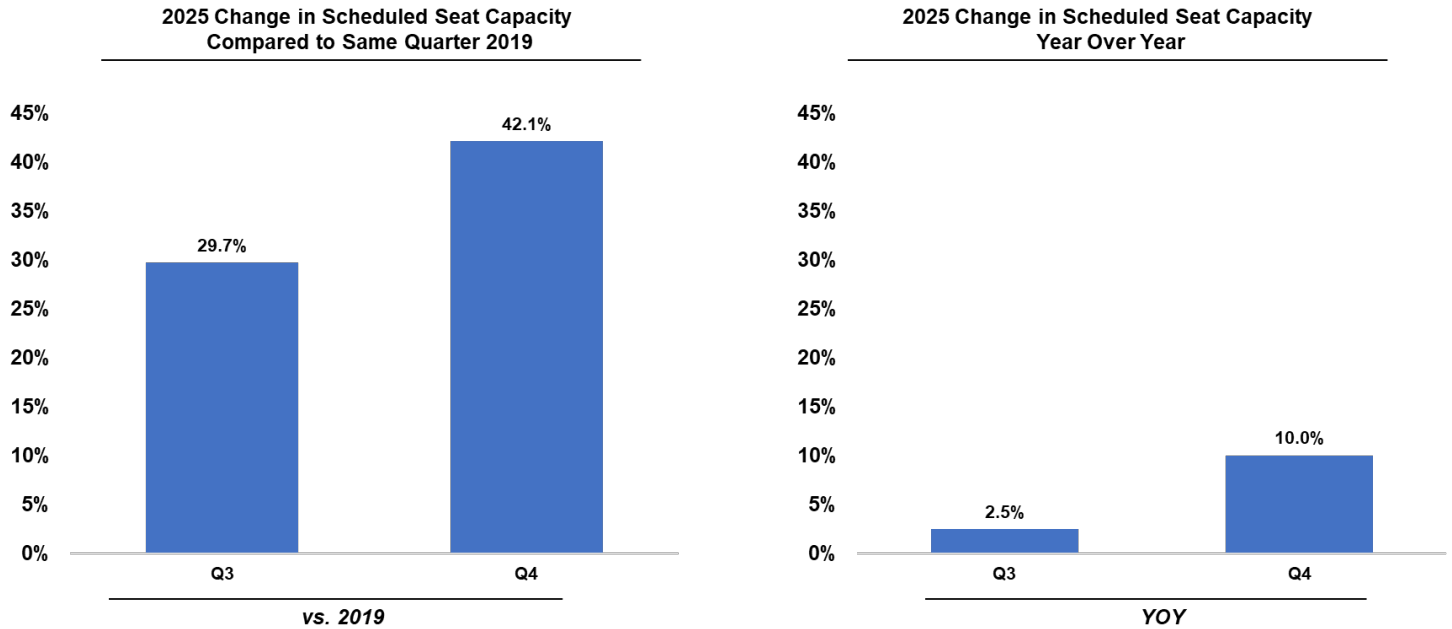


## September 2025 Air Service Snapshot

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 August 18, 2025.

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

- **Aeromexico** reverted back to 1x B737 from Aug 18 '25 onwards as opposed to 2x E190 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)
- **Alliant summary of service changes:**
  - Extended schedules for May 14 – Sept. 2 '25 and served 12 markets: AVL CVG DSM GRR IAD IND LAS PIT PVU SFB SRQ & TYS;
  - Schedules for Sept. 3 – Nov. 18 '25, will serve 6 markets: AVL CVG DSM GRR PVU TYS;
  - Schedules for Nov 19 '25 – Feb 10 '26, will serve 7 markets: AVL, CVG, DSM, GRR, PVU, SRQ & TYS;
  - Schedules for Feb 11-May 13 '26, will serve 4 markets: CVG, DSM, GRR & PVU
- **American** summary of service changes:
  - AA will serve 13 markets from AUS in Q3 2025 with 22% less seats YOY; 15 markets in Q4 2025 with 3% less seats YOY
  - Service for college football games: GNV (Oct 3/5) LEX (Nov 17/19) ATL (Nov 14/16) & XNA (Nov 21/23)
  - Service for Masters: AGS on April 6, 11 and 14
- **British Airways** 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; 2x service for Summer 2026 starting Mar. 29 with 1x B777-200ER and 1x B787-8
- **Copa** added 5th weekly PTY flight for Dec '25 & Jan '26
- **Delta** summary of service changes:

