and Transportation Infrastructure	21
5. Develop and Build Out an Entertainment and Events Mixed-Use District Near SeaTac/Airport Station	23
STRATEGIC FLOWCHART	26
APPENDIX: DESTINATION ASSESSMENT DATA	27

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EXECUTIVE SUMMARY

This 10-year City of SeaTac Tourism Destination Development Plan is a strategic road map to prioritize public investments that will improve the visitor experience and increase visitor volumes, spending and average length of stay. The intended outcome of this plan is to develop the visitor economy more intentionally to help build more vibrant and prosperous communities that benefit the broadest spectrum of local residents as possible.

While the objective of this document is ultimately to optimize the visitor economy and bring more visitor revenues into the city, it is important to note that the City of SeaTac's top priority is the community and ensuring that all residents have opportunities to create the lives they seek. The anticipated increases in lodging tax revenues and other visitor-generated revenues (sales, parking, commercial property tax, etc.) resulting from this plan will help fund the City's initiatives to continue to deliver on its commitment to the community, both equitably and sustainably.

In greater detail, the three stated purposes of this plan are:

1. Improve the visitor experience in SeaTac to increase incoming visitor dollars and average visitor length of stay in SeaTac hotels
2. Guide short, medium and long-term investment decisions to grow the visitor economy and optimize lodging tax allocations
3. Align government, industry and community priorities to strengthen SeaTac's civic pride, identity and sense of place as it relates to tourism

The intended results from expanding the city's scope of visitor amenities and experiences are: 1) Attract more visitors and increase repeat visitation and spending; 2) Enhance the city's brand and reputation among visitors; and 3) Compel more leisure and business travelers to stay longer and increase the



average hotel night stay beyond the critical 2-night threshold. That important 2-night metric delivers exponentially larger profits to businesses and lodging tax revenues to the City of SeaTac.

STRATEGIC FRAMEWORK

The City of SeaTac, the two contracted consultants (MMGY NextFactor and Hunden Partners), and a wide cross-section of community and industry stakeholders developed the plan's strategic framework collaboratively, based on the qualitative insights and quantitative data collected for this plan.

The overall vision for the framework is centered on activating the three light rail stations and their surrounding neighborhoods as mini urban villages for both visitors and locals, which has been the City's chief urban development strategy for three decades. This can be accomplished primarily by optimizing SeaTac's assets and attributes that leisure visitors, business travelers and conference attendees want when they are visiting and overnighting in SeaTac.

EXECUTIVE SUMMARY

The following strategic pillars and their respective actionable initiatives were developed and processed through the eyes of the visitor traveling to the city by air, sea and land. That visitor-centric perspective is critical to identify what will realistically increase overall visitor spending and length of stay year-round. (Note, the pillars are not listed in order of priority.)

1. Optimize the SeaTac Angle Lake Station Area’s Cultural Assets and Highlight Community-based Experiences
2. Develop Tukwila International Boulevard Station Area as a Grand Entrance to “SeaTac North” and North SeaTac Park
3. Activate the Three Light Rail Stations as Experience Platforms to Showcase Local and Regional Culture
4. International Boulevard Visitor Experience: Beautify, Brand, and Enhance Mobility and Transportation Infrastructure
5. Develop and Build Out an Entertainment and Events Mixed-Use District Near SeaTac/Airport Station

The City of SeaTac Tourism Destination Development Plan is the first ever effort of this kind undertaken by the City. It is anticipated that this plan will be a living document that will be updated on a regular basis as developments evolve within the metro area over the next 10 years.

COMPETITIVE ASSESSMENT

This plan identified four cities near gateway airports that have similar visitor industry infrastructure to provide a competitive framework to gauge how the City of SeaTac stacks up as a visitor destination across the multitude of indicators. The four cities and their respective airports are: Rosemont, IL (O’Hare International Airport); College Park, GA (Hartsfield-Jackson International Airport); South San Francisco, CA (San Francisco International Airport); and

Bloomington, MN (Minneapolis-St. Paul International Airport). It is important to note that SeaTac benefits from significant nearby demand generators beyond the City of SeaTac’s borders. Those assests include the Westfield Southcenter mall (the largest mall west of the Mississippi, which draws more than 15 million visitors per year) and The Museum of Flight (500,000 annual visitors). Also, SeaTac is a short drive to the City of Des Moines Marina and Puget Sound, and SeaTac provides quick access to downtown Seattle by light rail.

The chart below identifies at a high level how SeaTac compares against the competitive set in this plan. See the appendix for further context.

Asset	SeaTac	Peer Cities (Out of 4)
Convention/Conference Center	No	3
Conference Hotel	Yes	4
Special Event Space	No	3
Luxury/Upscale Hotels & Resorts	Yes	4
Select Service Hotels	Yes	4
Boutique & Independent Hotels	No	1
Downtown Walkable “Main Street”	No	3
Upscale Shopping	No	2
Outlet Mall	No	1
Music Venue	No	2
Family Entertainment Attraction	No	2
Strong Downtown District (Bars/Restaurants)	No	2
Wineries, Breweries & Distilleries	No	2
Food Halls, Local Cuisine & Eateries	Yes	3
Unique Attraction	Yes	4
Strong Local Event(s)	No	2
Parks & Trails	Yes	2
Outdoor Recreation & Sports	Yes	3

EXECUTIVE SUMMARY

PLAN DEVELOPMENT

The process to create the 10-year City of SeaTac Tourism Destination Development Plan involved a thorough review of existing planning documents and proposed developments presently under consideration at local and regional levels. The Tourism Destination Development Plan was created in full alignment with the City of SeaTac's past and ongoing planning initiatives in long-term economic and community development (e.g., Comprehensive Plan; City Center Plan, as it updates; and Station Area Plans; among others).

Supplementing that, the consultants were contracted to facilitate multi-sector community engagement, including a series of focus groups and individual interviews with more than 50 public leaders and private sector stakeholders. They also collected extensive visitor demographic and source market data, produced a competitive assessment comparing SeaTac against similar cities, and developed the final plan.

The key takeaways from the research and community engagement are outlined further in this document. Those takeaways provided the foundation for developing the final strategic framework, consisting of five overarching pillars and a series of actionable initiatives for each.

A few core themes emerged early on during this project, which influenced the direction of the plan's development and its final deliverables. Chiefly, there was widespread agreement that the City of SeaTac is mostly identified by its relationship with the Seattle-Tacoma International Airport (SEA), but the destination lacks a certain "there, there," with no discernible urban core or community gathering places such as a town square. Those are critical for growing leisure and business travel because they are magnets for visitors.

There was also a clear recognition that a key strength for the City of SeaTac is the global diversity of its residents, and the powerful community bonds inherent



in that spirit of inclusivity. Every element of this plan was developed with a commitment to embrace SeaTac's diversity and share it with the world.

Lastly, King County and the Port of Seattle are exploring the feasibility of building a new International Public Market somewhere in South King County. Concurrently, the City of SeaTac is considering building a new City Hall and Civic Center. The chance to develop those together near a light rail station is a potentially once-in-a-generation opportunity. However, if those don't come to pass as a combined project, the open-market concept is still relevant for SeaTac to develop a similar type of mixed-use public market space designed for both visitors and residents.

PURPOSES OF THIS PLAN

1. Improve the visitor experience in SeaTac to increase incoming visitor dollars and average visitor length of stay in SeaTac hotels

2. Guide short, medium and long-term investment decisions to grow the visitor economy and optimize lodging tax allocations

3. Align government, industry and community priorities to strengthen SeaTac's civic pride, identity and sense of place as it relates to tourism

INTRODUCTION

The City of SeaTac has a robust visitor economy with long-term projections predicting sustained growth. Operated by the Port of Seattle, the Seattle-Tacoma International Airport (SEA) employs more than 23,000 people, and it provides access to hundreds of domestic and global destinations with more routes being added every year. In 2022, the prestigious Skytrax Airport Ratings ranked SEA as the Best Airport in North America.

SEA totaled about 46.5 million passengers in 2022 – down 11% from 2019 – with a forecast to reach pre-pandemic traveler volumes in 2024. With a regional economic impact of more than \$22.5 billion in business revenue, SEA generates more than 151,400 jobs (87,300 direct jobs), representing over \$3.6 billion in direct earnings and more than \$442 million in state and local taxes ([SEA](#)). Also, it's estimated about 79% of visitors in SeaTac, Tukwila and Des Moines arrive through SEA ([Seattle Southside RTA "SSRTA"](#)).

Likewise, SeaTac's hotel sector is reporting healthy earnings. There are about 6,400 hotel rooms in SeaTac, generating around \$2 million in lodging tax revenues per year, making it the second largest lodging market in the State of

Washington (Seattle is first, Bellevue is third). From June to December 2022, hotel occupancy, revenue per available room, and average daily rate were floating between 2-5% below 2019 pre-Covid data. It is anticipated that year-end hotel metrics for 2023 will surpass those from 2019 ([SSRTA](#)). However, average hotel occupancy annually remains below two nights. That is a critical threshold for hotels because the second night, which doesn't require hotels to fully service a room, drives significant bottom line profits for the hotels, and it dramatically increases lodging tax revenues for the City of SeaTac.

The primary goals of the Tourism Destination Development Plan are to improve and diversify the visitor experience to increase visitor spending and length of stay throughout the year. That will subsequently increase lodging and other visitor-generated tax revenues (sales, parking, commercial property tax, etc.), which ultimately contribute to funding public services and amenities that benefit the residents of SeaTac.

One of the most significant opportunities for increasing visitor spending and length of stay is the meetings sector. The city's hotels have 90,000 square feet of meeting space collectively, and they are hosting more meetings every year. For example, DoubleTree by Hilton SeaTac recorded its highest revenue ever in

INTRODUCTION

2022. (The increase in meetings and conference business overall throughout SeaTac is partially because more hotel executives are increasingly collaborating with the SSRTA to jointly participate at meetings industry sales and trade shows throughout the year.)

The most significant trend in the meetings and convention sector in the last two decades is the increase in demand for destination experiences, above and beyond the quality and capacity of meeting venues. Meeting planners and attendees are generally eager to have a variety of options to gather and converse outside their hotels for meetings beyond a one-night hotel stay. These high-spending customers are especially looking for restaurants, coffee shops, bars and vibrant urban districts with rich amenities where they can experience the local energy and a diverse range of work and leisure environments.

DESTINATION DEVELOPMENT

In order to realistically increase annual visitor volumes and visitor spending in the City of SeaTac, it is critical to further develop high-traffic areas of the city to enhance the visitor experience. A common perception about SeaTac is, “There’s no there, there.” Dating back to the mid-to-late 1990s, the City’s master planning efforts have sought to create a strong sense of place by leveraging the three light rail stations as catalytic anchors for three “urban villages.” Instead of one main urban core, the centers of community activity are distributed across the city and connected by rail via stations that arrived from 2006 through 2016.

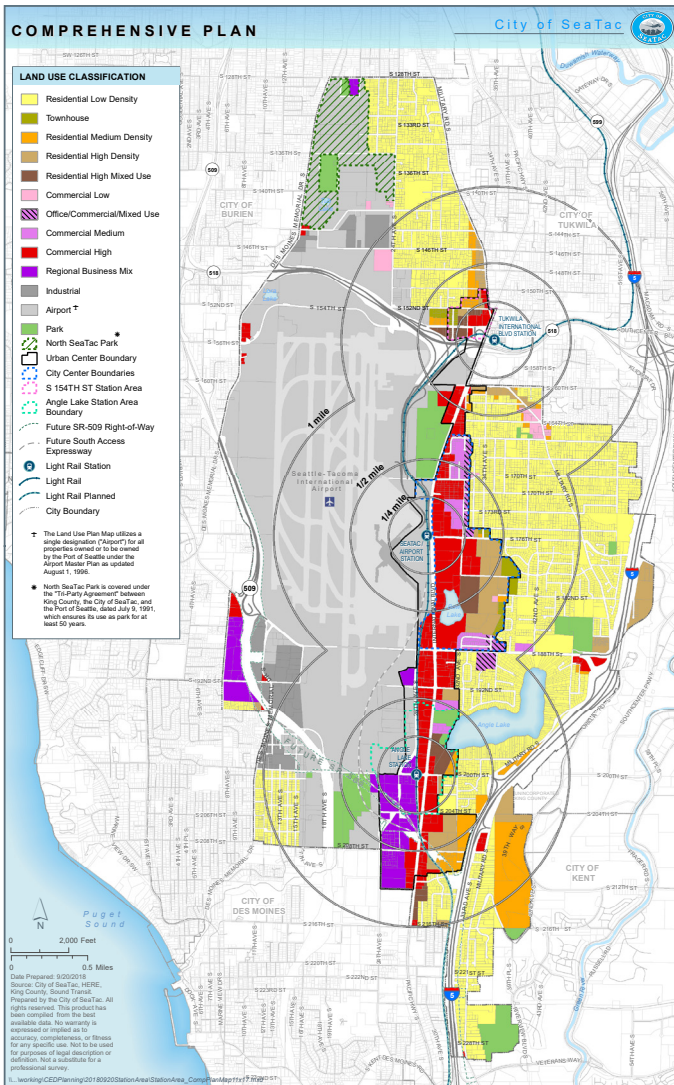
Presently, however, there is a lack of public places and amenity-rich commercial areas in the city where locals and visitors can gather and interact (*Hunden, p. 27, 30*). This is due to a lack of strategic planning and investment before the City’s incorporation. According to the City of SeaTac Comprehensive Plan: “*Most of the development along SeaTac’s main commercial corridor, International Boulevard, represents pre-incorporation development patterns, and does not adhere to urban design principles for active centers.*”

Today, the perception among travelers arriving from outside the city limits is that SeaTac is a convenient place to park, sleep, and for business travelers, conduct business in hotel meeting spaces. Except, the absence of a central downtown or neighborhood business district, which typically define the image and atmosphere of a city, means that visitors perceive SeaTac as a city without an identity beyond the airport, or, in most cases, visitors are not aware that it is a formally recognized city. (This is common visitor feedback shared by meeting planners, the SSRTA, local hospitality businesses, etc.)

Hunden Partners collected data on the top tourism generators for visitors in 2022 (*Hunden p. A15*) to identify the most popular visitor industry assets for SeaTac presently.

Attraction/Business	Total Visits (2022)
Seattle-Tacoma International Airport (SEA)	46,500,000
Valley Ridge Community Center & Fields	604,900
DoubleTree by Hilton Hotel Seattle Airport	554,100
Hilton Seattle Airport & Conference Center	285,200
Seattle Airport Marriott	239,600
Sharps RoastHouse	185,200
North SeaTac Park & Ball Fields	184,900
Cedarbrook Lodge	176,700
Crowne Plaza Seattle Airport	155,900
Angle Lake Park	87,300
Mall of Africa	77,000
SeaTac Community Center	47,600
SeaTac International Mall	18,500
Highline SeaTac Botanical Gardens	13,000
SeaTac BMX Park	11,600
Sunset Park	10,000

INTRODUCTION



This Tourism Destination Development Plan is designed to activate the three light rail stations and their surrounding land with visitor activity, in alignment with the City of SeaTac's Comprehensive Plan.

The fact that a restaurant catering to all types of travelers is one of the most popular non-hotel venues for travelers in SeaTac shows the demand for full-service dining and entertainment options in the city near the airport. Visitors arriving into SeaTac or leaving by car are often seeking a place to eat to break up their trip. Also, about 6% of air passengers departing SEA travel to a restaurant in SeaTac (*Hunden p. A21*) before heading on to their destination, suggesting opportunity for growth.

For this plan, Hunden Partners also collected data across a competitive set of cities with nearby gateway airports to compare against SeaTac. They are: Rosemont, IL; College Park, GA; South San Francisco, CA; and Bloomington, MN (*Hunden p. A7*). The peer destinations feature diverse restaurant, retail and entertainment amenities that provide those cities a competitive advantage for increasing visitor spending and average length of stay (*Hunden p. A9*).

CITY URBAN CENTER AND NODES DEVELOPMENT

The SeaTac Comprehensive Plan, SeaTac City Center Plan (being updated), and Station Area Plans all address and inform the development of intentionally planned city cores (currently called the City's "urban village strategy") to create a critical mass of human activity in close proximity.

This 10-year Tourism Destination Development Plan brings a visitor-centric lens to the equation that builds on the City's urban, economic and community development strategies. It advocates for the needs of visitors in order to increase visitor revenues year-round, but at the same time, residents also want more of the things that make a "there, there." It is assumed that anyone reading this plan will understand and appreciate that the destination development recommendations outlined in this plan will ultimately benefit local businesses and the City's tax base at scale.

The Angle Lake Station area (*consider name change to "SeaTac Angle Lake Station"*) provides a viable opportunity to steer the area's naturally developing ecosystem of cultural assets and independent businesses into an identifiable community/district for visitors. (See the #1 strategic goal and initiatives.) This community-building strategy aligns with the Angle Lake District Station Area Plan (2015), which states: "This plan aims to optimize the community and economic opportunities presented by the construction of the Angle Lake Station. Its main purpose is to guide future development by establishing a community supported vision and an achievable strategy that can transform the Angle Lake District into a pedestrian-friendly, transit-oriented community."

INTRODUCTION

In 2023, there is significant momentum with ongoing mixed-use commercial and residential development around SeaTac Angle Lake Station, inspired by the Station Area Plan, including approximately 1,500 units of new housing planned and under development.

Looking ahead, SeaTac is facing a generational opportunity with the Port of Seattle and King County exploring the development of an International Public Market, while the City of SeaTac is exploring a new City Hall and Civic Center. Should those projects be approved and integrated with each other, it would provide the desired gathering and activity places within the Urban Center near SeaTac Angle Lake Station or SeaTac/Airport Station.

The Tourism Destination Development plan also provides visitor-centric recommendations in strategic goal #5 to activate SeaTac/Airport Station, where there is presently no recent commercial development of interest to visitors (beyond the existing amenities of hotels/parking lots/limited restaurants and one proposed new hotel/apartment project).

The City is also working on updating the City Center subarea plan and urban development concepts to guide future development, and has already focused substantial funds for pedestrian environment and sidewalk improvement projects (exceeding \$18M of committed capital improvement project funds over the next couple of years).

