

BUILDING THE SEATTLE-TACOMA AIR GATEWAY



E-45

BUILDING THE SEATTLE-TACOMA AIR GATEWAY

DEVELOPED FOR

THE WASHINGTON PARTIES

Port Of Seattle Commission
State Of Washington Utilities And Transportation Commission
City Of Seattle
Board Of King County Commissioners
Seattle Chamber Of Commerce
City Of Tacoma
Tacoma Chamber Of Commerce
Seattle Traffic Association

BY

AND UNDER THE DIRECTION OF

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Graduate School Of Business Administration
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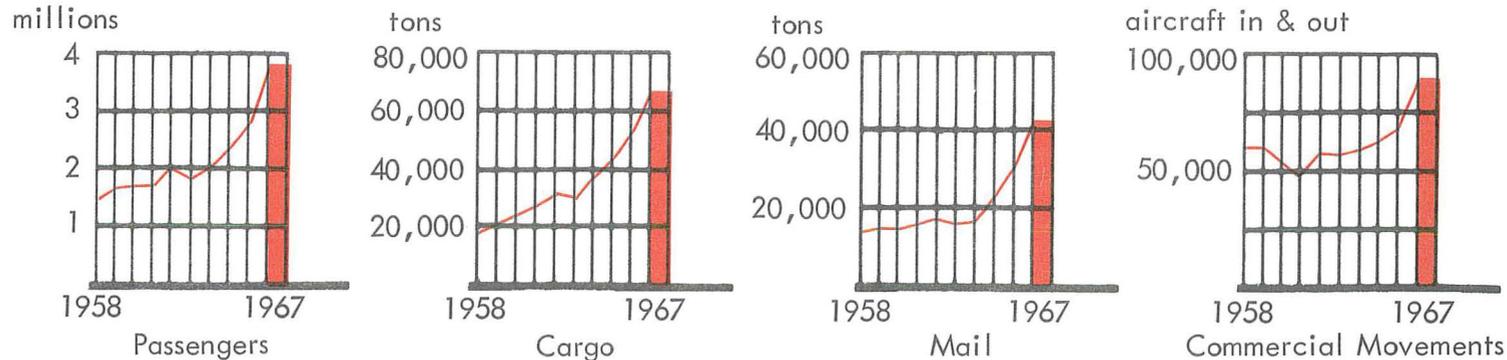
JULY 1968

SEATTLE/TACOMA WAS SERVED BY BUT THREE DOMESTIC TRUNK LINES AND ONE LOCAL SERVICE LINE PRIOR TO JUNE 13, 1967

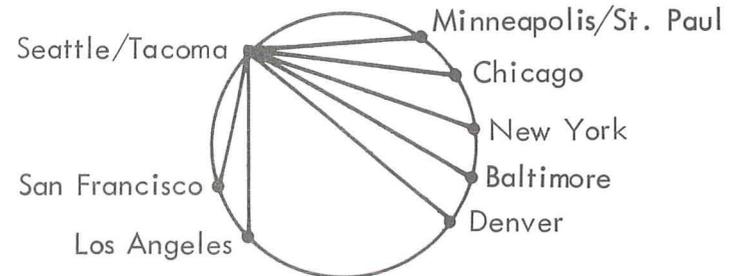
Figure 1 Shows The System Of Single-Carrier Air Routes Between Seattle/Tacoma And Other Major Domestic Continental U.S. Air Hubs As Of June 1967 -- This Air Network Had Remained Virtually Unchanged For Twenty Years

United's North-South And East-West Authority Was Obtained From "Grandfather" Rights Issued In 1938 As Was Much Of Northwest's Authority -- Western Was Extended To The Pacific Northwest Twenty Years Ago And West Coast Was Granted Rights To Operate Between Seattle And Other Northwest Communities In 1946

All Categories Of Commercial Air Traffic Have Grown Dramatically At Seattle/Tacoma In Recent Years*

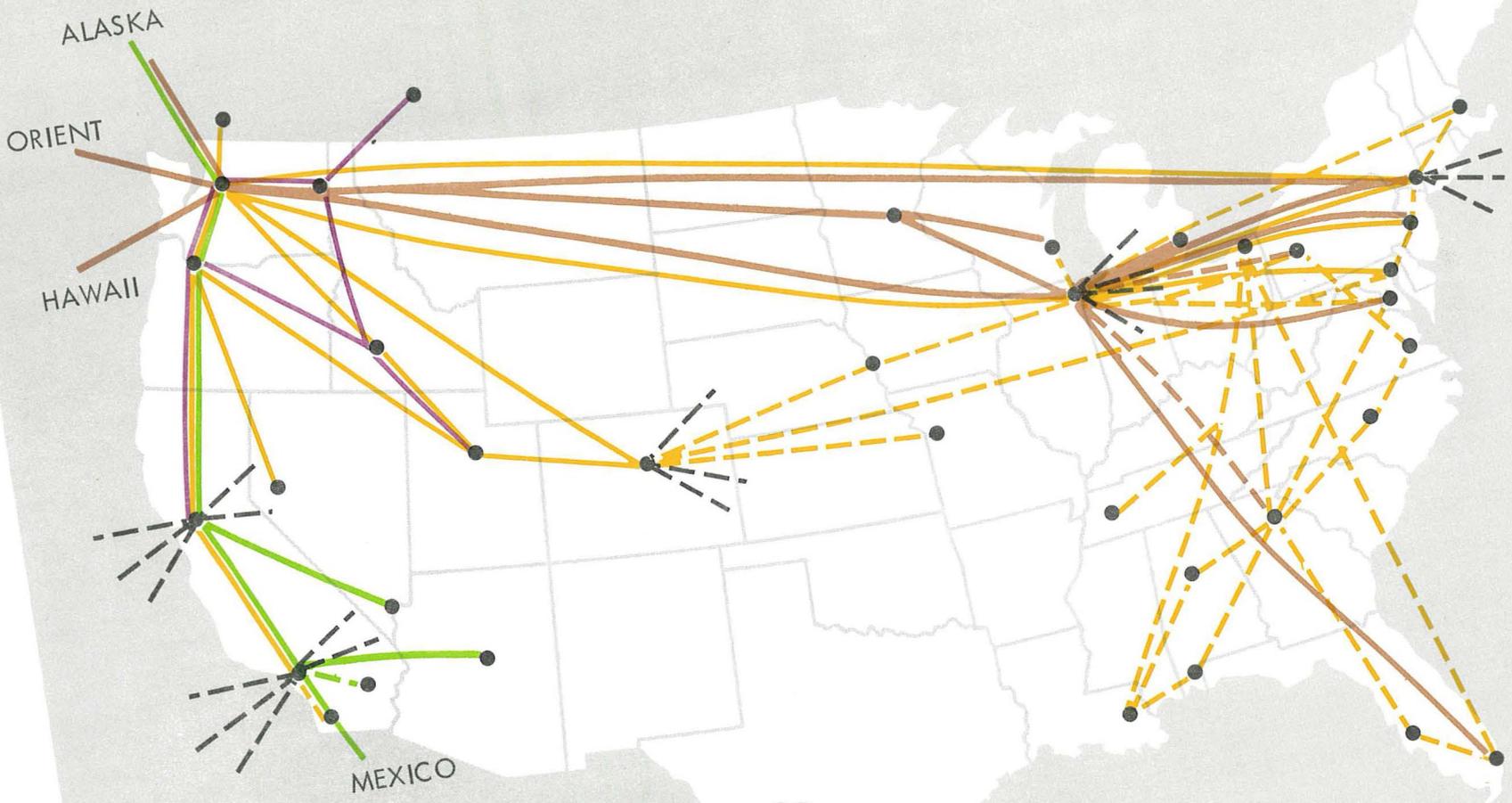


Seattle/Tacoma Based Air Carriers Operated Nonstop Patterns To But Seven Other Large Air Hubs Prior To June 1967



*Source: Seattle-Tacoma International Airport, Operations And Traffic Statistics, 1958 - 1967

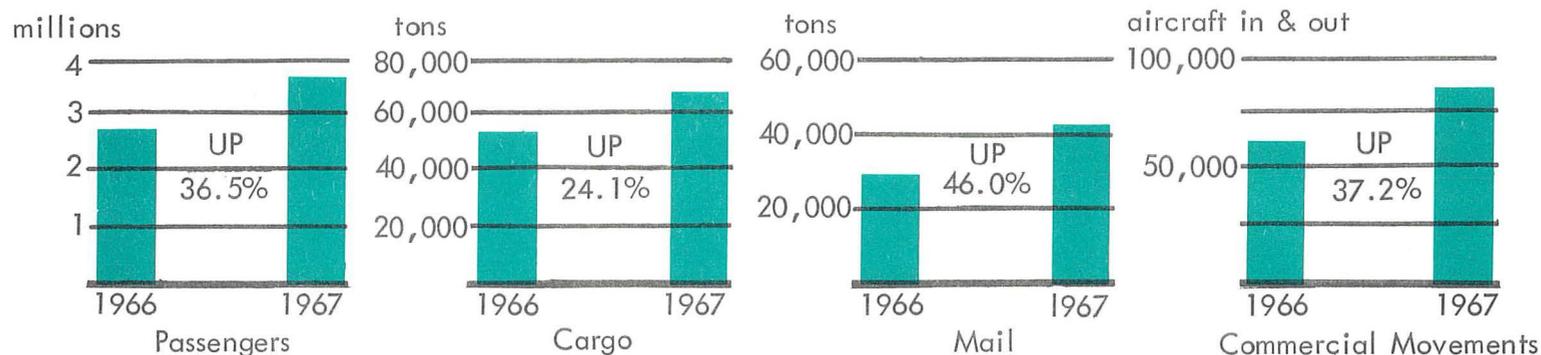
FIGURE 1



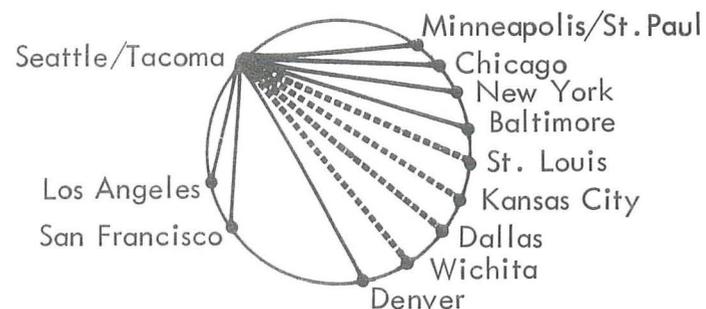
THREE NEW MAJOR TRUNK CARRIERS WERE AUTHORIZED TO SERVE SEATTLE/TACOMA IN THE ORIGINAL PACIFIC NORTHWEST-SOUTHWEST SERVICE INVESTIGATION -- THESE AIRLINES INAUGURATED SERVICE ON JUNE 13, 1967

June Of 1967 Saw The Commencement Of New Service By Braniff, Continental And Eastern At Seattle/Tacoma -- Figure 2 Shows The Expanded Network Of Air Service Between The Puget Sound Air Hub And Major Air Markets In The Southwest And St. Louis And Beyond Areas That Resulted From The CAB Decision In The Original Pacific Northwest-Southwest Service Investigation

The First 6 1/2 Months Of Operation By The Three New Carriers Brought A Dramatic Upsurge In Traffic Statistics*



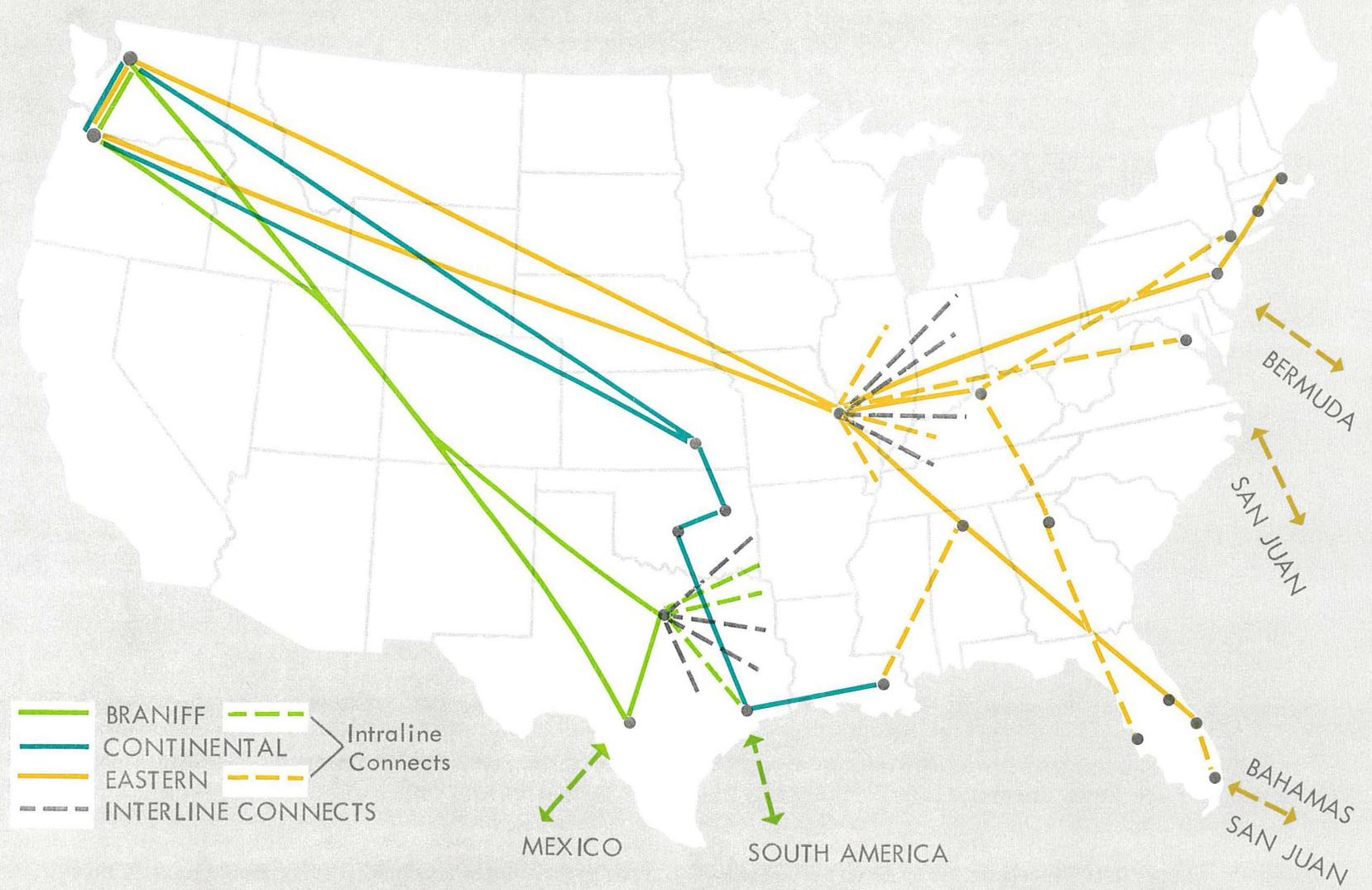
Nonstop Schedules Were Added Between Seattle/Tacoma And Four New Air Hubs In 1967



Eastern, Braniff, And Continental Employ More Than 400 People In The Seattle Area -- These Carriers Operated Over 3,000 Scheduled Flights Into Seattle/Tacoma During Their First Year Of Operation -- The Economic Impact Of These Activities Added More Than \$10,500,000 In Direct And Indirect Benefits To The Economic Base Of The Community During The First Year -- This Amount Will Increase In Future Years

*Source: Seattle-Tacoma International Airport, Operations And Traffic Statistics, 1958 - 1967

FIGURE 2



THE REOPENED PACIFIC NORTHWEST-SOUTHWEST SERVICE INVESTIGATION SHOULD RESULT IN COMPETITIVE AWARDS BETWEEN SEATTLE/TACOMA AND ALL MAJOR MARKETS IN THE SOUTHWEST, THE ROCKY MOUNTAIN AREA, AND ST. LOUIS/KANSAS CITY

Figure 3 Highlights The Suggested Authorizations For New Air Service That Were Made In The Examiner's Initial Decision In The Reopened Pacific Northwest-Southwest Service Investigation -- The Type Of Service Improvements Suggested Were What The Washington Parties Had Requested In This Proceeding

The Extension Of TWA From Kansas City To The Northwest Would Result In The Development Of Kansas City As A New Gateway For Large Northeast, East, And Southeast Metropolitan Areas And Provide A New Alternative For Avoiding The Congested Chicago Gateway

The Addition Of Houston As A Coterminial With Dallas And San Antonio On Braniff's Route To And From The Northwest Would Result In Direct Competition To Houston, As Well As An Authorization For Single-Plane Service Between Seattle/Tacoma And South America

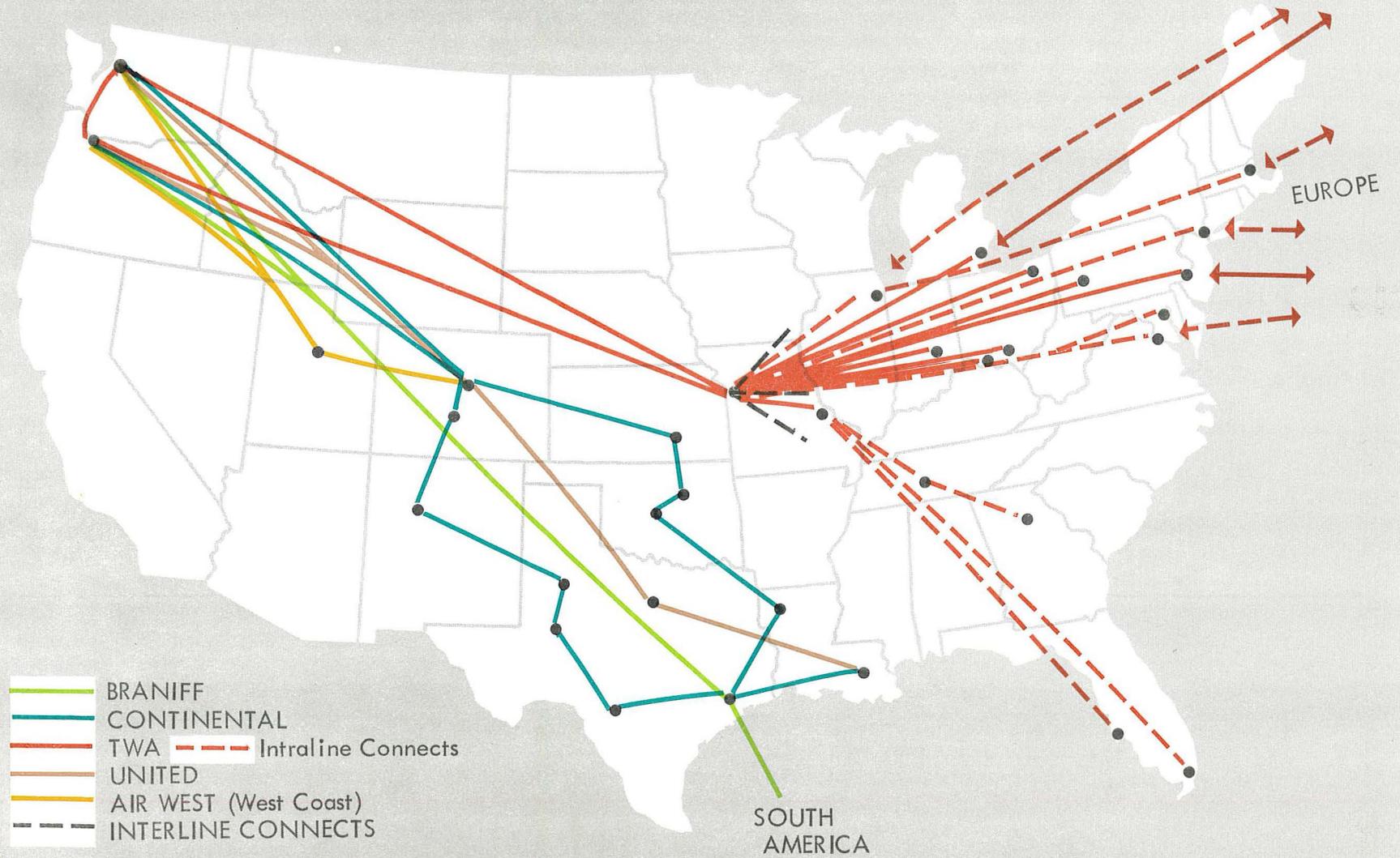
United's Suggested Award Between Denver, Dallas And On To New Orleans Would Provide Additional Competition For Braniff And Continental In Pacific Northwest-Southwest Air Markets

Continental's Recommended Extension Would Open Up Several New Areas In The Southwest, As Well As Providing Competitive Service To Denver

The New Authority Recommended For Air West Should Result In Additional Improved Service Between Seattle/Tacoma-Denver, And Intermediate Points Via Either Portland Or Spokane

All Of These New Services Will Greatly Stimulate Traffic Growth And Result In Increased Economic Activity In The Seattle/Tacoma Area

FIGURE 3



SEATTLE/TACOMA'S PATTERNS OF AIR SERVICE HAVE EXPANDED SIGNIFICANTLY WITHIN THE LAST YEAR -- IMPROVED SERVICES BY CARRIERS ALREADY SERVING THE AREA AND ADDED SERVICES BY THE NEWLY AUTHORIZED AIR-LINES HAVE ENHANCED THE STATUS OF THE SEATTLE/TACOMA GATEWAY -- CONTEMPLATED AWARDS IN PENDING CASES SHOULD FURTHER ADVANCE THE POSITION OF THIS AIR GATEWAY

