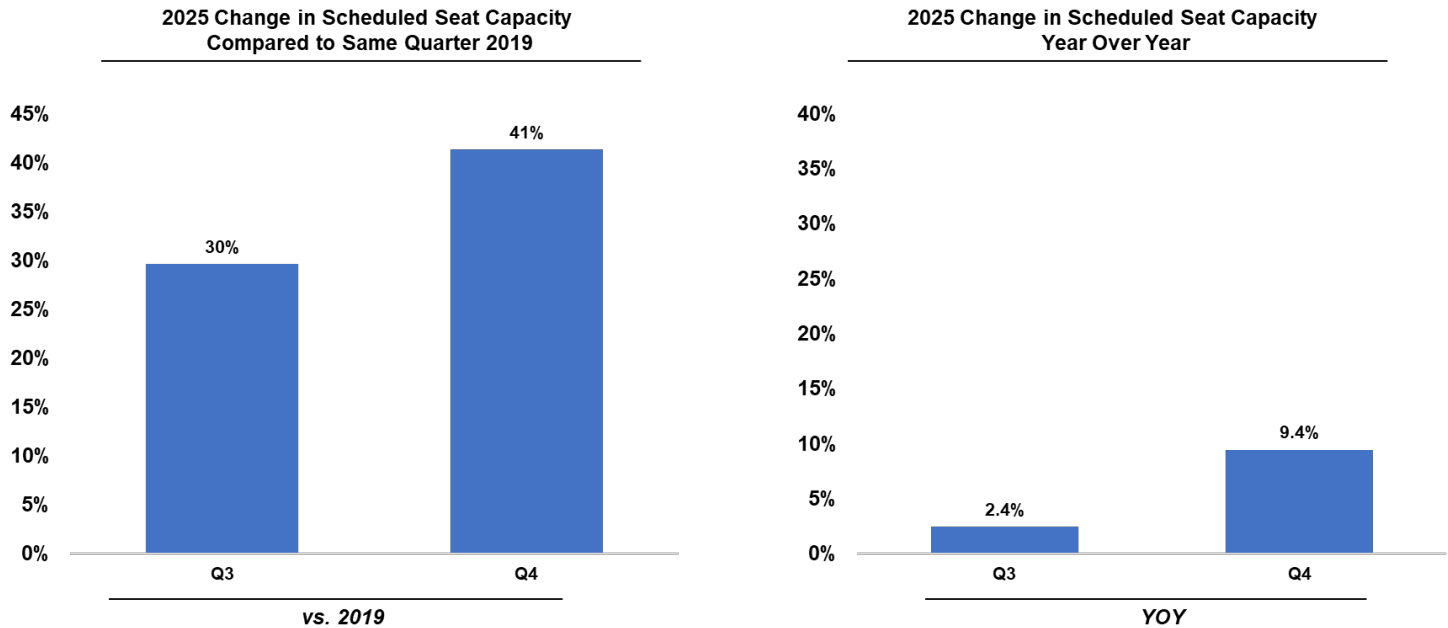


## July 2025 Air Service Snapshot

AUS quarterly seat comparisons, Q3 2025 and Q4 2025 compared to 2019 (pre-Covid) in left chart, and compared to year-over-year (YOY) 2024 in right chart:



Source: Cirium schedule data as of June 20, 2025.