COMMUNITY ECOSYSTEM DEVELOPMENT

All decisions related to optimizing the visitor economy in SeaTac must also benefit the broadest range of local residents as possible. The city's population of 32,000 residents represents some of the most diverse citizenry in South King County, with the lowest average income. Globally, the travel and tourism industry has long proven to provide exceptional personal and professional development opportunities for people across all spectrums, including citizens of marginalized communities, non-degreed workforce and people of all abilities.

Improving quality of life and professional/economic development opportunities for residents is key for further optimizing the SeaTac's visitor economy. It cannot be overestimated how much workforce pride and positive resident sentiment contribute to elevating the visitor experience and increasing repeat visitation.

Highline College offers a highly ranked 2-year degree program in hospitality and tourism management, which provides a direct workforce feeder pipeline for SeaTac hotels. In past years, Highline College has collaborated with the local hospitality industry to bring students to tour hotel properties and speak with management staff. Hotel executives are eager to continue that engagement.

Looking ahead, Highline College is seeking opportunities with the City of SeaTac to bring students into broader conversations around the synergies between tourism, urban, community, economic and small business development. The goal is to keep more new graduates in SeaTac by introducing them to new career pathways in a city that revolves around visitors. Anything the City can do to help retain local travel industry talent and strengthen the area's workforce development pipeline benefits everyone in SeaTac.

Also, the soon to open (end of 2023/early 2024) Kent/Des Moines light rail station will be directly across the street from Highline College, offering the addition of one more exceptional public transit station to help students access the City of SeaTac and SEA more conveniently.

NOTE TO READER: A LIVING DOCUMENT

This plan is the first ever of this kind for the City and is phased with near-term and long-term outlooks and recommendations. City staff should create annual work plans to implement the overall plan. The plan should also be reviewed and updated every 3-5 years to incorporate changes and maximize opportunities.

KEY INDUSTRY & COMMUNITY TAKEAWAYS

MMGY NextFactor and Hunden Partners engaged more than 50 government, industry and community leaders to identify the most significant opportunities and challenges for optimizing the visitor economy in the City of SeaTac. The following takeaways established the basis for developing the plan's strategic framework and prioritizing the initiatives.

1. URBAN CENTER & URBAN VILLAGES STRATEGY

- The City of SeaTac's master planning vision to develop land around the three light rail stations as mini urban villages was first proposed in the mid-1990s. The City has seen slower than desired progress to implement the City Center and station area development plans, yet this is critical for the success of the destination's development. There is substantial visitor activity within the "City Center" area (56% of the 6,000+ hotel rooms). Almost all of the hotels are within the broader Urban Center area.
- Based on context around the history of private real estate development and existing property uses in the city, there seems to be little economic incentive for airport parking lot owners/operators to redevelop or sell their properties (due to business revenue interruptions and perceived risk of new development/cost of capital and construction). Thus a lack of available developable land is a likely hurdle for the city's envisioned sustainable growth and equitable prosperity in the short/medium-term future.
- The most promising opportunity for developing a central community cultural experience hub with a SeaTac centric experience in the short-term is the potential International Public Market and the relocation of City Hall, as well as the creation of a Civic Center near a light rail station. The City is exploring what opportunities and partnerships exist near SeaTac Angle Lake Station and City Center SeaTac/Airport Station, which can accommodate multiple complementary uses.
- The Port of Seattle and King County are conducting a feasibility study for the International Public Market in South King County close to SEA. If the project is deemed viable, the committee conducting the study will make site recommendations in 2024.

- There are multiple organically developing ethnic businesses with a couple of multi-tenant markets that recently opened, and a music venue under development near the SeaTac Angle Lake Station. In addition to this culture-rich amenity cluster, there are about 1,500 units of new housing planned and under development in this area. This is important because businesses depend on "rooftops" and residential populations with disposable income to be sustainable, in addition to attracting visitor business.

2. AIRPORT & LIGHT RAIL STATIONS

- The City of SeaTac and SEA Airport are unique within North America in that the airport terminal is immediately adjacent to the city core. This allows for a 5-minute pedestrian connection into the city. Improving the walking environment also reduces use of carbon emitting modes of transport.
- SEA strives to provide all desired traveler amenities and shopping opportunities within the airport, which does not naturally encourage visitation into the City of SeaTac based on the lack of the wayfinding and visitor education throughout the facility.
- The parking lot environment connecting the SEA and City Center SeaTac/Airport Station could be further optimized. For example, it lacks the necessary wayfinding to guide visitors to the station and the City. Visitors do not discern where Port of Seattle jurisdiction turns into Sound Transit or City of SeaTac jurisdictions. Therefore, it is important that the connection is seamless and well-coordinated by the various jurisdictions for the best possible visitor experience and access to the city.

KEY INDUSTRY & COMMUNITY TAKEAWAYS

- While a significant new project is helping to implement the City’s vision for a residential mixed-use center across from Tukwila International Blvd Light Rail Station, SeaTac’s City Center and Angle Lake station area currently do not provide a local sense of place or encourage visitation. To address this, the City is presently updating the subarea plan for the City Center/ Airport District and continues to proactively attract new development and programs to the Angle Lake Station area. Sound Transit, Seattle Southside Regional Tourism Authority, and regional cultural organizations are also committed to activating the station areas, with some dedicated funding among them.

3. LOCAL COMMUNITY

- Based on local resident demographics, it is critical for the future of the City of SeaTac’s development to prioritize diversity, equity and inclusion.
- The city’s 32,000 residents represents one of the most diverse resident populations in South King County, with the lowest average income.
- There are significant opportunities to build on local and regional diversity to enhance the visitor experience, define the destination brand and identity, and inspire greater civic pride and optimism.

4. HOTEL INDUSTRY

- The 6,000+ hotel room cluster is performing well. Prior to and following the Covid pandemic, bookings have been steadily increasing, but average hotel stay is below two nights at 1.2 nights. A 2+ night stay metric is a key goal for the industry based on the profitability a second night delivers.
- 2022 hotel/motel tax collections of \$1,96M exceeded 2019 record level of \$1,88M. To date, 2023 collections indicate a likely \$2M or more total



for the year, barring any unforeseen impacts. This trajectory indicates continued growth.

- The hotel community has been vocal about rising crime and public safety concerns in and around their properties. Hotel executives state there is both a lack of police officers and a lack of available private security personnel to ensure that both guests and staff feel safe.
- More can be done to capitalize on Highline College and its highly rated hospitality program “HOST.” The school is eager to partner with the City and area hotels to advocate for the tourism sector and provide greater career opportunities for residents. There is a continuous shortage of hospitality workers locally despite the highest minimum hourly rates in the nation. The high cost of labor also impacts operational profitability.

KEY INDUSTRY & COMMUNITY TAKEAWAYS

- There has been significant discussion about centralizing hotel/airport shuttles to service multiple hotels on single routes, but visitors prefer direct service. New app technology could be a solution and there is some interest in electrification of shuttle fleets. Increasing vehicle and shuttle traffic in and out of the airport is extending the roundtrip shuttle times substantially.

5. ENTERTAINMENT & EVENT DISTRICT

- The City of SeaTac and local hotels have been very clear that they're not interested in entertaining strategies to develop a new convention/conference center at this time due to all the existing smaller meeting venues (capability of hosting concurrent events with about 300 attendees each). However, such a venue might be viable in the future, once all existing venue spaces are running at full capacity throughout the year.
- Longer-term, there is the potential availability of land and the demand for a Mixed-Use Entertainment & Event District near the SeaTac/Airport Station. Comparable destinations often have a vibrant ecosystem of amenities around their airport/hotel clusters.
- Hoteliers expressed general support for additional high-end restaurants and shopping options throughout SeaTac, as it is seen to support the overall desirability of the destination.

6. SPORTS TOURISM & OUTDOOR RECREATION

- North SeaTac Park, Angle Lake and regional sports facilities present growth opportunities for outdoor recreation and sports tourism, with potential for additional visitor spending in SeaTac.
- There is significant private sector investment in the SeaTac BMX track, and the City is continuing to expand trails and fields in North SeaTac Park.

- The north of the city can be further developed, positioned and branded as an outdoor destination for visitors, with an emphasis on biking culture and active lifestyles.
- Valley Ridge soccer fields brought more than 600,000 visitors to SeaTac in 2022. FIFA 2026 will offer new and unique opportunities to further elevate soccer in the region. Additionally, the Star Fire sports/soccer fields complex complements the sports scene in SeaTac by providing capacity for larger tournaments.
- Comparable destination analysis indicates that SeaTac has a notably large abundance of open space and parks in close proximity to the airport. Much of the visitation seems to be regional and local.

7. BRAND & IDENTITY

- Although the goal of this plan is for more visitors to stay overnight in SeaTac's 6,000+ hotel rooms and spend money within the city, the most effective way to promote the City of SeaTac to visitors is as the "Grand Entrance" to the Pacific Northwest and the Greater Seattle Area with a wide array of demand generators.
- International Boulevard and the three light rail stations are the best physical platforms for investing in branding and messaging to educate visitors that there is a City of SeaTac. There are many opportunities for art and beautification in and around the stations, and the SSRTA has already begun developing colorful marketing materials for the stations.
- The City of SeaTac is home to a highly diverse range of ethnicities. The international community of residents should be a central theme in branding and messaging to help tell a unique story of SeaTac to the world. The city's rich mosaic of identities, flavors, and interests should be viewed as a wellspring of strength, creativity and innovation for the city.

STRATEGIC FRAMEWORK



The City of SeaTac, the two contracted consultants, and a wide cross-section of community and industry stakeholders developed the following strategic pillars, based on the many qualitative insights and quantitative data collected to produce this plan.

Each of the pillars encompass a series of actionable initiatives to accomplish the goals put forth. There is also a timeline to identify the pace of resource allocation for each initiative. Note, the following pillars are not listed in order of priority.

1. Optimize the SeaTac Angle Lake Station Area's Cultural Assets and Highlight Community-based Experiences
2. Develop Tukwila International Boulevard Station Area as a Grand Entrance to "SeaTac North" and North SeaTac Park
3. Activate the Three Light Rail Stations as Experience Platforms to Showcase Local and Regional Culture
4. International Boulevard Visitor Experience: Beautify, Brand, and Enhance Mobility and Transportation Infrastructure
5. Develop and Build Out an Entertainment and Events Mixed-Use District Near SeaTac/Airport Station

1

Optimize the SeaTac Angle Lake Station Area's Cultural Assets and Highlight Community-based Experiences

The City of SeaTac is exploring the feasibility of developing a new City Hall and Civic Center on land likely near SeaTac Angle Lake Station or possibly near SeaTac/Airport Station. Presently, this initiative is in the very early stages. However, the synergies of developing a new City Hall, Civic Center and the potential International Public Market on one integrated campus near a light rail station will likely alter the trajectory of the city for generations.

In March 2023, the Port of Seattle and King County launched a feasibility study for development of an International Public Market in South King County with preference for near airport locations in SeaTac or Tukwila. An Advisory Committee is overseeing the feasibility process, which included community and business outreach. Phase one of the process confirmed strong community and business interest in a potential international public market. The committee recommended proceeding to phase two, where financial and locational feasibility will be evaluated by early 2024.

Holistically, the convergence of the following three conditions provide a rare and dynamic opportunity for the City of SeaTac and its communities, where the result is substantially greater than each as a standalone pursuit: 1) Availability of sizable land parcels for the potential project in close proximity to a light rail station; 2) Decision to move City Hall and develop an adjacent Civic Center; and 3) Winning the bid for the International Public Market built within SeaTac

There are several key factors that make the case for building the International Public Market in the City of SeaTac.

1. The City of SeaTac has one of the most diverse populations in King County but also the lowest household median income. With the City of SeaTac, Port of Seattle and King County prioritizing inclusivity, a strong argument can be made that SeaTac is the most opportune location for the public

market based on the impact it will have to lift underserved communities. Market participants will show how all resident groups have opportunities for self-determination in the Pacific Northwest. The city's unique resident and student demographics strongly lend to the recommendation that the market be aptly named "SeaTac International Public Market," which capitalizes on the already internationally recognized brand of "SeaTac."

2. The creation of a public marketplace has the potential to dramatically reshape SeaTac's overlooked reputation. Building the International Public Market in SeaTac finally establishes a "there, there" for the city. A potential public market will be able to capitalize on an established ethnic market ecosystem (Mall of Africa, SeaTac International Mall, and other ethnic businesses) that has evolved organically over decades. In effect, SeaTac has the most authentic international makeup to best host an international market for the region and attract/retain an international workforce.
3. The City's central location in the Puget Sound region and being the host city to Seattle-Tacoma International Airport create an unparalleled advantage in serving and providing accessibility to the region. Visitors to a proposed SeaTac International Public Market can also take advantage of the city's close proximity to destination waterfronts in Angle Lake and Des Moines, as well as the region's other charming amenities.
4. One of the city's economic strategies is to promote arts and entertainment. The city is working with Sound Transit's STart program to energize public spaces along SeaTac's three rail stations. An upcoming effort is The Roadhouse, which will involve a live music venue at the SeaTac Angle Lake Transit Station for riders, travelers, and the community to enjoy.

1

Optimize the SeaTac Angle Lake Station Area’s Cultural Assets and Highlight Community-based Experiences

Strategic Initiatives

Timeline (Years)
 Now 1-2 3-5 6-10

		Now	1-2	3-5	6-10
a)	Increase partnerships with the Mall of Africa, SeaTac International Mall and other ethnic local businesses in the regional market, and increase visibility				
b)	Support and promote the growth of arts and entertainment venues such as the Roadhouse music venue				
c)	Develop transportation links to the waterfronts of Angle Lake and Des Moines				
d)	Collaborate with Highline College to support local workforce development and leadership training opportunities that align with economic and community development goals				
e)	Evaluate developing new City Hall, Civic Center and the SeaTac International Public Market in an integrated campus that celebrates SeaTac’s local diversity				

2

Develop Tukwila International Boulevard Station Area as a Grand Entrance to “SeaTac North” and North SeaTac Park

There is significant ongoing private investment in “SeaTac North” on land surrounding Tukwila International Boulevard Station (TIBS) for both transit-oriented development of light commercial space and multi-family housing. Once the commercial space achieves full occupancy and the small businesses open, it will provide a magnet for visitor spending in addition to the expanding economic activity derived by the growing local community.

“SeaTac North” also presents remarkable potential for the creation of a sustainable, long-term outdoor recreational hub for locals and visitors. This strategy is supported by the presence of unique park amenities near the light rail station and surrounding communities, along with ongoing investments in and around North SeaTac Park. TIBS is the next station north of the SEA Airport and only a 4 minute light rail ride. North SeaTac Park is about 1.5 miles away.

Although already a regional destination, North SeaTac Park is an under-leveraged jewel for the city from a tourism visitation and visitor spending capture perspective. The Highline SeaTac Botanical Garden attracts thousands of regional visitors to “SeaTac North” annually, and the landscaped grounds provide many benefits for locals. Aside from the typical park uses, the garden can host wine/beer/alcohol-related events, which can be a great addition for other North SeaTac Park related experiences and events (SeaTac BMX; Wednesday Night Races; mountain bike trails and tracks, etc.)

Another opportunity for the region is the creation of bikeshare stations and/or ebike (electric bicycle) businesses near the TIBS light rail station for people to bike up to the park. The area is heavily residential so the streets are more safe, although the area would benefit from dedicated bikes lanes where suitable. Existing research shows how increasing non-motorized mobility options drives incremental spending in restaurant and retail businesses. Developing biking infrastructure in the region also aligns with the BMX and off- road bike culture

in the park, which is a booming sector in outdoor recreation. Furthermore, biking provides a great way for visitors to access the increasing volume of hiking trails being developed in the area. (E-bikes and other modes should be evaluated throughout the city).

The well-established SeaTac BMX track facilities provide a commercial anchor for the park, and the organization running it has been successful at raising private investment for improvement and expansion of the various tracks. SeaTac BMX recognizes that users of the park come from very diverse backgrounds and age groups, and they have developed programs that support these various groups, with an emphasis on disadvantaged children and young adults. The youthful BMX culture nationally also provides significant opportunities to diversify the City of SeaTac’s brand around active outdoor lifestyles.

There is a growing travel segment of passionate BMX and off-road biking enthusiasts in the Pacific Northwest, and therefore there is a growing, high-spending visitor source market in close range to SeaTac. Additionally, developing the SeaTac BMX facilities to align closer with national competition standards presents opportunities to attract major race sporting events, which equates to an expanding visitor base spanning local, national, and even international. The growing influence of BMX in SeaTac will enable people from all over to interact and experience the city’s unique attractions.

SeaTac BMX track hosted the State Championship Qualifier race and the Gold Cup Championship Qualifier race in July of 2022. The track is well positioned to host national races and is exploring bigger events on a regular basis. This kind of national and international exposure creates new opportunities for SeaTac. Also, with the high and growing attendance (regular users and race participants/ attendants), there are also opportunities to increase food and beverage, amenities and other shopping opportunities.

2 Develop Tukwila International Boulevard Station Area as a Grand Entrance to “SeaTac North” and North SeaTac Park

Strategic Initiatives

		Timeline (Years)			
		Now	1-2	3-5	6-10
a)	Enhance bike infrastructure and support related small business development around northern neighborhoods and North SeaTac Park				
b)	Attract more bike-related and outdoor sporting events to the park; identify and address logistics related to bigger events				
c)	Support Highline SeaTac Botanical Garden’s visitor attraction initiatives and robust programming				
d)	Support sport-related local youth development programs				
e)	Integrate the visitor experience more closely with local community businesses and residents who live in the area				
f)	Explore creation of activities protected from the elements/weather (indoor facilities) to increase year-round activity options (i.e., roof over BMX track, lighting and turf on fields, etc.)				

3

Activate the Three Light Rail Stations as Experience Platforms to Showcase Local and Regional Culture

With 3.5 million riders annually boarding at the three light rail stations serving SeaTac, the stations are well-positioned to provide significant information about local culture, art, events, food, shopping, activities and ongoing developments for both visitors and local residents. And, with the stations strategically located in the city's north, central and southern regions, they can be further optimized for educating and inspiring all rail passengers about the city, its businesses, its people, and its role as the Gateway/Grand Entrance to the Pacific Northwest.

