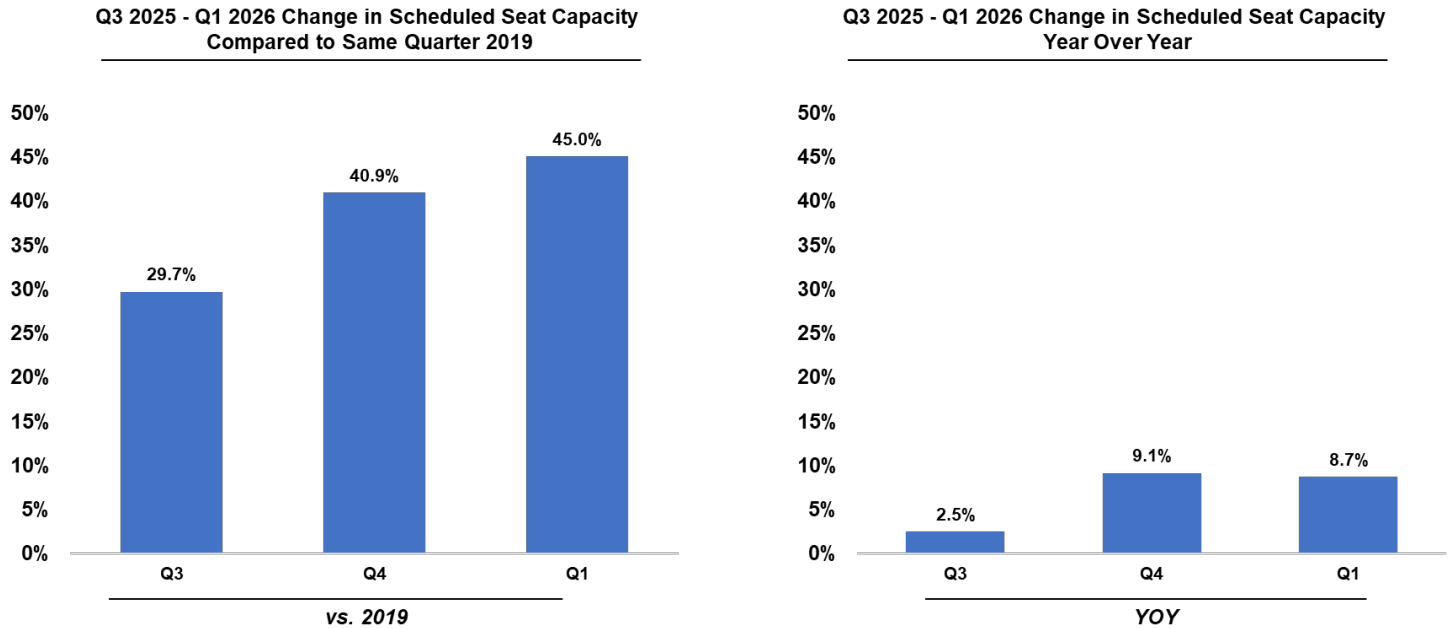


## November 2025 Air Service Snapshot

AUS quarterly seat comparisons, Q3 2025, Q4 2025 and Q1 2026 compared to 2019 (pre-Covid) in left chart, and compared to year-over-year (YOY) in right chart:



Source: Cirium schedule data as of October 21, 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** extended YUL 3/Wk for Oct 25 '25 – Mar 27 '26 (now year-round)
- **Alaska** will discontinue 2X SFO, last op Jan. 6 '26; will increase SAN from 3x->4x on Jan. 7 '26
- **Alliant summary of service changes:**
  - Extended 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 15 markets in Q4 2025 (including special events) with 5% less seats YOY
  - Service for college football games: LEX (Nov 17/19) ATL (Nov 14/16) & XNA (Nov 21/23)
  - Service for Masters: AGS on April 6, 11 and 14
  - Service to SDF for Kentucky Derby with 128-seat A319 (outbound April 30/return May 3)
- **British Airways** Winter season started Oct. 26 '25 with 1x daily A350-1000 (331 seats); double daily service returns on March 29 '26 with the start of the Summer IATA season
- **Copa** added 5th weekly PTY flight for Dec '25 & Jan '26; extended 5th weekly PTY frequency for April – August
- **Delta** summary of service changes:
  - New markets: DEN (eff. Nov. 9 '25); MIA (eff. Nov. 22 '25), CUN (eff. Dec. 20 '25); CMH & MCI (eff. June 7 '26); Saturday only BZN, FCA and VPS (eff. June 13 – Sept. 5 '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: XNA for Nov. 21 '25 weekend
- MAF discontinued after November 8 '25
- Kentucky Derby service: one SDF roundtrip on April 30 and another on May 3
- **Frontier** 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; extended schedules for Jan 6 '26 – March 5 '26 but will seasonally suspend CLE, CVG & PHL
- **JetBlue** added 2x FLL service starting Nov 20 '25 with 162-seat A320 (last served April 30, 2024); FLL will only operate 1x for Jan 7 '26 – Feb 11 '26
- **KLM** AMS will be served 3/wk in 2025 except for June with 5/wk ; 3/wk loaded for 2026 as well except 4/wk in June
- **Lufthansa** will serve FRA on Tues/Thur/Sun for the Winter season eff. Oct. 26 '25 with B787-9; service is loaded with 5/Wk A340-300 for Summer eff. Mar. 29 '26
- **Southwest** summary of service changes:
  - Southwest daily departures for 2025-early 2026 shown below:

Time Period	Daily Departures			
	Max	YoYChg	Min	YoYChg
Oct. 2 - Nov. 1	128	5	72	1
Nov. 2 - Jan. 5	121	3	73	7
Jan. 6 - Jan. 26	109	3	53	6
Jan. 27 - Mar. 4	118	4	53	6
Mar. 5 - Apr. 6	129	5	87	5
Apr. 7-June 3	126	6	70	(6)
June 4 – Aug. 3	132	10	96	3

- Schedules for Oct. 2-Nov. 1 '25: added new 6/Wk service to JAX
- Schedules for March 5-April 6 '26: 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
- Schedules for April 7-June 3 '26; new PSP service is maintained on Saturdays
- Schedules for June 4 – August 3 '26; 132 departures on Mon/Thur/Fri is a new record; new service added to CVG and seasonal SEA returns (last served by WN in 2018)
- **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 on Tues/Thur/Sat
- **November '25 v November '24 (up 4 destinations based on monthly schedules):**
  - + destinations: ECP, JAX, MEM, MKE, NLU, PSP, RNO & YUL
  - – destinations: AVL, GNV, HNL & LEX

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

Destination	Airline	Start Date	Type	Other Airlines Serving the Route
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>
Miami, FL (MIA)	Delta	11/22/2025	Year-round	American, Frontier & Southwest
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>
Cincinnati, OH (CVG)	Southwest	6/4/2026	Year-round	Allegiant, Delta & Frontier
Seattle, WA (SEA)	Southwest	6/4/2026	Seasonal	Alaska & Delta
Columbus, OH (CMH)	Delta	6/7/2026	TBD	Southwest
Kansas City, MO (MCI)	Delta	6/7/2026	TBD	Southwest
Bozeman, MT (BZN)	Delta	6/13/2026	Seasonal	<i>New Route</i>
Kalispell, MT (FCA)	Delta	6/13/2026	Seasonal	<i>New Route</i>
Valparaiso, FL (VPS)	Delta	6/13/2026	Seasonal	<i>New Route</i>

Source: Cirium schedule data.