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

- **Aeromexico** reverted back to 1x B737 for Aug 18 '25 – Dec 17 '25 as opposed to 2x E190; this is only a 16% capacity reduction and due to downturn in U.S. demand
- **Air Canada** will serve YUL May 2 – Oct. 24 '25 and YVR May 1 – Oct. 25 '25; YVR returned at 4/wk and increased to 5/wk for June – Sept '25; extended YUL 3/Wk for Oct 25 '25 – Mar 27 '26 (now year-round)
- **Allegiant** 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; extended schedules for Sept. 3 – Nov. 18 '25 and will serve 6 markets: AVL CVG DSM GRR PVU TYS; extended schedules for Nov 19 '25 – Feb 10 '26 and will serve 7 markets: AVL, CVG, DSM, GRR, PVU, SRQ & TYS
- **American** summary of service changes:
  - AA will serve 13 markets from AUS in Q3 2025 with 23% reduction in seat capacity YOY
  - Service for college football games: CMH (Aug 29/31) GNV (Oct 3/5) LEX (Nov 17/19) ATL (Nov 14/16) & XNA (Nov 21/23)
  - Service for EPIC IGM Conf: MSN (outbound Aug 17/return Aug 21)
- **British Airways** downgauged LHR #1 from A350-1000 (331 seats) to B777-200ER (272 seats) starting Mar. 29 '25; added LHR #2 daily, eff. Mar. 31 '25 which will operate 6/Wk (all days except Sunday); second frequency in Summer 2025 (March 20-Oct. 25 '25) will be mix of B787-8 and -9
- **Delta** summary of service changes:
  - New markets: IND, JAX & MEM (eff. May 7 '25), SFO & TPA (eff. June 8 '25), CUN (eff. Dec. 20 '25)
  - SJD originally planned as daily from Dec 20 '25 - Jan 5 '26, will be extended through April 12 '26

- PSP will be served seasonally from Nov 8 '25 – April 12 '26, increasing from Saturday only to daily from Dec 20 '25 - March 7 '26, and on March 8 will go back to Saturday only through April 25 '26
- ECP decreased from daily to Saturday only from Jan 5 - March 8 '26
- College football service: GNV for weekend of Oct. 3 '25, LEX for Oct. 17 '25 weekend and XNA for Nov. 21 '25 weekend
- HRL last op. on June 7 '25 but MAF will increase 2x->3x eff. June 8 '25
- **Frontier** new service to MIA 3/Wk and PHL 3/Wk eff. May 22 '25; new service to SAN (4/Wk eff June 13 '25); new SAN 4/Wk service eff. June 13 '25; extended schedules for Aug 19 ' – Nov 19 '25 and will serve 11 markets: ATL, CLE, CVG, DEN, LAS, MCO, MIA, ORD, PHL, PHX & SAN
- **KLM** AMS will be served 3/wk in 2025 except for June with 5/wk
- **Lufthansa** downgauged FRA from 294-seat B787-9 to 255-seat A330 for Mar. 31-Oct. 25 '25; will serve FRA on Tues/Thur/Sun instead of Mon/Thur/Sat for the winter season eff. Oct. 26
- **Southwest** summary of service changes:
  - BOS will be served daily eff. June 5 '25 and SFO daily service eff. Aug. 5 '25
  - Added new 6/Wk service to JAX effective Oct. 2 '25
  - Added SDF for UT football (outbound Oct 17 '25/inbound Oct 19 '25)
  - ORD service will be discontinued after Nov. 1 '25
  - Southwest daily departures for 2025-2026 shown below (128 daily departures for Oct. 2-Nov. 1 is a new record for Southwest at AUS):

Daily Departures								
Time Period	Mon/Thur/Fri	YoYChg	Tues/Wed	YoYChg	Sat	YoYChg	Sun	YoYChg
April 8 - June 4	120	(3)	106	(10)	76	(7)	118	1
June 5 - Aug. 4	125		117	1	93	4	112	12
Aug. 5 - Oct. 1	112	4	90	2	62		105	2
Oct. 2 - Nov. 1	128	5	112	15	72	1	112	4
Nov. 2 - Jan. 5	121	3	101	6	73	7	121	15

- Extended schedules for Jan 6-26 '26, ranging from 53 departures on Saturdays (+6 YOY) to 109 departures on Sundays and MLK weekend (+3 YOY)
- **Spirit** added DTW on June 12 '25 with 4/Wk
- **WestJet** YYC returned to AUS on May 12 '25 and increased from twice weekly to three times weekly frequency for the 2025 season; YVR service is cancelled for 2025 and will not start on May 11 '25 due to downturn in U.S. demand
- **July '25 v July '24 (down 5 destinations based on monthly schedules):**
  - + destinations: JAX, MEM & MKE
  - – destinations: BZN, CZM, EUG, FSD, HNL, OMA, SDF & VPS