In effect, the stations are empty canvases, stages and platforms for multimedia programming that celebrates local diversity and identifies the City of SeaTac as a destination of its own. The three stations are also the anchors of the City's master planning vision dating back three decades. Therefore, they are crucial considerations for the city's long-term development beyond their role as transportation hubs.

Explore Seattle Southside recently implemented a pilot marketing campaign initiative called "[Station Domination](#)." The organization is developing colorful branding imagery for inside the SeaTac/ Airport Station to begin activating the light rail stations aesthetically and promote the City of SeaTac and the tourism promotion region, which includes Des Moines and Tukwila, to visitors traveling through the stations. The public, private and civic sectors should build upon this initiative to expand it to the other two stations with SeaTac branding, promotion and programming within the stations and their surroundings.

Concurrently, representatives from Sound Transit state that public programming, art and culture, and events are foundational for expressing the unique identity of a community to visitors. Sound Transit is presently exploring a station activation pilot program called the South Transit Art Program (STart). The goal is to produce music and event programming that complements the existing public art that's already been incorporated into the stations.

The first phase of this program is planned for late 2023 and will be a live performance space at SeaTac Angle Lake Station, inspired by the Roadhouse culture along Highway 99 that was popular from the 1930s to 1960s. STart will host a series of small, intimate performances at this new venue that will feature artists and community organizations from the region. These will be free, space-limited events, and they'll be recorded for streaming to riders and South King County residents.

There is also interest from Sound Transit in partnering with the Port of Seattle and local/regional cultural organizations to design specific multimedia programming for each station to inspire both locals and visitors to explore more of the City of SeaTac and South King County. Therefore, there is considerable opportunity to increase music at the three stations, various types of events, and other activation programming (food trucks, pop up retail, farmer's markets, etc.).

Lastly, the connection between the SEA airport and SeaTac/Airport Station through the airport's parking garage lacks wayfinding. Anyone departing SEA wouldn't necessarily know that a train station was five minutes away. The entire "welcome" experience should be upgraded because that provides an opportune moment to create a greater sense of place and sense of arrival for visitors. It is in the best interest of all community and industry stakeholders in SeaTac for visitors to know they're in a specific place that acknowledges their presence and cares about their experience.

In summary, the City of SeaTac should maximize the city's identity and values to the traveling public through strategic marketing and promotion around the travel hubs.

3

Activate the Three Light Rail Stations as Experience Platforms to Showcase Local and Regional Culture

Strategic Initiatives

Timeline (Years)
 Now 1-2 3-5 6-10

a)	Create a greater sense of place and identity inside the stations and nearby with multimedia programming (varies by stations) and align with external efforts around the stations featuring appropriate visual cues, signage and beautification/art				
b)	Profile community and business leaders in public messaging/promotion to foster greater civic pride and support local small business development				
c)	Highlight the City of SeaTac’s diverse resident population to promote diversity, equity and inclusion as a strength for the city and region				
d)	Expand collaboration between tourism industry and the city’s Arts, Culture and Library Advisory Committee (ACLAC), and related Greater Seattle organizations to implement the city’s Arts and Culture Masterplan to improve and diversify the visitor experience				
e)	Develop a cohesive and comprehensive tourism branding package that guides multimedia programming and establishes a consistent look and feel for SeaTac as a visitor destination				

4

International Boulevard Visitor Experience: Beautify, Brand, and Enhance Mobility and Transportation Infrastructure

The Gateway to the Pacific Northwest should feel like the Pacific Northwest. Presently, the first impression for visitors driving/flying into the city is less than ideal compared to many similar gateway cities along the West Coast from Vancouver to San Diego, as well as other international airport cities across the country.

As the busiest, most high-profile, and most connected street in the city, International Boulevard is the natural corridor for investing in beautification and branding efforts. Some recommended initiatives include installing public art; adding new trees and other landscaping; developing new city branding and banners; and upgrading public bus transit stations. There are also issues with various degrees of blight throughout the corridor that require longer term strategies to address.

There are multiple reasons for enhancing the visitor experience with a comprehensive scope of beautification and branding initiatives along International Boulevard. For one, the Boulevard should communicate that there is such a thing as the City of SeaTac. Creating a stronger identity for the city is the first step for establishing a “there, there.” Before you can create a “there, there,” it needs a name. That begins with modern, high-impact signage or murals that welcome visitors driving in when they first arrive at the city limits. It creates a connection. It tells people they have arrived at a distinct place.

Simple, low-cost street light banners and other signage should also identify the City of SeaTac up and down the Boulevard, beginning with the areas surrounding the three light rail stations. One of the earliest initiatives should be the creation of a significant sign or art element that identifies the city, such as an “I ♥ SeaTac” or “Welcome to the City of SeaTac” installation across International Boulevard directly in line of sight with the SeaTac/Airport Station.

This will serve a dual purpose of providing an iconic identifier/place to meet people, and it will block the view of the power substation from the station platform. Also, enhancing the Boulevard streetscape establishes a sense of civic pride and it increases the optics related to safety. Bigger picture, beautifying the Boulevard encourages outside investment and talent attraction, and it increases the overall brand reputation for SeaTac as a welcoming visitor destination.

The three light rail stations transport both locals and visitors to key locations in the city. Long-term, however, the addition of a branded people circulator like a trolley or shuttle will provide improved access to businesses and amenities (parks, entertainment, shopping, dining) located between the stations. As more businesses open in the next decade, that will eventually provide the critical mass to warrant increased mobility options with added hop-on/hop-off flexibility.

The City of SeaTac should also explore opportunities related to electric scooters and e-bikes to increase mobility options to access all amenities from north to south. This is only recommended once the necessary street infrastructure and dedicated lanes are in place to ensure safety for everyone. Some areas of the city may be suitable for pilot programs ahead of a full city network.

There is also the question about how visitor demand for parking will evolve in the next decade. Today, the mobility sector is developing new technologies rapidly, such as autonomous vehicle systems that are presently operating in cities in closed loop configurations. There are also app-based shuttle services where visitors can access transportation on demand, much like with individual car-sharing. For the near-term, there is substantial use of vehicles to access the airport and the local hotels/amenities. Looking further ahead, the local urban landscape will need to accommodate more multimodal infrastructure within the 10-year timeframe of this plan.

4 International Boulevard Visitor Experience: Beautify, Brand, and Enhance Mobility and Transportation Infrastructure

Strategic Initiatives

Timeline (Years)
 Now 1-2 3-5 6-10

		Now	1-2	3-5	6-10
a)	Create a big “I ♥ SeaTac” or “Welcome to the City of SeaTac” sign/monument at SeaTac/Airport Station, and add enhancements to or nearby the electric substation fencing such as a mural, etc.				
b)	Enhance streetscape, walkability and gateway signage/wayfinding to improve the overall sense of arrival for visitors arriving by car, shuttle, or on foot				
c)	Expand public art and murals, branding, lighting and landscaping				
d)	Encourage development of additional multimodal mobility options that connect visitors with businesses/amenities between light rail stations (shuttle, hop-on/hop-off circulators)				
e)	Seek investment from alternative mobility companies to improve visitor and resident access to all amenities from north to south SeaTac				

5 Develop and Build Out an Entertainment and Events Mixed-Use District Near SeaTac/Airport Station

The City of SeaTac should eventually have a dynamic city center ideally in close proximity to the entrance of Seattle-Tacoma International Airport. The area around SeaTac/Airport Station is the natural choice for a walkable mixed-use entertainment and events district (EED) that connects the airport, the high number of hotel rooms, and the density of a diverse residential population.

Having direct access from the international airport terminals into the city within a five-minute walk is unique and provides tremendous opportunities. The part of the city directly east of the airport already provides highly functional and practical amenities for visitors, including: a full spectrum of hotel options (majority of all hotel rooms are within a mile of the airport), conference spaces, multiple restaurants, abundant park & fly lots, and direct light rail access to downtown Seattle and many other destinations.

As well, there is a strong corporate presence at the International Place office complex with more than 500,000 square feet of Class A office space currently fully leased by diverse businesses. Also, Alaska Airlines is headquartered in close proximity and has an expanding campus presence. Surrounding all this is multifamily and residential housing, with many of the local residents working at the airport and area businesses.

The City is currently working on an update to the City Center/Airport District Subarea Plan, which will guide the urban development patterns in this area. Further exploration of a mixed-use EED will be informed by the mentioned plan and other relevant planning documents such as the Comprehensive Plan.

Developing a mixed-use EED is highly dependent on the availability of buildable sites and willing and capable developers committed to the concept in the next 5-10 years. For it to be viable, and make the desired impact on the community, the overall real estate footprint will need to be significant. The City's current

planning effort in the area will continue to evaluate development scenarios in the district and work with local business and property owners on viable near-term and long-term strategies to achieve the adopted vision of a vibrant mixed-use center. An EED is a platform for telling the world what the City of SeaTac is all about. It also will capture increased visitor spending in SeaTac instead of leaking it to neighboring communities.

Such a district should feature a walkable urban design along with a variety of culinary and retail options that celebrate local cultures and values. Ideally, the inventory of businesses would include local and nationally recognized brands to increase mainstream appeal, while also including creative and independent merchants as well. Furthermore, exploring and evaluating activation programming and market gap development opportunities can provide good test cases for bigger mixed-use concepts.

An EED plan would encourage further corporate investment to help shape the future of the city's amenity base and bring more high-value jobs to the community. Within this area the city continues to make significant capital improvements that would support a walkable EED. Sidewalk and lighting improvements and other planned beautification efforts along 176th Street and International Boulevard are some examples of that (estimated planned capital improvements underway will exceed \$18M).

Potentially complementing the development of the EED is a proposal for an integrated development project featuring a new City Hall, Civic Center, and International Public Market, which was previously mentioned in Strategic Goal #2 relating to activation of SeaTac Angle Lake Station. This proposal is being explored in several locations and everything is dependent on the availability of land. Also, the development of the City Hall and Civic Center is independent of the prospective International Public Market project.

5

Develop and Build Out an Entertainment and Events Mixed-Use District Near SeaTac/Airport Station

Depending how the visitor economy evolves in the City of SeaTac during the next five years, and what long-term visitation forecasts materialize into, it is feasible there could be enough demand for some type of adaptable venue for special events, cultural performances and conferences (which build on the existing hotel meeting space inventory for smaller-sized (200-500 person) attendee meetings.

The key requirement to developing any kind of new meetings and convention venue in the next 6-10 years is the support of SeaTac hotels, who must buy in to the idea with the necessary data to show that such a facility would expand, rather than cannibalize their own meetings business. Presently, the hotels are operating at less than full capacity with regard to hosting meetings business. Therefore, during the development of this plan, the City of SeaTac, the Seattle Southside Regional Tourism Authority, and local hotel executives have all stressed that they're not interested in exploring the feasibility of a new meetings venue in the near term.

There is also the consideration that the potential development of a new Civic Center near the proposed new City Hall, when that happens, can provide additional space for larger meeting and convention events.

Long-term, and when the meetings market validates the capital expenditure, the major value for an integrated entertainment and events district in front of SEA near SeaTac/Airport Station is that it puts a stake in the ground. It helps further establish a clear identity for the City of SeaTac, and it creates a strong sense of place for every visitor and local resident. Based on how the district is designed and programmed, it can showcase the unique spirit and aspirations of the community, and elevate the City of SeaTac into an international brand.



5

Develop and Build Out an Entertainment and Events Mixed-Use District Near SeaTac/Airport Station

Strategic Initiatives

Timeline (Years)
 Now 1-2 3-5 6-10

		Now	1-2	3-5	6-10
a)	Explore and evaluate activation programming and market gap development opportunities (coffee shop, mixed-use projects, food truck rodeo/square, etc.)				
b)	Implement recommendations from the Vision Report and the City Center/Airport District Subarea Plan underway (including art, streetscape improvements/beautification, etc.)				
c)	Attract nationally recognized brand tenants (restaurant, retail, entertainment, etc.), preferably strong local/regional brands				
d)	Develop midsize meeting facilities to increase capacity for larger meetings and attract a broader range of companies and organizations across more source markets				
e)	Evaluate and potentially develop a cultural performance venue that builds on and celebrates the diversity of the community and region				

STRATEGY FLOWCHART

Timeline (Years)

Now 1-2 3-5 6-10

		Now	1-2	3-5	6-10
1. Optimize the SeaTac Angle Lake Station Area's Cultural Assets and Highlight Community-based Experiences					
a) Increase partnerships with Mall of Africa, SeaTac International Mall and other ethnic local businesses in the regional market, and increase visibility					
b) Support and promote the growth of arts and entertainment venues such as the Roadhouse music venue					
c) Develop transportation links to the waterfronts of Angle Lake and Des Moines					
d) Collaborate with Highline College to support local workforce development and leadership training opportunities that align with economic and community development goals					
e) Evaluate developing new City Hall, Civic Center and the SeaTac International Public Market in an integrated campus that celebrates SeaTac's local diversity					
2. Develop Tukwila International Boulevard Station Area as a Grand Entrance to "SeaTac North" and North SeaTac Park					
a) Enhance bike infrastructure and support related small business development around northern neighborhoods and North SeaTac Park					
b) Attract more bike-related and outdoor sporting events to the park; identify and address logistics related to bigger events					
c) Support Highline SeaTac Botanical Garden's visitor attraction initiatives and robust programming					
d) Support sport-related local youth development programs					
e) Integrate the visitor experience more closely with local community businesses and residents who live in the area					
f) Explore creation of activities protected from the elements/weather (indoor facilities) to increase year-round activity options (i.e., roof over BMX track, lighting and turf on fields, etc.)					
3. Activate the Three Light Rail Stations as Experience Platforms to Showcase Local and Regional Culture					
a) Create a greater sense of place and identity inside the stations with multimedia programming (varies by stations) and align with external efforts around the stations featuring appropriate visual cues and signage and beautification/art					
b) Profile community and business leaders to foster greater civic pride and support local small business development					
c) Highlight the City of SeaTac's diverse resident population to promote diversity, equity and inclusion as a strength for the city and region					
d) Expand collaboration between tourism industry and the city's Arts, Culture and Library Advisory Committee (ACLAC), and related Greater Seattle organizations to implement the city's Arts and Culture Masterplan to improve and diversify the visitor experience					
e) Develop a cohesive and comprehensive tourism branding package that guides multimedia programming and establishes a consistent look and feel for SeaTac as a visitor destination					
4. International Boulevard: Beautify, Brand, and Enhance Mobility Systems and Transportation Infrastructure					
a) Create a big "I ♥ SeaTac" or "Welcome to the City of SeaTac" sign/monument at SeaTac/Airport Station, and add enhancements to or nearby the electric substation fencing such as a mural, etc.					
b) Enhance streetscape, walkability and gateway signage/wayfinding to improve sense of arrival for visitors arriving by car, shuttle, or on foot					
c) Expand public art and murals, branding, lighting and landscaping					
d) Encourage development of additional multimodal mobility options that connect visitors with businesses/amenities between light rail stations (shuttle, hop on/hop off circulators)					
e) Seek investment from alternative mobility companies to improve access to all amenities from north to south SeaTac					
5. Develop an Entertainment and Events District Near SeaTac/Airport Station					
a) Explore and evaluate activation programming and market gap development opportunities (coffee shop, mixed-use projects, food truck rodeo/square, etc.)					
b) Implement recommendations from the Vision Report and the City Center/Airport District Subarea Plan underway (including art, streetscape improvements/beautification, etc.)					
c) Attract nationally recognized brand tenants (restaurant, retail, entertainment, etc.), preferably strong local/regional brands					
d) Develop midsize meeting facilities to increase capacity for larger meetings and attract a broader range of companies and organizations across more source markets					
e) Evaluate and potentially develop a cultural performance venue that builds on and celebrates the diversity of the community and region					

APPENDIX

DESTINATION ASSESSMENT DATA HUNDEN PARTNERS



SeaTac Destination Development Plan



■ November 6, 2023





Table of Contents

1. **Executive Summary**
2. **SeaTac Destination Analysis**
 - a) Economic, Demographic & Tourism Analysis
 - b) Placemaking Market Opportunity Analysis
 - c) Comparable Destinations
3. **Implications & Recommendations**

Introduction



The City of SeaTac (Client) engaged MMGY NextFactor to complete a Global Sustainable Tourism Council Assessment and Tourism Master Plan. Hunden Strategic Partners was engaged as a sub-consultant to complete a scope of work that meets or exceeds all the elements necessary for a tourism destination assessment for SeaTac.

The visionary goals of the Plan include:

- Analyze destination metrics, including marketing and visitor metrics, current markets and product offerings.
- Review existing research, destination plans and other planning documents.
- Asset mapping, product gap & market analysis.
- Identify relevant local, national and global trends.

02

Executive Summary



Project Objectives

*This study aims at defining **where SeaTac is as a destination now**, how the city **stacks up to comparable major airport hub cities across the country** and finally, based on this analysis, **drawing impactful conclusions that identify where strong opportunities lie to take SeaTac to the next level as a destination.***



Where you are now.

Assessment of SeaTac's tourism assets, including the visitation induced, their attributes and quality, and overall performance. Focusing primarily on the influence of the SEA Int'l Airport.



How you stack up.

What have comparable airport cities done/are doing that has been successful in driving/capturing tourism? What assets do these communities have that may present a strong opportunity in SeaTac?



What are the opportunities.

Based on the assessment of where you are now and how you stack up, HSP will identify areas that represent strong opportunities to bolster SeaTac's tourism package.



How we get there.

How do we execute and implement these opportunities? What is the 10-year strategic action plan?

How you stack up.

SeaTac, Washington

2021 Population: 31,454

Seattle-Tacoma International Airport



hunden strategic partners

Comparable Peer Destinations

Rosemont, IL

2021 Population Combined: 3,952

O'Hare International Airport

College Park, GA

2021 Population: 13,930

Hartsfield-Jackson International Airport

South San Francisco, CA

2021 Population Combined: 66,105

San Francisco International Airport

Bloomington, MN


2021 Population: 89,987

Minneapolis-St. Paul International Airport

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Summary Matrix

Comparable Destination Analysis

How you stack up.	Category	Asset	SeaTac, WA	Peer Destinations (Out of 4)
	Meetings & Events	Convention/Conference Center	✗	3
		Conference Hotel	✓	4
		Special Event Space	✗	3
	Hotels	Luxury/Upscale Hotels & Resorts	✓	4
		Select Service Hotels	✓	4
		Boutique & Independent Hotels	✗	1
	Retail, Restaurant & Nightlife	Downtown Walkable, "Main Street"	✗	3
		Upscale Shopping Mall or Strip Mall	✗	2
		Outlet Mall	✗	1
Source: HSP, Various		 Under Development		

Summary Matrix

Comparable Destination Analysis

How you stack up.

