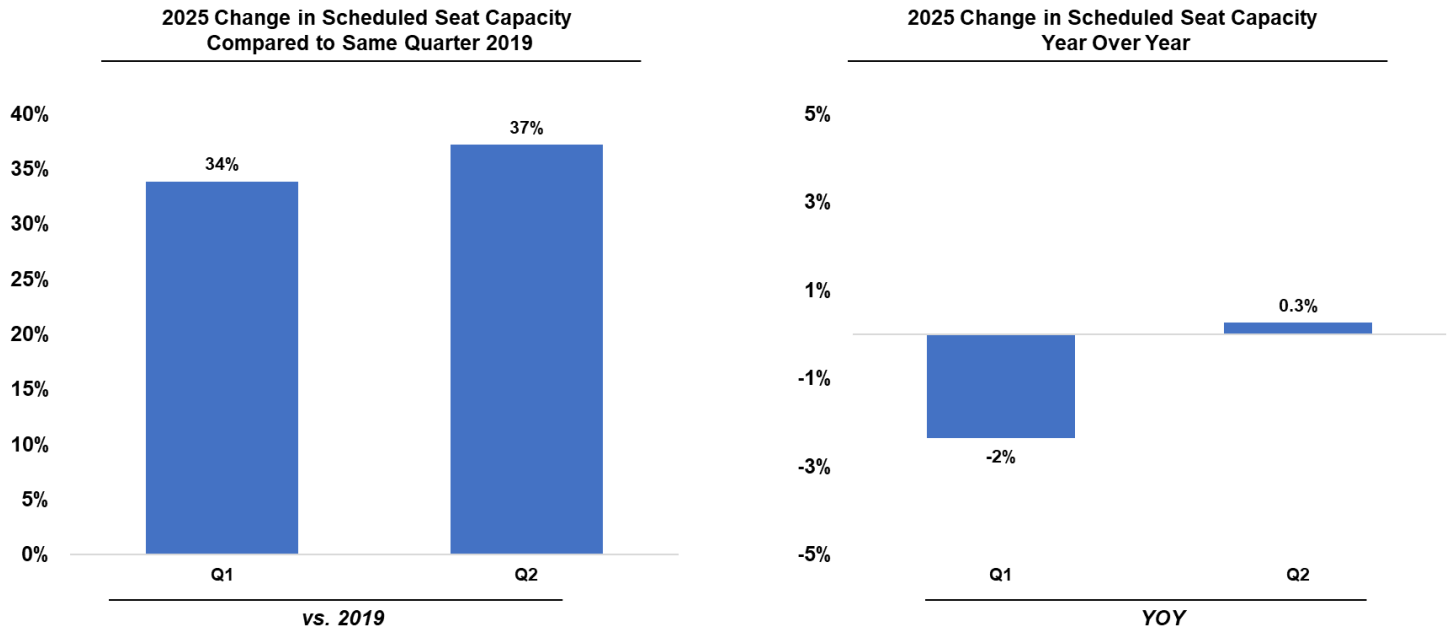


## January 2025 Air Service Snapshot

AUS quarterly seat comparisons, Q1 2025 and Q2 2025 compared to 2019 (pre-Covid) in left chart, and Q1 2025 and Q2 2025 compared to year over year (YOY), 2024, in right chart:



Source: Cirium schedule data.

### Highlights of recent air service announcements/developments include:

- **Aeromexico** upgauged MEX service from 99-seat E190 to 160-seat B737-800 on Oct. 28 '24
- **Air Canada** will serve YUL May 2 – Oct. 24 '25, and YVR May 1 – Oct. 25 '25; YVR will return at 4/wk and increase to 5/wk for June – September '25; AC upgauges YYZ from A319 (136 seats) to A320 (168 seats) eff. May 1 '25
- **Allegiant** will close its AUS crew base on January 7 '25 - service is permanently cancelled to BZN, FSD, SDF & SNA; extended schedules for Feb 12 – May 13 '25 and will serve 6 markets: AVL CVG DSM GRR PVU & TYS; extended schedules for May 14 – Sept. 2 '25 and will serve 12 markets: AVL CVG DSM GRR IAD IND LAS PIT PVU SFB SRQ & TYS (G4 served 18 markets in 2024 during this same time period).
- **American** summary of 2024/2025 service changes:
  - Discontinued ABQ, BNA, BOS, BZN, CVG, CZM, EGE, ELP, IAD, IND, JAX, LAS, LIR, MBJ, MCI, MCO, MEM, MSY, NAS, OKC, PUJ, PSP, PVR, RDU, RNO, RNO, RSW, SMF, SNA, TPA & TUL
  - Suspended SJD from Jan 7 '25 – Feb 12 '25
  - AA will serve 13 markets from AUS in Q1 2025 with 27% reduction in seat capacity YOY
  - Added MSY service for Super Bowl on Feb 6, 7 & 10 2025
  - Following flights added for college football games:
    - XNA roundtrip on Nov 15 & 17 '24
    - LEX-AUS on Nov 22 '24 and AUS-LEX on Nov 24 '24
    - AUS-ATL on Dec. 31 and return on Jan. 1 for Peach Bowl
- **British Airways** downgauged LHR #1 from A350-1000 (331 seats) to B777-200ER (272 seats) starting March 29 '25; added LHR #2 daily, eff. Mar. 31 '25 which will operate 6/Wk (all days but Sunday); second frequency in Summer 2025 (March 20-October 25 2025) will be mix of B787-8 and -9
- **Delta** summary of service changes:

- New markets: MSY (eff. Feb. 27 '25), ECP (eff. Mar. 9 '25), IND, JAX & MEM (eff. May 7 '25), SFO & TPA (eff. June 8 '25)
- Added AGS roundtrips in April '25 for the Masters golf tournament
- Added service for college football games for the following weekends in 2024: FLL on Nov. 7; Gainesville (GNV) & TPA on Nov. 9; XNA on Nov. 16; Lexington (LEX) on Nov. 23; and, Greenville-Spartanburg (GSP) on Dec. 20; CMH added for weekend of Aug. 29, 2025
- **Frontier** started new ATL service on Oct. 11 '24 3/Wk; announced new service to CVG (2/Wk eff Mar. 7 '25) ORD (3/Wk eff. Mar. 6 '25) MCO (3-6/Wk eff. Mar. 6 '25) & PHX (2/Wk eff. Mar. 7 '25)
- **Hawaiian** last day of nonstop HNL service will be March 26, '25
- **JetBlue** last JFK flight was October 26 '24 and service is now discontinued
- **KLM** 275-seat B787-9 returned on October 28 '24, AMS-AUS will be served 3/wk in '25 except for June which will have 5/wk
- **Lufthansa** extended the B787-9 service for Oct. 28 '24– Mar. 29 '25 (IATA winter season) with 3/Wk; downgauged FRA from 294-seat B787-9 to 255-seat A330 for Mar. 31-Aug. 30 '25
- **Southwest** summary of service changes:
  - OMA will operate on Saturdays for Nov. 23 '24– Mar. 1 '25
  - New year-round weekday MKE service starts on March 6 '25, and new seasonal 3/Wk RNO service starts on March 6 '25
  - Extended schedules for April 8 '25 – June 4 '25: 120 flights on Mon/Thur/Fri (down 3 YOY), 106 on Tues/Wed (down 10 YOY), 76 on Sat (down 7 YOY) & 118 on Sun (up 10 YOY)
  - Extended schedules for June 5 '25 – August 4 '25: 125 flights on Mon/Thur/Fri (flat YOY), 117 on Tues/Wed (up 1 YOY), 93 on Sat (up 4 YOY) & 112 on Sun (up 12 YOY); BOS will be served daily
  - Extended schedules for Aug. 5 '25 – Oct. 1 '25: 112 flights on Mon/Thur/Fri (up 4 YOY), 90 on Tues/Wed (up 2 YOY), 62 on Sat (no chg.) & 105 on Sun (up 2 YOY)
  - Added new daily service to SFO effective August 5 '25
- **Spirit** extended schedules for April 9 '25 through May 21 '25 and will serve EWR (1x), FLL (5/Wk), LAS (5/Wk), LAX (1x) & MCO (5/Wk)
- **United** added college football service to Greenville-Spartanburg (GSP) on Dec. 20 weekend
- **VivaAerobus** increased MTY from 3/Wk-4/WK for Jan 8 '25 – Mar 26 '25; upgauged MTY from 180-seat A320 to 240-seat A321 from Oct. 18 '24; downgauged MTY starting Dec '25 from A321s to A320s (240 seats to 180 seats), 25% reduction in capacity
- **WestJet** YYC will return to AUS on May 12 '25 and increases from twice weekly to three times weekly frequency for the 2025 season
  - Announced new 3/Wk service to YVR eff. May 11 '25
- **January '25 v January '24 (down 8 destinations based on monthly schedules):**
  - + destinations: CLE, MFE, MTY & SJU
  - – destinations: BZN, CZM, EGE, FSD, JAX, LIR, MEM, PSP, PUJ, RNO, RSW & SDF