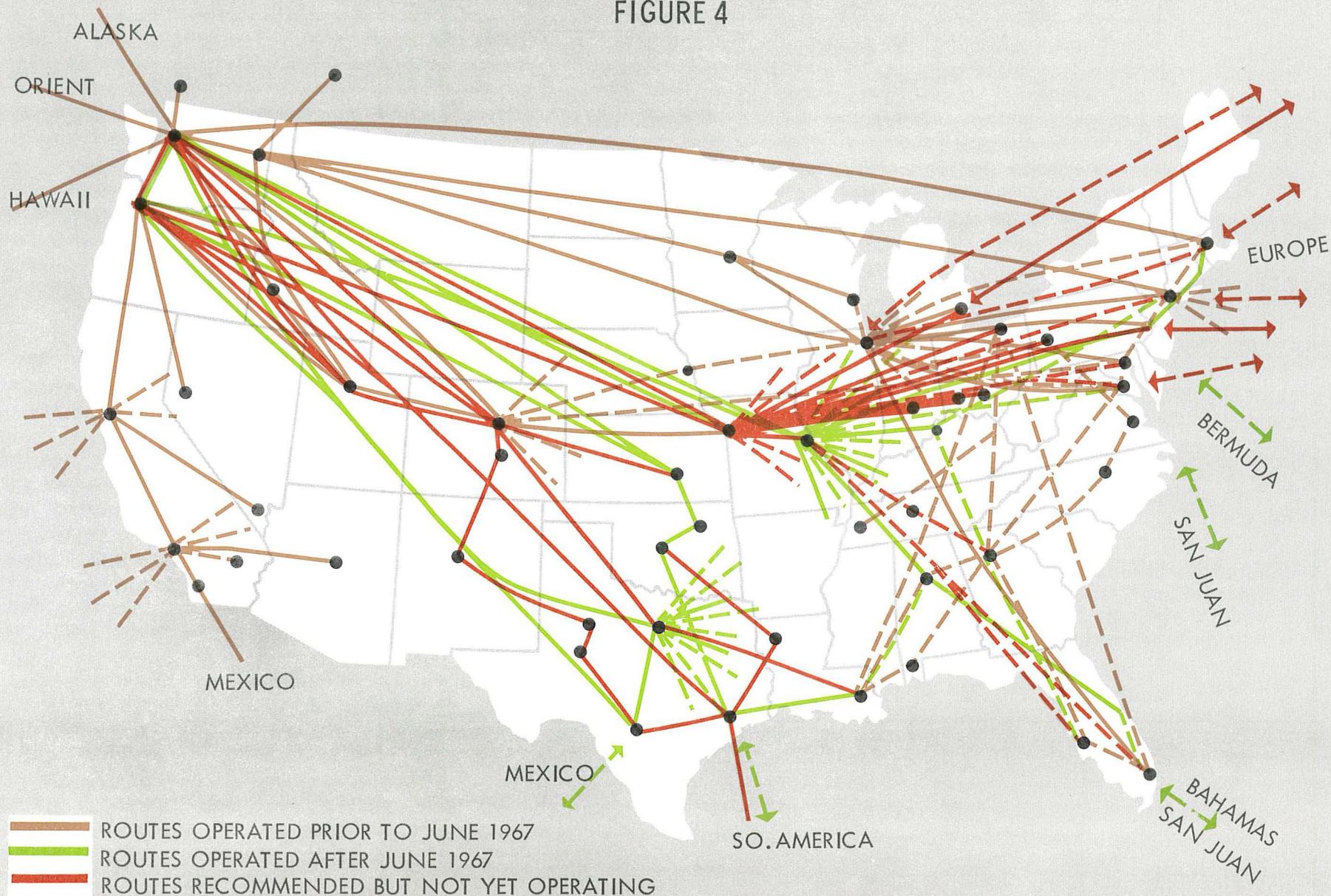
Figure 4 Shows Patterns Of Air Service That Are Now Available Or Should Be Available For Air Travelers, Cargo, And Mail Moving In And Out Of The Seattle/Tacoma Gateway

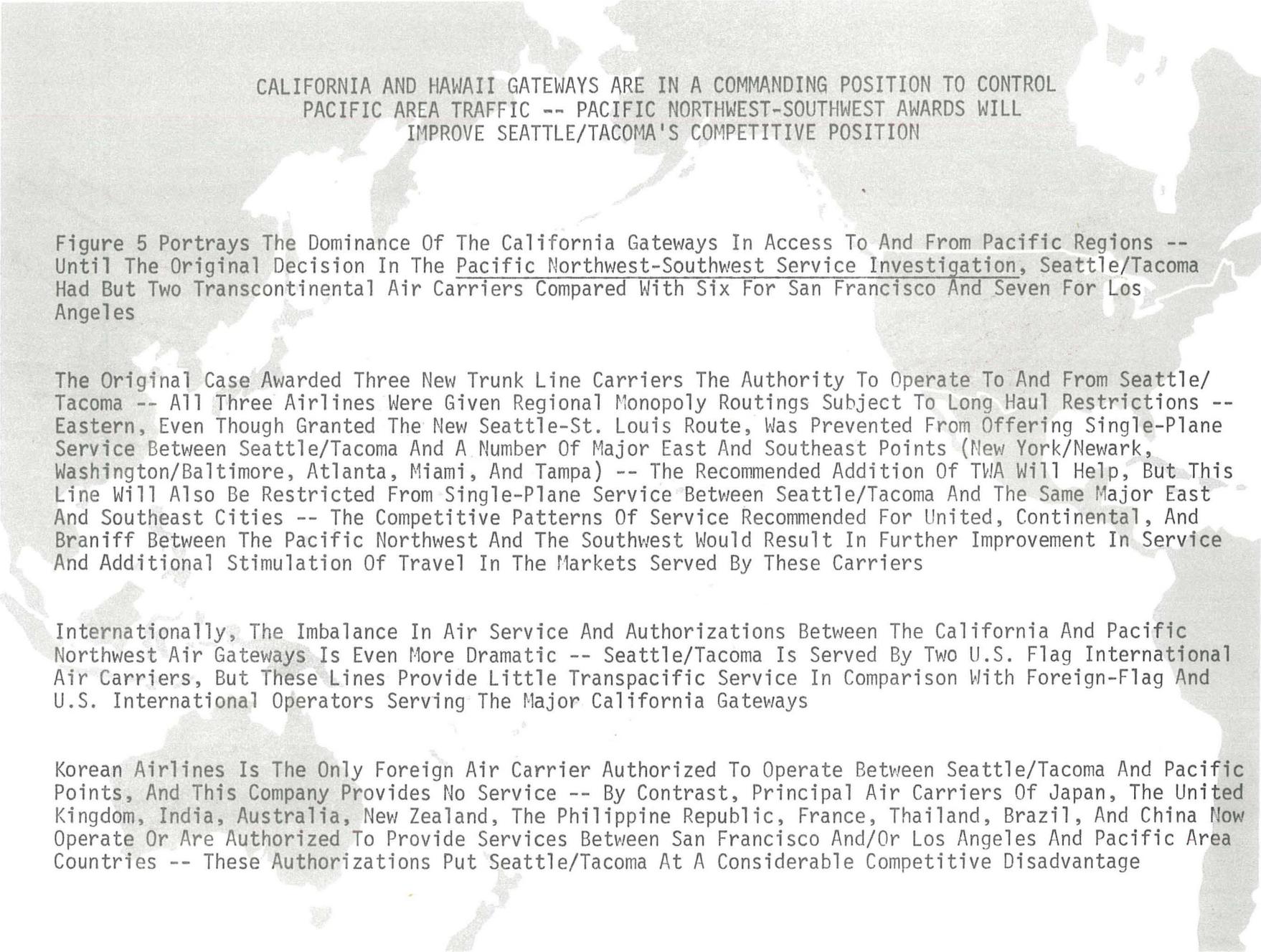
This Composite Route Map Portrays --

- * Seattle/Tacoma's Basic Airline System Prior To June 1967, Including More Recent Service Improvements
- * The Routes Awarded In The Original Pacific Northwest-Southwest Service Investigation -- These Services Have Now Been In Operation For More Than A Year
- * The Routes Recommended By The Examiner In His Initial Decision In The Reopened Pacific Northwest-Southwest Service Investigation

The Recommended Routes Are Now Before The Civil Aeronautics Board For Final Decision -- The Decision And Order In This Case Should Be Made Soon

FIGURE 4





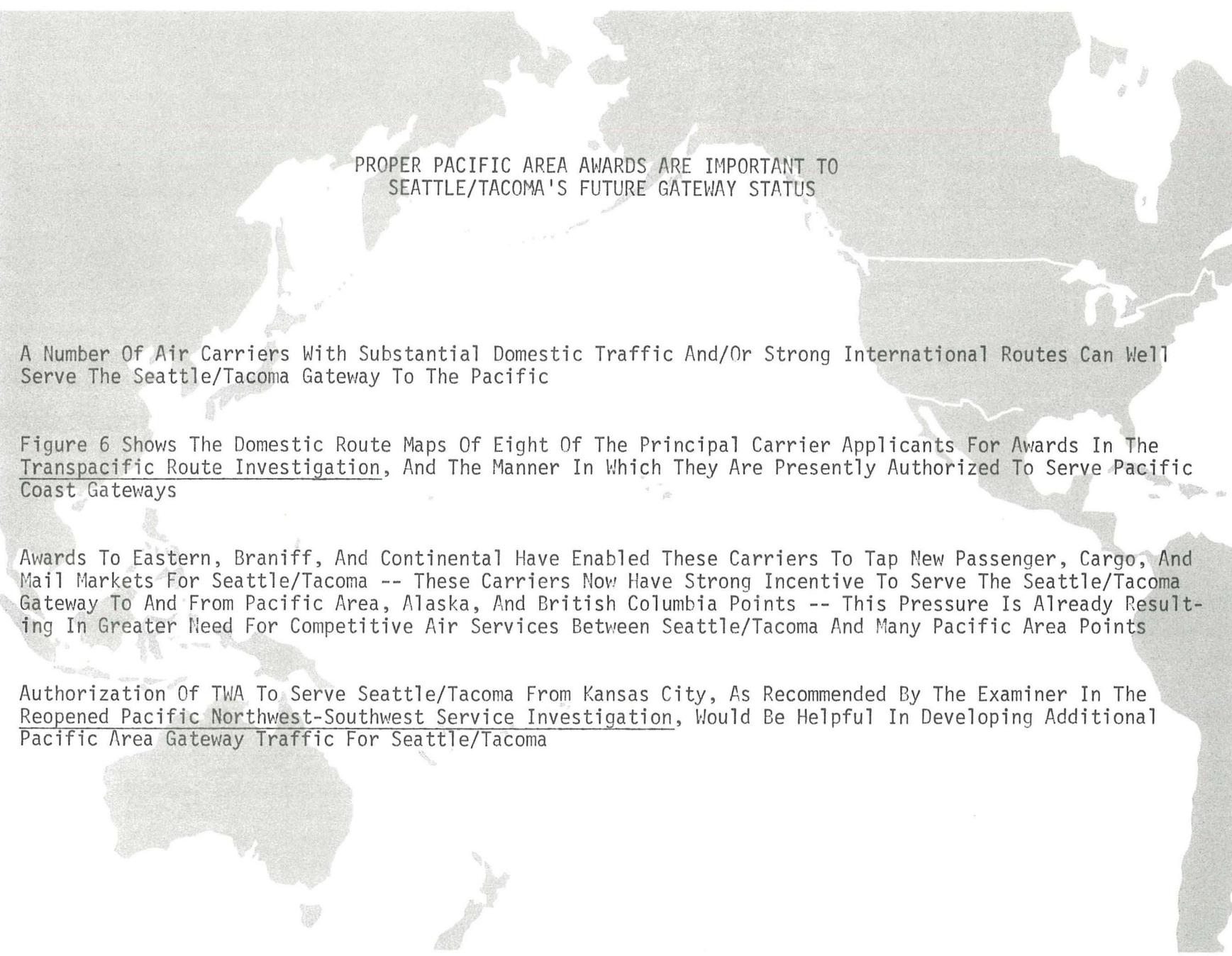
CALIFORNIA AND HAWAII GATEWAYS ARE IN A COMMANDING POSITION TO CONTROL
PACIFIC AREA TRAFFIC -- PACIFIC NORTHWEST-SOUTHWEST AWARDS WILL
IMPROVE SEATTLE/TACOMA'S COMPETITIVE POSITION

Figure 5 Portrays The Dominance Of The California Gateways In Access To And From Pacific Regions -- Until The Original Decision In The Pacific Northwest-Southwest Service Investigation, Seattle/Tacoma Had But Two Transcontinental Air Carriers Compared With Six For San Francisco And Seven For Los Angeles

The Original Case Awarded Three New Trunk Line Carriers The Authority To Operate To And From Seattle/Tacoma -- All Three Airlines Were Given Regional Monopoly Routings Subject To Long Haul Restrictions -- Eastern, Even Though Granted The New Seattle-St. Louis Route, Was Prevented From Offering Single-Plane Service Between Seattle/Tacoma And A Number Of Major East And Southeast Points (New York/Newark, Washington/Baltimore, Atlanta, Miami, And Tampa) -- The Recommended Addition Of TWA Will Help, But This Line Will Also Be Restricted From Single-Plane Service Between Seattle/Tacoma And The Same Major East And Southeast Cities -- The Competitive Patterns Of Service Recommended For United, Continental, And Braniff Between The Pacific Northwest And The Southwest Would Result In Further Improvement In Service And Additional Stimulation Of Travel In The Markets Served By These Carriers

Internationally, The Imbalance In Air Service And Authorizations Between The California And Pacific Northwest Air Gateways Is Even More Dramatic -- Seattle/Tacoma Is Served By Two U.S. Flag International Air Carriers, But These Lines Provide Little Transpacific Service In Comparison With Foreign-Flag And U.S. International Operators Serving The Major California Gateways

Korean Airlines Is The Only Foreign Air Carrier Authorized To Operate Between Seattle/Tacoma And Pacific Points, And This Company Provides No Service -- By Contrast, Principal Air Carriers Of Japan, The United Kingdom, India, Australia, New Zealand, The Philippine Republic, France, Thailand, Brazil, And China Now Operate Or Are Authorized To Provide Services Between San Francisco And/Or Los Angeles And Pacific Area Countries -- These Authorizations Put Seattle/Tacoma At A Considerable Competitive Disadvantage



PROPER PACIFIC AREA AWARDS ARE IMPORTANT TO
SEATTLE/TACOMA'S FUTURE GATEWAY STATUS

A Number Of Air Carriers With Substantial Domestic Traffic And/Or Strong International Routes Can Well Serve The Seattle/Tacoma Gateway To The Pacific

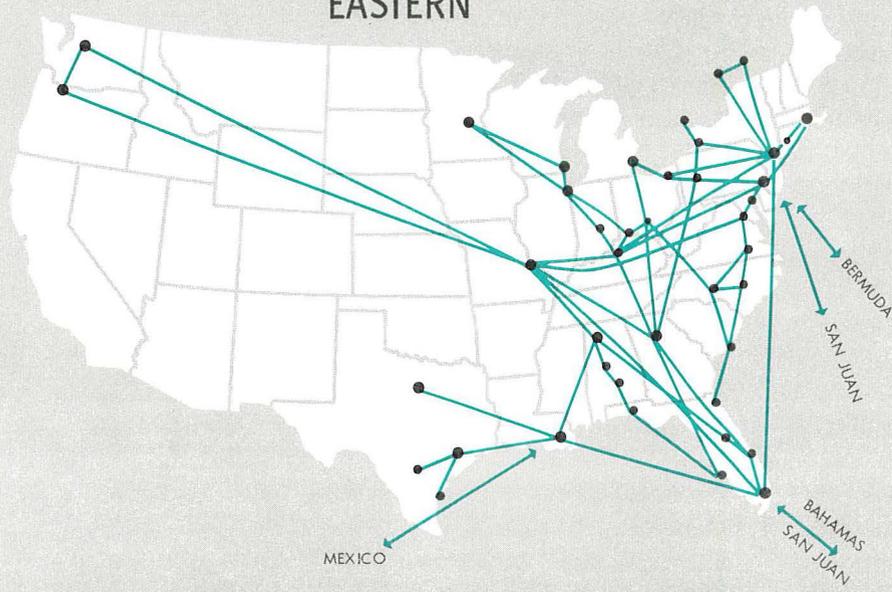
Figure 6 Shows The Domestic Route Maps Of Eight Of The Principal Carrier Applicants For Awards In The Transpacific Route Investigation, And The Manner In Which They Are Presently Authorized To Serve Pacific Coast Gateways

Awards To Eastern, Braniff, And Continental Have Enabled These Carriers To Tap New Passenger, Cargo, And Mail Markets For Seattle/Tacoma -- These Carriers Now Have Strong Incentive To Serve The Seattle/Tacoma Gateway To And From Pacific Area, Alaska, And British Columbia Points -- This Pressure Is Already Resulting In Greater Need For Competitive Air Services Between Seattle/Tacoma And Many Pacific Area Points

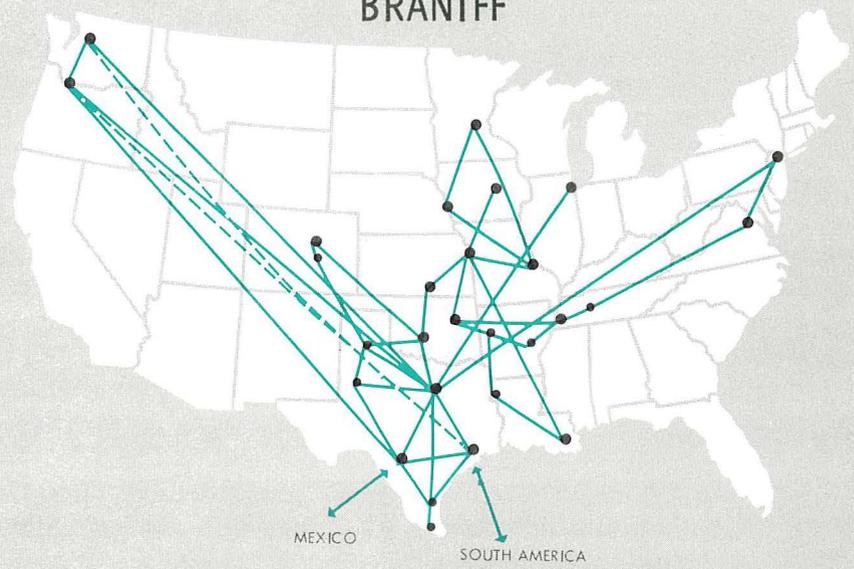
Authorization Of TWA To Serve Seattle/Tacoma From Kansas City, As Recommended By The Examiner In The Reopened Pacific Northwest-Southwest Service Investigation, Would Be Helpful In Developing Additional Pacific Area Gateway Traffic For Seattle/Tacoma