Category	Asset	SeaTac, WA	Peer Destinations (Out of 4)
Entertainment	Music Venue	✗	2
	Family Entertainment Attraction	✗	2
Winery, Brewery, Distillery & Food Hall	Strong Downtown District (Bars & Restaurants)	✗	2
	Wineries, Breweries & Distilleries	✗	2
	Food Halls, Local Cuisine & Eateries	✓	3
Unique Attractions & Events	Unique Attraction	✓	4
	Strong Local Event(s)	✗	2
Rec, Parks & Nature-Oriented Assets	Parks & Trails	✓	2
	Outdoor Recreation & Sports	✓	3

Source: HSP, Various + Under Development

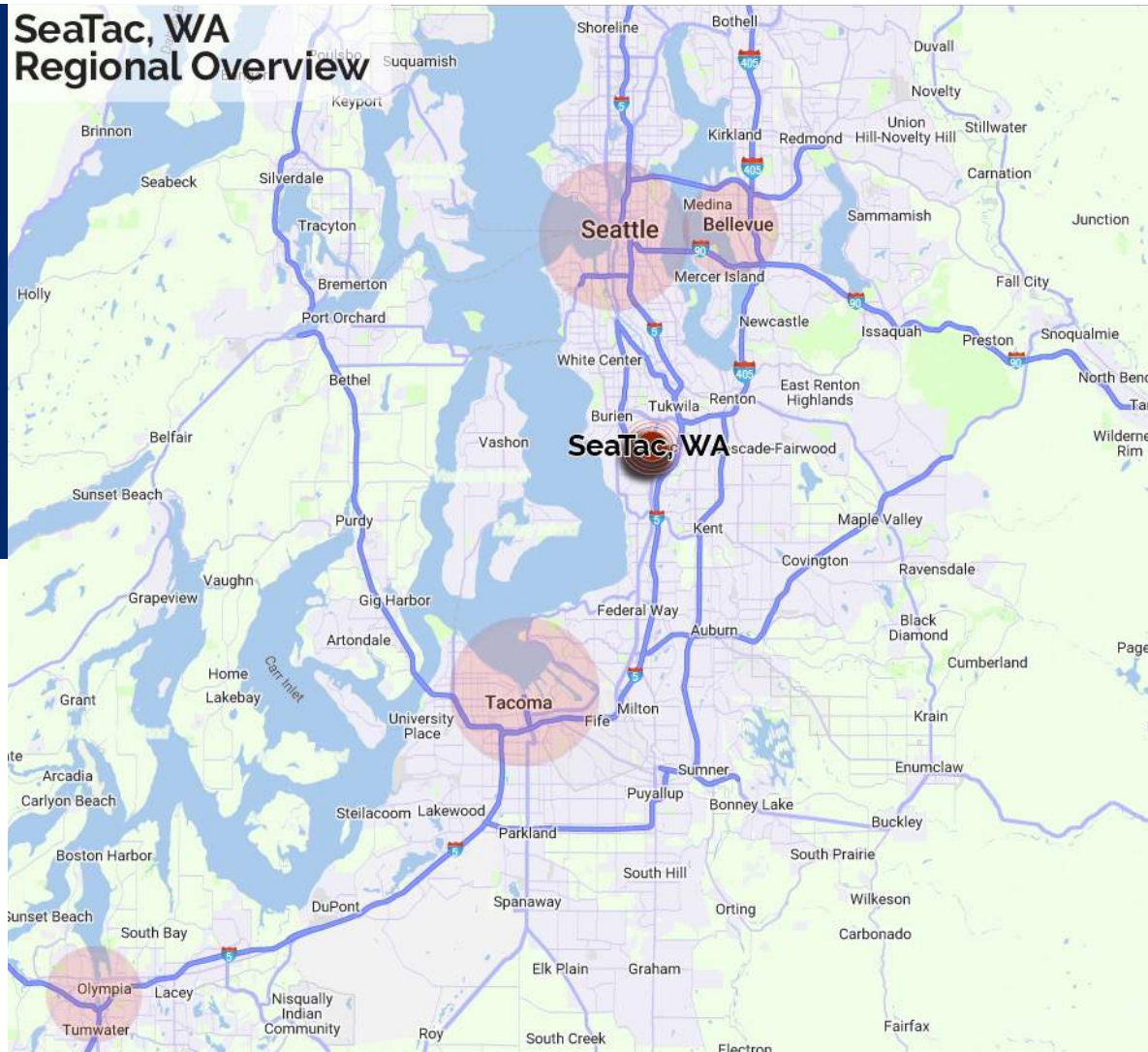


Economic, Demographic & Tourism Analysis

Regional Overview

SeaTac is a city in southern King County, Washington. The city is part of the Seattle metropolitan area and home to the Seattle-Tacoma International Airport.

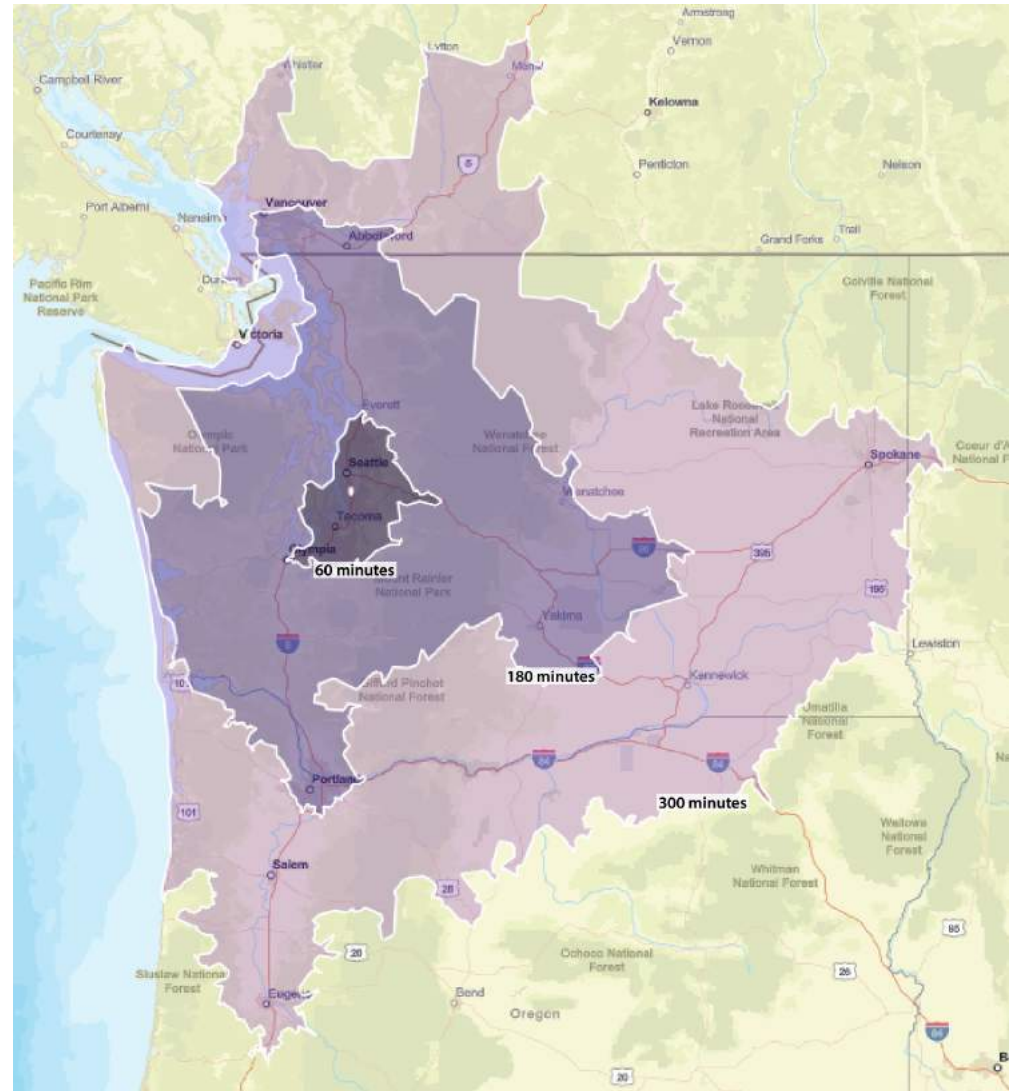
- The City's 10 square miles surround the Seattle-Tacoma International Airport, which is owned and operated by the Port of Seattle.
- SeaTac is centrally located between Seattle and Tacoma within the Pacific Northwest region of the United States.



Regional Drive Times

The population is nearly 4 million within a one-hour drive time of SeaTac. When expanded to a three-hour drive time, the population reaches nearly 8 million, and increases to more than 11.2 million within five hours.

SeaTac is centrally located between Seattle and Tacoma. Major markets within the Pacific Northwest also include Portland, Spokane, Salem and Victoria and Vancouver across the border in Canada. The drivable tourism market allows for opportunities for SeaTac to attract out-of-town visitors.



Estimated Drive-Time Statistics from SeaTac, WA (2022)			
	1-Hour	3-Hour	5-Hour
Population	3,948,653	7,937,634	11,264,301
Households	1,544,320	3,100,930	4,356,895
Median Household Income	\$105,713	\$91,768	\$85,336
Median Home Value	\$590,194	\$477,916	\$440,142
Median Age	38.4	39.0	38.9

Source: ESRI

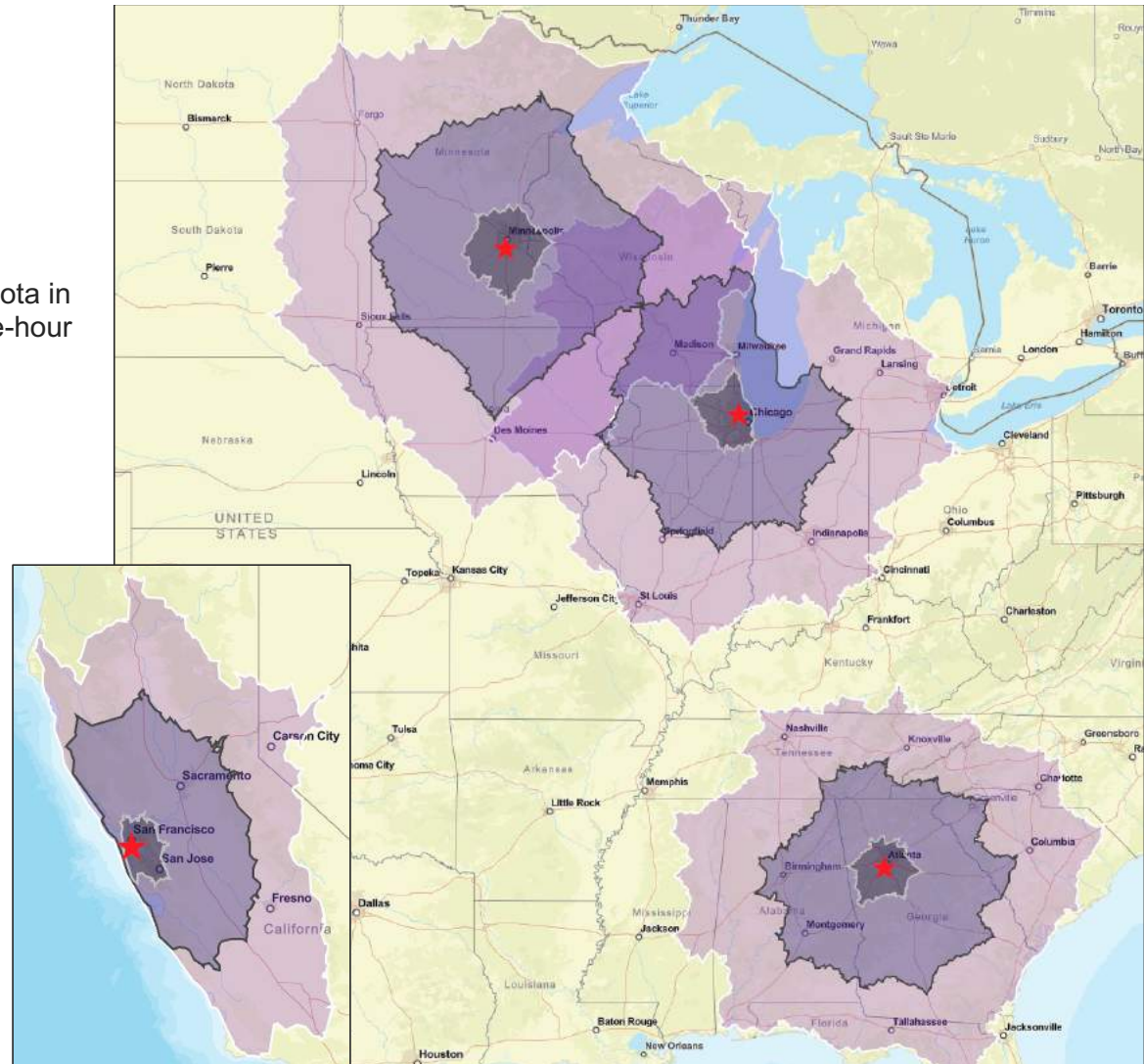
Regional Drive Times Peer Destinations

SeaTac's population is most similar to Bloomington, Minnesota in terms of the capturable market within a one-, three- and five-hour drive time.

Estimated Drive-Time Statistics from Peer Cities (2022)

	1-Hour	3-Hour	5-Hour
Rosemont, IL			
Population	8,704,342	17,628,597	37,043,817
Households	3,333,982	6,953,133	14,790,947
College Park, GA			
Population	5,359,715	14,099,592	31,573,334
Households	2,017,090	5,400,843	12,328,031
South San Francisco, CA			
Population	6,303,422	13,401,437	17,711,446
Households	2,281,395	4,700,979	6,177,714
Bloomington, MN			
Population	3,759,685	6,532,957	13,552,126
Households	1,460,519	2,591,264	5,461,092

Source: ESRI



Tourism Generators vs. Accommodators

Tourism Generator: Tourism generators are assets that primarily induce visitation because of their quality, amenity offerings and size of space. Generators, although they may accommodate tourism generated by other assets, induce a large majority. Examples of tourism generators are luxury resorts, convention centers, or amusement parks.

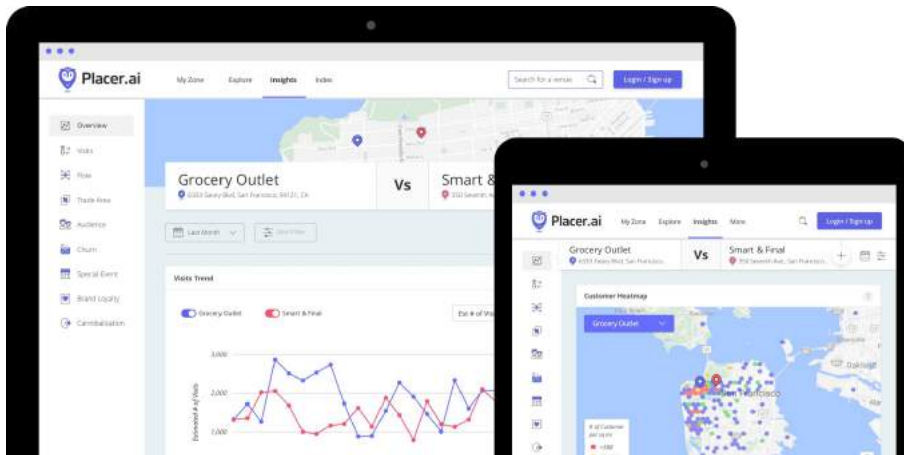
Tourism Accommodator: Tourism accommodators are assets that support the visitation generated by another asset or assets. The primary example of tourism accommodators are select-service hotels or any hotel adjacent to a major tourism generating asset that does not contain a robust package of meeting space. The City of SeaTac has many hotels that support the activity generated by SEA Airport and are thus tourism accommodators rather than generators.

The following slides primarily assess the tourism generating assets in SeaTac, but also many of the tourism accommodating hotel properties.



Placer.ai

- Placer.ai is a location analytics company that studies visit trends, trade areas, and demographics.
- Placer.ai collects geolocation data from mobile devices that have enabled data sharing in an unidentifiable fashion.