**New AUS Nonstop Service for 2024/2025:**

Destination	Airline	Start Date	Type	Other Airlines Serving the Route
Harlingen, TX (HRL)	Delta	10/7/2024	Year-round	Southwest
Atlanta, GA (ATL)	Frontier	10/11/2024	Year-round	Delta & Southwest
Omaha, NE (OMA)	Southwest	11/23/2024	Seasonal	Allegiant
New Orleans, LA (MSY)	Delta	2/27/2025	Year-round	Southwest
Chicago-O'Hare, IL (ORD)	Frontier	3/6/2025	TBD	American, United & Southwest
Milwaukee, WI (MKE)	Southwest	3/6/2025	Year-round	<i>New Route</i>
Orlando, FL (MCO)	Frontier	3/6/2025	TBD	Delta, Spirit & Southwest
Reno, NV (RNO)	Southwest	3/6/2025	Seasonal	<i>New Route</i>
Cincinnati, OH (CVG)	Frontier	3/7/2025	TBD	Delta & Allegiant
Phoenix, AZ (PHX)	Frontier	3/7/2025	TBD	American & Southwest
Panama City, FL (ECP)	Delta	3/9/2025	Year-round	American & Southwest
Indianapolis, IN (IND)	Delta	5/7/2025	Year-round	Allegiant & Southwest
Jacksonville, FL (JAX)	Delta	5/7/2025	Year-round	<i>New Route</i>
Memphis, TN (MEM)	Delta	5/7/2025	Year-round	<i>New Route</i>
Vancouver, Canada (YVR)	WestJet	5/11/2025	Seasonal	Air Canada
San Francisco, CA (SFO)	Delta	6/8/2025	Year-round	Alaska & United
Tampa, FL (TPA)	Delta	6/8/2025	Year-round	Southwest
San Francisco, CA (SFO)	Southwest	8/5/2025	Year-round	Delta & United

Source: Cirium schedule data.