FIGURE 6

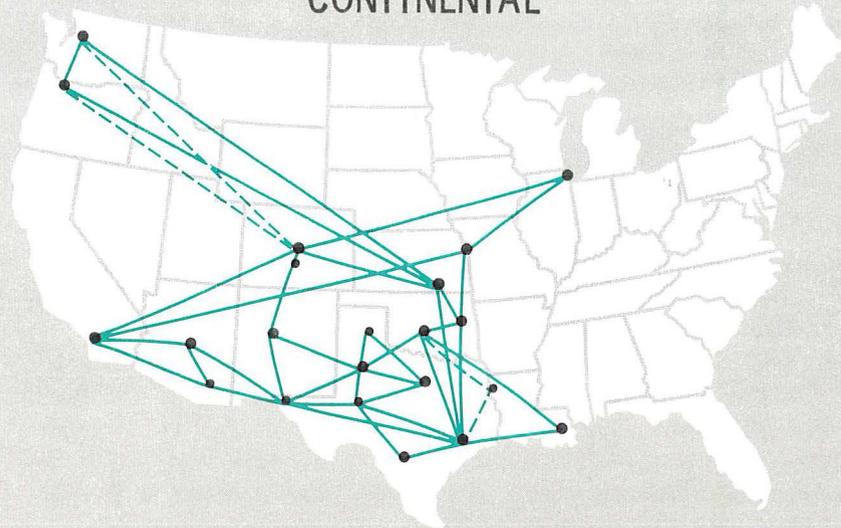
EASTERN



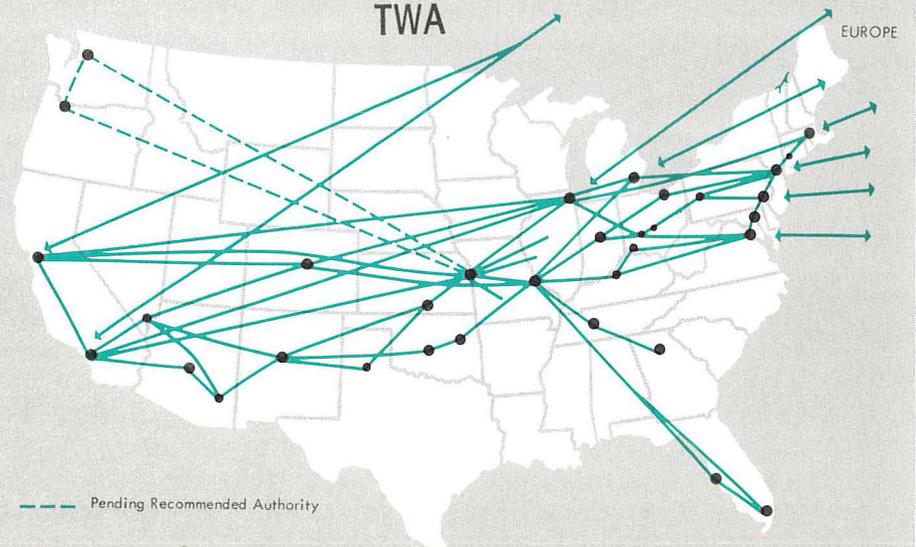
BRANIFF



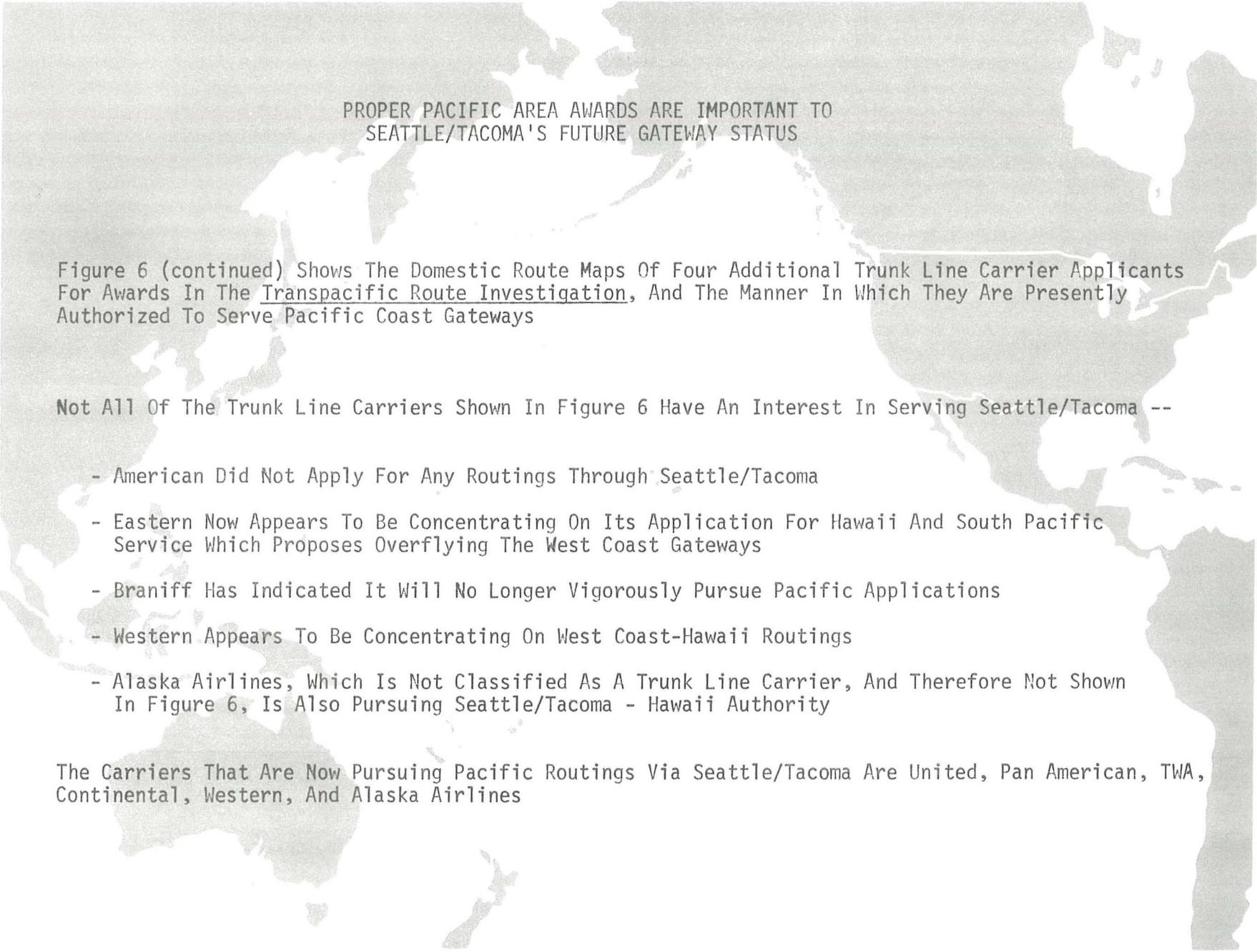
CONTINENTAL



TWA



--- Pending Recommended Authority



PROPER PACIFIC AREA AWARDS ARE IMPORTANT TO
SEATTLE/TACOMA'S FUTURE GATEWAY STATUS

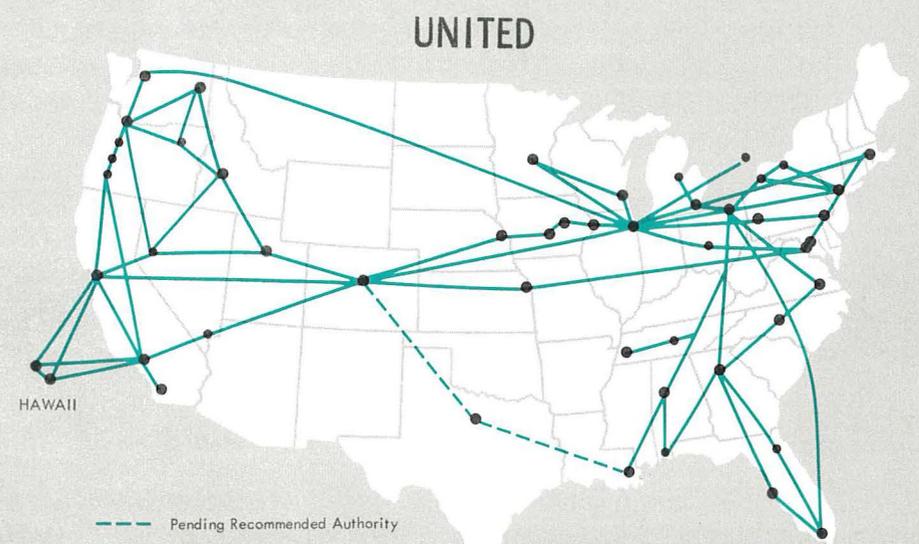
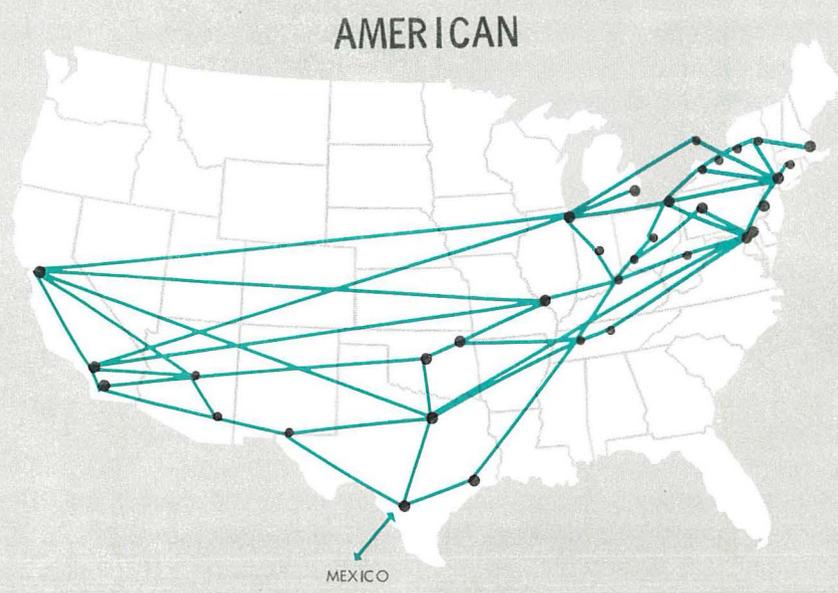
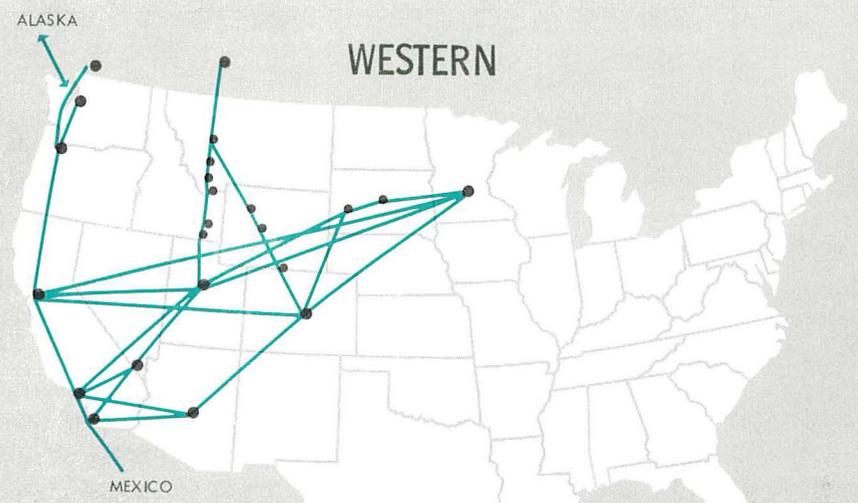
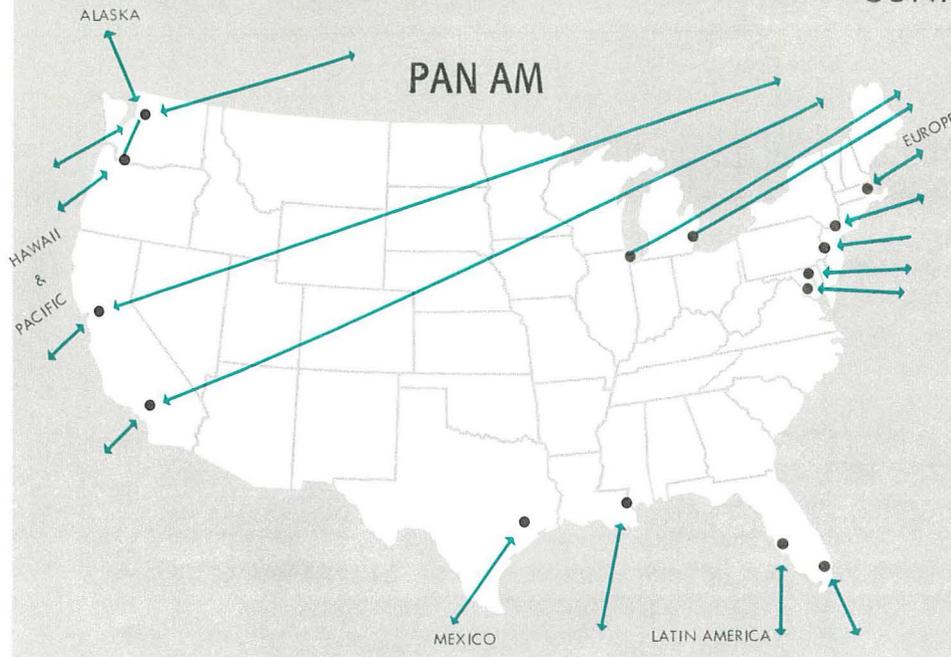
Figure 6 (continued) Shows The Domestic Route Maps Of Four Additional Trunk Line Carrier Applicants For Awards In The Transpacific Route Investigation, And The Manner In Which They Are Presently Authorized To Serve Pacific Coast Gateways

Not All Of The Trunk Line Carriers Shown In Figure 6 Have An Interest In Serving Seattle/Tacoma --

- American Did Not Apply For Any Routings Through Seattle/Tacoma
- Eastern Now Appears To Be Concentrating On Its Application For Hawaii And South Pacific Service Which Proposes Overflying The West Coast Gateways
- Braniff Has Indicated It Will No Longer Vigorously Pursue Pacific Applications
- Western Appears To Be Concentrating On West Coast-Hawaii Routings
- Alaska Airlines, Which Is Not Classified As A Trunk Line Carrier, And Therefore Not Shown In Figure 6, Is Also Pursuing Seattle/Tacoma - Hawaii Authority

The Carriers That Are Now Pursuing Pacific Routings Via Seattle/Tacoma Are United, Pan American, TWA, Continental, Western, And Alaska Airlines

FIGURE 6
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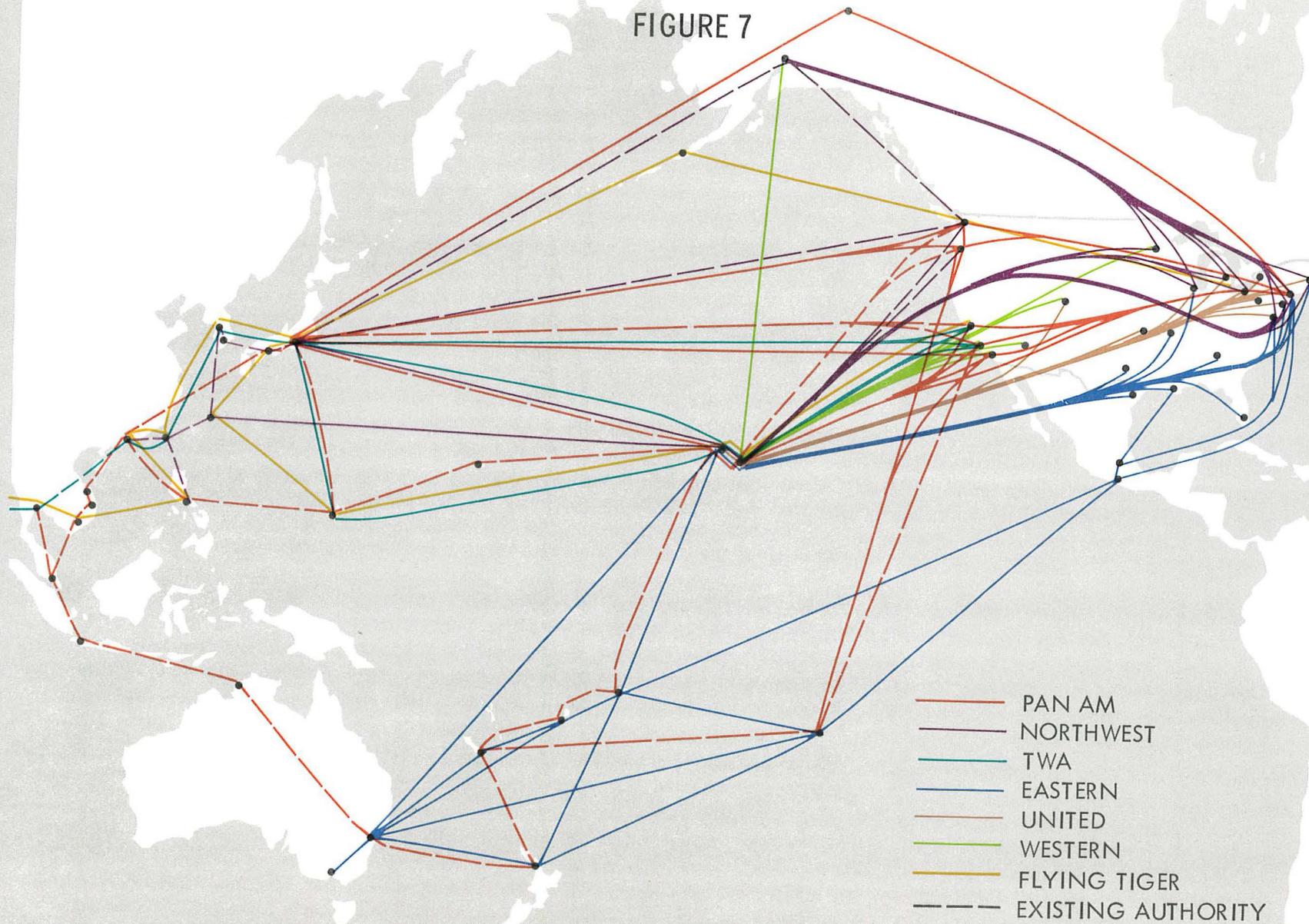


--- Pending Recommended Authority

PRINCIPAL AWARDS RECOMMENDED BY THE EXAMINER IN HIS INITIAL
DECISION IN THE TRANSPACIFIC ROUTE INVESTIGATION

The Examiner's Recommended Decision In The Transpacific Route Investigation, If Followed By The Civil Aeronautics Board And The President, Would Greatly Strengthen Hawaii's Pacific Area Gateway Status -- This Recommendation, That Mexican And Alaskan Gateways For The Pacific Be Strengthened, Would Divert Additional Traffic That Now Moves Through West Coast Cities -- These Recommendations, If Followed, Will Pose A Serious Threat To The Standing Of Seattle/Tacoma And Other West Coast Airports That Are Now The Principal Gateways To And From Pacific Area Countries

FIGURE 7



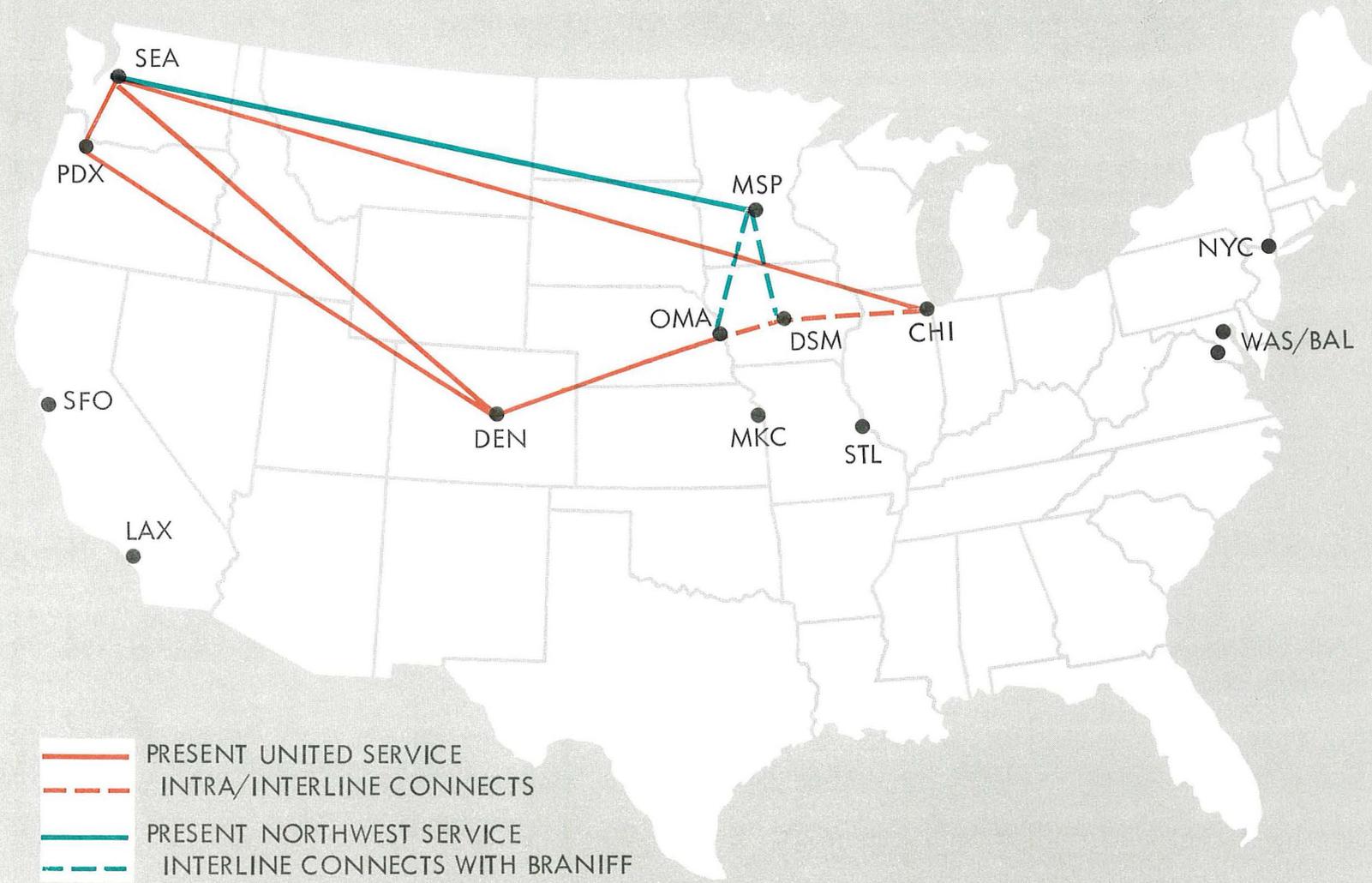
NEW AUTHORIZATIONS BETWEEN THE PACIFIC NORTHWEST AND OMAHA/DES MOINES AND BEYOND AREAS WILL BE CONSIDERED IN THE SERVICE TO OMAHA AND DES MOINES CASE -- LIMITED SERVICES ARE NOW OFFERED IN THESE MARKETS

Figure 8 Portrays Present Service Patterns Between Seattle/Tacoma And Omaha/Des Moines -- Routings Shown Are The Most Direct And Convenient Available Over Which The Lowest Fares Are Published

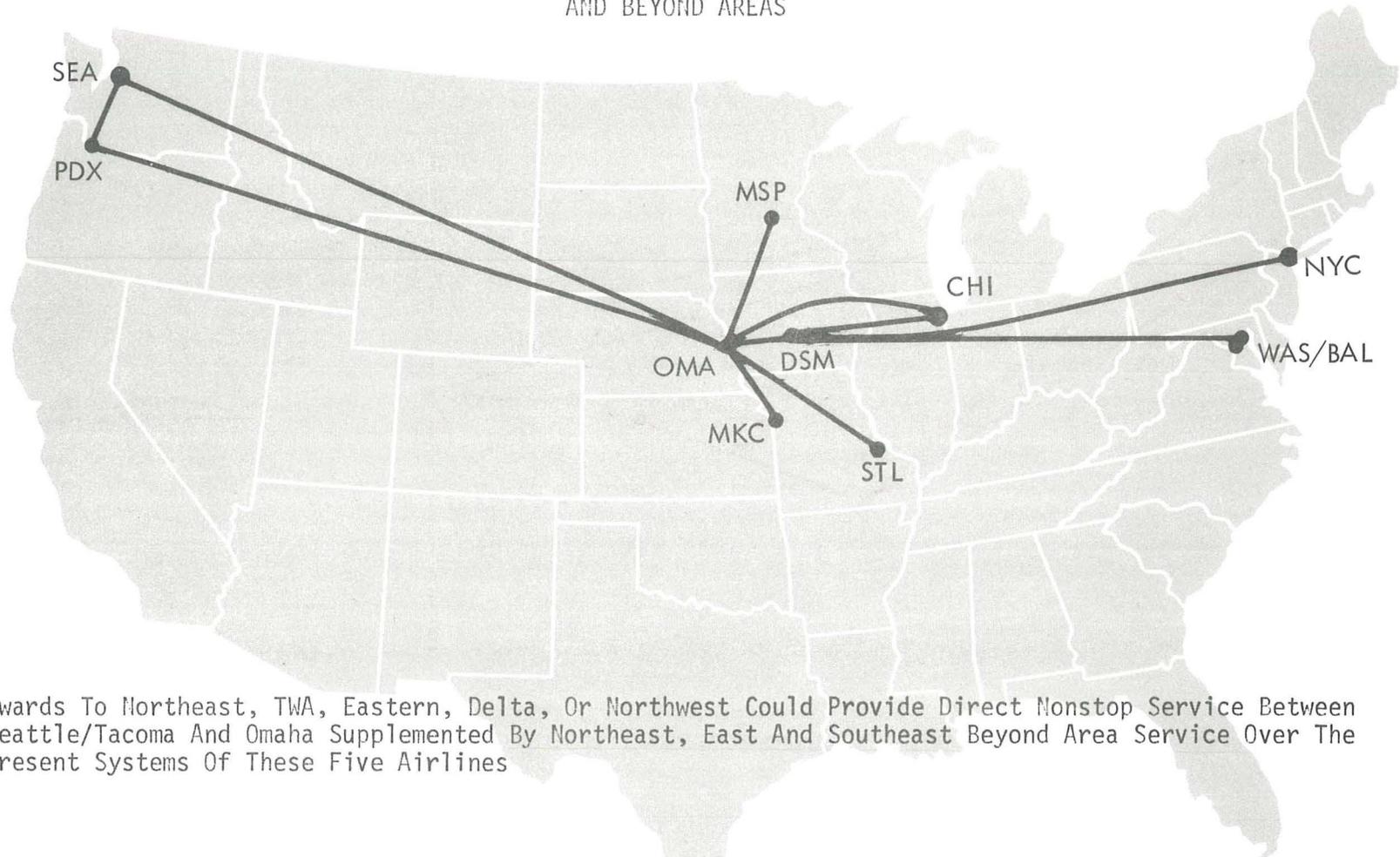
Present Schedules Provide Only Limited Single-Plane Service To Omaha And Only Connecting Service To Des Moines -- Recent Pacific Northwest-Omaha/Des Moines Traffic Statistics Show That These Markets Are Experiencing Explosive Growth -- These Growth Rates Indicate Need For Direct Service And Utilization Of These Cities As Viable Gateways To And From The Extensive Service Areas That Can Be Served Through Omaha And Des Moines -- These Air Hubs Can Also Be Used As Additional East-West Air Gateways