**New AUS Nonstop Service for 2025:**

Destination	Airline	Start Date	Type	Other Airlines Serving the Route
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>
Miami (MIA)	Frontier	5/22/2025	TBD	American & Southwest
Philadelphia (PHL)	Frontier	5/22/2025	TBD	American
San Francisco, CA (SFO)	Delta	6/8/2025	Year-round	Alaska & United
Tampa, FL (TPA)	Delta	6/8/2025	Year-round	Southwest
Detroit, MI (DTW)	Spirit	6/12/2025	TBD	Delta
San Diego, CA (SAN)	Frontier	6/13/2025	TBD	Alaska & Southwest
San Francisco, CA (SFO)	Southwest	8/5/2025	Year-round	Delta & United
Jacksonville, FL (JAX)	Southwest	10/2/2025	Year-round	Delta
Cancun, Mexico (CUN)	Delta	12/20/2025	Seasonal	American & Southwest
Cabo San Lucas (SJD)	Delta	12/20/2025	Seasonal	American & Southwest
Palm Springs, CA (PSP)	Delta	11/8/2025	Seasonal	<i>New Route</i>

Source: Cirium schedule data as of May 26, 2025.

**July air service comparison:**

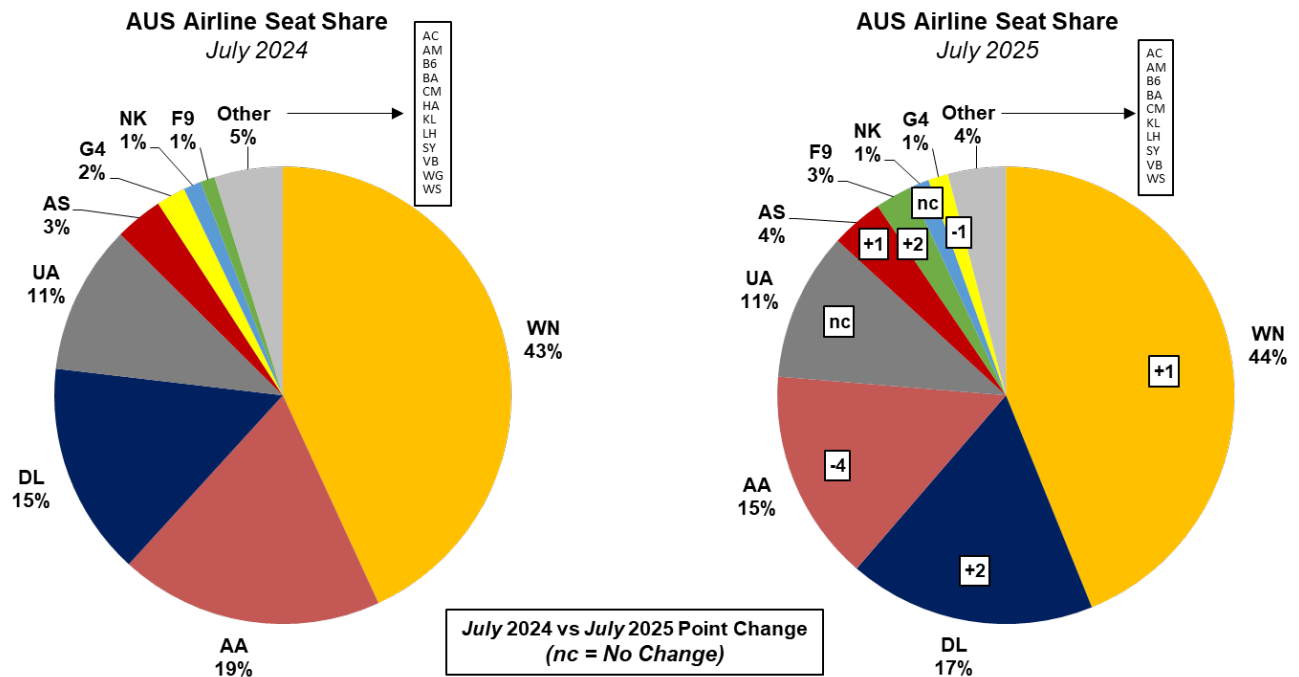
Average Daily	July 2024	July 2025	Change	Change %
Nonstop Destinations	90	85	-5	-5%
Carriers	19	18	-1	-1%
Nonstop Departures	266	274	+8	+3%
Nonstop Seat Departures	40,357	41,622	+1,265	+3%
Average Seats/Aircraft	152	152	n.c.	n.c.