- New markets: SFO & TPA (eff. June 8 '25); DEN (eff. Nov. 9 '25); CUN (eff. Dec. 20 '25); CMH & MCI (eff. June 7 '26)
- 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
- MAF discontinued after November 8 '25
- **Frontier** new service to SAN 4/Wk started 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; extended schedules for Nov 20 '25 – Jan 6 '26 and will serve same 11 markets
- **JetBlue** added 2x FLL service starting Nov 20 '25 with 162-seat A320 (last served April 30, 2024)
- **KLM** AMS will be served 3/wk in 2025 except for June which was 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-early 2026 shown below:

	Daily Departures							
Time Period	Mon/Thur/Fri	YoY Chg	Tues/Wed	YoY Chg	Sat	YoY Chg	Sun	YoY Chg
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)
- Extended schedules for Jan 27-March 4 '26, ranging from 53 departures on off-peak Saturdays (+6 YOY) to 118 departures on peak days (+4 YOY)
- Extended schedules for March 5-April 6 '26; ranging from 87 departures on Saturdays (+5 YOY) to 129 departures on Mon/Thur/Fri (+5 YOY); includes new Sat only service to HDN and RSW, Sat/Sun service to PSP and daily (xTues/Wed) service to PNS; HDN and RSW are new nonstop markets for AUS; PSP is a new nonstop market for WN
- Extended schedules for April 7-June 3 '26; ranging from 70 departures on Saturdays (-6 YOY) to 126 departures on Mon/Thur/Fri (+6 YOY); new PSP service is maintained on Saturdays
- **Spirit** added DTW on June 12 '25 with 4/Wk; extended schedules for Nov 19 '25 – March 3 '26 and will serve 6 markets: DTW, EWR, FLL, LAS, LAX & MCO
- **United** service for college football games: XNA (Nov 21 weekend)
- **VivaAerobus** announced new nonstop service to Mexico City - Felipe Ángeles International Airport (NLU) with 3/Wk starting Nov. 20 '25
- **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

- **September '25 v September '24 (up 3 destinations based on monthly schedules):**

- + destinations: JAX, MEM, MKE & RNO
- – destinations: HNL

**New AUS Nonstop Service for 2025 & 2026:**

Destination	Airline	Start Date	Type	Other Airlines Serving the Route
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, Mexico (SJD)	Delta	12/20/2025	Seasonal	American & Southwest
Palm Springs, CA (PSP)	Delta	11/8/2025	Seasonal	<i>New Route</i>
Denver, CO (DEN)	Delta	11/9/2025	TBD	Frontier, Southwest & United
Ft. Lauderdale, FL (FLL)	JetBlue	11/20/2025	TBD	Southwest & Spirit
Mexico City, Mexico - Felipe Ángeles (NLU)	VivaAerobus	11/20/2025	TBD	<i>New Route</i>
Ft. Myers, FL (RSW)	Southwest	3/7/2026	Seasonal	<i>New Route</i>
Hayden (Steamboat Springs), CO (HDN)	Southwest	3/7/2026	Seasonal	<i>New Route</i>
Palm Springs, CA (PSP)	Southwest	3/7/2026	Seasonal	<i>Delta</i>
Columbus, OH (CMH)	Delta	6/7/2026	TBD	Southwest
Kansas City, MO (MCI)	Delta	6/7/2026	TBD	Southwest

Source: Cirium schedule data.