The Service To Omaha And Des Moines Case Will Consider The Need For Nonstop Service Between Seattle/Tacoma/Portland, On The One Hand, And Omaha, On The Other -- The Proceeding Can Also Result In Additional One-Stop Service Between Seattle/Tacoma-Chicago, Des Moines, St. Louis, And Kansas City Through Omaha -- Two-Stop Service Between The Pacific Northwest And New York/Newark And Baltimore/Washington, Via A Number Of Combinations Of Omaha, Des Moines, And Other Midwest Gateways, Can Also Result From This Case

FIGURE 8



PROPER AWARDS IN THE SERVICE TO OMAHA AND DES MOINES CASE CAN PROVIDE MORE CONVENIENT, COMPETITIVE, AND EFFECTIVE AIR SERVICE BETWEEN THE PACIFIC NORTHWEST AND MAJOR PLAINS STATES AIR CENTERS AND BEYOND AREAS



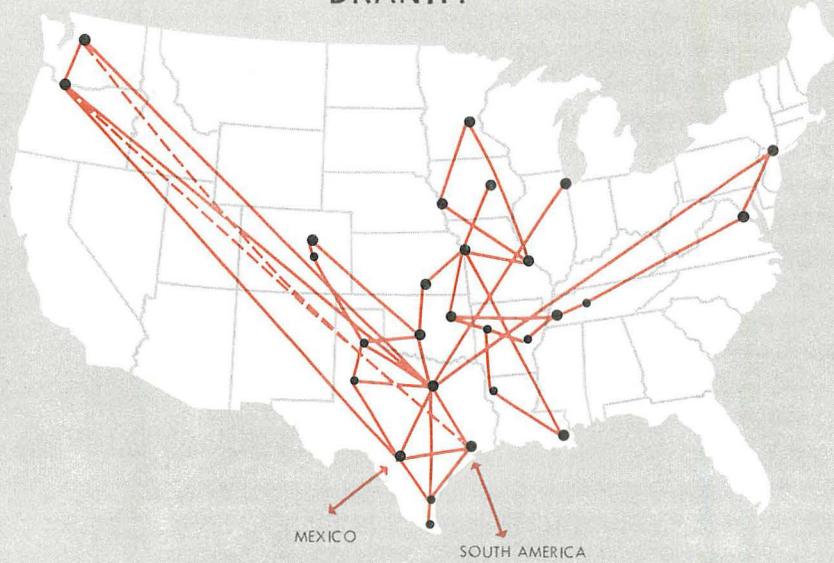
Awards To Northeast, TWA, Eastern, Delta, Or Northwest Could Provide Direct Nonstop Service Between Seattle/Tacoma And Omaha Supplemented By Northeast, East And Southeast Beyond Area Service Over The Present Systems Of These Five Airlines

Awards To Continental, Braniff, Or Western Could Provide New Services To And From Chicago, New York/ Newark, And Washington/Baltimore By Way Of Omaha And/Or Des Moines -- Local Service Applicants Could Develop Strong Long Haul Markets From Awards In This Investigation

Figure 9 Portrays The Domestic Route Maps Of The 10 Carrier Applicants Who Have Applied For Seattle/ Tacoma-Omaha/Des Moines And Beyond Area Service In This Proceeding -- The Present Routes Of Braniff, Continental, Delta, And Eastern Are Shown On The Facing Page

FIGURE 9

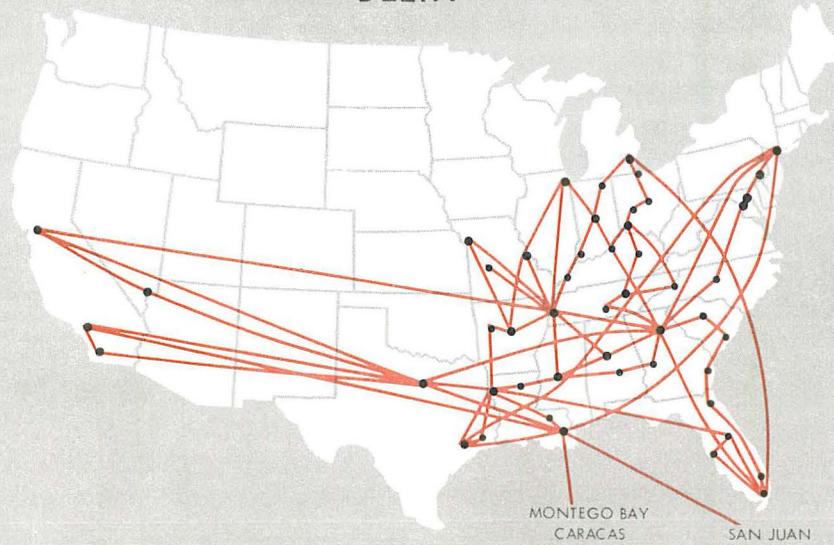
BRANIFF



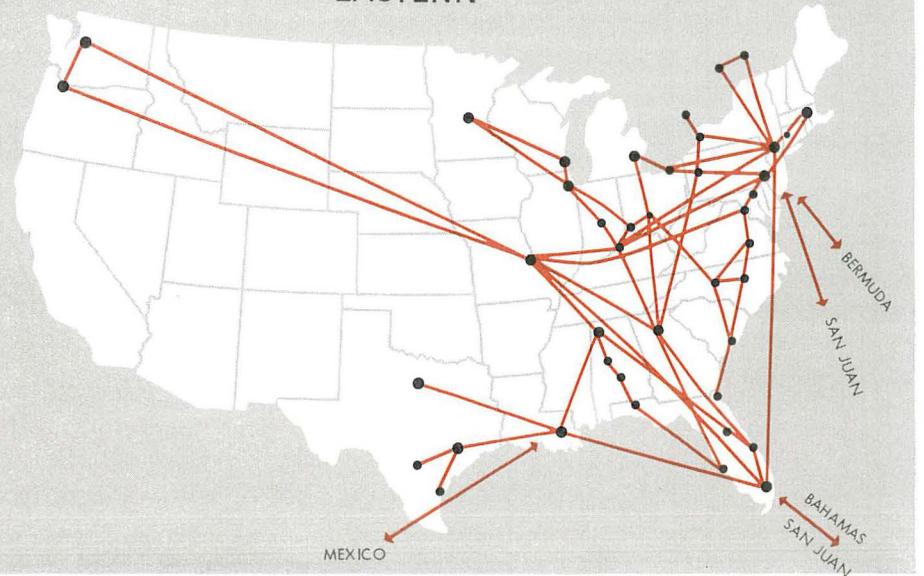
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DELTA



EASTERN



PROPER AWARDS IN THE SERVICE TO OMAHA AND DES MOINES CASE CAN PROVIDE MORE CONVENIENT, COMPETITIVE,
AND EFFECTIVE AIR SERVICE BETWEEN THE PACIFIC NORTHWEST AND MAJOR PLAINS STATES AIR CENTERS
AND BEYOND AREAS

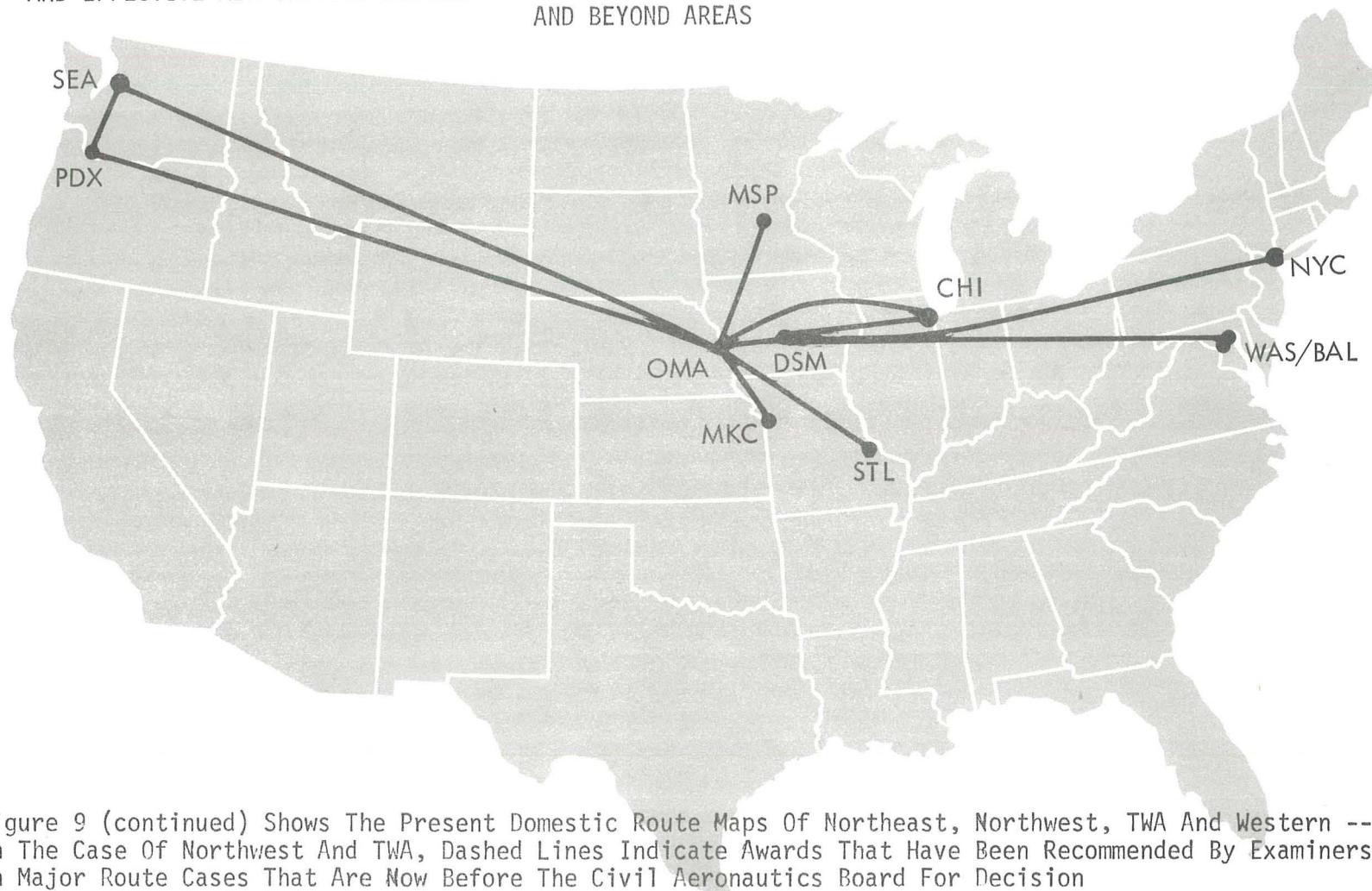
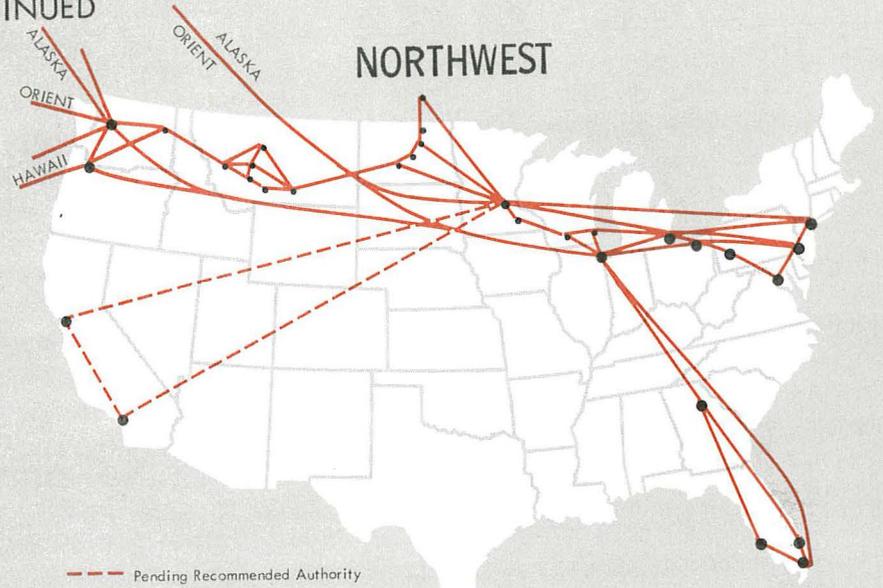
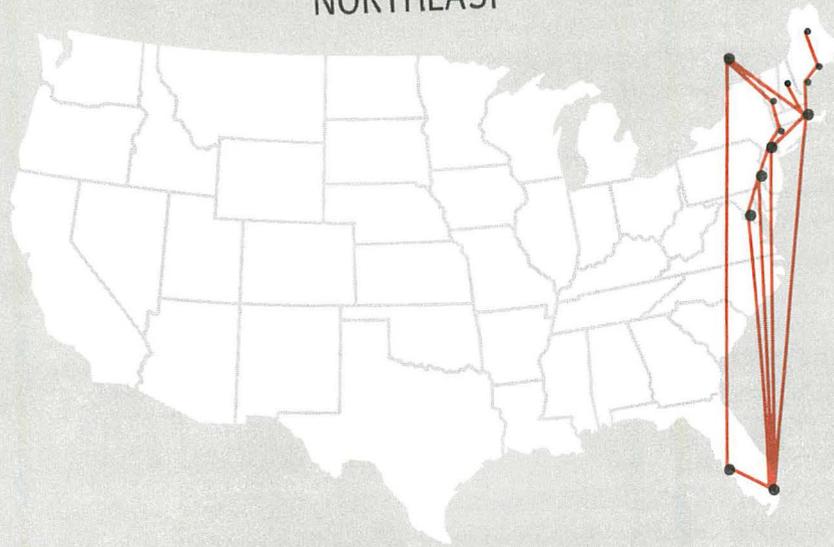


Figure 9 (continued) Shows The Present Domestic Route Maps Of Northeast, Northwest, TWA And Western -- In The Case Of Northwest And TWA, Dashed Lines Indicate Awards That Have Been Recommended By Examiners In Major Route Cases That Are Now Before The Civil Aeronautics Board For Decision

FIGURE 9
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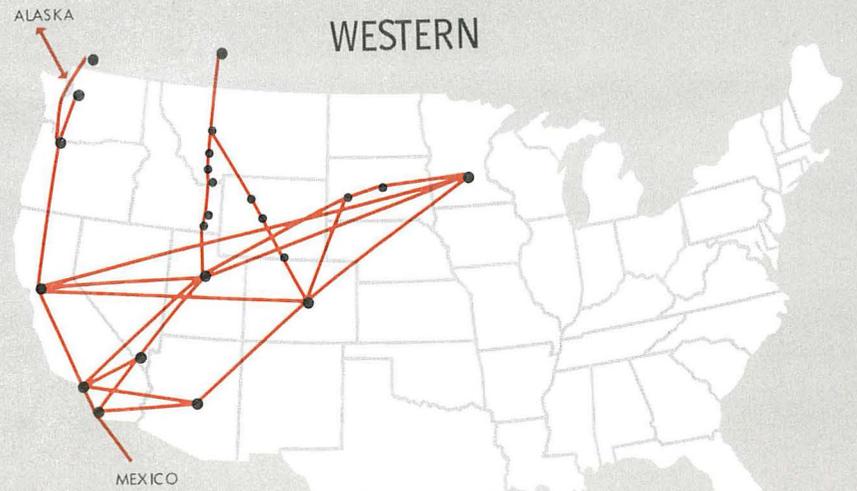
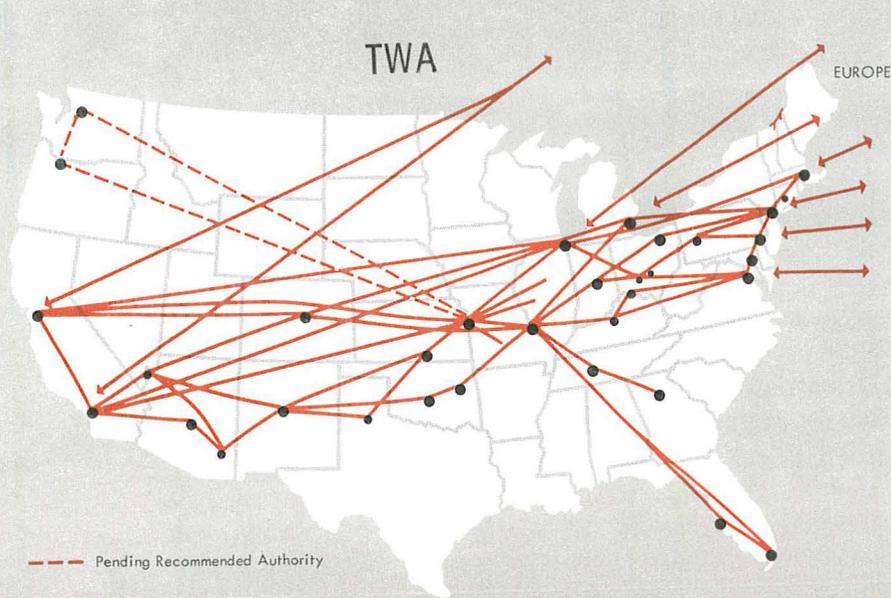
NORTHEAST

NORTHWEST



TWA

WESTERN



PROPER AWARDS IN THE SERVICE TO OMAHA AND DES MOINES CASE CAN PROVIDE MORE CONVENIENT, COMPETITIVE,
AND EFFECTIVE AIR SERVICE BETWEEN THE PACIFIC NORTHWEST AND MAJOR PLAINS STATES AIR CENTERS
AND BEYOND AREAS