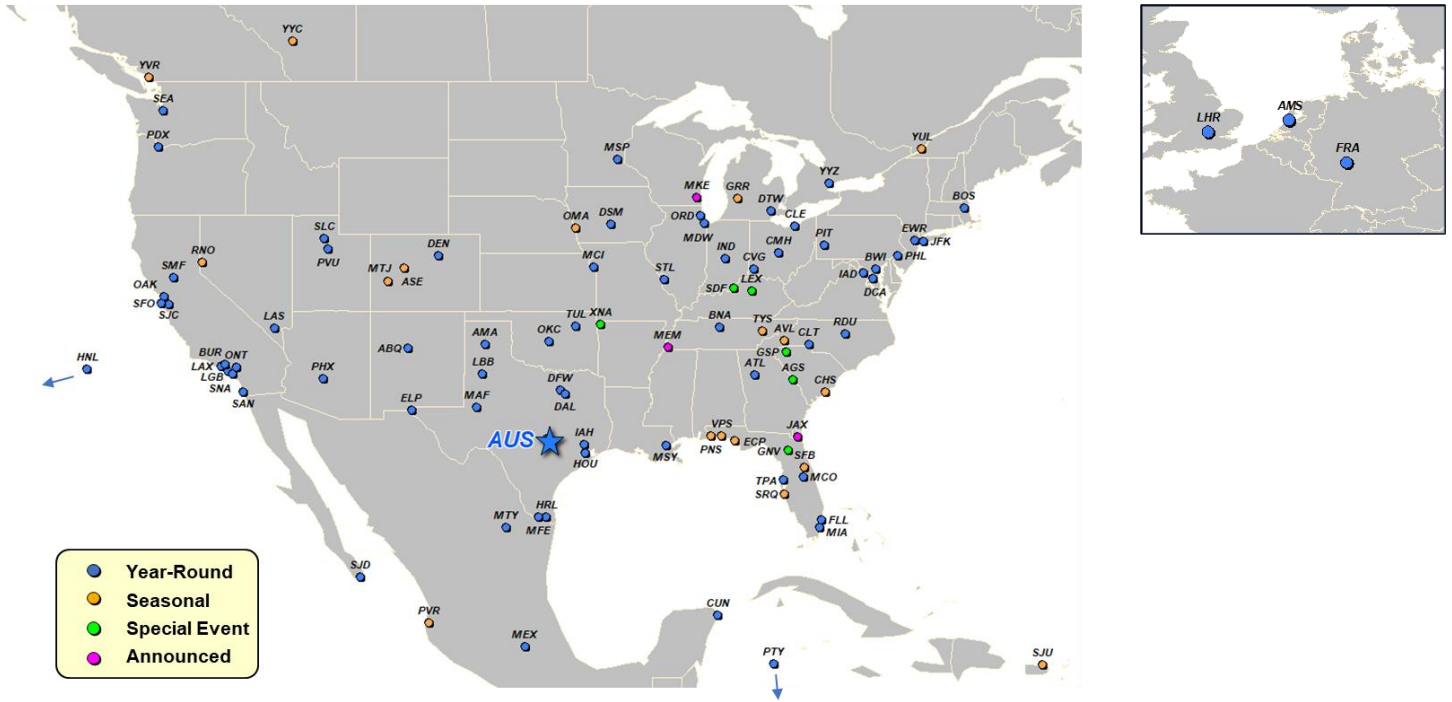
**January air service comparison:**

Average Daily	Jan. 2024	Jan. 2025	Change	Change %
Nonstop Destinations	84	76	-8	-10%
Carriers	19	19	n.c.	n.c.
Nonstop Departures	229	207	-21	-9%
Nonstop Seat Departures	34,365	31,365	-2,417	-7%
Average Seats/Aircraft	150	154	+4	+3%

Jan.	No. Nonstop Destinations	Average Daily Departures	Average Daily Seats	Average Aircraft Size
2019	60	166	24,262	146
2020	53	177	26,978	152
2021	46	82	12,264	150
2022	84	230	32,593	142
2023	87	250	37,424	150
2024	84	229	34,365	150
2025	76	207	31,948	154

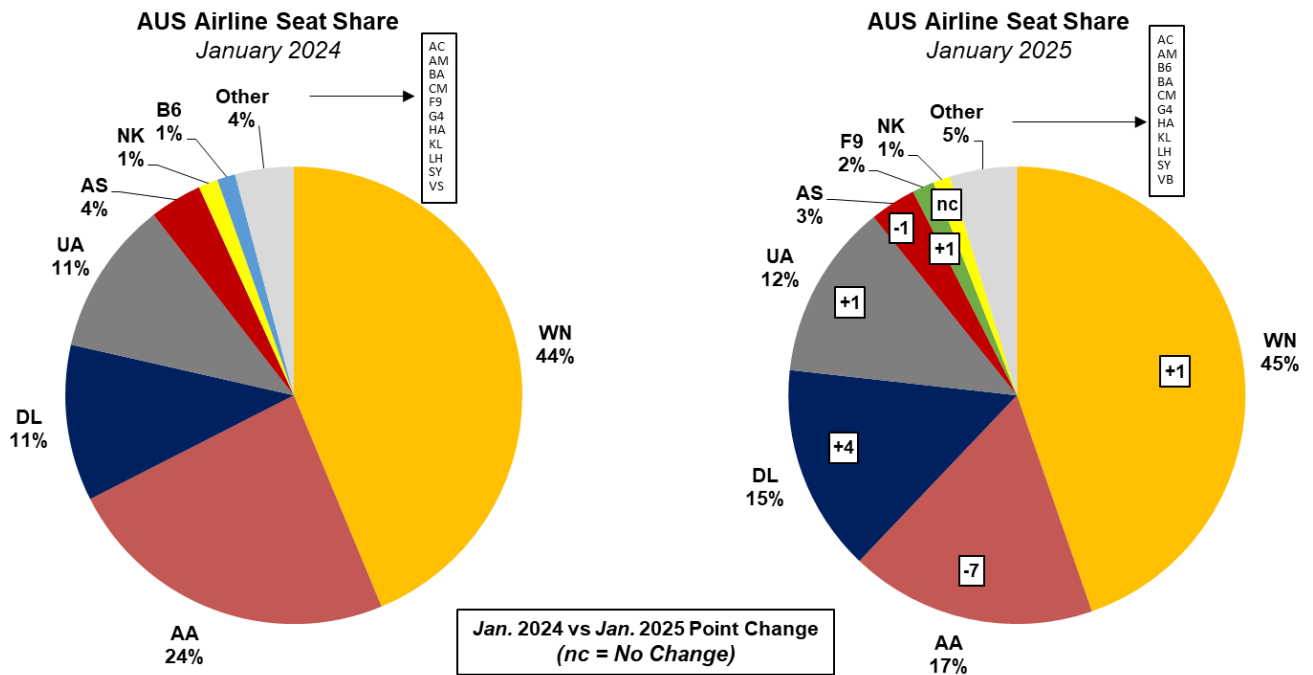
Source: Cirium schedule data.