VISITS:

- The estimated number of visits to the Point of Interest
- This includes repeat visitors

VISITORS:

- The estimated number of unique visitors to the Point of Interest

Example:

- A person goes to their favorite restaurant 12 times throughout the year

12 Visits

1 Visitor

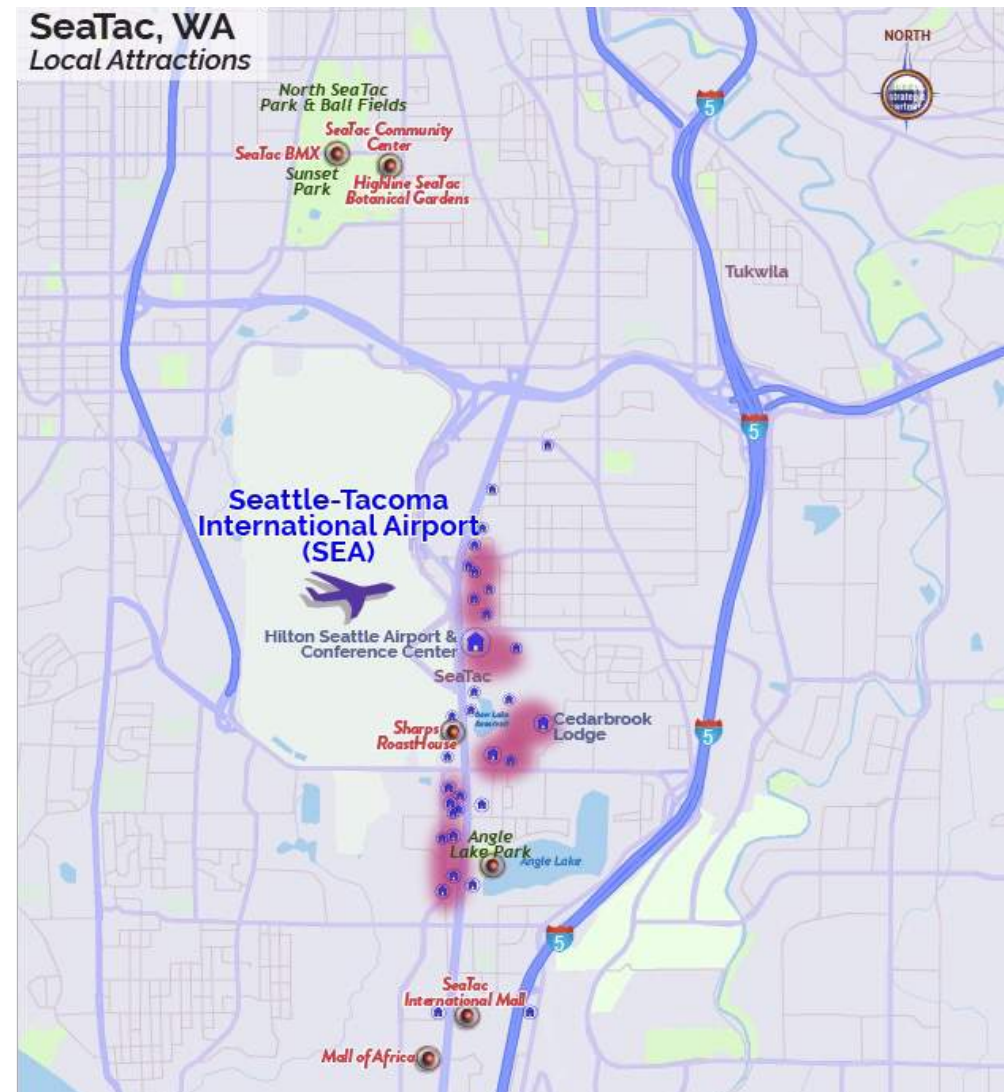
SeaTac

Tourism Generators

The adjacent map details the main tourism generators found within SeaTac categorized by attractions, hotels, major parks, and retail and restaurant areas.

The International Blvd corridor has the highest concentration of attractions and hotels given the proximity to the airport. Other attractions north of the airport include the Highline SeaTac Botanical Gardens, SeaTac BMX and North SeaTac Park & Ball Fields. Attractions are limited within SeaTac given the minimal available land and significant presence of the Seattle-Tacoma International Airport and related services.

The following slides will profile SeaTac as a tourism destination highlighting the top attractions in the area.



Top Tourism Generators

SeaTac is limited in tourism offerings outside of the airport. However, the increasing passenger count that the airport boasts proves to be a huge advantage for SeaTac and an opportunity to recapture those visitors who don't spend time in the area outside of the airport.

HSP utilizes Placer.ai geofencing data to understand visitor trends in the area.

The adjacent table highlights the area's most visited attractions in 2022 sorted by unique visitors. The top attractions include the Seattle Tacoma International Airport (SEA), the DoubleTree at the Seattle Airport, and Sharps Roast-house.

Rank	Name	Est. 2022 Unique Visitors	Est. 2022 Total Visits	Average Visits per Customer	Type of Attraction
1	Seattle-Tacoma International Airport (SEA)	14,000,000	46,500,000	3.3	Airport
2	DoubleTree by Hilton Hotel Seattle Airport	225,700	554,100	2.5	Hotel/Conference Center
3	Valley Ridge Community Center & Fields	148,200	604,900	4.1	Outdoor Recreation
4	Sharps Roasthouse	148,000	185,200	1.3	Restaurant
5	Hilton Seattle Airport & Conference Center	126,700	285,200	2.3	Hotel/Conference Center
6	Seattle Airport Marriott	98,700	239,600	2.4	Hotel/Conference Center
7	North SeaTac Park & Ball Fields	67,700	184,900	2.7	Outdoor Recreation
8	Crowne Plaza Seattle Airport	59,000	155,900	2.6	Hotel/Conference Center
9	Cedarbrook Lodge	54,800	176,700	3.2	Hotel/Conference Center
10	Angle Lake Park	53,600	87,300	1.6	Outdoor Recreation
11	Mall of Africa	19,900	77,000	3.9	Shopping Mall
12	SeaTac Community Center	16,000	47,600	3.0	Community Center
13	Highline SeaTac Botanical Gardens	10,600	13,000	1.2	Nature
14	SeaTac International Mall	6,900	18,500	2.7	Shopping Mall
15	Sunset Park	4,000	10,000	2.5	Park
16	SeaTac BMX	3,500	11,600	3.3	Outdoor Recreation
Total		15,043,300	49,151,500	3.3	
Legend					
Highest Visitation					
Moderate Visitation					
Lowest Visitation					

Top Tourism Generators

Long Distance Visitors – 50+ miles

The adjacent table lists the top attractions and tourism generators within SeaTac sorted by estimated total long-distance visitation in 2022, which is classified as visitors traveling beyond 50 miles.

The percentages show how much of the total visitation is generated from visitors who live within 15 miles, beyond 15 miles but less than 50 miles and beyond 50 miles (local, regional, long-distance).

Airport and travel related establishments and attractions show the strongest long-distance visitation. The long-distance visitation is heavily influenced by the airport and surrounding amenities.

Rank	Name	Est. 2022 Unique Visitors	Est. 2022 Total Visits	Percent Within 15 miles	Percent Beyond 15 miles & less than 50 miles	Percent from Beyond 50 miles
1	Seattle Airport Marriott	98,700	239,600	7.3%	11.4%	81.3%
2	Crowne Plaza Seattle Airport	59,000	155,900	9.0%	10.7%	80.3%
3	Seattle-Tacoma International Airport (SEA)	14,000,000	46,500,000	12.9%	15.0%	72.1%
4	DoubleTree by Hilton Hotel Seattle Airport	225,700	554,100	13.5%	20.3%	66.2%
5	Sharps Roasthouse	148,000	185,200	17.8%	16.5%	65.6%
6	Hilton Seattle Airport & Conference Center	126,700	285,200	17.8%	20.6%	60.7%
7	Cedarbrook Lodge	54,800	176,700	24.3%	21.9%	53.5%
8	Highline SeaTac Botanical Gardens	10,600	13,000	56.6%	13.2%	30.2%
9	SeaTac BMX	3,500	11,600	54.3%	20.0%	25.7%
10	Valley Ridge Community Center	148,200	604,900	46.9%	31.6%	21.5%
11	North SeaTac Park & Ball Fields	67,700	184,900	54.4%	26.7%	19.1%
12	Angle Lake Park	53,600	87,300	72.4%	13.2%	14.6%
13	Mall of Africa	20,000	77,600	73.5%	13.5%	12.0%
14	SeaTac International Mall	6,900	18,500	78.3%	11.6%	10.1%
15	SeaTac Community Center	16,000	47,600	59.4%	30.6%	10.0%
16	Sunset Park	4,000	10,000	87.5%	7.5%	5.0%
Total		15,043,400	49,152,100	13.9%	15.3%	70.7%
Legend						
Highest Visitation						
Moderate Visitation						
Lowest Visitation						

Top Tourism Generators

Long Distance Visitors – 100+ miles

The adjacent table lists the top attractions and tourism generators within SeaTac sorted by estimated total long-distance visitation in 2022, which is classified as visitors traveling beyond 100 miles.

The percentages show how much of the total visitation is generated from visitors who live within 15 miles, beyond 15 miles but less than 100 miles and beyond 100 miles (local, regional, long-distance).

Airport and travel related establishments and attractions show the strongest long-distance visitation. The long-distance visitation is heavily influenced by the airport and surrounding amenities.

SeaTac, WA - Most Visited Singular Attractions - Ranked by Long-Distance Visitors (100 miles)						
Based on geofencing data January 1st, 2022 to December 31st, 2022						
Rank	Name	Est. 2022 Unique Visitors	Est. 2022 Total Visits	Percent Within 15 miles	Percent Beyond 15 miles & less than 100 miles	Percent from Beyond 100 miles
1	Seattle Airport Marriott	98,700	239,600	7.3%	17.0%	75.7%
2	Crowne Plaza Seattle Airport	59,000	155,900	9.0%	16.1%	74.9%
3	Seattle-Tacoma International Airport (SEA)	14,000,000	46,500,000	12.9%	19.3%	68.6%
4	DoubleTree by Hilton Hotel Seattle Airport	225,700	554,100	13.5%	28.0%	58.5%
5	Sharps Roasthouse	148,000	185,200	17.8%	23.7%	58.4%
6	Hilton Seattle Airport & Conference Center	126,700	285,200	17.8%	27.9%	54.4%
7	Cedarbrook Lodge	54,800	176,700	24.3%	28.1%	47.6%
8	Highline SeaTac Botanical Gardens	10,600	13,000	56.6%	16.0%	27.4%
9	Angle Lake Park	53,600	87,300	72.4%	15.5%	21.1%
10	Valley Ridge Community Center	148,200	604,900	46.9%	35.0%	18.1%
11	SeaTac BMX	3,500	11,600	54.3%	31.4%	17.1%
12	North SeaTac Park & Ball Fields	67,700	184,900	54.4%	29.1%	16.7%
13	Mall of Africa	20,000	77,600	73.5%	13.5%	12.0%
14	SeaTac International Mall	6,900	18,500	78.3%	11.6%	10.1%
15	SeaTac Community Center	16,000	47,600	59.4%	31.9%	8.8%
16	Sunset Park	4,000	10,000	87.5%	10.0%	2.5%
Total		15,043,400	49,152,100	13.9%	19.7%	67.1%

Visitation numbers are estimates based off of geo-fencing data from Placer.ai
Source: Placer.ai

Legend
Highest Visitation
Moderate Visitation
Lowest Visitation

Top Tourism Accommodators

As defined earlier, tourism accommodators are assets that support the tourism induced by another asset or assets. Given that SeaTac is an airport destination, there are many hotel properties with limited or no meeting/event spaces. These hotels generally accommodate travelers who are going to or coming from SEA Airport or who are attending events in SeaTac or within the region.

The following tables contains all hotel properties above economy chainscale, that contain less than 5,000 SF of total function space.

SeaTac, WA - Tourism Accomodators - Hotel Product - Ranked by Long-Distance Visitors (50 miles)						
Based on geofencing data January 1st, 2022 to December 31st, 2022						
Rank	Name	Est. 2022 Unique Visitors	Est. 2022 Total Visits	Average Visits per Customer	Percent from Beyond 50 miles	Type of Attraction
1	Red Lion Hotel Seattle Airport	58,600	137,600	2.3	73.2%	Upper Midscale
2	Country Inn and Suites by Radisson	57,300	154,500	2.7	84.3%	Upper Midscale
3	Best Western Seattle Airport Hotel	55,300	167,900	3.0	68.9%	Midscale
4	Radisson Hotel Seattle Airport	52,200	135,700	2.6	62.8%	Upscale
5	Fairfield Inn by Marriott Seattle Sea-Tac Airport	46,200	124,100	2.7	74.0%	Upper Midscale
6	Comfort Inn & Suites Sea-Tac Airport	45,800	112,700	2.5	82.8%	Upper Midscale
7	Hampton Inn & Suites Seattle-Airport/28th Ave	44,700	151,500	3.4	79.6%	Upper Midscale
8	Hilton Garden Inn Seattle Airport	43,900	116,800	2.7	80.4%	Upscale
9	Holiday Inn Express & Suites Seattle-Sea-Tac Airport	42,000	132,500	3.2	85.7%	Upper Midscale
10	Ramada SeaTac Airport	41,600	112,400	2.7	77.4%	Midscale
11	La Quinta Inn & Suites by Wyndham Seattle Sea-Tac Airport	40,900	111,800	2.7	75.1%	Upper Midscale
12	Aloft Seattle Sea-Tac Airport	37,200	102,400	2.8	79.6%	Upscale
13	Hampton Inn Seattle Airport	34,500	90,600	2.6	78.6%	Upper Midscale
14	Quality Inn Sea-Tac Airport	30,700	72,000	2.3	76.2%	Midscale
15	Coast Gateway Hotel	30,600	70,900	2.3	77.1%	Upscale
16	Zone Hotel SEA Airport	25,300	102,000	4.0	79.8%	Midscale
17	Residence Inn by Marriott Seattle Sea-Tac Airport	20,400	104,600	5.1	67.6%	Upscale
18	Sleep Inn SeaTac Airport	14,000	34,300	2.5	72.1%	Midscale
Total		721,200	2,034,300	2.8	76.5%	

Legend
Highest Visitation
Moderate Visitation
Lowest Visitation

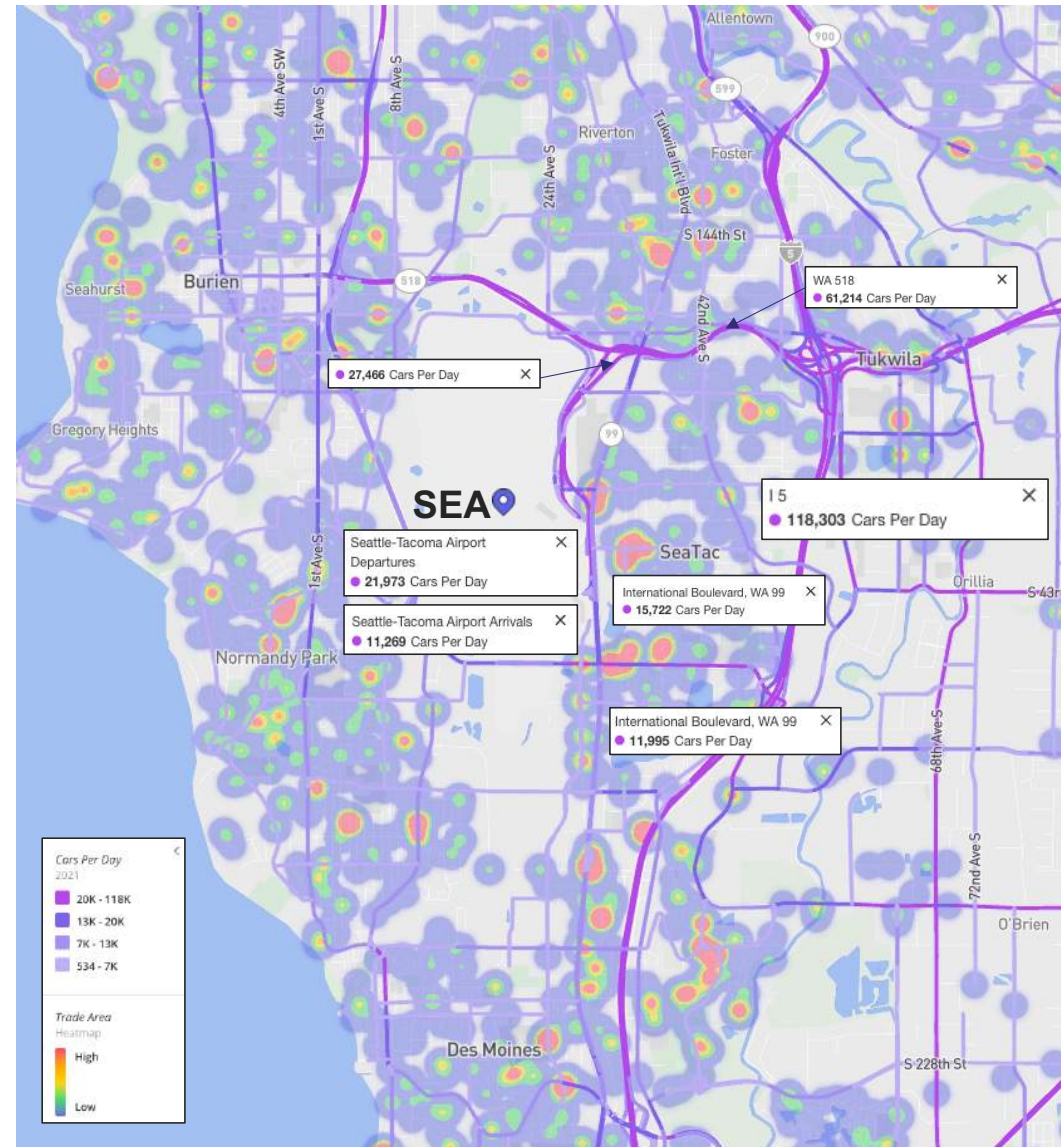
Visitation numbers are estimates based off of geo-fencing data from Placer.ai
 Source: Placer.ai

SEA Airport Estimated Visitation

The adjacent map shows the trade area heatmap of SEA as well as vehicle traffic. The trade area visualizes where visitors come from, by home or work location, to identify the pockets that generate visitation per different trade area types. Vehicle traffic is shown in estimated cars per day.