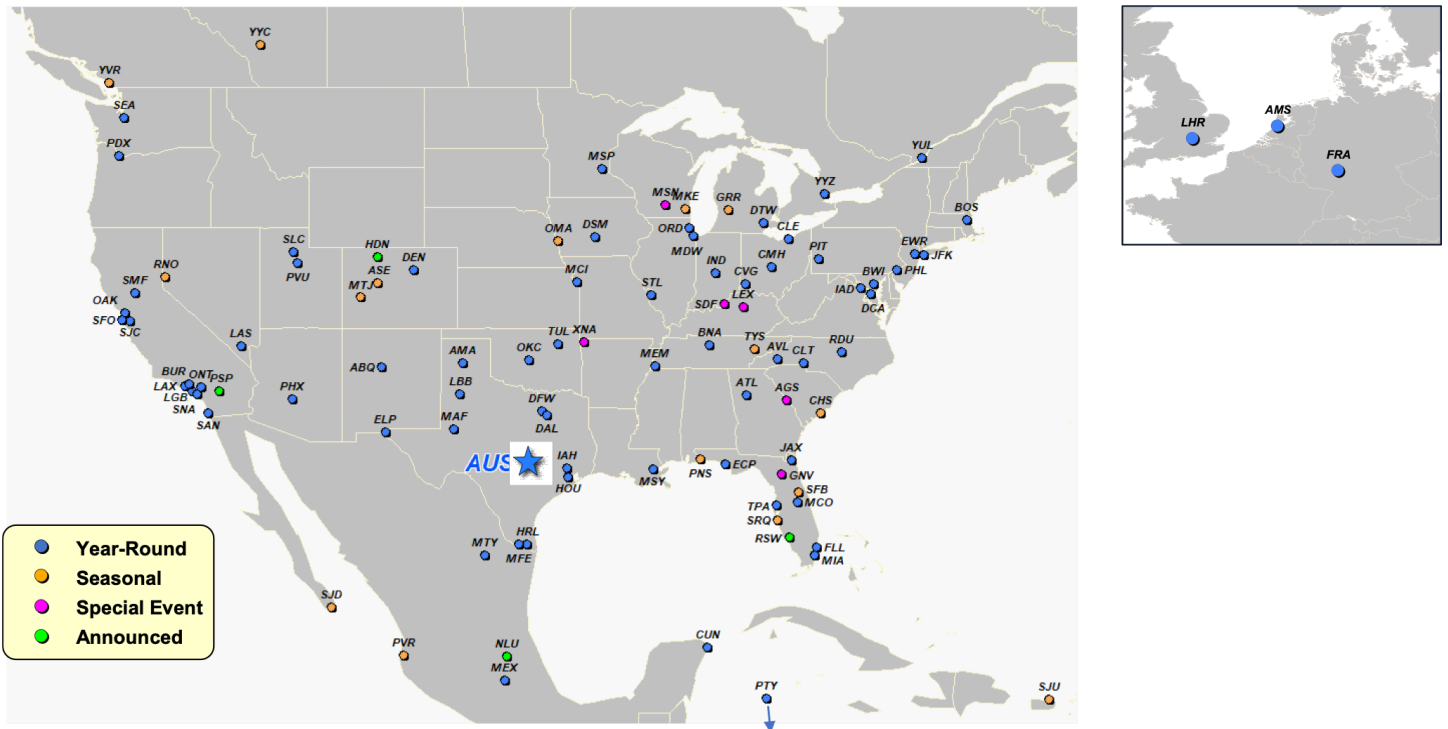
**September air service comparison:**

Average Daily	Sept. 2024	Sept. 2025	Change	Change %
Nonstop Destinations	74	77	+3	+4%
Carriers	19	18	-1	-5%
Nonstop Departures	237	242	+5	+2%
Nonstop Seat Departures	36,201	37,042	+842	+2%
Average Seats/Aircraft	153	153	n.c.	n.c.

Sept.	No. Nonstop Destinations	Average Daily Departures	Average Daily Seats	Average Aircraft Size
2019	56	192	29,221	152
2020	42	81	11,828	145
2021	65	206	29,572	143
2022	85	263	38,763	148
2023	85	271	39,926	148
2024	74	237	36,201	153
2025	77	242	37,042	153