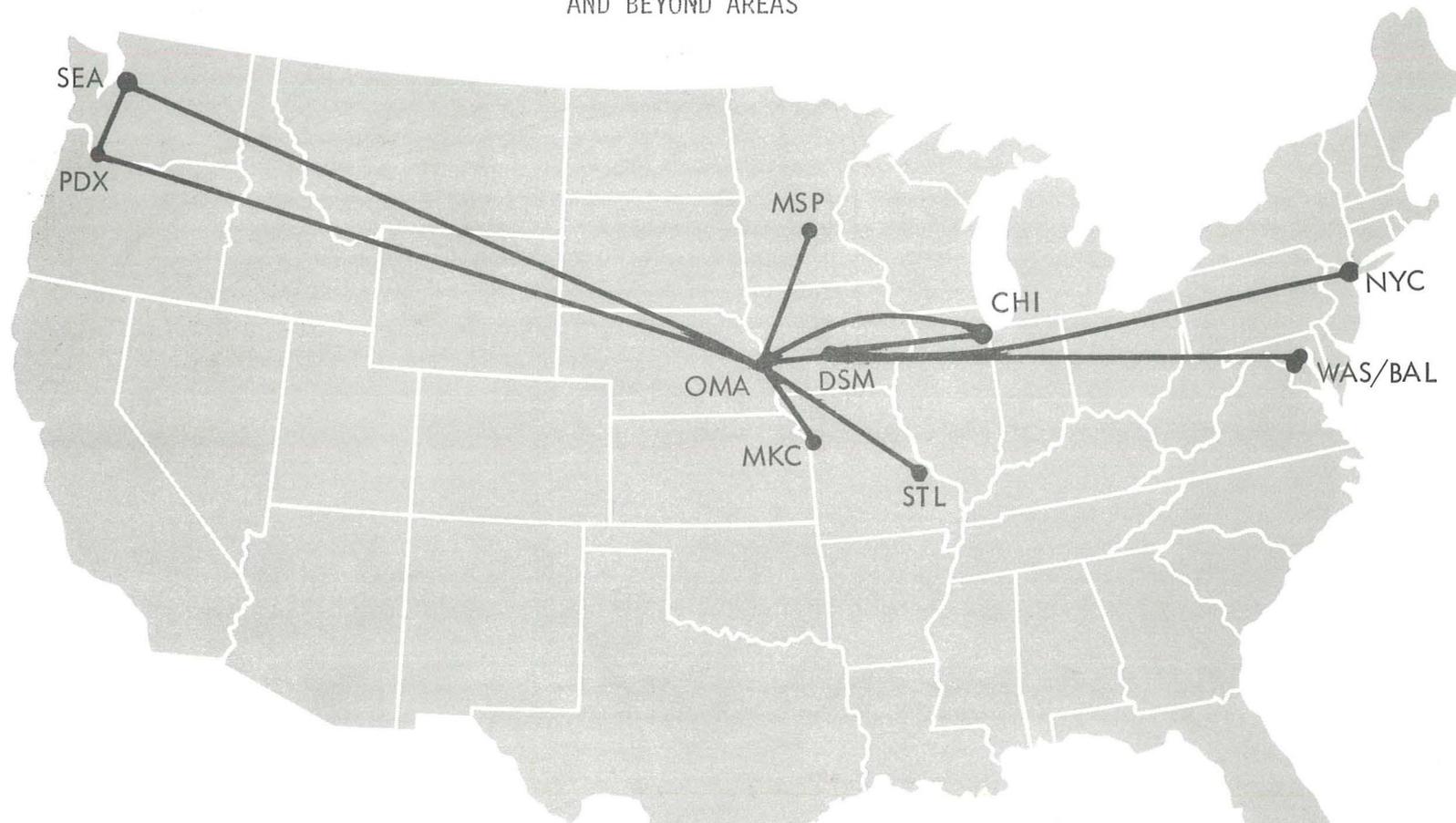
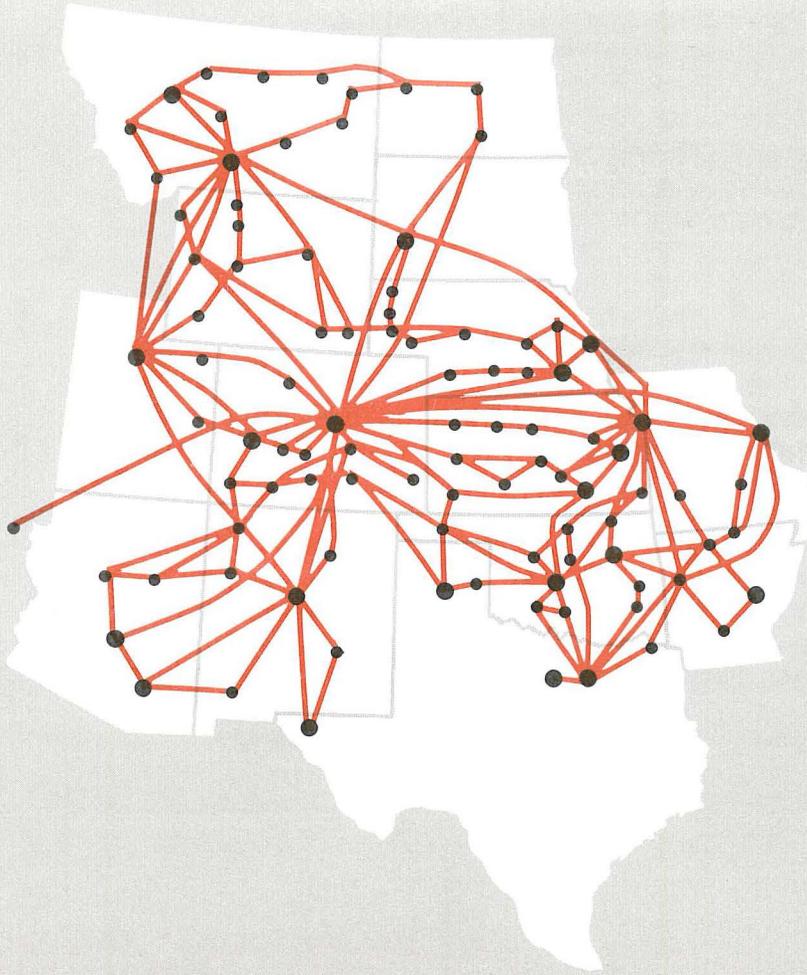


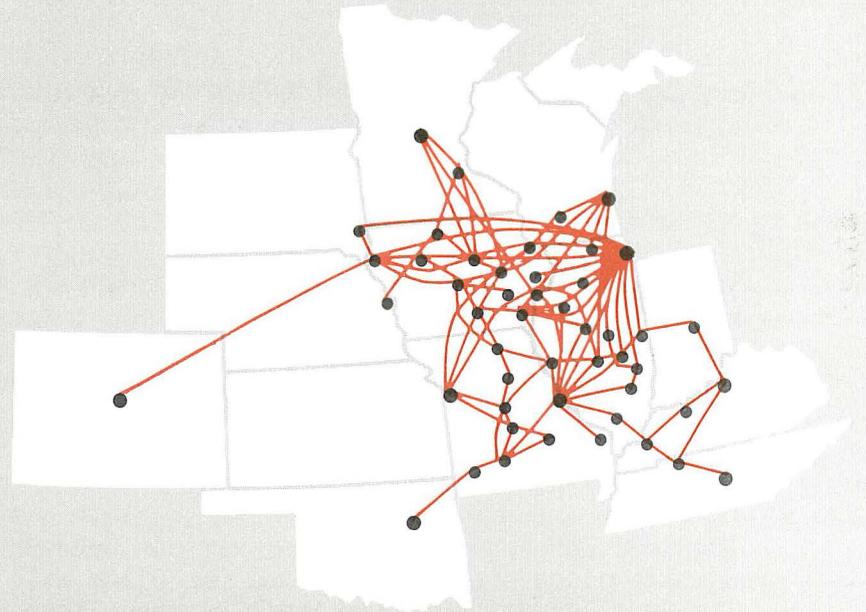
Figure 9 (continued) Shows Present Route Maps Of Frontier And Ozark -- Both Of These Local Service Airlines Have Now Introduced Substantial Numbers Of Jet Aircraft Into Their Route Systems And Are Aggressively Pursuing Applications For Longer Haul Authorizations In Major Markets -- Such Awards Will Enable Them To Get Better Utilization From Their Equipment And Reduce Subsidy Requirements

FIGURE 9
CONTINUED

FRONTIER



OZARK



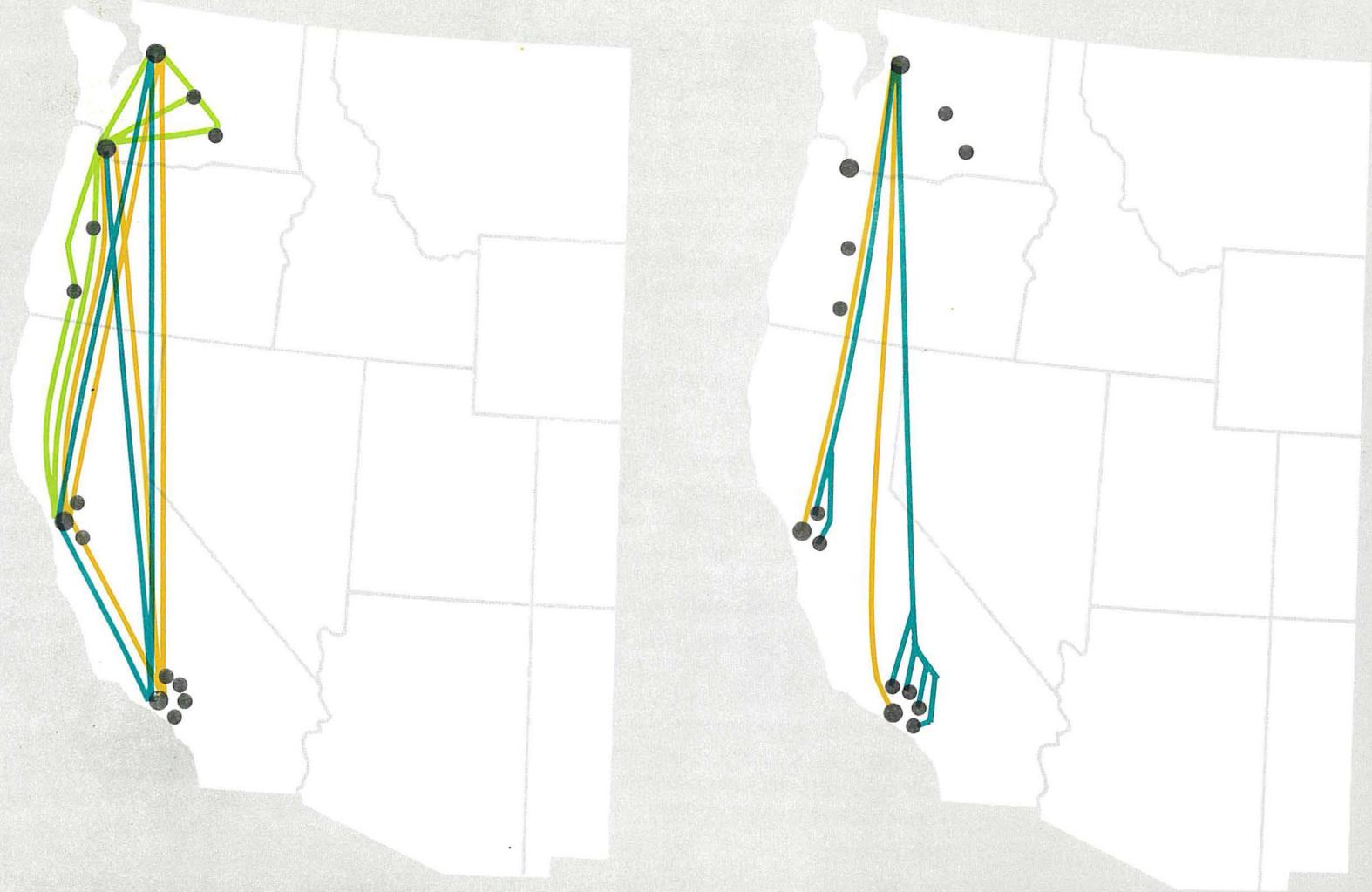
PRESENT PACIFIC COAST AIR ROUTE PATTERNS WILL BE REVIEWED IN THE
PACIFIC NORTHWEST-CALIFORNIA SERVICE INVESTIGATION

Figure 10 Shows The Present System Of Air Service Between The Pacific Northwest And California, And The Points That Will Be At Issue In The Pacific Northwest-California Service Investigation

The Rapidly Growing Pacific Coast Air Markets Require The Review Of Present And Future Service Needs -- Congestion Is Increasing At Los Angeles And San Francisco International Airports -- Satellite Communities Around These Air Centers Have Developed To The Extent That Some Of These Points Require Consideration Of Their Own Long Haul Air Service Needs

The Need For Additional Authorizations Between Major Air Centers Such As Seattle/Tacoma, Portland, San Francisco, Los Angeles, And San Diego Will Be Reviewed In This Investigation -- In Addition, The Need For New Authorizations Between These Major Pacific Northwest Air Hubs And Such Satellites As Oakland, San Jose, Hollywood/Burbank, Orange County And Long Beach Will Be Investigated

FIGURE 10



UNITED
WESTERN
AIR WEST (West Coast)

POSSIBLE COMPETITIVE AWARDS
POSSIBLE AWARDS TO SATELLITE AIRPORTS

NINE AIR CARRIERS HAVE NOW INDICATED THEIR INTENTIONS TO PURSUE APPLICATIONS FOR NEW AUTHORITY
IN THE PACIFIC NORTHWEST-CALIFORNIA SERVICE INVESTIGATION

Figure 11 Shows The Route Patterns Of The Nine
Air Carriers That Have Now Indicated Their
Desire To Pursue Applications For New Authority
In The Pacific Northwest-California Service
Investigation

The Route Maps Of Braniff, Continental, Delta,
And National, Four Of The Trunk Line Applicants
In This Investigation, Are Set Forth On The
Facing Page -- Other Applicants' Route Maps
Are Shown On Succeeding Pages Of This Figure



FIGURE II

BRANIFF

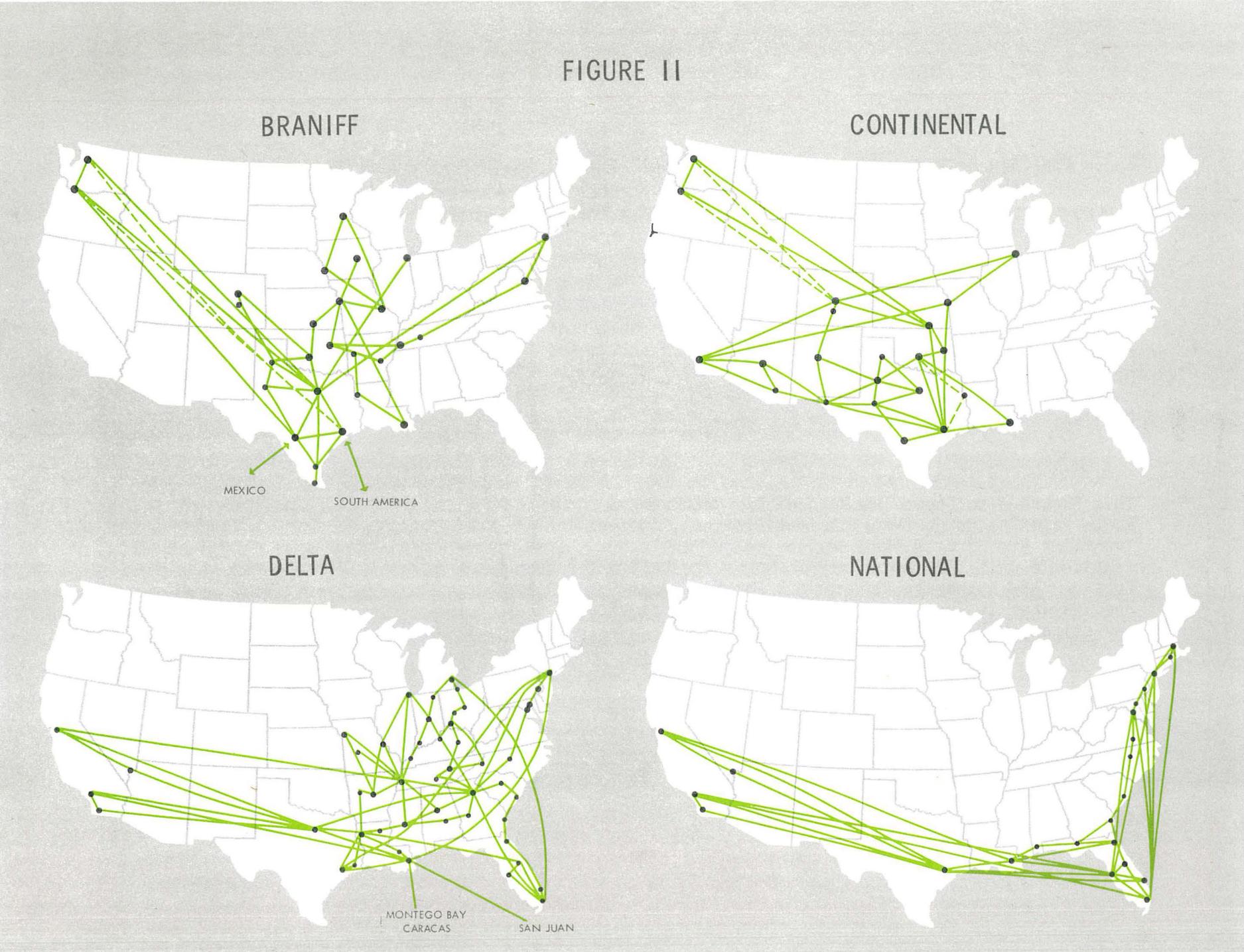
CONTINENTAL

MEXICO SOUTH AMERICA

DELTA

NATIONAL

MONTEGO BAY CARACAS SAN JUAN



NINE AIR CARRIERS HAVE NOW INDICATED THEIR INTENTIONS TO PURSUE APPLICATIONS FOR
NEW AUTHORITY IN THE PACIFIC NORTHWEST-CALIFORNIA SERVICE INVESTIGATION

Figure 11 (continued) Shows The Present Route System Of The Local Service Carrier, Air West, Which Recently Resulted From Merger Of West Coast, Bonanza, And Pacific Airlines

This Figure Also Shows The Present And Recommended Route Patterns Of Northwest Orient Airlines, Another Trunkline Air Carrier That Has Indicated Its Intention To Apply For Authority To Serve The Pacific Coast -- New Authority Recommended For Northwest By The Examiner In The Twin Cities - California Service Investigation Is Shown By Dotted Lines

Standard Airways, A Supplemental Air Carrier Based In Seattle, Has Filed An Application To Provide Scheduled Services Between The Pacific Northwest And California -- Standard Does Not Now Have Any Regular Route Authority And As A Result Its System Is Indicated In Figure 11 (continued) By A Star

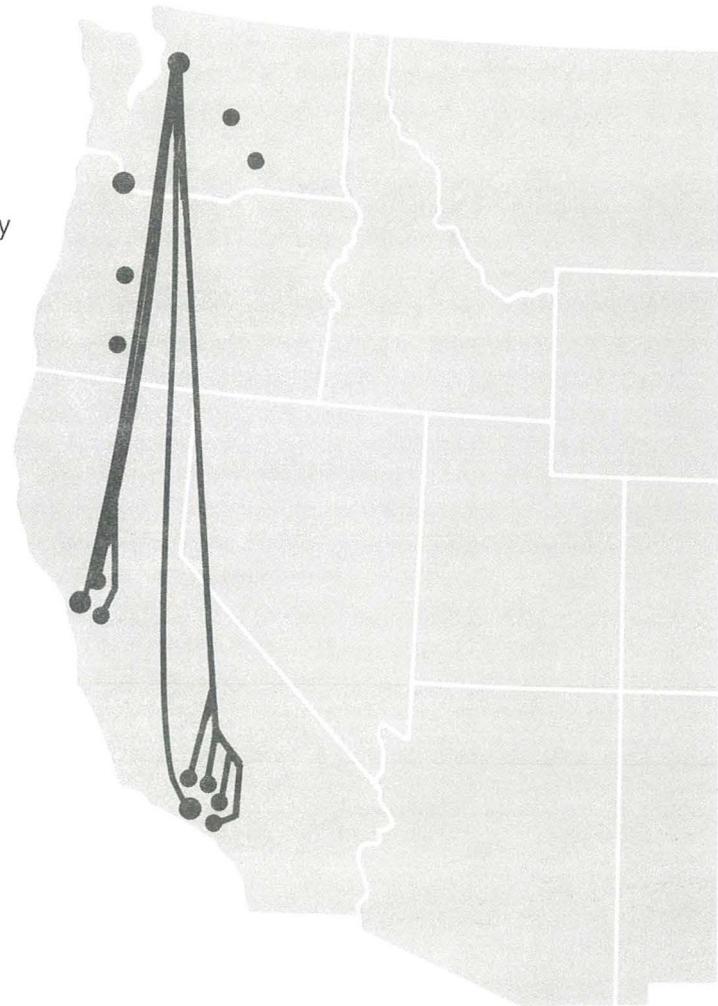
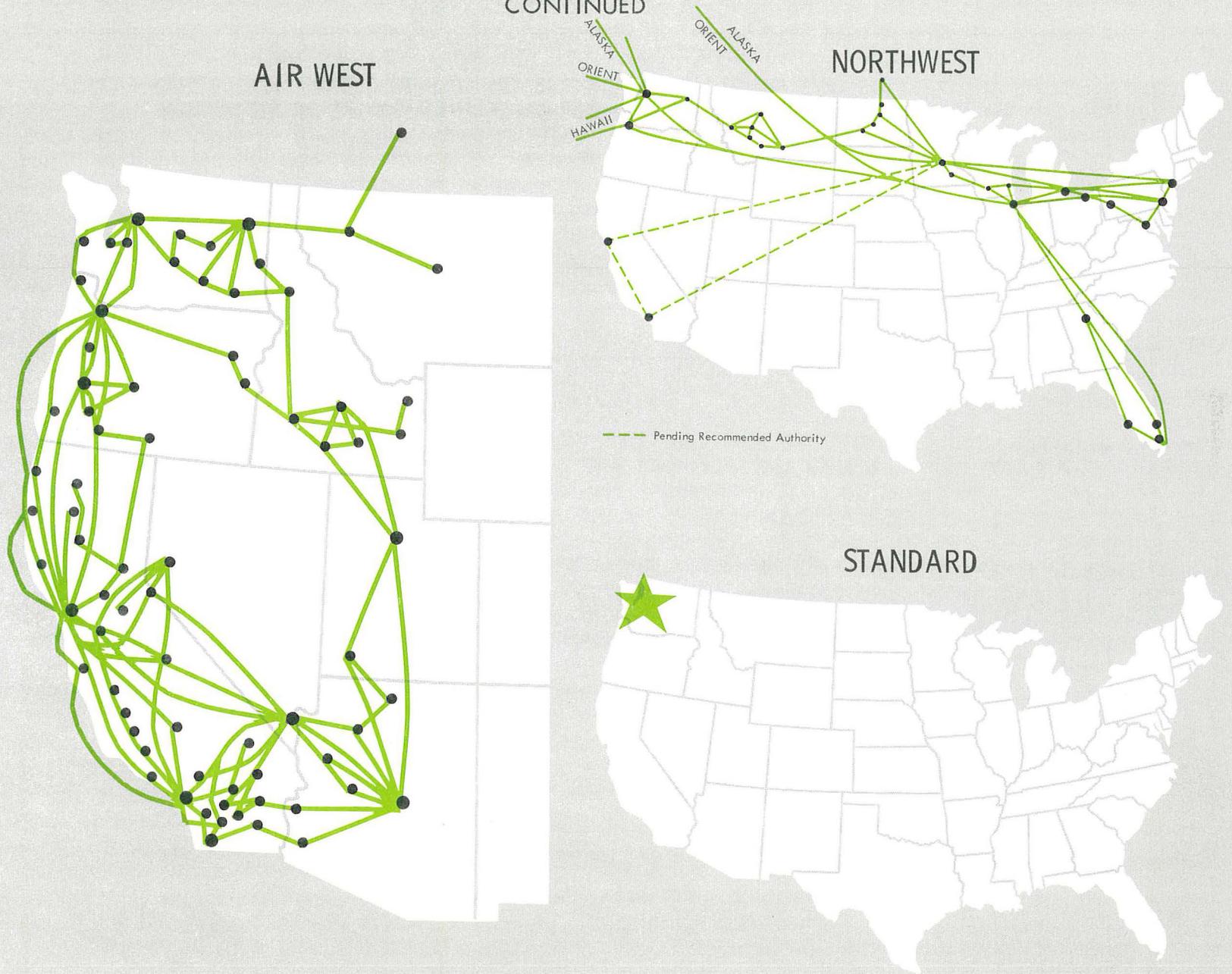