**Current AUS air service:**



Source: Cirium schedule data.

**January 2025 v. 2024 carrier seat share comparison:**

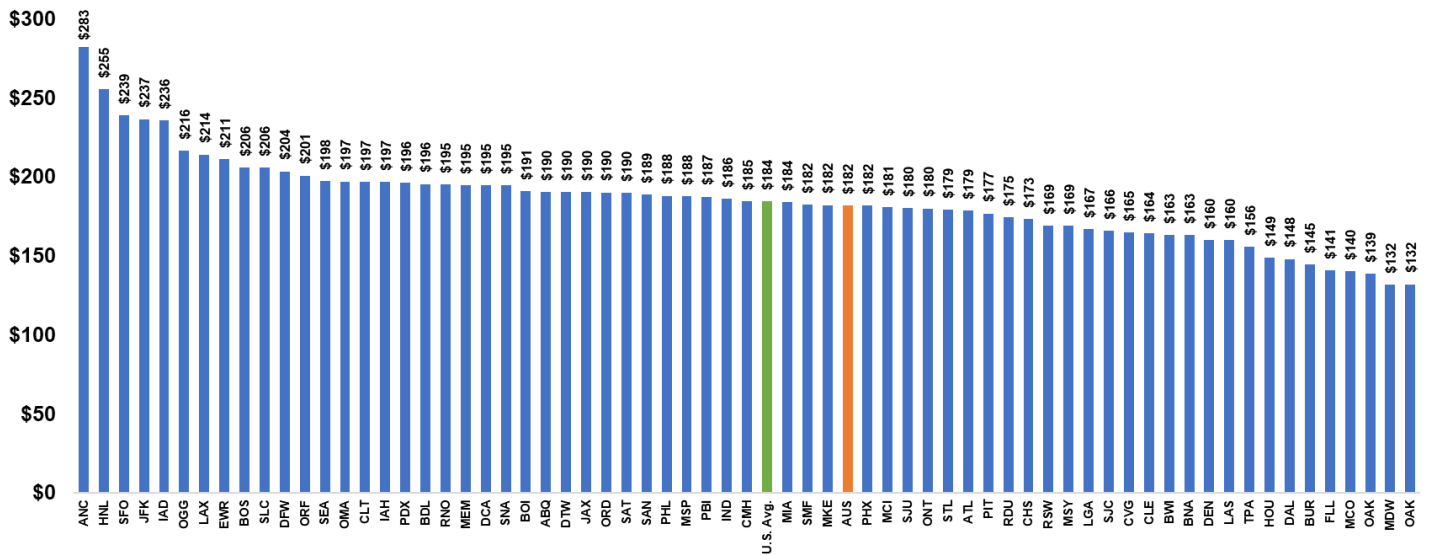


Source: Cirium schedule data.

**AUS Connecting Traffic Trends:**

Based on U.S. DOT O&D Passenger Survey, Cirium FM Traffic and ABIA statistics: 15.7% of AUS passengers in Q2 2024 were connecting between flights at the Airport.

## One-Way Domestic Fares for U.S. Medium & Large Hub Airports



Source: U.S. DOT, O&D Survey, YE Q2 2024

### Top 10 AUS Domestic Markets Without Nonstop Service

(Source: YE Q2 2024 DOT O&D Survey)

- 1 Richmond (RIC)
- 2 Boise (BOI)
- 3 Ft. Myers (RSW)
- 4 Hartford (BDL)
- 5 Birmingham (BHM)
- 6 Louisville (SDF)
- 7 Colorado Springs (COS)
- 8 Norfolk (ORF)
- 9 Bozeman (BZN)
- 10 Savannah (SAV)

### Top 10 AUS International Markets Without Nonstop Service

(Source: YE Sept 2024 FM Traffic)

- 1 Paris (CDG)
- 2 Liberia (LIR)
- 3 Rome (FCO)
- 4 Seoul (ICN)
- 5 San Jose (SJO)
- 6 Dublin (DUB)
- 7 Sao Paulo (GRU)
- 8 Barcelona (BCN)
- 9 Madrid (MAD)
- 10 Tokyo (HND)