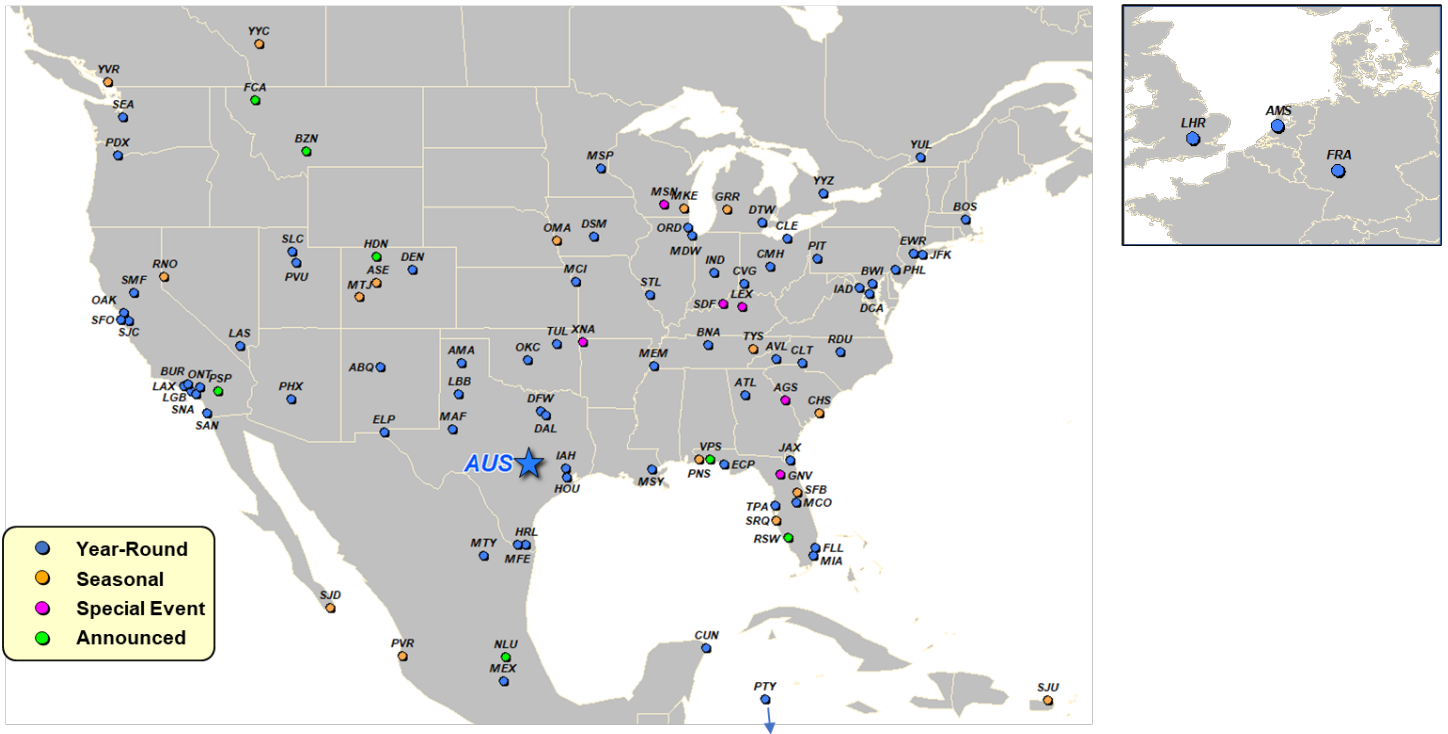
**November air service comparison:**

Average Daily	Nov. 2024	Nov. 2025	Change	Change %
Nonstop Destinations	78	82	+4	+5%
Carriers	17	17	--	--
Nonstop Departures	238	257	+19	+8%
Nonstop Seat Departures	37,074	40,281	+3,207	+9%
Average Seats/Aircraft	156	157	+1	+1%

Nov.	No. Nonstop Destinations	Average Daily Departures	Average Daily Seats	Average Aircraft Size
2019	56	189	28,547	151
2020	48	94	14,011	149
2021	81	238	34,088	143
2022	83	257	38,413	150
2023	81	270	40,369	150
2024	78	238	37,074	156
2025	82	257	40,281	157