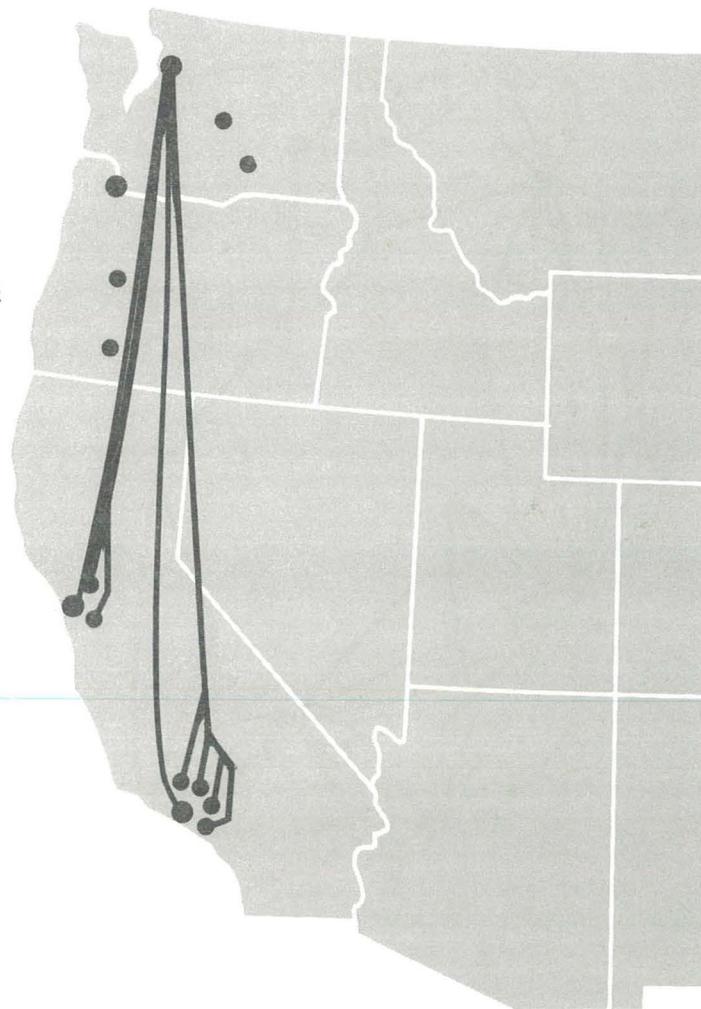
FIGURE 11
CONTINUED



NINE AIR CARRIERS HAVE NOW INDICATED THEIR INTENTIONS TO PURSUE APPLICATIONS FOR
NEW AUTHORITY IN THE PACIFIC NORTHWEST-CALIFORNIA SERVICE INVESTIGATION

Alaska Airlines Now Operates Between Seattle/Tacoma And
Points In The State Of Alaska -- This Carrier Has Filed
An Application To Extend Its Lines South To The California
Cities At Issue In The Pacific Northwest-California Service Investigation

Also Shown In Figure 11 (continued) Are The Routes Of
Pacific Southwest Airlines, A California Intrastate
Carrier That Has Indicated By Its Application In This
Investigation That It Would Like To Also Serve The
Pacific Northwest



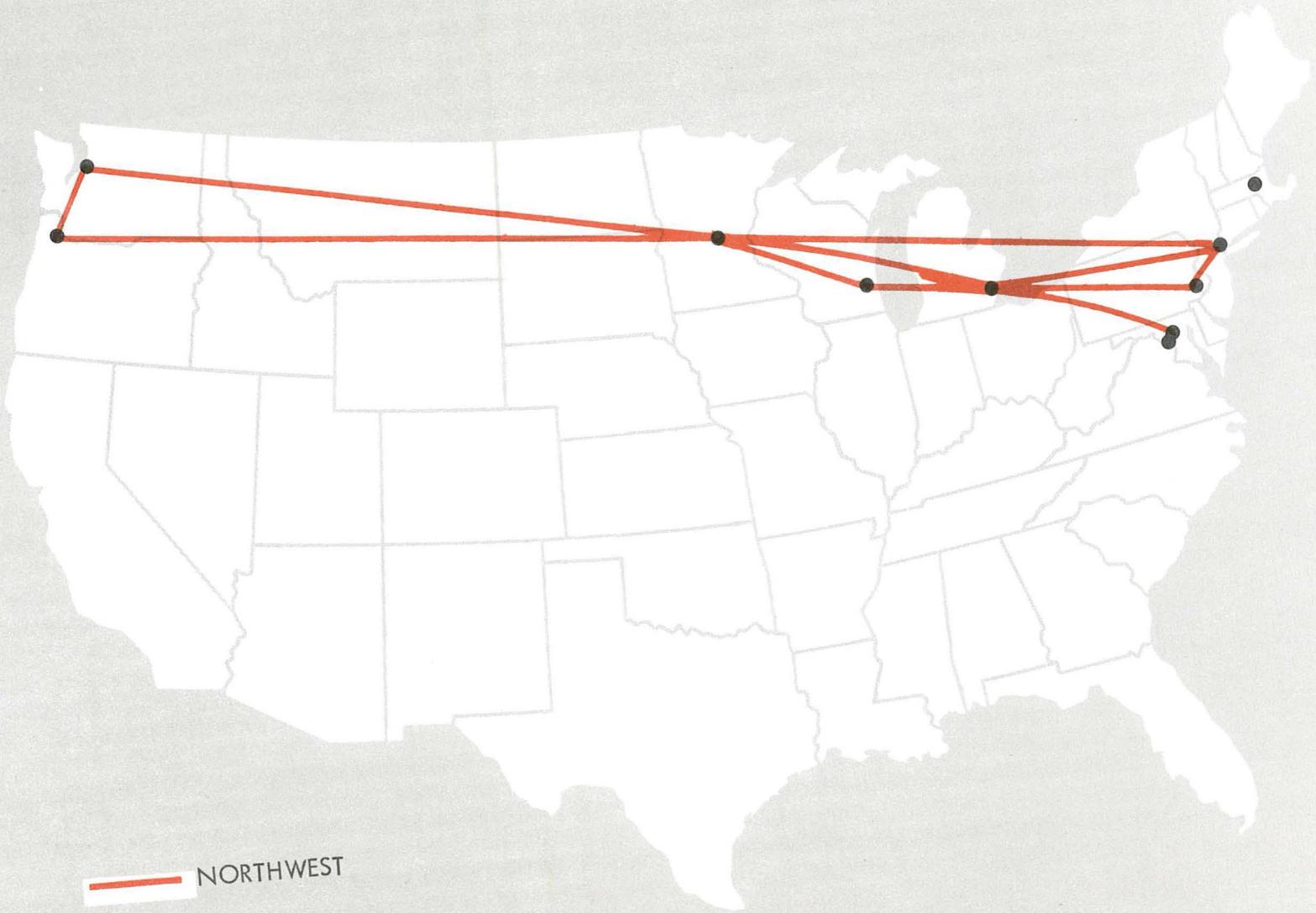
THE CIVIL AERONAUTICS BOARD HAS ANNOUNCED THAT IT WILL SOON INVESTIGATE THE NEED FOR IMPROVED SERVICE BETWEEN SEATTLE/TACOMA-MINNEAPOLIS/ST. PAUL/MILWAUKEE AND BEYOND POINTS IN THE EAST AND NORTHEAST

The Twin Cities-Milwaukee Long Haul Service Investigation Will Consider The Need For Improved Service Over The Northern Tier Of The United States, Focusing On Service Both To The East And West Of Minneapolis/St. Paul And Milwaukee

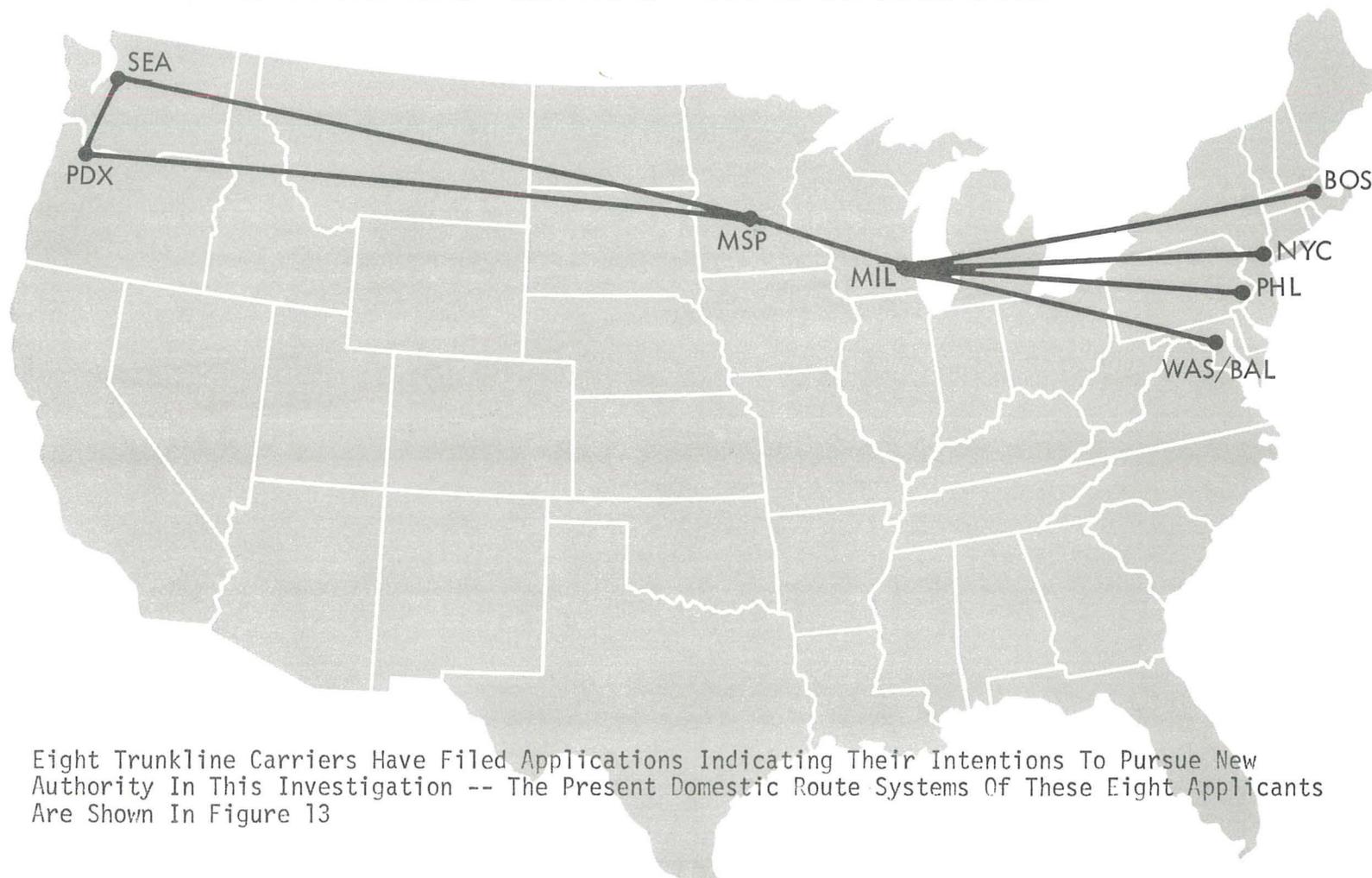
Figure 12 Shows Present Service By Northwest Airlines In The Pacific Northwest-Twin Cities And Milwaukee And Beyond East And Northeast Markets -- These Markets Are Growing Rapidly, And So Is The Need For New Or Expanded Airline Route Authorizations

The Board Has Announced That The Twin Cities And Milwaukee Are Also Potentially Viable Gateways For Relieving Congestion At Chicago -- All Of These Issues Will Be Investigated In This Important Proceeding

FIGURE 12



EIGHT OR MORE AIRLINES ARE EXPECTED TO VIGOROUSLY PURSUE APPLICATION FOR ADDITIONAL AUTHORITY
IN THE TWIN CITIES-MILWAUKEE LONG HAUL SERVICE INVESTIGATION

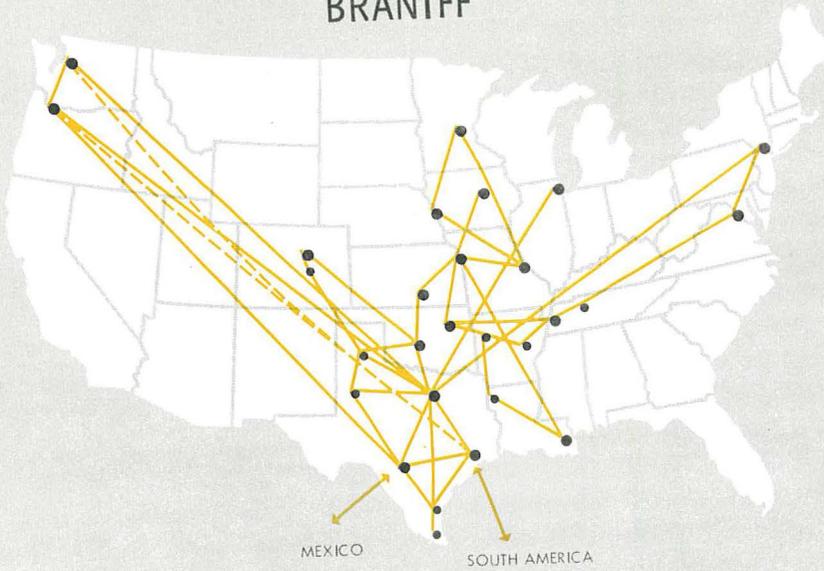


Eight Trunkline Carriers Have Filed Applications Indicating Their Intentions To Pursue New Authority In This Investigation -- The Present Domestic Route Systems Of These Eight Applicants Are Shown In Figure 13

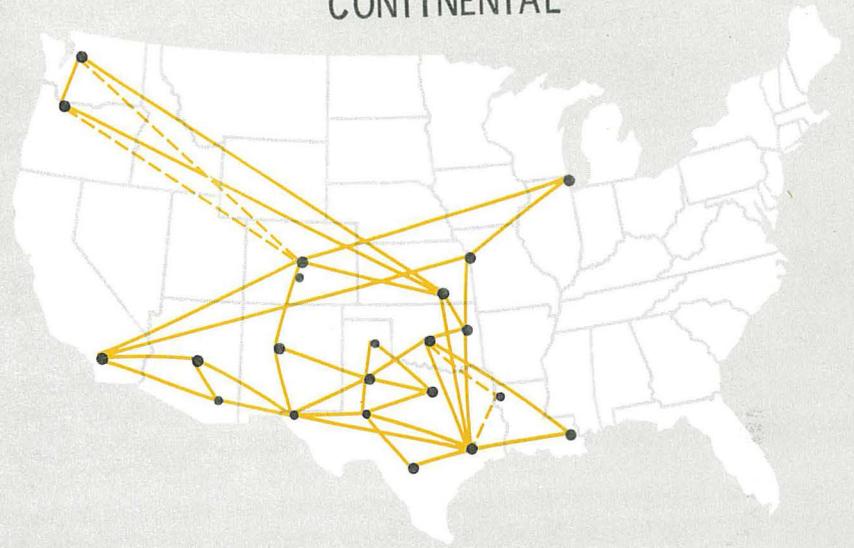
The Routes Of Braniff, Continental, Eastern, And Northeast Airlines Are Shown On The Facing Page

FIGURE 13

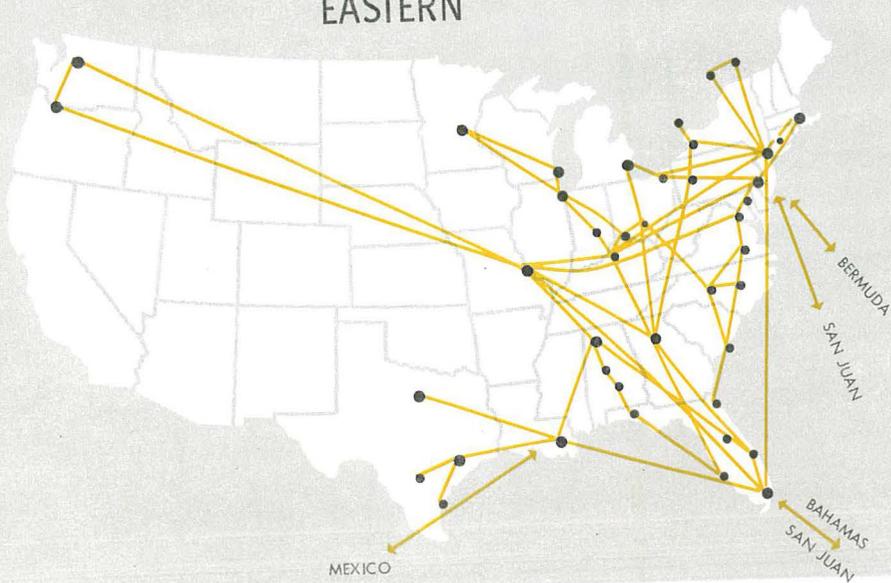
BRANIFF



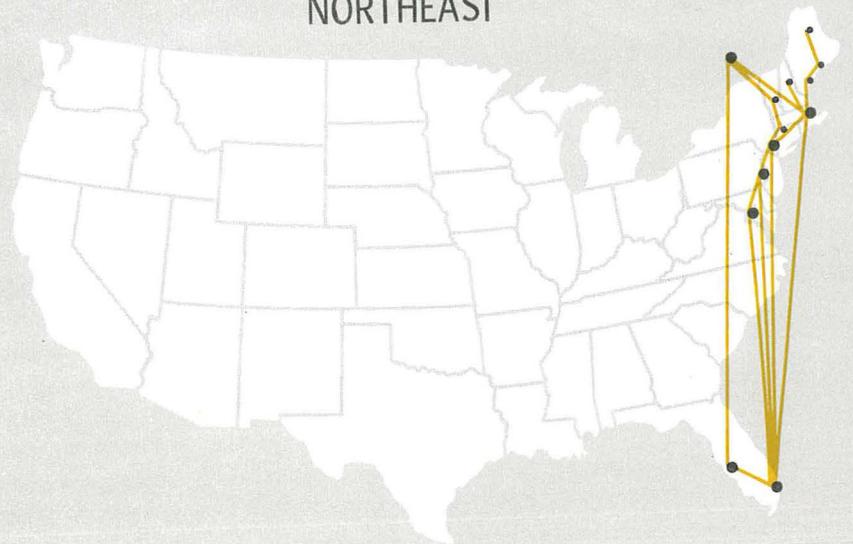
CONTINENTAL



EASTERN



NORTHEAST



EIGHT OR MORE AIRLINES ARE EXPECTED TO VIGOROUSLY PURSUE APPLICATION FOR ADDITIONAL AUTHORITY
IN THE TWIN CITIES-MILWAUKEE LONG HAUL SERVICE INVESTIGATION