### AUS Airline Codes:

AA	American Airlines	HA	Hawaiian Airlines
AC	Air Canada	KL	KLM-Royal Dutch Airlines
AM	Aeromexico	LH	Lufthansa German Airlines
AS	Alaska Airlines	NK	Spirit Airlines
B6	JetBlue Airways	SY	Sun Country Airlines
BA	British Airways	UA	United Airlines
CM	Copa Airlines	VB	VivaAerobus
DL	Delta Air Lines	VS	Virgin Atlantic Airways
F9	Frontier Airlines	WN	Southwest Airlines
G4	Allegiant Air	WS	WestJet

**Airport Codes:**

ABQ	Albuquerque, NM	MEM	Memphis, TN
AMA	Amarillo, TX	MEX	Mexico City, Mexico
AMS	Amsterdam, Netherlands	MFE	McAllen, TX
ANC	Anchorage	MIA	Miami, FL
ATL	Atlanta, GA	MKE	Milwaukee, WI
AVL	Asheville, NC	MSN	Madison, WI
BDL	Hartford, CT	MSP	Minneapolis/St. Paul, MN
BHM	Birmingham, AL	MSY	New Orleans, LA
BNA	Nashville, TN	MTY	Monterrey, Mexico
BOI	Boise, ID	OAK	Oakland, CA
BOS	Boston, MA	OGG	Kahului – Maui, HI
BUR	Burbank, CA	OKC	Oklahoma City, OK
BWI	Baltimore, MD	OMA	Omaha, NE
CHS	Charleston, SC	ONT	Ontario, CA
CLE	Cleveland, OH	ORD	Chicago O'Hare, IL
CLT	Charlotte, NC	ORF	Norfolk, VA
CMH	Columbus, OH	PBI	Palm Beach, FL
CUN	Cancun, Mexico	PDX	Portland, OR
CVG	Cincinnati, OH	PHL	Philadelphia, PA
CZM	Cozumel, Mexico	PHX	Phoenix, AZ
DAL	Dallas, TX	PIT	Pittsburgh, PA
DCA	Washington Reagan, DC	PSP	Palm Springs, CA
DEN	Denver, CO	PUJ	Punta Cana, Dominican Rep.
DFW	Dallas/Ft. Worth, TX	PTY	Panama City, Panama
DSM	Des Moines, IA	PVR	Puerto Vallarta, Mexico
DTW	Detroit, MI	PVU	Provo, UT
ECP	Panama City, FL	RDU	Raleigh-Durham, NC
ELP	El Paso, TX	RNO	Reno, NV
EUG	Eugene, OR	RSW	Ft. Myers, FL
EWR	Newark, NJ	SAN	San Diego, CA
FLL	Ft. Lauderdale, FL	SAT	San Antonio, TX
FRA	Frankfurt, Germany	SDF	Louisville, KY
FSD	Sioux Falls, SD	SEA	Seattle, WA
GNV	Gainesville, FL	SFB	Sanford, FL
GRR	Grand Rapids, MI	SFO	San Francisco, CA
GSP	Greenville-Spartanburg, SC	SGF	Springfield, MO
HNL	Honolulu, HI	SJC	San Jose, CA
HOU	Houston Hobby, TX	SJD	San Jose del Cabo, Mexico
HRL	Harlingen, TX	SJO	San Jose, Costa Rica
IAD	Washington Dulles, DC	SJU	San Juan, Puerto Rico
IAH	Houston Intercontinental, TX	SLC	Salt Lake City, UT
IND	Indianapolis, IN	SMF	Sacramento, CA
JAX	Jacksonville, FL	SNA	Orange County, CA
JFK	New York JFK, NY	SRQ	Sarasota, FL
LAS	Las Vegas, NV	STL	St. Louis, MO
LAX	Los Angeles, CA	TPA	Tampa, FL

LBB	Lubbock, TX	TUL	Tulsa, OK
LEX	Lexington, KY	TYS	Knoxville, TN
LGA	New York – LaGuardia, NY	VPS	Valparaiso, FL
LGB	Long Beach, CA	XNA	Fayetteville, AR
LHR	London, UK	YUL	Montreal, Canada
LIR	Liberia, Costa Rica	YVR	Vancouver, Canada
MAF	Midland/Odessa, TX	YYC	Calgary, Canada
MCI	Kansas City, MO	YYZ	Toronto, Canada
MCO	Orlando, FL		
MDW	Chicago Midway, IL		