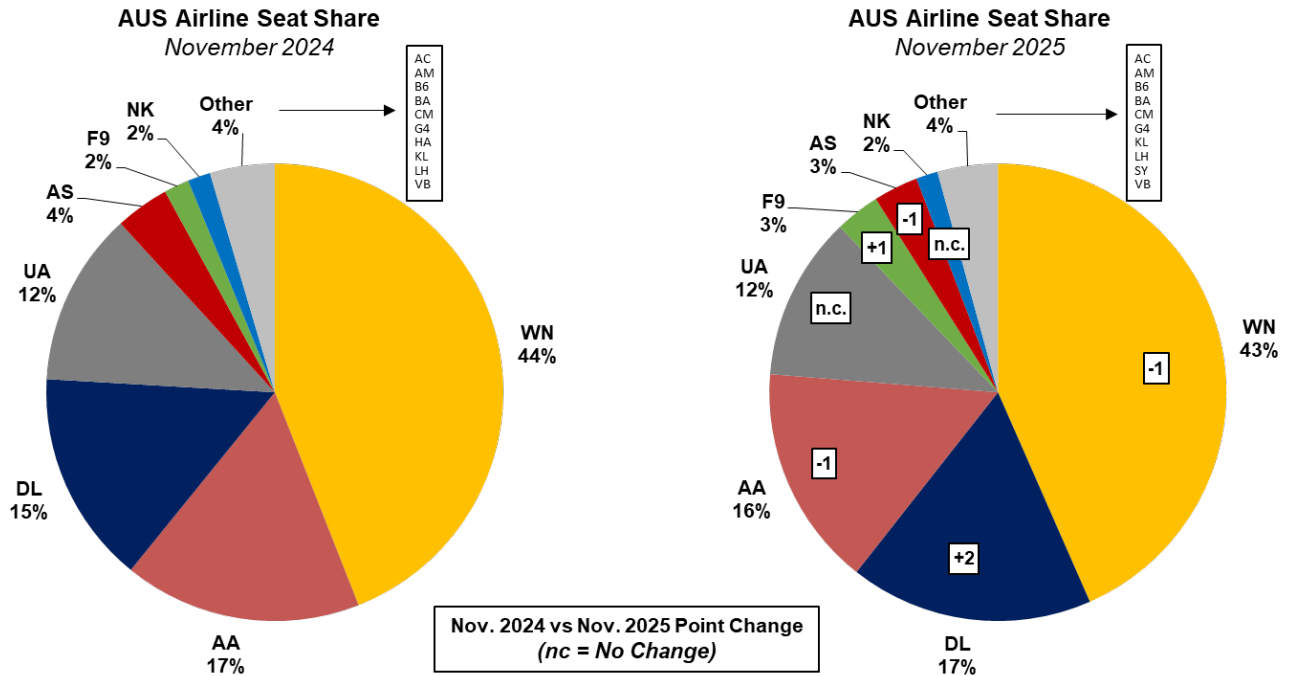
Source: Cirium schedule data as of October 21, 2025.

**Current AUS air service:**



Source: Cirium schedule data as of October 21, 2025.

