



Monthly Statistical Report

To: Jesus Saenz, Aviation Director
From: Brian Pratte, Chief Air Service Development Officer
Copies: San Antonio Regional Stakeholders
Subject: March 2021 Monthly Statistics
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MAKING STRIDES TOWARDS RECOVERY

SUMMARY

One year after the start of the COVID-19 Global Pandemic, San Antonio International Airport (SAT)'s passenger numbers grew 14.5% to 481,637 when compared to the same month in 2020. This is the first time that passenger numbers have exceeded 400,000 since the pandemic started. When compared to the month prior, February 2021, passenger numbers grew 112.1%. While this growth shows great signs towards recovery, it is important to compare these numbers to the same month in 2019. When compared to March 2019, passenger numbers are down 46.6%. The increase in passenger numbers is a direct result in passenger confidence as people returned to the sky to take long overdue vacations during the Spring Break period. San Antonio also hosted the Women's NCAA Basketball Championship which brought in teams and fans from around the country. With increased vaccinations, easing of regulations, and growth in consumer confidence, demand and capacity are anticipated to continue to grow.

Additionally, a total of 24,423,067 pounds of air cargo moved through SAT in March 2021, reaching levels not experienced during the month of March within the past 10 years. This growth further supports the economic resiliency apparent in the San Antonio region.

(Please see Exhibit A for a detailed breakdown of all passenger and cargo stats)

While passenger numbers dropped significantly due to the pandemic, the number of people relocating from around the country to this area has not. The San Antonio-New Braunfels metropolitan statistical area (MSA) continues to be one of the fastest growing in the country. Home sales during the pandemic have continued to grow. San Antonio led all other large Texas metros in terms of new-home sales from February 2020 to February 2021. San Antonio also continues to be a strong market for tourism and tourists have been returning. CNBC recently released information in partnership with Trivago that showed San Antonio in the top ten destinations that people were interested in traveling to during March 2021.



DOMESTIC PASSENGERS

Scheduled domestic capacity, or seats, decreased 36.4%, or 175,544 seats in March 2021 vs. March 2020, with a total of 307,184 monthly departure seats. While this is a decrease, passenger numbers were up 10.1% when compared to the same month in 2020. This is because passenger numbers fell significantly during March 2020, but scheduled seats did not. This resulted in many canceled and empty flights because the airlines did not have time to adjust the seats being offered with the sudden drop in demand due to the pandemic.

From February to March 2021, almost all routes from San Antonio International Airport saw increases in both frequencies and seats. In addition to this, multiple airlines resumed routes that were suspended due to the pandemic. March 2021 saw the resumption of service to Los Angeles on Delta Air Lines, Miami on American Airlines, Ft. Lauderdale, El Paso, and St. Louis on Southwest Airlines.

March 2021 vs. March 2020		
Airline	Seat Capacity Change	Passenger Change
Alaska Airlines	(46.5%)	6.7%
Allegiant Air	1.7%	54.4%
American Airlines	(33.4%)	22.9%
Delta Air Lines	(5.8%)	1.5%
Frontier Airlines	(8.1%)	66.3%
Southwest Airlines	(45.6%)	5.0%
United Airlines	(45.2%)	3.0%



INTERNATIONAL PASSENGERS

Scheduled international capacity decreased by 10.2% in March 2021 compared to the year before, with a total of 24,213 monthly departure seats. While there was a decrease in capacity, international passenger numbers increased 93.1% compared to March 2020.

International travel was one of the first to stop quickly due to the growing case numbers when the pandemic first started. Much like domestic passengers, international passenger numbers fell significantly during March 2020, but scheduled seats did not. This resulted in many canceled and empty flights because the airlines did not have time to adjust the seats being offered with the sudden drop in demand due to the pandemic.

Due to many factors including the closed land border, demand to and from Mexico from SAT has recovered and increased quickly. SAT ranked #2 among all U.S. medium-hub airports in terms of total seats to Mexico for March 2021, only behind Houston-Hobby.