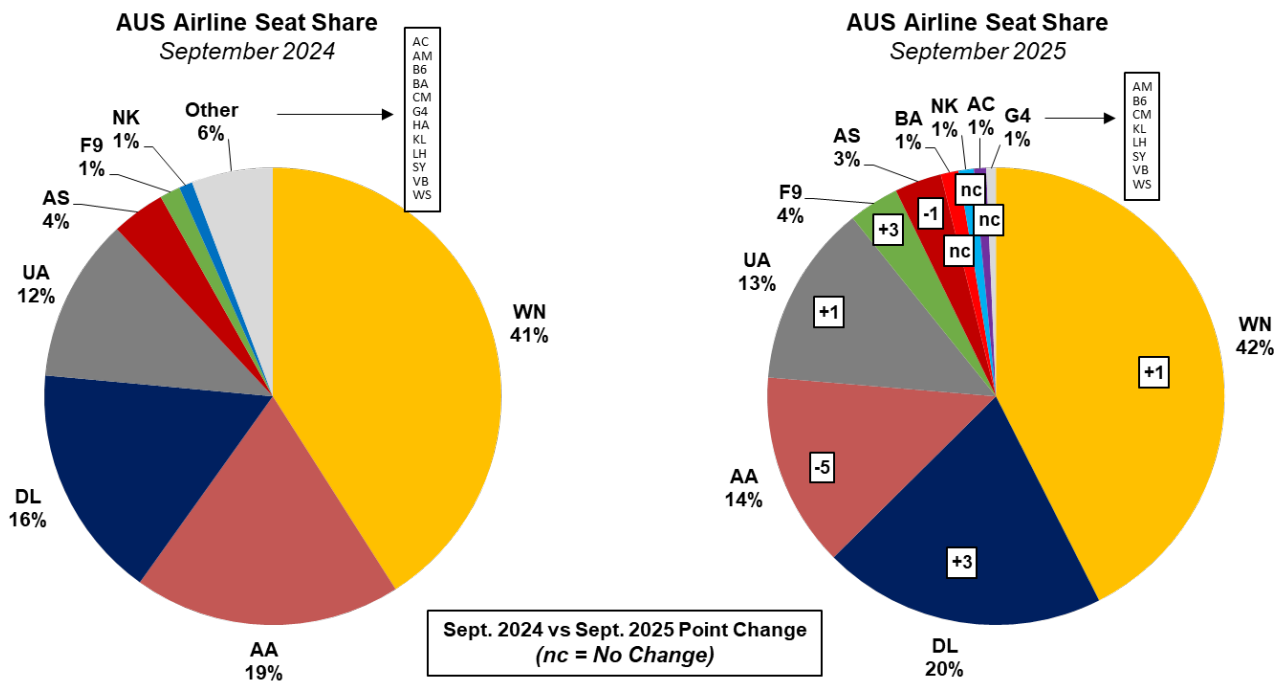
Source: Cirium schedule data as of August 18, 2025.

**Current AUS air service:**



Source: Cirium schedule data.