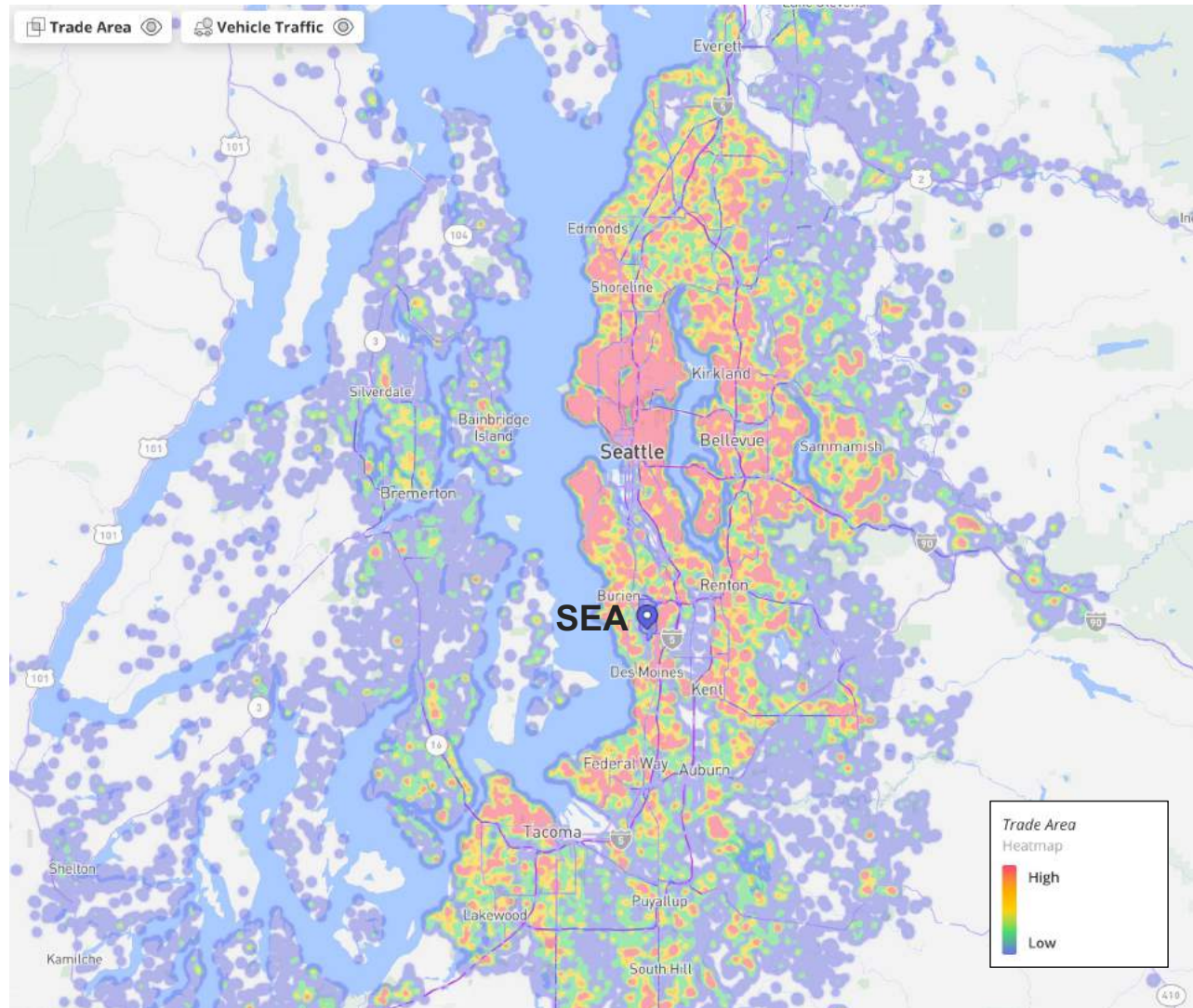
Activity generated by the airport is substantial in the region, as expected. Several key nodes in SeaTac are highlighted along International Boulevard, especially around the major clusters of hotel properties.

The daily traffic volumes highlight several key trends as it pertains to ingress and egress to the SEA. Most visitors enter the airport by way of 518 and if they do not exit from the same point of entry, they travel south along International Boulevard, turn left on S 188th Street and head toward the I-5 freeway. Understanding the path of airport visitors assists in understanding key areas where visitors can be captured.



SEA Airport Estimated Visitation

The adjacent map shows the trade area heatmap of SEA expanded to cover the larger Seattle Metropolitan area. The trade area visualizes where visitors come from, by home or work location, to identify the pockets that generate visitation per different trade area types. As expected, the higher density areas, such as Downtown Seattle, attract a larger distribution of visitors to the airport.

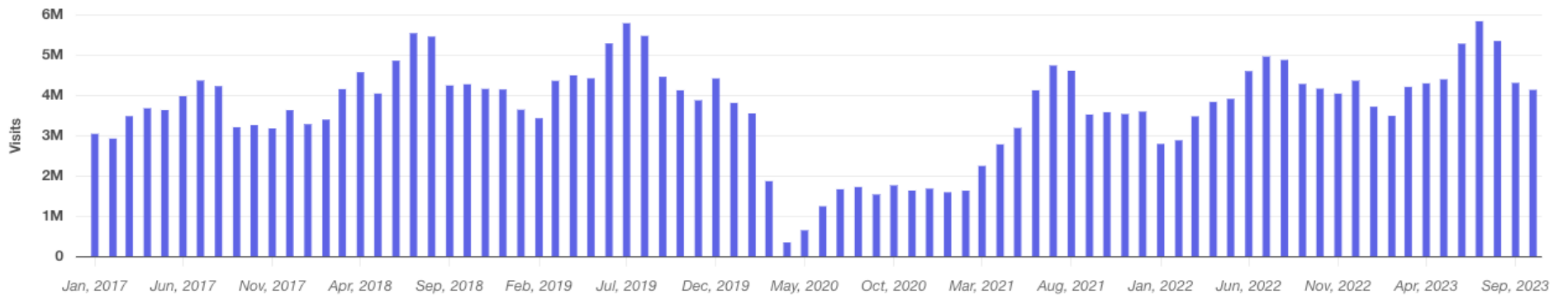


SEA Airport Estimated Visitation

This chart takes a brief look at the overall estimated visitation to Seattle-Tacoma International Airport since 2017 provided by the Bureau of Transportation Statistics, including detail on domestic and international enplanements and deplanements.

Seattle - Tacoma International Airport (SEA)							
Year	Enplanement			Deplanement			Annual Total
	Domestic	International	Total	Domestic	International	Total	
2017	20,132,351	2,471,297	22,603,648	20,211,617	2,488,025	22,699,642	45,303,290
2018	21,381,290	2,619,955	24,001,245	21,383,278	2,625,457	24,008,735	48,009,980
2019	22,209,398	2,752,160	24,961,558	22,275,062	2,771,440	25,046,502	50,008,060
2020	8,799,451	618,631	9,418,082	8,846,405	658,121	9,504,526	18,922,608
2021	16,621,435	763,736	17,385,171	16,617,105	791,667	17,408,772	34,793,943
2022	20,040,420	2,073,080	22,113,500	20,080,655	2,103,401	22,184,056	44,297,556
Average			18,564,046			20,142,039	39,447,804

Source: Bureau of Transportation Statistics

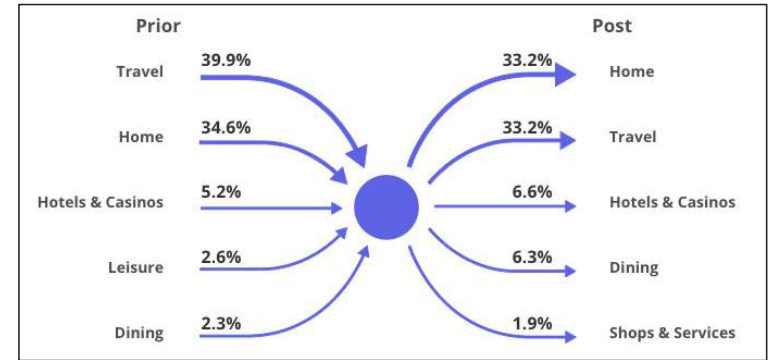


Monthly | Visits | Jan 1st, 2017 - Dec 31st, 2022
Data provided by Placer Labs Inc. (www.placer.ai)

SEA Airport

Top 25 Prior & Post Visitation

HSP's prior & post analysis aims to show where people are coming and where people go after visiting SEA. The analysis is sorted by top prior visit Point of Interest (POI) from 2017 through the end of 2022.



Prior & Post Analysis - Top 25 Airports						
Rank	Name	City	Prior %	Prior Visits	Post %	Post Visits
1	Hany Reid International Airport	Las Vegas	1.80%	851,963	2.10%	986,800
2	Portland International Airport	Portland	1.70%	803,795	1.30%	618,381
3	Spokane International Airport	Spokane	1.60%	726,075	0.80%	367,226
4	Denver International Airport	Denver	1.50%	699,376	1.90%	867,909
5	San Francisco International Airport	San Francisco	1.50%	682,820	1.60%	751,706
6	Sacramento International Airport	Sacramento	1.30%	582,397	1.50%	692,842
7	O'Hare International Airport	Chicago	1.20%	553,323	N/A	N/A
8	Boise Airport	Boise	1.10%	517,939	0.70%	331,314
9	Salt Lake City International Airport	Salt Lake City	1.10%	491,735	1%	462,089
10	San Diego International Airport	San Diego	1.10%	487,773	1%	466,095
11	Minneapolis-Saint Paul International Airport	Minneapolis	1%	483,325	<0.5%	19,042
12	Norman Y. Mineta San Jose International Airport	San Jose	0.90%	428,534	0.90%	418,214
13	Boston Logan International Airport	Boston	0.90%	395,185	<0.5%	11,742
14	Hartsfield-Jackson Atlanta International Airport	Atlanta	0.90%	394,419	N/A	N/A
15	John Wayne Airport	Santa Ana	0.80%	347,687	1.10%	492,471
16	Rogue Valley International - Medford Airport	Medford	0.70%	329,996	<0.5%	83,920
17	Tri-Cities Airport	Pasco	0.70%	312,671	<0.5%	114,023
18	Orlando International Airport	Orlando	0.70%	307,680	<0.5%	29,906
19	John F. Kennedy International Airport	Queens	0.60%	290,056	N/A	N/A
20	Roberts Field	Redmond	0.60%	276,944	<0.5%	200,227
21	Ontario International Airport	Ontario	0.60%	267,559	<0.5%	219,796
22	Detroit Metropolitan Wayne County Airport	Detroit	0.60%	266,171	N/A	N/A
23	Newark Liberty International Airport	Newark	0.50%	246,091	N/A	N/A
24	Oakland International Airport	Oakland	<0.5%	225,677	0.80%	370,709
25	Palm Springs International Airport	Palm Springs	<0.5%	216,446	0.50%	235,267

Source: Placer.ai, HSP

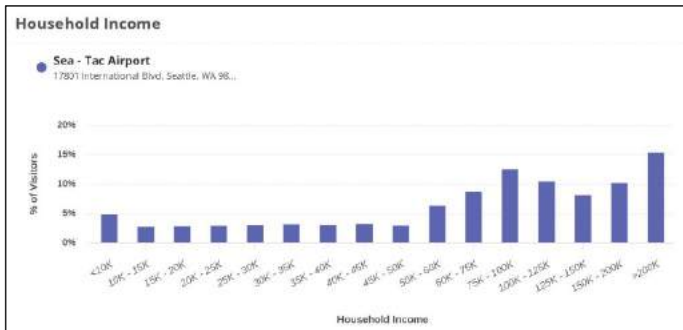
Prior & Post Analysis - Top 25 Non-Airport POIs									
Rank	Name	Category	City	Prior %	Prior Visits	Post %	Post Visits		
1	DoubleTree by Hilton Hotel Seattle Airport	Hotels & Casinos	SeaTac	0.50%	232,673	<0.5%	178,133		
2	Pier 91	Leisure	Seattle	<0.5%	211,205	<0.5%	113,023		
3	Hilton-Seattle	Hotels & Casinos	Seattle	<0.5%	145,868	<0.5%	114,871		
4	Seattle Airport Marriott	Hotels & Casinos	SeaTac	<0.5%	145,604	<0.5%	80,474		
5	University of Washington	Education	Seattle	<0.5%	109,298	<0.5%	57,205		
6	DoubleTree Suites by Hilton Hotel Seattle Airport - Southcenter	Hotels & Casinos	Tukwila	<0.5%	92,198	<0.5%	28,601		
7	Crowne Plaza Seattle Airport	Hotels & Casinos	SeaTac	<0.5%	88,357	<0.5%	34,717		
8	Marriott Seattle Waterfront	Hotels & Casinos	Seattle	<0.5%	78,521	<0.5%	69,539		
9	Angle Lake	Travel	SeaTac	<0.5%	74,483	<0.5%	28,059		
10	IHOP	Dining	Renton	<0.5%	72,450	N/A	N/A		
11	Renaissance Seattle Hotel	Hotels & Casinos	Seattle	<0.5%	67,500	N/A	N/A		
12	Sol Duc Falls - Olympic National Park	Leisure	Bainbridge Island	<0.5%	62,627	N/A	N/A		
13	Seattle Marriott Bellevue	Hotels & Casinos	Bellevue	<0.5%	59,535	N/A	N/A		
14	Cedarbrook Lodge	Hotels & Casinos	SeaTac	<0.5%	59,432	<0.5%	26,286		
15	La Quinta Inn & Suites Seattle Sea-Tac Airport	Hotels & Casinos	SeaTac	<0.5%	56,417	<0.5%	33,746		
16	Holiday Inn Express & Suites Seattle-Sea-Tac Airport	Hotels & Casinos	SeaTac	<0.5%	54,679	N/A	N/A		
17	Radisson Hotel Seattle Airport	Hotels & Casinos	SeaTac	<0.5%	54,216	<0.5%	29,852		
18	Denny's	Dining	SeaTac	<0.5%	50,376	N/A	N/A		
19	Coast Gateway Hotel	Hotels & Casinos	SeaTac	<0.5%	49,704	N/A	N/A		
20	Country Inn & Suites by Radisson, Seattle-Tacoma International Airport, WA	Hotels & Casinos	SeaTac	<0.5%	49,006	<0.5%	39,031		
21	Hyatt Regency Seattle	Hotels & Casinos	Seattle	<0.5%	48,719	<0.5%	59,063		
22	Hampton Inn Seattle Airport	Hotels & Casinos	SeaTac	<0.5%	48,231	N/A	N/A		
23	Four Seasons Hotel Seattle	Hotels & Casinos	Seattle	<0.5%	48,194	N/A	N/A		
24	Hyatt House Seattle/Downtown	Hotels & Casinos	Seattle	<0.5%	46,015	N/A	N/A		
25	Skyway Inn Hotel	Hotels & Casinos	SeaTac	<0.5%	45,815	N/A	N/A		

Source: Placer.ai, HSP

*Does not capture international travelers

SEA Airport Mosaic Profile

The adjacent table shows the Experian Mosaic breakdown for SEA Airport. Experian Mosaic breaks down visitors based on their home location and the demographics of those areas, providing a holistic approach to whether a Point of Interest (POI) under- or over-indexes compared to similar major international airports. Further detail on these groups is provided in the appendix of this report.



The average income of all visitors in 2022 to SEA Airport was \$121,000, and the median income was \$88,000

Search Group or Attribute	30 % of Visits	50 % of Visits	70 % of Visits
By Households			
G - Young City Soles	94,181 (23%) 900	109,975 (15.1%) 592	121,458 (10.9%) 425
A - Power Elite	84,902 (20.7%) 247	137,281 (18.9%) 225	172,212 (15.4%) 184
O - Singles and Starters	66,133 (16.1%) 157	108,706 (15%) 145	161,727 (14.5%) 140
C - Booming with Confidence	51,126 (12.5%) 139	102,025 (14%) 157	159,236 (14.3%) 159
B - Flourishing Families	23,696 (5.8%) 109	64,691 (8.9%) 168	104,415 (9.3%) 176
E - Thriving Boomers	19,138 (4.7%) 73	34,195 (4.7%) 73	55,240 (4.9%) 77
K - Significant Singles	18,191 (4.4%) 102	43,337 (6%) 116	72,892 (6.5%) 149
Q - Golden Year Guardians	17,599 (4.3%) 57	34,045 (4.7%) 62	61,395 (5.5%) 72
H - Bourgeois Melting Pot	8,138 (2%) 56	22,221 (3.1%) 83	50,864 (4.6%) 123
F - Promising Families	8,012 (2%) 57	21,599 (3%) 87	46,649 (4.2%) 122
D - Suburban Style	4,616 (1.1%) 15	17,620 (2.4%) 40	41,525 (3.7%) 62
P - Cultural Connections	4,080 (1%) 23	7,696 (1.1%) 25	12,889 (1.2%) 27
S - Thrifty Habits	3,439 (0.8%) 28	5,261 (0.7%) 24	7,349 (0.7%) 22
J - Autumn Years	1,702 (<0.5%) 6	6,174 (0.8%) 17	18,512 (1.7%) 24
I - Family Union	1,677 (<0.5%) 7	4,083 (0.6%) 9	9,409 (0.8%) 13
L - Blue Sky Boomers	1,541 (<0.5%) 9	4,918 (0.7%) 15	14,173 (1.3%) 29
R - Aspirational Fusion	1,326 (<0.5%) 18	2,841 (<0.5%) 22	6,327 (0.6%) 31
M - Families in Motion	51 (<0.5%) 1	209 (<0.5%) 1	726 (<0.5%) 3
N - Pastoral Pride	22 (<0.5%)	104 (<0.5%)	323 (<0.5%) 1

Audience Profile

Experian Mosaic

Audience Profile provides a variety of demographic and psychographic insights about property visitors and the population living within its trade area, based on a variety of 3rd party datasets.

Audience Profile presents a diverse range of demographic and psychographic attributes ranging from household income, age, and gender, to lifestyle preferences, spending patterns, and more - per the datasets enabled

True Trade Area: Represents the trade area derived from the actual volume of visitors that visited the property, per the % of Visits thresholds defined. By default, you will see 30%, 50%, and 70% visit volume thresholds pre-populated to capture the core visitation to the property. A visit volume of 100% would consider everyone who visited the location during the report's date range including tourists and other transient visitors, while a smaller % of visits can give a clearer picture of the visitors that most frequently go to the location.