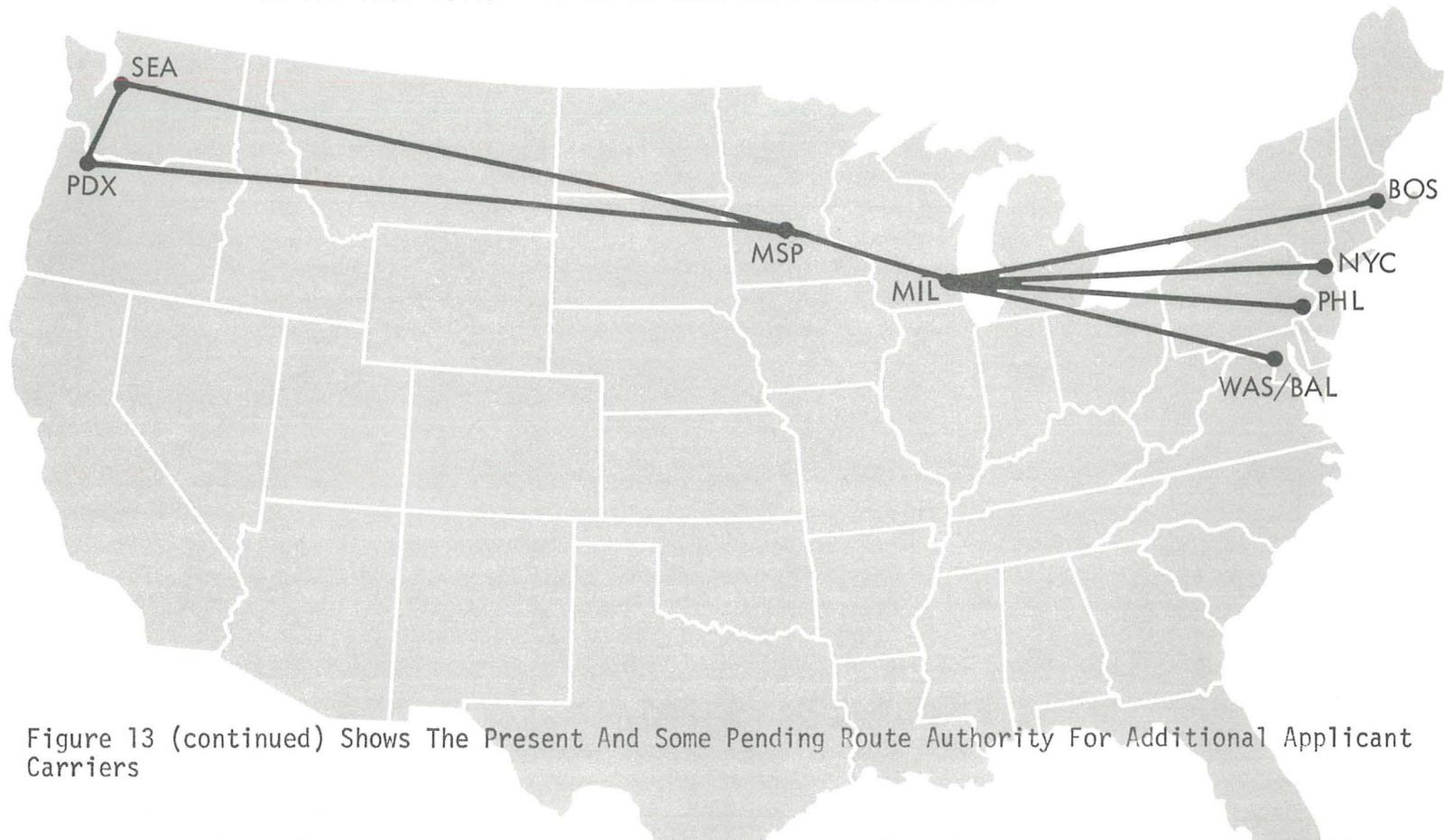
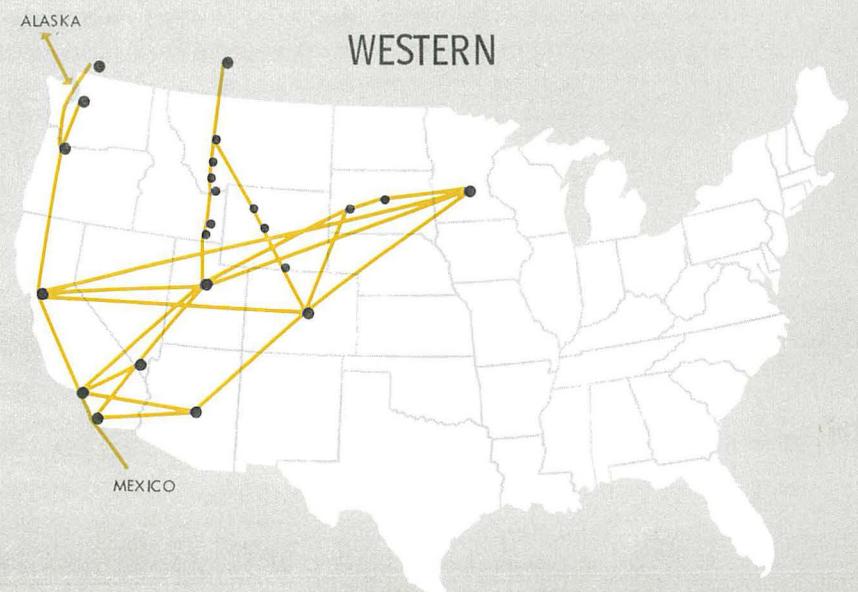
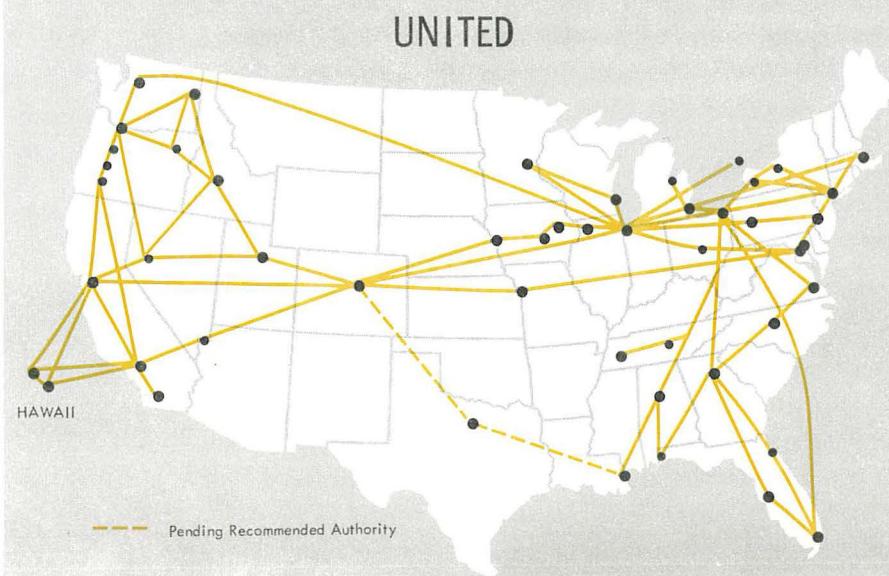
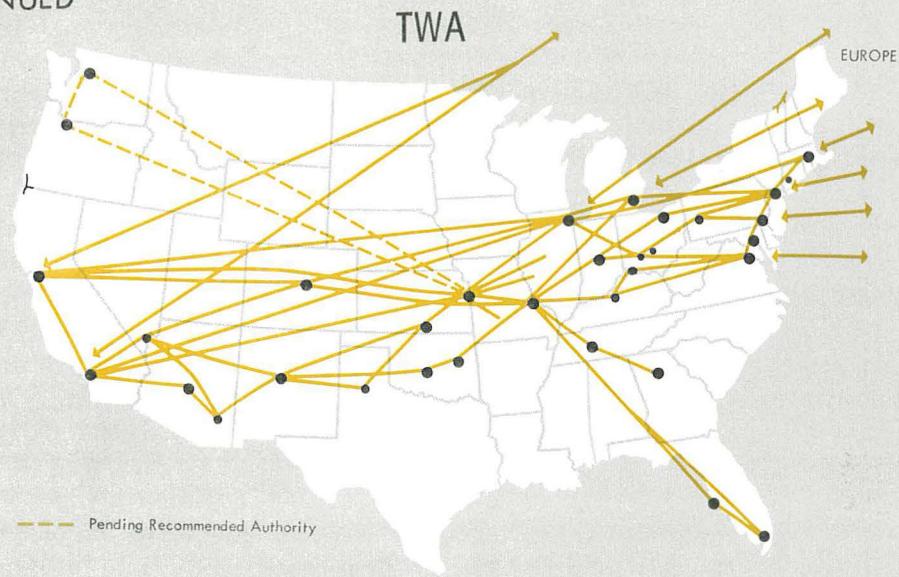
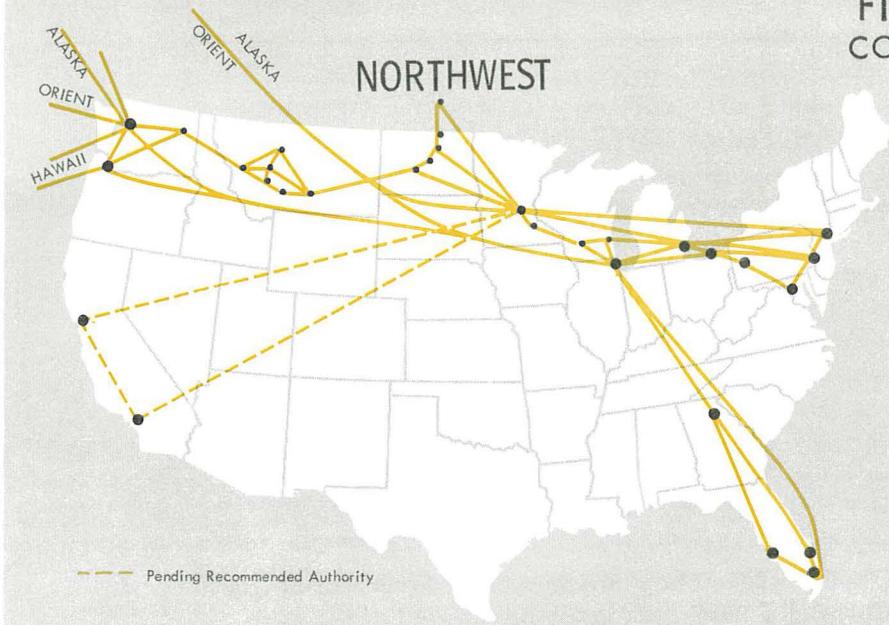


Figure 13 (continued) Shows The Present And Some Pending Route Authority For Additional Applicant Carriers

In The Case Of Northwest, This Carrier Already Has A Strong Position In The Markets That Will Be Investigated But Seeks Additional Authority, Principally To Boston -- The New Route Authority Recommended By The Examiner For Northwest In The Twin Cities - California Service Investigation Is Shown By Dashed Lines

The Examiner, In The Reopened Pacific Northwest-Southwest Service Investigation, Recommended That TWA Be Authorized To Extend Service Between Kansas City To The Pacific Northwest -- These Extensions Are Shown By Dashed Lines On TWA's Route System

FIGURE 13
CONTINUED



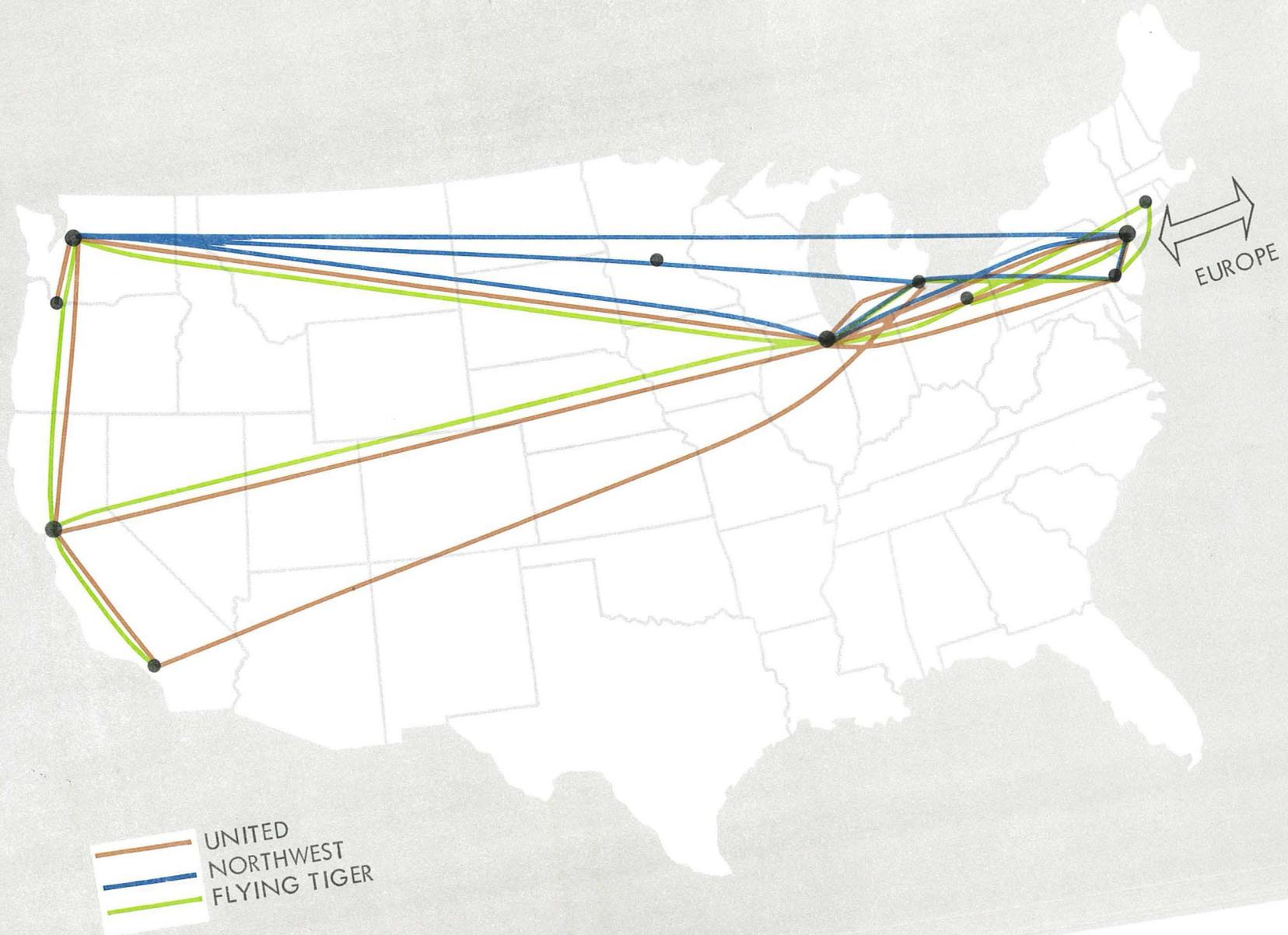
THE SEATTLE-TACOMA INTERNATIONAL AIRPORT HAS LIMITED ALL-CARGO SERVICE TO AND FROM MAJOR DOMESTIC AIR MARKETS -- NO ALL-CARGO SERVICES ARE OPERATED BETWEEN THE PACIFIC NORTHWEST AND EUROPE

Currently The CAB Is Considering The Needs For Expanded All-Cargo Services Between 14 Selected Points In The United States And Between These 14 Domestic Coterminals And Europe -- This Proceeding Is Entitled The Domestic Coterminals Points-Europe All-Cargo Service Investigation

Seattle/Tacoma Is One Of These Proposed Coterminals And Is The Only Point Under Consideration In The Area North Of San Francisco And West Of Minneapolis/St. Paul

Present Service Between Seattle/Tacoma And Other Major Domestic Air Cargo Markets Is Limited, And Patterns And Frequency Of Service Are Often Rescheduled From Month To Month -- Figure 14 Shows Points Served To And From Seattle/Tacoma And Through-Plane Routings That Are Used -- These Services Are Often Not Offered More Than Twice Weekly

FIGURE 14



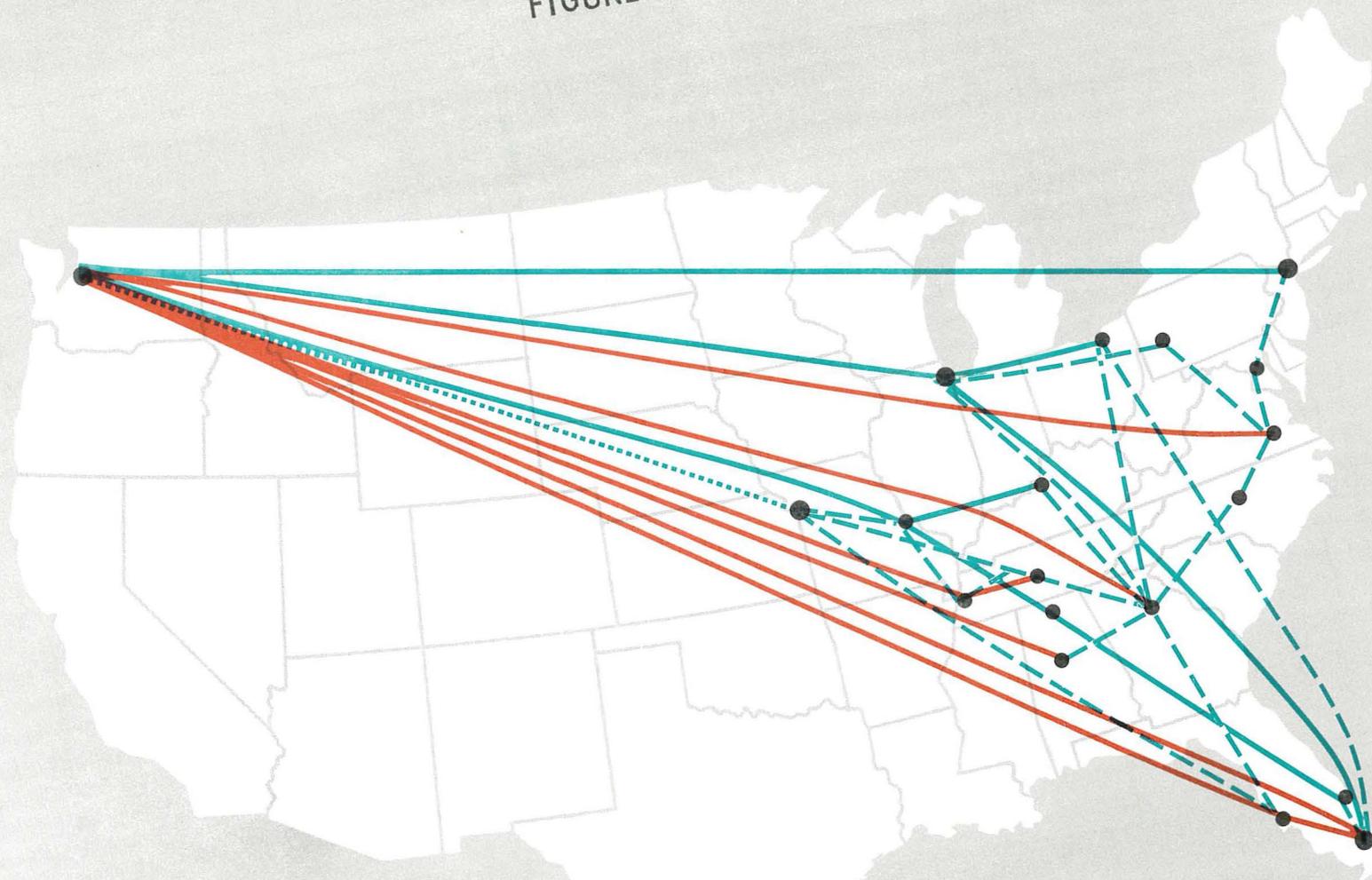
UNITED
NORTHWEST
FLYING TIGER

AIR TRAVEL BETWEEN THE PACIFIC NORTHWEST AND THE SOUTHEAST IS GROWING AT AN ACCELERATING PACE --
DIRECT SERVICE BETWEEN SEATTLE/TACOMA AND THE LARGE AIR HUBS OF THE SOUTHEAST
WILL SOON BE NEEDED

An Airline Route Case That Is Being Discussed, But Which Has Not Yet Been Set For Investigation, Is A Pacific Northwest-Southeast Service Investigation -- Passenger Travel, Mail, And Air Cargo Movement In These Markets Is Increasing At A Very Rapid Pace -- Normally, It Takes Two To Four Years To Process An Airline Route Investigation From Beginning To End -- How Soon This Case Will Be Set For Hearing Is A Matter Of Conjecture, But It Will Be A Large Proceeding And Important To Seattle/Tacoma When The Civil Aeronautics Board Does Announce Such An Investigation

Figure 15 Shows Present Patterns Of Air Service Between Seattle/Tacoma And The Southeast, And Portrays Potential Direct Routings That May Be Operated In The Future

FIGURE 15



PRESENT DIRECT
PRESENT CONNECT
PENDING
FUTURE DIRECT

CASES THAT ALLOW EXISTING CARRIERS TO ELIMINATE RESTRICTIONS WILL BECOME AN AVENUE TO IMPROVED
AIR SERVICES IN THE FUTURE

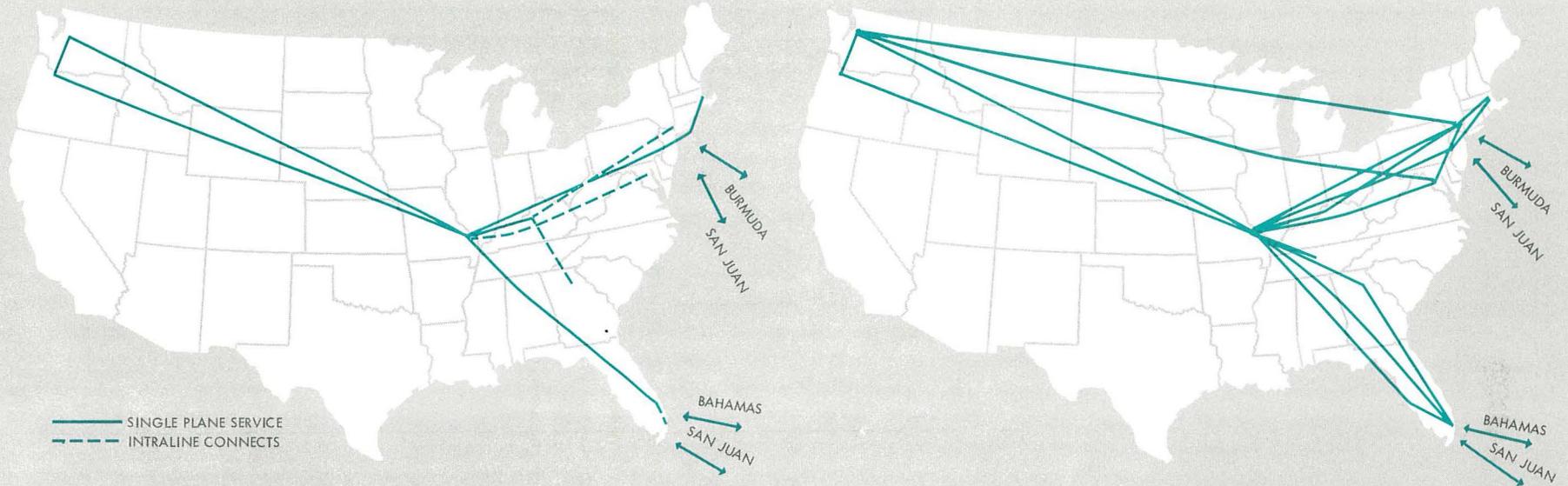
All Carriers Have Restrictions In Their Certificate Of Public Convenience And Necessity That Prevent Them From Offering Patterns Of Service They Might Soon Like To Fly -- These Restrictions Are Normally Established At The Time Awards Are Made To Protect Other Carriers From Excessive Competition -- As Markets Grow The Need For Protection Often Vanishes, But The Protected Carriers Are Not Anxious To See Restrictions Lifted -- Changes In Competitive Situations Call For New Hearings

For Example, Eastern Cannot Now Operate Single-Plane Services Between Seattle/Tacoma And Large East And Southeast Cities Such As New York/Newark, Washington/Baltimore, Atlanta, Miami, And Tampa -- It Is Expected That The Same Restrictions Will Apply To TWA, Should They Be Authorized To Operate Between Kansas City And The Pacific Northwest -- If These Restrictions Were Lifted, The Carriers Could Provide New Nonstop And Limited-Stop Service Between The Major Cities Of The East And Southeast And The Pacific Northwest