June	No. Nonstop Destinations	Average Daily Departures	Average Daily Seats	Average Aircraft Size
2019	63	203	30,687	151
2020	48	99	14,523	147
2021	65	199	29,092	146
2022	88	263	38,621	147
2023	92	274	41,207	150
2024	91	266	40,357	152
2025	85	274	41,622	152

Source: Cirium schedule data.



## July 2025 v. 2024 carrier seat share comparison:

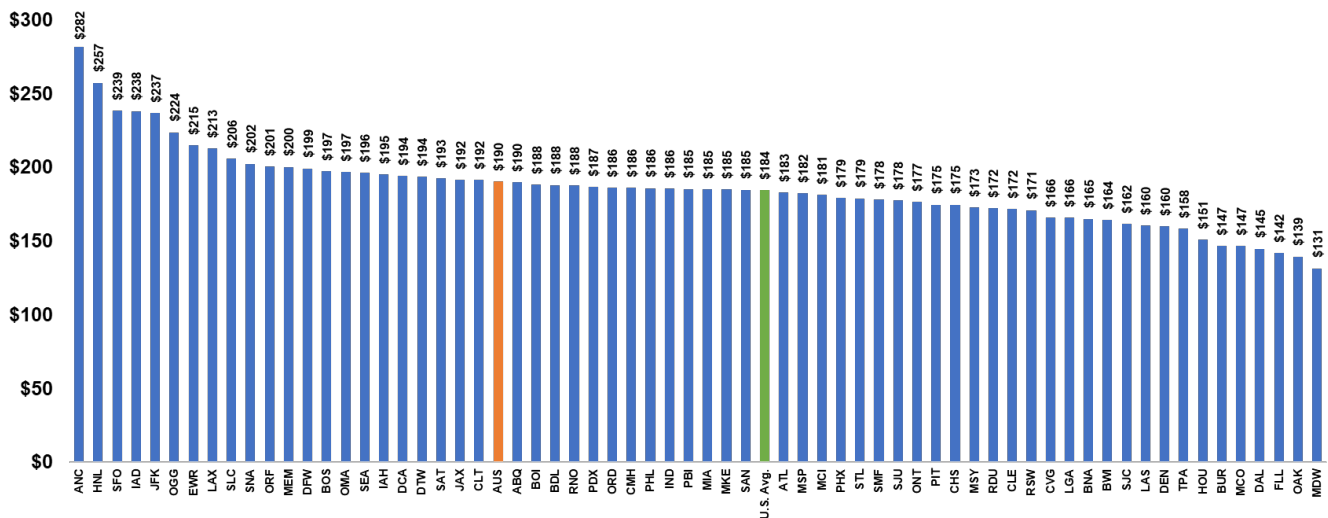


Source: Cirium schedule data.

## AUS Connecting Traffic Trends:

Based on U.S. DOT O&D Passenger Survey, Cirium *FM Traffic* and ABIA statistics: 12.6% of AUS passengers in Q4 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, CY 2024

## Top 10 AUS Domestic Markets Without Nonstop Service

## Top 10 AUS International Markets Without Nonstop Service

**(Source: CY 2024 DOT O&D Survey)**

- 1 Honolulu (HNL)
- 2 Richmond (RIC)
- 3 Hartford (BDL)
- 4 Boise (BOI)
- 5 Ft. Myers (RSW)
- 6 Norfolk (ORF)
- 7 Bozeman (BZN)
- 8 Buffalo (BUF)
- 9 Birmingham (BHM)
- 10 Savannah (SAV)

**(Source: YE Mar. 2025 FM Traffic)**

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

**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	WN	Southwest Airlines
F9	Frontier Airlines	WG	Sunwing 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
HNL	Honolulu, HI	SGF	Springfield, MO

HOU	Houston Hobby, TX	SJC	San Jose, CA
HRL	Harlingen, TX	SJD	San Jose del Cabo, Mexico
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
LGA	New York – LaGuardia, NY	TYS	Knoxville, TN
LGB	Long Beach, CA	VPS	Valparaiso, FL
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		

**Submitted June 26, 2025 Kazanoff**