A Power Elite	A01	American Royalty
	A02	Platinum Prosperity
	A03	Kids and Cabernet
	A04	Picture Perfect Families
	A05	Couples with Clout
	A06	Jet Set Urbanites
B Flourishing Families	B07	Across the Ages
	B08	Babies and Bliss
	B09	Family Fun-tastic
	B10	Cosmopolitan Achievers
C Booming with Confidence	C11	Sophisticated City Dwellers
	C12	Golf Carts and Gourmets
	C13	Philanthropic Sophisticates
	C14	Boomers and Boomerangs
D Suburban Style	D15	Sport Utility Families
	D16	Settled in Suburbia
	D17	Cul de Sac Diversity
	D18	Suburban Nightlife
E Thriving Boomers	E19	Consummate Consumers
	E20	No Place Like Home
	E21	Unspoiled Splendor
F Promising Families	F22	Fast Track Couples
	F23	Families Matter Most
G Young City Solos	G24	Ambitious Singles
	G25	Urban Edge
H Bourgeois Melting Pot	H26	Progressive Assortment
	H27	Life of Leisure
	H28	Everyday Moderates
	H29	Destination Recreation
I Family Union	I30	Pollucks and the Great Outdoors
	I31	Hard Working Values
	I32	Steadfast Conventionalists
	I33	Balance and Harmony
J Autumn Years	J34	Suburban Sophisticates
	J35	Rural Escape
	J36	Settled and Sensible

K Significant Singles	K37	Wired for Success
	K38	Modern Blend
	K39	Metro Fusion
	K40	Bohemian Groove
L Blue Sky Boomers	L41	Booming and Consuming
	L42	Rooted Flower Power
	L43	Homemade Happiness
M Families in Motion	M44	Creative Comfort
	M45	Growing and Expanding
N Pastoral Pride	N46	True Grit Americans
	N47	Countrified Pragmatics
	N48	Rural Southern Bliss
	N49	Touch of Tradition
O Singles and Starters	O50	Full Steam Ahead
	O51	Digital Savvy
	O52	Urban Ambition
	O53	Colleges and Cafes
	O54	Influenced by Influencers
P Cultural Connections	O55	Family Troopers
	P56	Mid-scale Medley
	P57	Modest Metro Means
	P58	Heritage Heights
	P59	Expanding Horizons
	P60	Striving Forward
Q Golden Year Guardians	P61	Simple Beginnings
	Q62	Enjoying Retirement
	Q63	Footloose and Family Free
	Q64	Established in Society
	Q65	Mature and Wise
R Aspirational Fusion	R66	Ambitious Dreamers
	R67	Passionate Parents
S Thrifty Habits	S68	Small Town Sophisticates
	S69	Urban Legacies
	S70	Thrifty Singles
	S71	Modest Retirees

Experian Mosaic – Young City Solos

Young City Solos are a notable visitor group for the SEA Airport. This is a young, active group that devotes a lot of time to entertainment and nightlife activities. However, these individuals are also career-driven with a majority of them working in business, financial, and professional jobs.



G G24 G25

G

Young City Solos

Younger and middle-aged singles living active and energetic lifestyles in metropolitan areas

3.18% | 1.69%



Who we are

Head of household age

25-30
305 | 35.3%

Household income

\$75,000-\$99,999
133 | 18.2%

Home ownership

Renter
187 | 43.3%

Type of property

Multi-family;
101+ units
302 | 14.2%

Household size

1 person
182 | 85.3%

Age of children

13-18
25 | 3.1%

Channel preference



Technology adoption



Key features

- Singles
- Downtown commuters
- Apartment dwellers
- Active lifestyles
- Career-driven
- Liberal



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G G24 G25

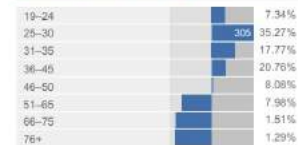
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Young City Solos

Younger and middle-aged singles living active and energetic lifestyles in metropolitan areas

3.18% | 1.69%

Head of household age



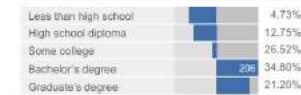
Family structure



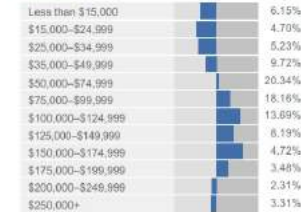
Home ownership



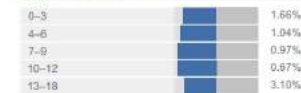
Education



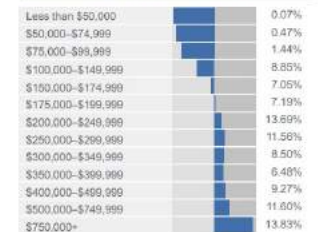
Income



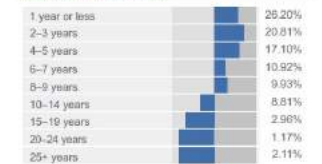
Age of children



Estimated current house value



Length of residency



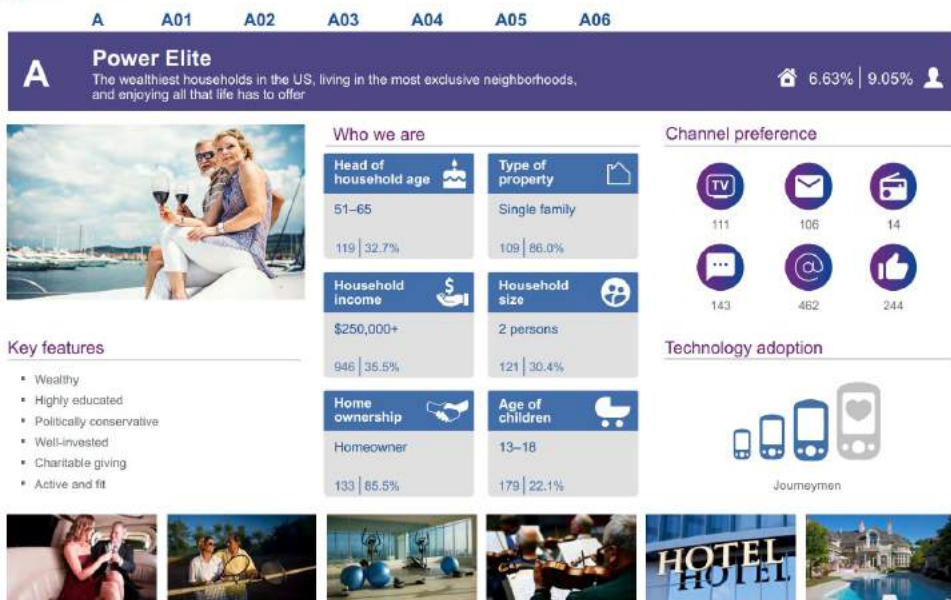
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Experian Mosaic – Power Elite

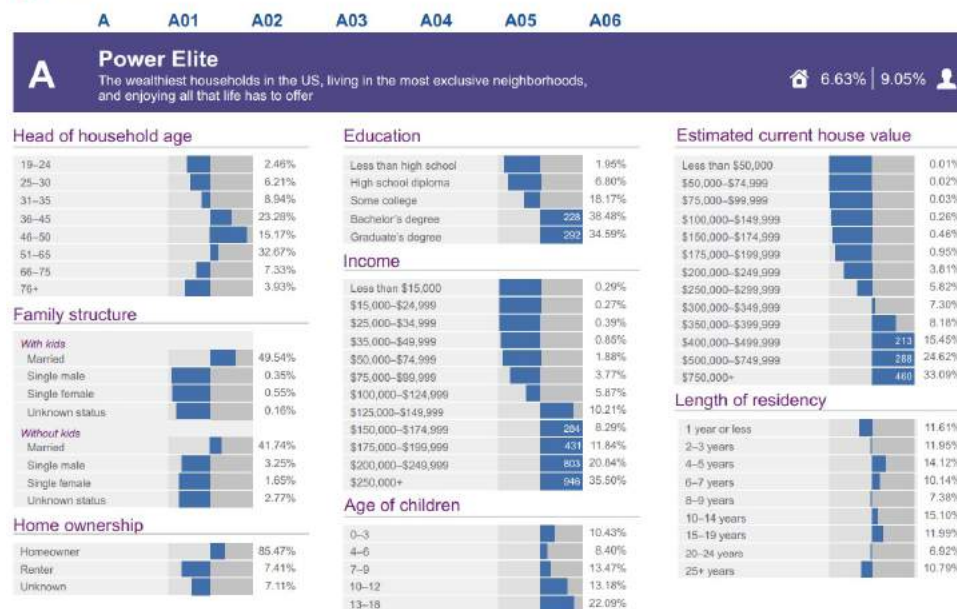
Power Elites are a notable visitor group for the SEA Airport. As the wealthiest households in the nation, this visitor group has the financial resources to indulge in travel, fine dining, and shopping. This group is also the strongest market for luxury goods in the United States.



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Experian Mosaic – Singles & Starters

Singles & Starters are a notable visitor group for the SEA Airport. Similar to Young City Solos, this is a younger demographic that enjoys active leisure and nightlife activities yet are motivated professionals with entry-level positions.



O O50 O51 O52 O53 O54 O55



Singles and Starters

Young singles starting out and some starter families living a city lifestyle

11.06% | 6.98%



Who we are

Head of household age

25–30
380 | 43.9%

Household income

Less than \$15,000
161 | 16.0%

Home ownership

Renter
252 | 58.3%

Type of property

Multi-family;
101+ units
316 | 14.0%

Household size

1 person
171 | 80.3%

Age of children

7–9
100 | 11.0%

Channel preference



Technology adoption



Wizards

Key features

- Rental housing
- Single adults
- Politically disengaged
- Engage via radio
- Foodies
- Digitally savvy



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O O50 O51 O52 O53 O54 O55

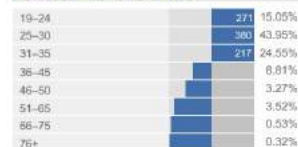


Singles and Starters

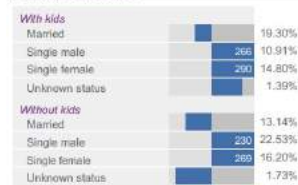
Young singles starting out and some starter families living a city lifestyle

11.06% | 6.98%

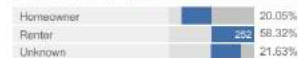
Head of household age



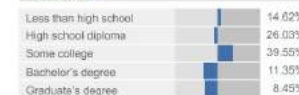
Family structure



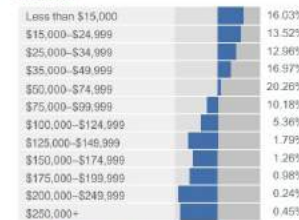
Home ownership



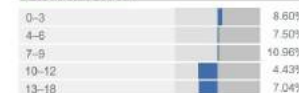
Education



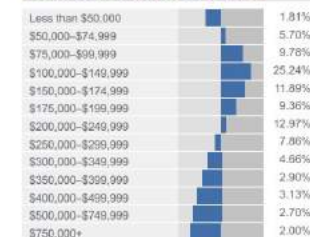
Income



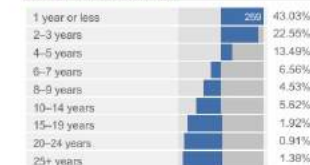
Age of children



Estimated current house value



Length of residency



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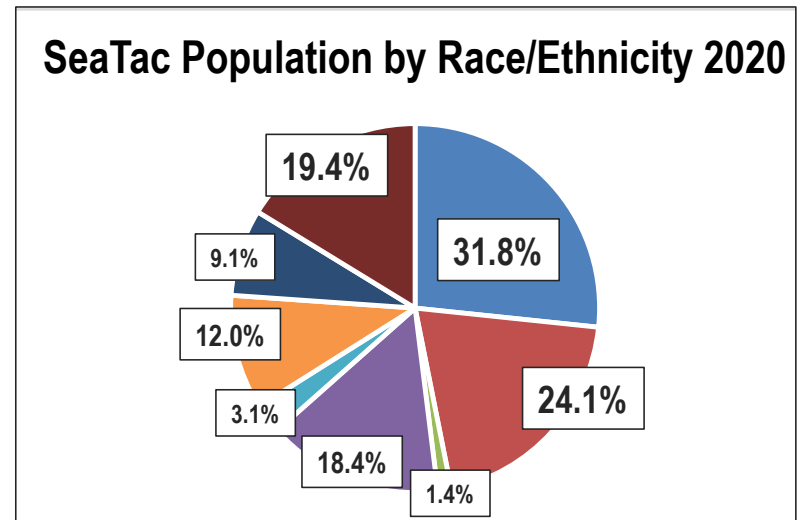
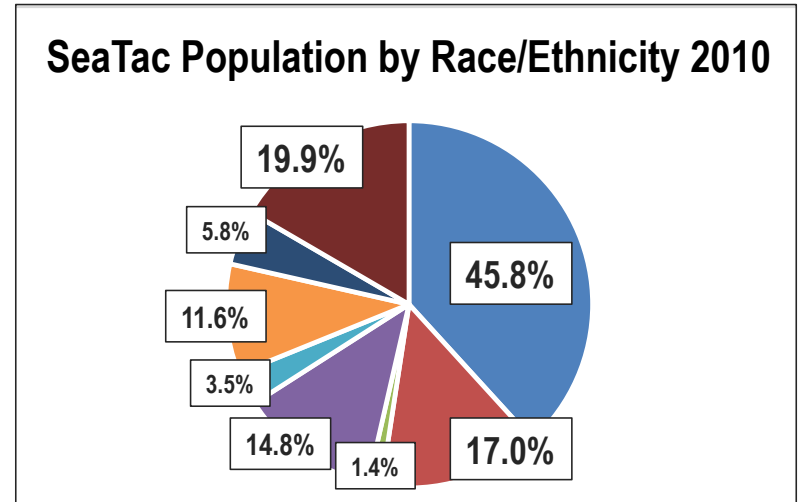
SeaTac Population by Race/Ethnicity

The adjacent table charts show the breakdown of the population by ethnicity/race according to the 2010 and 2020 U.S. Census data.

- White
- Black
- American Indian
- Asian
- Pacific Islander
- Some Other Race Alone
- Two or More Races
- Hispanic Origin

SeaTac Population by Race/Ethnicity (2010 - 2022)			
	2010	2020	2022
Total	26,630	31,454	31,925
White	45.8%	31.8%	31.0%
Black	17.0%	24.1%	24.2%
American Indian	1.4%	1.4%	1.4%
Asian	14.8%	18.4%	19.1%
Pacific Islander	3.5%	3.1%	3.0%
Some Other Race Alone	11.6%	12.0%	11.8%
Two or More Races	5.8%	9.1%	9.4%
Hispanic Origin	19.9%	19.4%	19.1%
Diversity Index	81.0	85.1	85.1

Source: ESRI



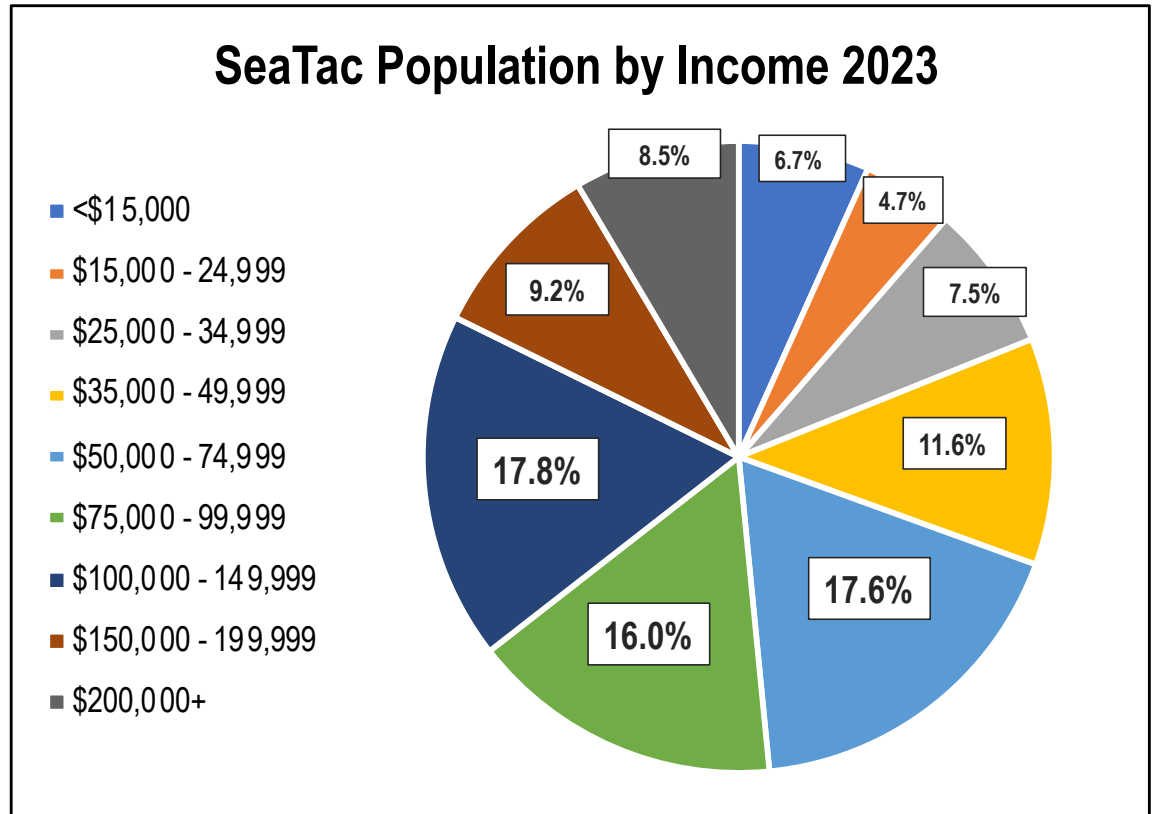
SeaTac Population by Income

The adjacent table and chart show the breakdown of the 2023 population by income according to the ESRI database.

Over half of the population has a median household income of at least \$75,000. Tourism assets often thrive in affluent areas since their households have higher disposable income.