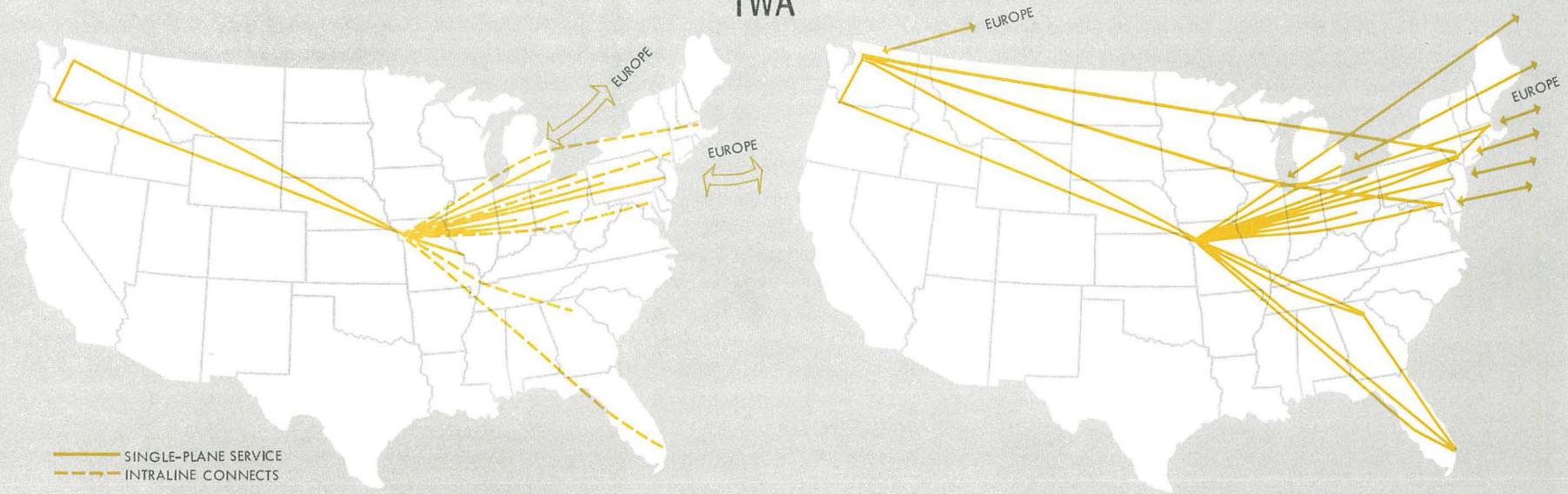
It Is Expected That The Civil Aeronautics Board Will Review The Need For Such Restrictions In The Certificates Of These Carriers, As Well As The Other Carriers Serving The Pacific Northwest, In Future Cases

Figure 16 Shows, By Example, Some Of The Schedule Patterns That Might Be Flown By Eastern And TWA Without Any New Route Authority, But Merely By The Lifting Of Restrictions In Their Present Or Proposed Authority

FIGURE 16
EASTERN



TWA



DOMESTIC AND INTERNATIONAL AIR SERVICES OF THE SEATTLE/TACOMA AIR GATEWAY WILL BE GREATLY IMPROVED
AS A RESULT OF CASES THAT HAVE AND WILL BE HEARD BY THE CIVIL AERONAUTICS BOARD

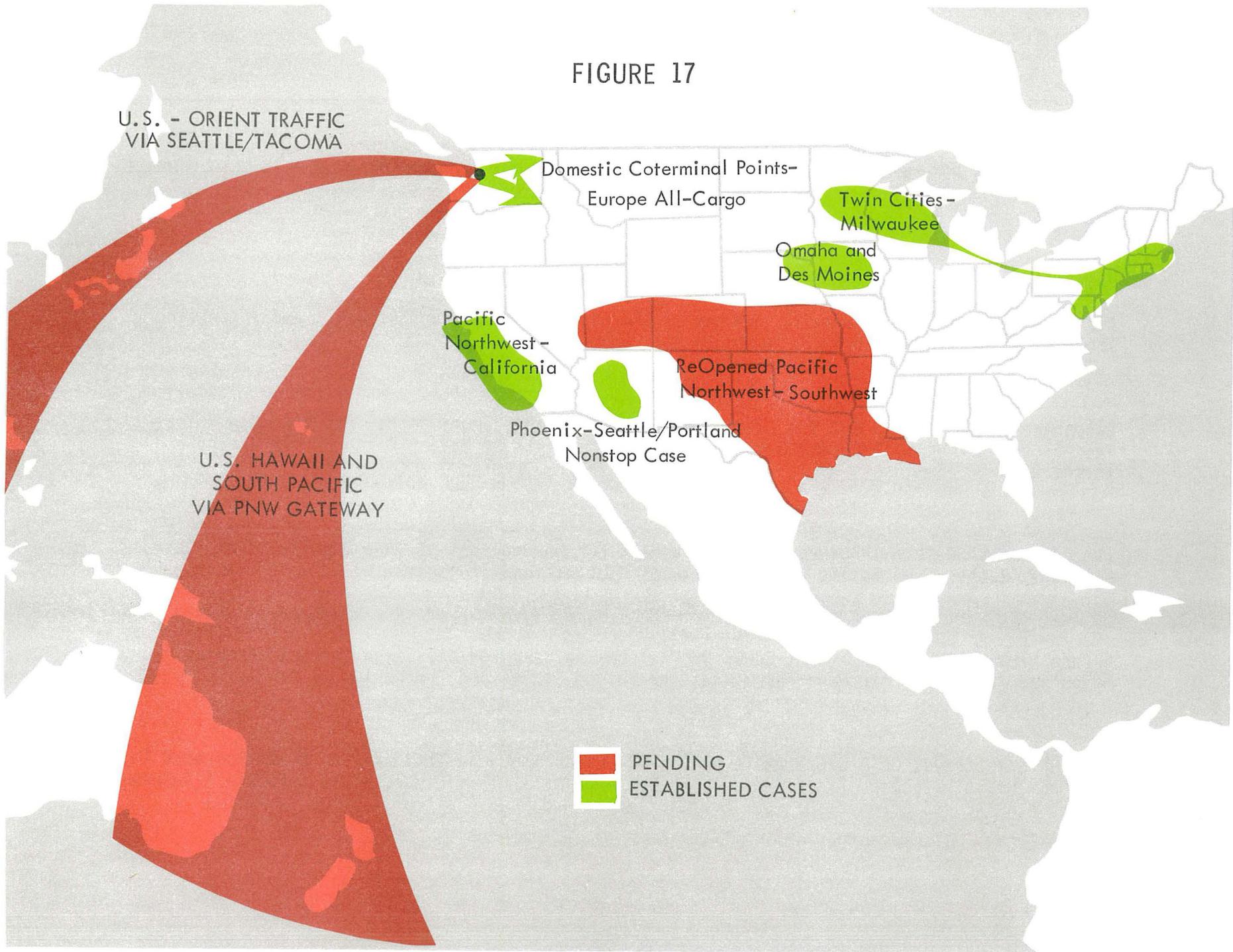
Many Of The Immediate Needs Of The Seattle/Tacoma Air Gateway For Expanded Air Services Will Be Served By Successful Intervention In The Air Route Cases That Have Recently Been Heard Or Which Will Be Heard In The Next Two Years

However, It Will Be A Continuing Process To Make Sure The Service Needs Of This Large Air Hub Are Constantly Met As The Need Arises

Figure 17 Summarizes The Areas Of The Country And The World That Have Recently Received Or Which Should Receive Expanded Air Services As A Result Of CAB Investigations That The Washington Parties Have Pursued Or In Which They Intend To Pursue Vigorous Interventions

Additional Cases Have Been And Will Be Set In The Immediate And Not Too Distant Future -- For Example The CAB Has Just Announced A New Investigation Of The Possible Need For Nonstop Service Between Seattle/Tacoma And Phoenix, Arizona -- It Is Expected That Other Cases Of This Nature Will Also Be Scheduled

FIGURE 17



AIR CARGO SERVICES MUST BE EXPANDED TO TAKE CARE OF THE RAPIDLY GROWING DEMAND IN THIS SEGMENT OF THE AIRLINE BUSINESS

Air Cargo Is The Fastest Growing Segment Of The Air Transportation Business; And Increasing Amounts Of This Traffic Will Be Moved In All-Cargo Aircraft

Aerospace Manufacturers Are Now Concentrating On The Development Of New And More Economical Technology That Will Allow Air Carriers To Decrease Costs Of Moving Cargo On The Ground And In The Air

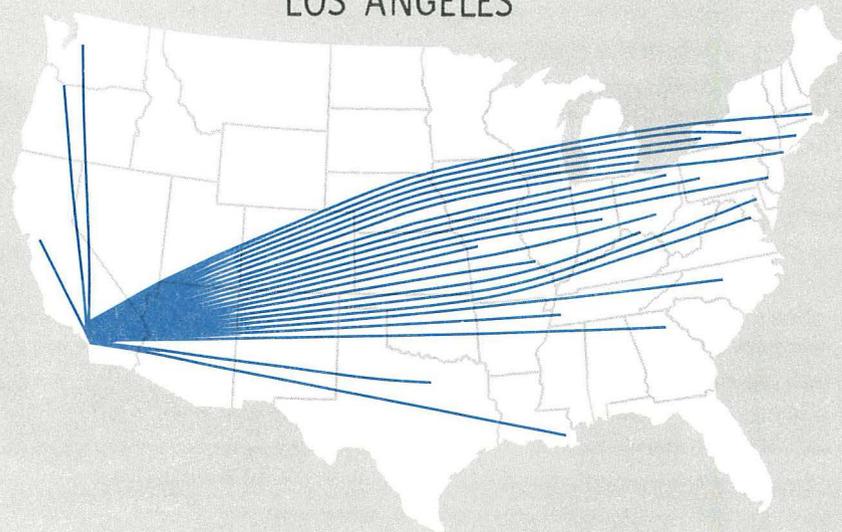
The Economies Of This Industry Dictate The Need For Moving Most Of This Traffic In All Cargo Aircraft, Rather Than In The Baggage Holds Of Combination Airplanes

Future Airline Route Cases Will Focus On The Growing Need For All-Cargo Services Between Every Major And Many Minor Air Hubs Throughout The United States And The World

Figure 18 Portrays, On A Comparative Basis, All-Cargo Services That Are Now Being Operated To And From Seattle/Tacoma, San Francisco And Los Angeles -- This Figure Would Indicate A Future Need For All-Cargo Services Between Seattle/Tacoma And Many Additional Domestic Points

FIGURE 18

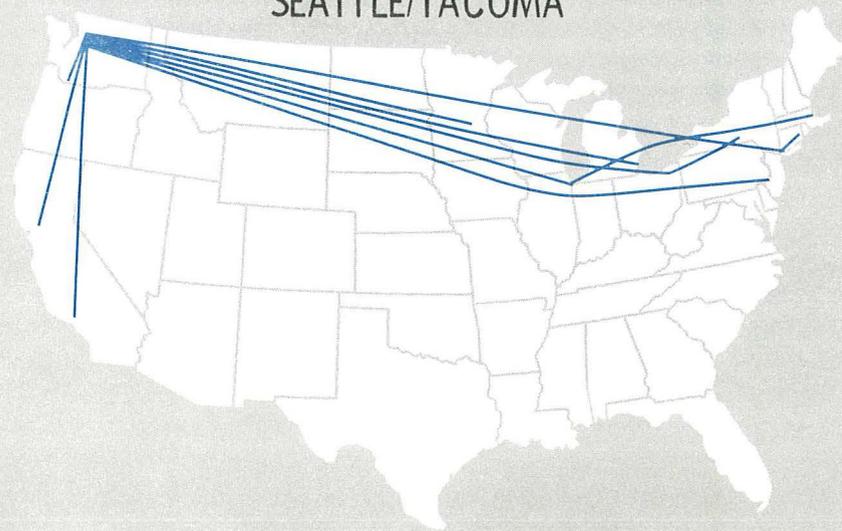
LOS ANGELES



SAN FRANCISCO



SEATTLE/TACOMA



FUTURE SEATTLE/TACOMA



— NEW ALL-CARGO SERVICE
- - - IMPROVED ALL-CARGO SERVICE

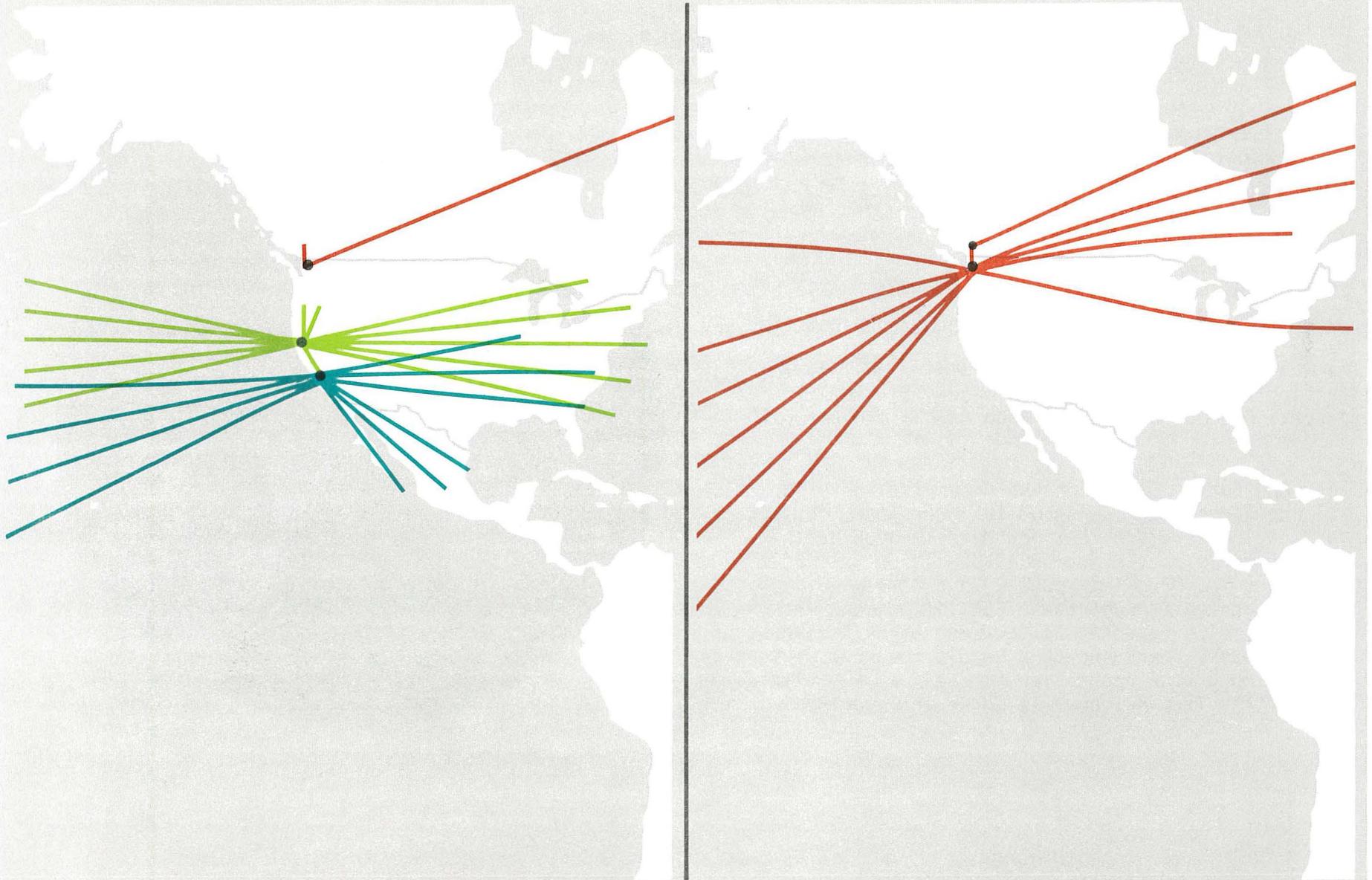
ADDITIONAL FOREIGN-FLAG AIRLINES WILL VIGOROUSLY PURSUE NEW AUTHORIZATIONS THAT WILL ENABLE THEM TO SERVE THE WEST COAST OF THE UNITED STATES -- SEATTLE/TACOMA SHOULD BE PREPARED TO MAKE A STRONG BID FOR A FAIR SHARE OF THESE AUTHORIZATIONS

The Large West Coast Gateways Of California Have Attracted A High Percentage Of The Foreign-Flag Airlines Serving This Region Of The United States -- Seattle/Tacoma Has Virtually Been Ignored By These Lines -- This Situation Will Change -- Seattle/Tacoma Will Attract Air Travelers, Air Mail, And Air Cargo At An Accelerating Pace As New Services Are Added; A Result Of The Many New Authorizations That Should Result From Present, Pending, And Future Cases -- This Rapidly Increasing Traffic Will Make The Seattle/Tacoma Air Gateway Increasingly Attractive To Foreign-Flag Lines

The Pacific Is Often Called The Sleeping Giant Of The Air Travel World, But It Will Soon Awaken -- Varig Of Brazil Recently Inaugurated Service Between Los Angeles And The Orient -- Many Additional Foreign Lines Are Eyeing Possibilities To Serve West Coast Gateways -- Italy's Alitalia Has Asked For U.S. West Coast Beyond Authority -- The Dutch Carrier KLM Has Long Sought Permission To Serve The West Coast -- Nationalist China Has Announced Future Plans To Serve A West Coast Gateway -- Air India Has Pacific Rights And Is Known To Be Studying Possibilities For Around-The-World Service -- Garuda Of Indonesia, Thai Airways Of Thailand And South Vietnamese's Airlines Are Among Other Air Carriers That Have Indicated Ambitions To Mount Transpacific Services -- There Are A Number Of Other Foreign Flag Airlines That Have Studied Possibilities For Pacific Routings And Are Waiting For The Sleeping Giant To Awaken

Figure 19 Compares Seattle/Tacoma's Present Foreign-Flag Services With Those Of San Francisco And Los Angeles -- The Growing Importance Of The Seattle/Tacoma Air Gateway Will Dictate The Need For Additional Foreign-Flag Services To And From Both Europe And Pacific Areas In The Future

FIGURE 19



BETWEEN 1968 AND 1971 MORE THAN 90 MILLIONS OF DOLLARS WILL BE SPENT ON IMPROVEMENT OF TERMINALS AND OTHER FACILITIES AT THE SEATTLE-TACOMA INTERNATIONAL AIRPORT

The Seattle-Tacoma International Airport Will Be Ready To Accommodate The Increasing Numbers Of Passengers, The Rapid Growth In Mail And Cargo Volume, And The Growing Numbers Of Aircraft Landings And Departures

A \$90,037,251.00 Improvement Program Is Now Under Way And Scheduled For Completion By 1971 -- Many Of These Improvements Will Be Completed Long Before That Time -- The Carefully Planned Program Will Adequately Handle The Growing Volumes Of Airline Traffic And The Vehicular Traffic That Moves Airline Customers, Visitors To The Airport, And Cargo And Mail From And To The Airport

This, And Future Expansion And Modernization Programs, Will Provide For The Needs Of The More Than 1 Million Additional Passengers That Now Move Through Seattle/Tacoma Each Year, The Nearly 10,000 Added Tons Of Air Cargo, And The More Than 10,000 Tons Of New Mail That Must Be Handled Through These Facilities Each Year -- This Traffic Is Expected To Increase At An Accelerating Rate In Future Years And As A Result The Port Of Seattle Has Developed An Airport Plan For 1972 -- A Preliminary Model Of The Terminal Area Is Shown In Figure 20

TOTAL BUDGET - 1968-1971
\$90,037,251.00

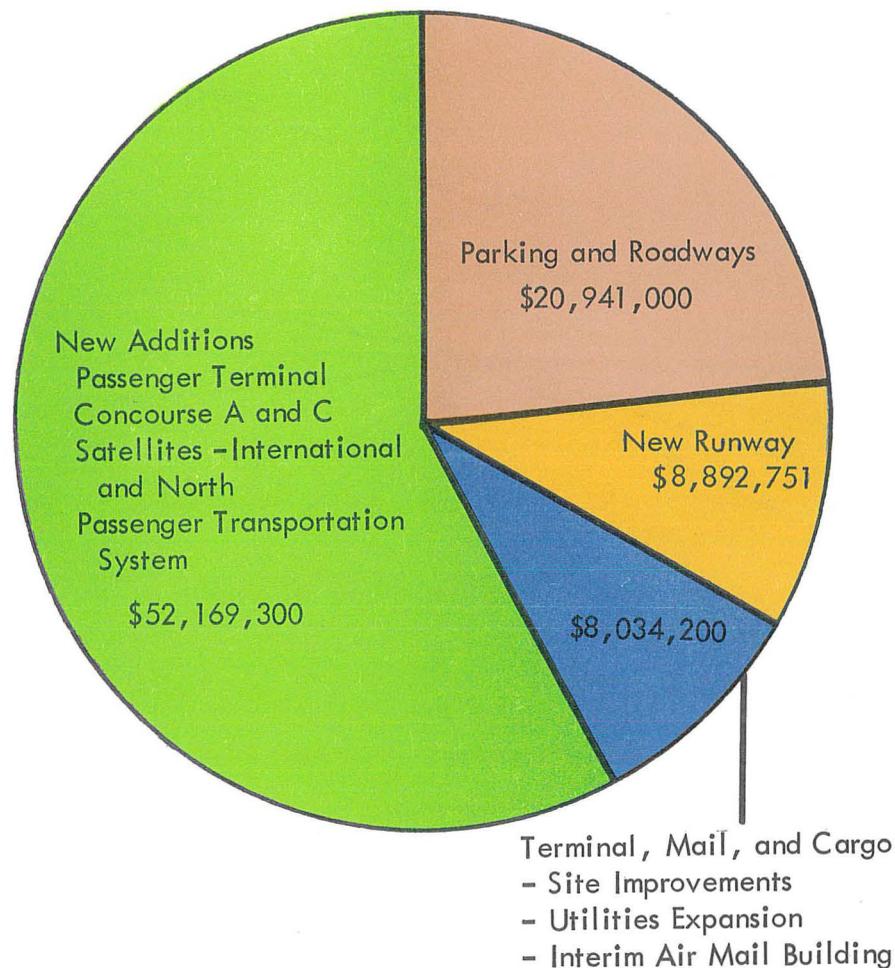


FIGURE 20



SEATTLE-TACOMA INTERNATIONAL AIRPORT

PORT OF SEATTLE COMMISSION

TERMINAL AREA 1972

THE RICHARDSON ASSOCIATES · ARCHITECTS ENGINEERS PLANNERS