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

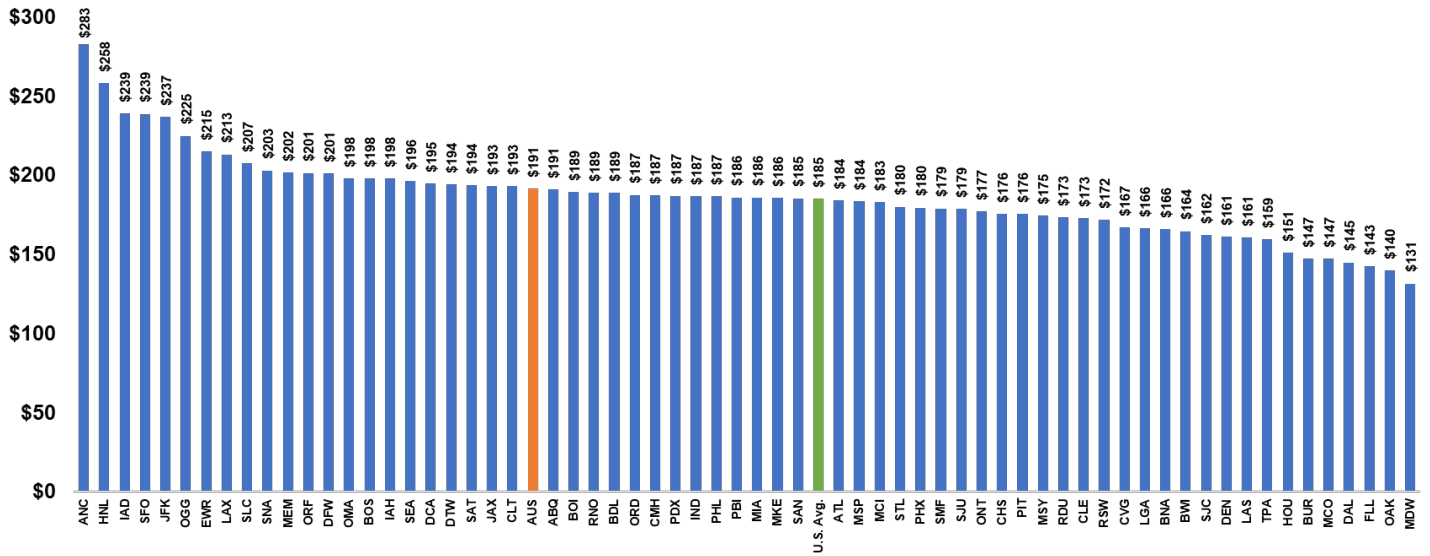


Source: Cirium schedule data as of August 18, 2025.

**AUS Connecting Traffic Trends:**

Based on U.S. DOT O&D Passenger Survey, Cirium *FM Traffic* and ABIA statistics: 14.1% of AUS passengers in Q1 2025 were connecting between flights at the Airport.

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



Source: U.S. DOT, O&D Passenger Survey, YE Q1 2025.

### Top 10 AUS Domestic Markets Without Nonstop Service

(Source: YE Q1 2025, DOT O&D Survey)

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

### Top 10 AUS International Markets Without Nonstop Service

(Source: YE May 2025, FM Traffic)

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

**AUS Airline Codes:**

AA	American Airlines	KL	KLM-Royal Dutch Airlines
AC	Air Canada	KX	Cayman Airways
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	MDW	Chicago Midway, IL
AMA	Amarillo, TX	MEM	Memphis, TN
AMS	Amsterdam, Netherlands	MEX	Mexico City, Mexico
ANC	Anchorage	MFE	McAllen, TX
ATL	Atlanta, GA	MIA	Miami, FL
AVL	Asheville, NC	MKE	Milwaukee, WI
BDL	Hartford, CT	MSN	Madison, WI
BHM	Birmingham, AL	MSP	Minneapolis/St. Paul, MN
BNA	Nashville, TN	MSY	New Orleans, LA
BOI	Boise, ID	MTY	Monterrey, Mexico
BOS	Boston, MA	NLU	Mexico City, Mexico - Felipe Ángeles (NLU)
BUR	Burbank, CA	OAK	Oakland, CA
BWI	Baltimore, MD	OKC	Oklahoma City, OK
CHS	Charleston, SC	OMA	Omaha, NE
CLE	Cleveland, OH	ONT	Ontario, CA
CLT	Charlotte, NC	ORD	Chicago O'Hare, IL
CMH	Columbus, OH	ORF	Norfolk, VA
CUN	Cancun, Mexico	PBI	Palm Beach, FL
CVG	Cincinnati, OH	PDX	Portland, OR
DAL	Dallas, TX	PHL	Philadelphia, PA
DCA	Washington Reagan-National, DC	PHX	Phoenix, AZ
DEN	Denver, CO	PIT	Pittsburgh, PA
DFW	Dallas/Ft. Worth, TX	PSP	Palm Springs, CA
DSM	Des Moines, IA	PTY	Panama City, Panama
DTW	Detroit, MI	PVR	Puerto Vallarta, Mexico
ECP	Panama City, FL	PVU	Provo, UT
ELP	El Paso, TX	RDU	Raleigh-Durham, NC
EUG	Eugene, OR	RNO	Reno, NV
EWR	Newark, NJ	RSW	Ft. Myers, FL
FLL	Ft. Lauderdale, FL	SAN	San Diego, CA

FRA	Frankfurt, Germany	SAT	San Antonio, TX
FSD	Sioux Falls, SD	SDF	Louisville, KY
GNV	Gainesville, FL	SEA	Seattle, WA
GRR	Grand Rapids, MI	SFB	Sanford, FL
HDN	Hayden (Steamboat Springs), CO	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
LGB	Long Beach, CA	TYS	Knoxville, TN
LHR	London (Heathrow), UK	VPS	Valparaiso, FL
MAF	Midland/Odessa, TX	YUL	Montreal, Canada
MCI	Kansas City, MO	YVR	Vancouver, Canada
MCO	Orlando, FL	YYC	Calgary, Canada
		YYZ	Toronto, Canada

**Submitted Sept 3, 2025 Kazanoff**