Name	Percent
<\$15,000	6.7%
\$15,000 - 24,999	4.7%
\$25,000 - 34,999	7.5%
\$35,000 - 49,999	11.6%
\$50,000 - 74,999	17.9%
\$75,000 - 99,999	16.0%
\$100,000 - 149,999	17.8%
\$150,000 - 199,999	9.2%
\$200,000+	8.5%

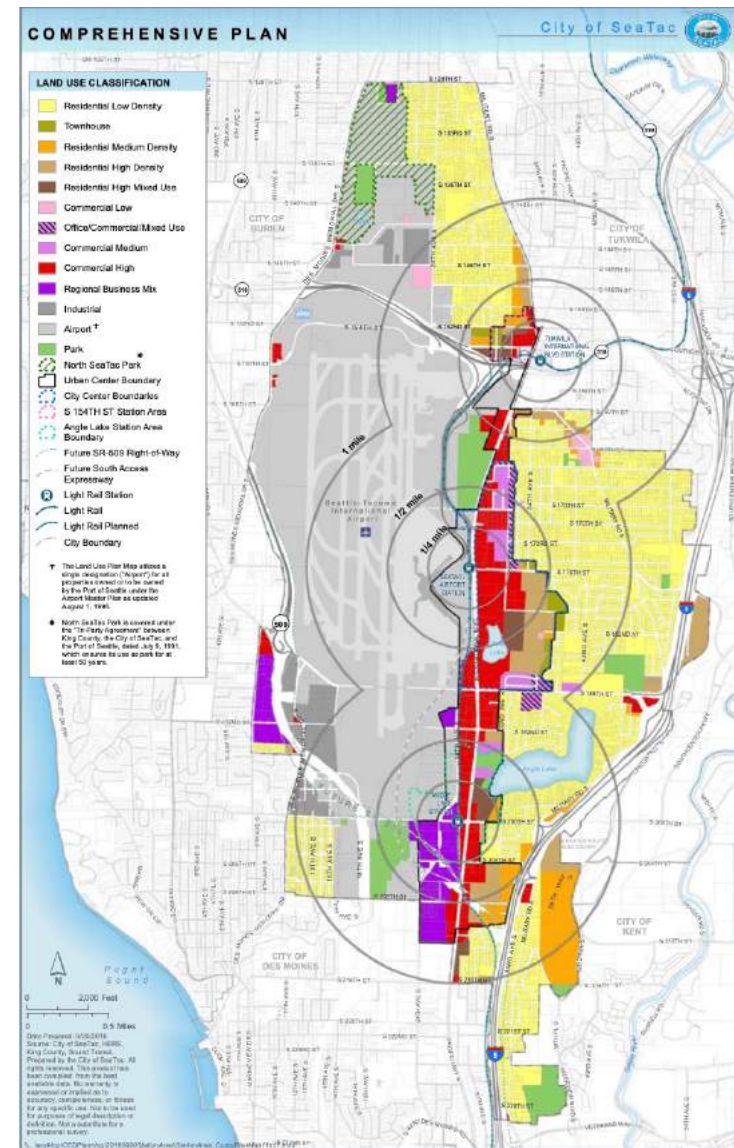
Source: ESRI



Link Light Rail Overview

The Light Rail is owned and operated by Sound Transit and continues to expand connecting Seattle-Tacoma International Airport (SEA) and the City of SeaTac with downtown Seattle and the Puget Sound Region.

- Currently there are three light rail stations in SeaTac with Angle Lake, Tukwila International Blvd, and the Airport that connect passengers to downtown Seattle with approximately 19 stops available.
- The City of SeaTac plans to develop three light rail nodes as urban village communities enhancing with placemaking and programming highlighting local culture/innovation.
- As of 2023, five Link extension projects are currently in construction to more than double the regional light rail network – from 26 miles to 62 miles – within the next few years including Bellevue, Redmond, Microsoft Campus and more.
- The Federal Way Link Extension (FWLE) will extend South Transit’s Link Rail system from Angle Lake Station in SeaTac to the Federal Way Transit Center expected to open in 2025/2026. The extension will also connect through Federal Way Transit Center to Bellevue, Redmond and North Lynnwood.





Placemaking Market Opportunity Analysis



Market Opportunity Analysis Overview

HSP's assessment of the visitor market opportunity in SeaTac was segmented into two sections. The first focuses on conferences, meeting and events, hotels, and restaurant, retail and nightlife. The second section assesses entertainment facilities, winery, brewery, distillery and food halls, unique attractions and events, and recreation, parks and nature assets. Within this analysis HSP first took a close look at the local assets in SeaTac, as well as those in surrounding communities. Additionally, the current hotel room night generation and visitor spend level of each category is assessed.



Summary Matrix Ranking Rationale

After 17 years of experience as a firm assessing communities and their assets, Hunden provides a Summary Matrix ranking system to analyze the strengths and weaknesses of certain asset categories within a municipality. These rankings provide insight into areas of opportunity or relative to other asset categories in a municipality, are underserved or underdeveloped.

Rankings take into account quantity, performance, quality, visitation, visitor perception, accessibility among many other variables which are then categorized into the following rankings.

Strong	Good	Moderate	Minimal
<p>Top Assets: Assets that are of highest quality, induce the most visitation, were brought up by stakeholders and/or are unique to the destination.</p>			

Asset Analysis Matrix

Meetings, Hotels & Retail



	Conferences, Meetings & Events	Hotels	Restaurant, Retail & Nightlife
Supply SeaTac, WA	Minimal	Strong	Moderate
Details: Top Assets SeaTac, WA	<ul style="list-style-type: none"> Conference Center at SEA Hilton Seattle Airport & Conference Center DoubleTree by Hilton Seattle Airport Seattle Airport Marriott Cedarbrook Lodge Crowne Plaza Seattle Airport 	<ul style="list-style-type: none"> Hilton Seattle Airport & Conference Center Seattle Airport Marriott Cedarbrook Lodge Select Service Hotels along International Boulevard/Pacific Highway 	<ul style="list-style-type: none"> Sharps Roast-House, 13 Coins Restaurant, Copperleaf Restaurant & Bar, Mango Thai Cuisine & Bar Mall of Africa, SeaTac International Mall
Adjacent City Supply	Minimal	Moderate (Tukwila)	Moderate – Good (Tukwila, Kent, Renton, Burien)
Hotel Room Night Generation	Moderate	Strong	Minimal
Visitor Spending	Moderate	Good	Minimal

Meetings, Hotel & Retail Assets

The current supply of meeting spaces, hotels and support amenities such as restaurant and retail places SeaTac below average in offerings when compared to neighboring cities and similar airport cities.



Conferences, Meetings & Events

- Hilton Seattle Airport & Conference Center and the DoubleTree Seattle Airport are the two properties with the most significant function space to accommodate an array of meetings and events.
- However, SeaTac offers less than average when compared to similar airport cities.

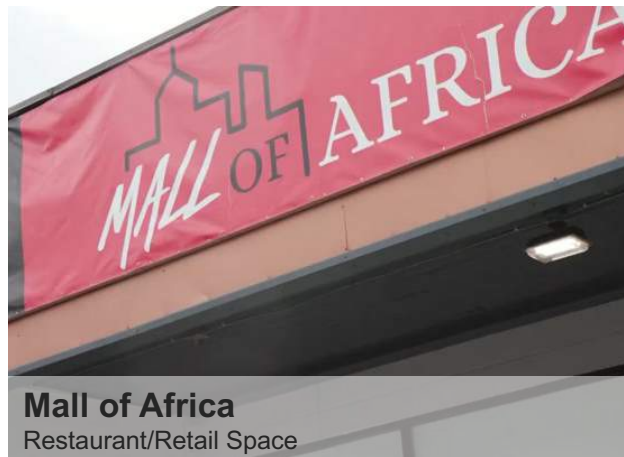
Hotels

- The local hotel supply within SeaTac is strong with approximately 6,441 hotel rooms across 38 hotel properties.
- The majority of hotels in SeaTac are Upscale or Upper Midscale clustered on International Blvd that cater toward airport travel.

Restaurant, Retail & Nightlife

- Very limited local supply of restaurant and retail offerings, especially when compared to neighboring cities such as Tukwila and Kent. The Westfield Southcenter shopping mall in Tukwila is the most popular in the area.

Asset Summary – Meetings, Hotels & Retail



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Asset Analysis Matrix

Entertainment, Unique Attractions & Nature-Assets



	Entertainment Facilities	Winery, Brewery, Distillery & Food Hall	Unique Attractions & Events	Rec, Parks & Nature-Assets
Supply SeaTac, WA	Minimal	None	Moderate	Good
Details: Top Assets SeaTac, WA	<ul style="list-style-type: none"> Angle Lake Park Pavilion The Roadhouse music venue at Angle Lake Station (opened October 2023) <p><i>Adjacent City Relevant Assets</i></p> <ul style="list-style-type: none"> Westfield Southcenter (Tukwila), iFLY, Round1 Bowling & Amusement, DEFY Seattle 	<ul style="list-style-type: none"> None within SeaTac <p><i>Adjacent City Relevant Assets</i></p> <ul style="list-style-type: none"> Surrounding cities have a brewery, winery and food hall presence (Tukwila, Burien, Kent, Renton) 	<ul style="list-style-type: none"> SeaTac BMX Mall of Africa SeaTac International Mall Polar Bear Plunge (Angle Lake) Concerts in the Park 4th of July Fireworks 	<ul style="list-style-type: none"> SeaTac BMX North SeaTac Park (Soccer & Baseball Fields, Mountain Bike Trails) SeaTac Community Center & Highline SeaTac Botanical Gardens Angle Lake Park Grandview Off-Leash Dog Park
Adjacent City Supply	Strong (Tukwila)	Moderate – Good (Tukwila, Burien, Kent, Renton)	Moderate – Good (Tukwila, Burien, Kent, Renton)	Moderate – Good (Tukwila, Burien, Kent, Renton)
Hotel Room Night Generation	Minimal	None	Minimal – Moderate	Minimal – Moderate
Visitor Spending	Minimal	None	Moderate	Moderate

Entertainment & Leisure Assets

When it comes to the entertainment and leisure category, SeaTac struggles. However, the recreation, parks and nature assets is a strong point, where many airport destinations typically fall short.



Entertainment

- There are only two true entertainment assets in SeaTac, the Angle Lake Pavilion, which is underutilized, and the Roadhouse music venue, which recently just opened

Winery, Brewery, Distillery & Food Hall

- There are no wineries, breweries, distilleries or food halls in SeaTac
- Adjacent cities have several of these assets, which draws visitors to these cities to seek these offerings

Unique Attractions & Events

- SeaTac BMX and Mall of Africa are two of the top unique attractions in SeaTac
- SeaTac International Mall is an additional asset yet generates lower visitation numbers

Rec, Parks & Nature-Assets

- SeaTac is a strong performer when it comes to recreation, parks and nature-assets, compared to other airport cities

Asset Summary – Entertainment & Recreation Focused



Angle Lake Park
Outdoor Pavilion & Event Venue



SeaTac BMX
Dirt BMX Track, Pump Track & Mountain Biking



North SeaTac Park
Large City Park, Fields & Trails



Angle Lake Park
4th of July Fireworks



Highline SeaTac Botanical Garden
Botanical Gardens



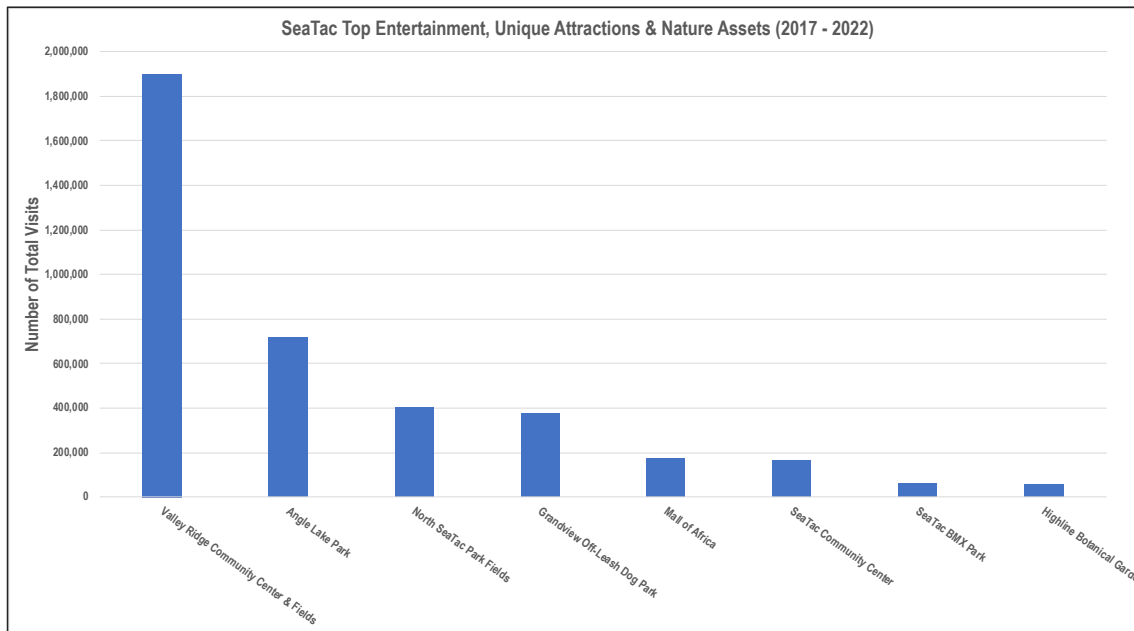
Grandview Off-Leash Dog Park
Dog Park

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Segment Visitation Analysis

HSP gathered a list of some of the top Points of Interest (POI) in SeaTac within the entertainment, unique attractions and nature assets categories and performed a Placer.AI geo-fencing analysis to understand how these assets perform for the city, in terms of inducing visitors to the area. From 2017 through 2022 Valley Ridge Community Center & Fields received approximately 1.9 million visits, with approximately nine percent, or 171,000, coming from beyond 50 miles. However, Valley Ridge contains significant repeat visitation from locals in the area, especially due to the influence of the adjacent high school and middle school. HSP provided a few of the top assets in the adjacent city of Tukwila as a comparison of the demand inducing capabilities of different assets within these categories as well as the ability of some of these assets to induce tourism from beyond the region.



Entertainment, Unique Attractions & Nature Assets Visitation		
Name	Est. Visitation (2017 - 2022)	Visitation % Beyond 50 Miles (2022)
Valley Ridge Community Center & Fields	1,900,000	9%
Angle Lake Park	715,300	10%
North SeaTac Park Fields	403,300	6%
Grandview Off-Leash Dog Park	373,800	7%
Mall of Africa	171,900	7%
SeaTac Community Center	165,700	4%
SeaTac BMX Park	62,900	4%
Highline Botanical Garden	55,500	16%
<i>Adjacent City Relevant Asset Comparison</i>		
Museum of Flight - Tukwila	2,300,000	39%
DEFY - Tukwila	2,200,000	5%
Bowlero - Tukwila	292,900	22%
iFLY - Tukwila	221,300	16%





Source: Placer.AI



Comparable Destinations

Summary Matrix

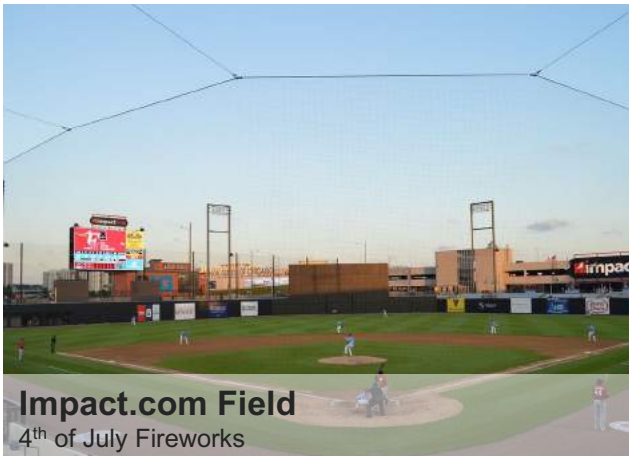
Comparable Destination Analysis

-  Strong, Above Comparables
-  Adequate, On Par with Comparables
-  Present, Needs Improvement, and/or Minimal Supply
-  Limited/Weak

How you stack up.	Asset	SeaTac, WA	Rosemont, IL	South San Francisco, CA	Bloomington, MN	College Park, GA
	Conferences, Meetings & Events					
	Hotels					
	Restaurants, Retail & Nightlife					
	Entertainment Facilities					
	Winery, Brewery, Distillery & Food Hall					
	Unique Attractions & Events					
	Rec, Parks & Nature-Assets					

Source: HSP, Various

Asset Summary – Rosemont, IL



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Asset Summary – South San Francisco, CA



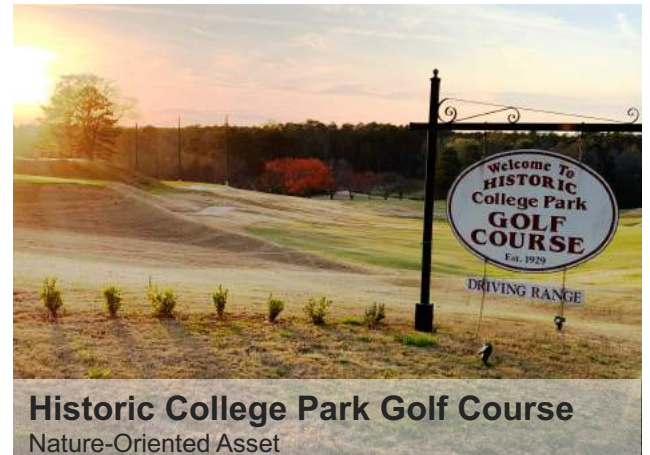
Asset Summary – Bloomington, MN



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Asset Summary – College Park, GA



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Implications

HSP's analysis of both SeaTac and comparable destinations resulted in the following key implications:

- Each comparable airport city analyzed has one, or sometimes multiple, major attractions that are exclusively focused on inducing visitors. Many times, this takes the shape of a convention center, sports venue, outlet mall or entertainment district. SeaTac currently is missing that “one” major attraction that has this demand inducing capability
- **Many of these destinations do not focus entirely on capturing airport visitors but instead creating assets that induce demand and benefit from being convenient and easily accessible from the airport, providing the city with a competitive advantage over other nearby destinations.**



05

Implications & Recommendations



Summary Matrix

Opportunities

	Conference, Meeting & Events	Hotels	Restaurant, Retail & Nightlife	Entertainment Facilities	Winery, Brewery, Distillery & Food Hall	Unique Attractions & Events	Rec, Parks & Nature-Assets	
Opportunity	Strong	Limited – Moderate	Good	Limited – Moderate	Good	Good	Good	
Priority Level								
1 Short Term (1-5 Years)	-	-	Develop walkable mixed-use cultural districts surrounding light rail stations in SeaTac (multifamily, retail, restaurants, anchored by International Market)				Bolster existing assets (branding, connectivity, look & feel)	
2 Medium/Long Term (5-10 Years)	Conduct a full convention / conference center market & financial feasibility study	Site assessment to ensure connectivity of a convention – conference center to the supply of hotels or a new HQ hotel	Continue to push development forward surrounding light rail stations/hubs			Leverage local cultural assets	Bolster existing assets (branding, connectivity, look & feel)	

Summary Matrix


Execution

How we get there.





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- Economic, Fiscal & Employment Impact Analysis (Cost/Benefit)
- Organizational Development
- Public Incentive Analysis
- Economic and Tourism Policy/Legislation Consulting
- Research & Statistical Analysis
- Developer Solicitation & Selection

The firm and its principal have performed more than 1,000 studies over the past 25 years, with more than \$20 billion in built, successful projects.