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

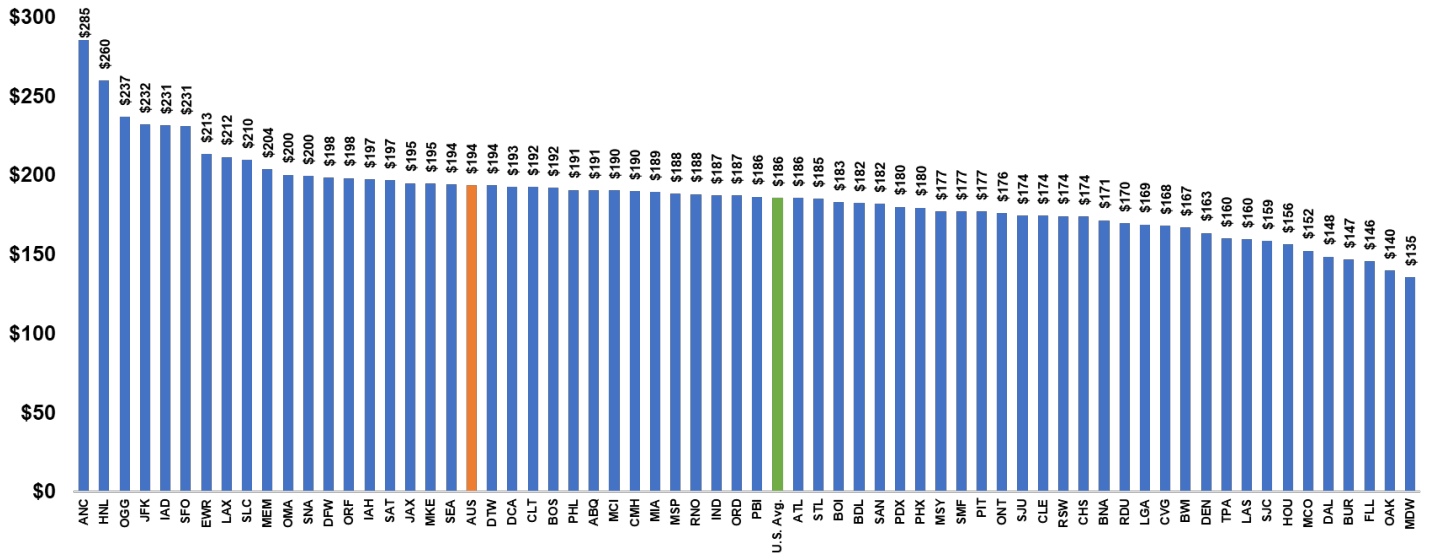


Source: Cirium schedule data as of October 21, 2025.

**AUS Connecting Traffic Trends:**

Based on U.S. DOT O&D Passenger Survey, Cirium *FM Traffic* and ABIA statistics: 14.5% of AUS passengers in Q2 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 Q2 2025.

### Top 10 AUS Domestic Markets Without Nonstop Service

(Source: YE Q2 2025, DOT O&D Survey)

- 1 Honolulu (HNL)
- 2 Hartford (BDL)
- 3 Richmond (RIC)
- 4 Boise (BOI)
- 5 Louisville (SDF)
- 6 Norfolk (ORF)
- 7 Savannah (SAV)
- 8 Buffalo (BUF)
- 9 Birmingham (BHM)
- 10 Albany (ALB)

### Top 10 AUS International Markets Without Nonstop Service

(Source: YE July 2025, FM Traffic)

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

**AUS Airline Codes:**

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

**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 (Felipe Ángeles), Mexico
BUR	Burbank, CA	OAK	Oakland, CA
BWI	Baltimore, MD	OKC	Oklahoma City, OK
BZN	Bozeman, MT	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
DAL	Dallas, TX	PHX	Phoenix, AZ
DCA	Washington Reagan-National, DC	PIT	Pittsburgh, PA
DEN	Denver, CO	PSP	Palm Springs, CA
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

FCA	Kalispell, MT	SAT	San Antonio, TX
FLL	Ft. Lauderdale, FL	SDF	Louisville, KY
FRA	Frankfurt, Germany	SEA	Seattle, WA
FSD	Sioux Falls, SD	SFB	Sanford, FL
GNV	Gainesville, FL	SFO	San Francisco, CA
GRR	Grand Rapids, MI	SGF	Springfield, MO
HDN	Hayden (Steamboat Springs), CO	SJC	San Jose, CA
HNL	Honolulu, HI	SJD	San Jose del Cabo, Mexico
HOU	Houston Hobby, TX	SJU	San Juan, Puerto Rico
HRL	Harlingen, TX	SLC	Salt Lake City, UT
IAD	Washington Dulles, DC	SMF	Sacramento, CA
IAH	Houston Intercontinental, TX	SNA	Orange County, CA
IND	Indianapolis, IN	SRQ	Sarasota, FL
JAX	Jacksonville, FL	STL	St. Louis, MO
JFK	New York JFK, NY	TPA	Tampa, FL
LAS	Las Vegas, NV	TUL	Tulsa, OK
LAX	Los Angeles, CA	TYS	Knoxville, TN
LBB	Lubbock, TX	VPS	Valparaiso, FL
LGB	Long Beach, CA	YUL	Montreal, Canada
LHR	London (Heathrow), UK	YVR	Vancouver, Canada
MAF	Midland/Odessa, TX	YYC	Calgary, Canada
MCI	Kansas City, MO	YYZ	Toronto, Canada
MCO	Orlando, FL		