March 2021 vs. March 2020		
Airline	Seat Capacity Change	Passenger Change
Aeromexico	121.4%	320.9%
Southwest*	(25.0%)	7.5%
VivaAerobus**	-	-
Volaris	(20.0%)	74.7%

*Southwest offers seasonal service to Cancún, Mexico.

**VivaAerobus started service in July 2020

When comparing year-over-year international capacity changes, the results were based on the following:

- Interjet suspended all service as a result of financial losses due to many factors including the pandemic.
- VivaAerobus entered our market with nonstop service to Monterrey and Mexico City in July 2020 and, with Volaris, filled the gap left by Interjet.
- Southwest resumed Saturday only service to Cancun.
- Volaris: increased frequency and capacity to Guadalajara.



RECENT SCHEDULE CHANGES

This month, American Airlines resumed daily, nonstop service to Miami. This link not only provides access to South Florida but also to American's extensive Caribbean and Latin American network via Miami.

Delta Air Lines became the first carrier to bring back regularly scheduled service to Los Angeles. The airline brought back service daily on mainline A319 aircraft. Pre-pandemic they operated twice-daily service on regional aircraft. While they are down one daily flight, seats are only down 11.5% due to the use of larger aircraft on the route.

Southwest Airlines resumed daily, nonstop service to Ft. Lauderdale this month. In addition to this, the airline also resumed nonstop service to Cancun, El Paso, and St. Louis. These routes operate once-daily on Saturdays.

All the routes being operated from SAT in March 2021 had a substantial increase in both frequencies and seats from the previous month. The exception being some Mexican markets because of growing COVID-19 case numbers in Mexico as well as new regulations requiring anyone entering the United States to have a negative COVID-19 test.

As a result of new demand and travelers favoring outdoor destinations, some routes saw increases in seats and frequencies when compared to both March 2020 and March 2019. These markets included Orlando, Ft. Lauderdale, Denver, Salt Lake City, Las Vegas, and Phoenix.



EXHIBIT A

San Antonio International Airport Passenger & Air Cargo Activity Summary Report

	March			Calendar Year-to-Date		
	2021	2020	% Change	2021	2020	% Change
Passengers						
Domestic Enplanements	214,720	198,145	8.4%	447,159	886,050	-49.5%
Domestic Deplanements	223,694	200,211	11.7%	461,001	896,109	-48.6%
Total Domestic Passengers	438,414	398,356	10.1%	908,160	1,782,159	-49.0%
Intl Enplanements	18,145	10,824	67.6%	36,407	47,176	-22.8%
Intl Deplanements	25,078	11,557	117.0%	51,597	48,086	7.3%
Total Intl Passengers	43,223	22,381	93.1%	88,004	95,262	-7.6%
Grand Total All Passengers	481,637	420,737	14.5%	996,164	1,877,421	-46.9%

Air Cargo (in Pounds)						
Domestic Freight Enplaned	7,085,234	6,590,703	7.5%	18,935,254	19,205,405	-1.4%
Domestic Freight Deplaned	9,942,493	8,993,398	10.6%	25,986,325	26,233,728	-0.9%
Total Domestic Freight	17,027,727	15,584,101	9.3%	44,921,579	45,439,133	-1.1%
Intl Freight Enplaned	885,608	1,138,494	-22.2%	1,512,447	2,816,098	-46.3%
Intl Freight Deplaned	257,397	283,663	-9.3%	502,273	902,023	-44.3%
Total Intl Freight	1,143,005	1,422,157	-19.6%	2,014,720	3,718,121	-45.8%

Total Freight	18,170,732	17,006,258	6.8%	46,936,299	49,157,254	-4.5%
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Mail Enplaned	2,418,441	1,897,581	27.4%	6,260,784	5,699,583	9.8%
Mail Deplaned	3,833,894	1,897,581	102.0%	10,357,066	10,418,037	-0.6%
Total Mail	6,252,335	3,795,161	64.7%	16,617,850	16,117,620	3.1%

Grand Total All Air Cargo	24,423,067	20,801,419	17.4%	63,554,149	65,274,874	-2.6%
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SAN ANTONIO INTERNATIONAL AIRPORT

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