

Tiered Target Market Designations

Air Carrier Incentive Program

Effective March 2026

Purpose

This document identifies the Tier 1 and Tier 2 Target Markets referenced in the Northwest Arkansas National Airport Air Carrier Incentive Program. These market designations support the Airport's strategic air service development objectives and are incorporated by reference into Exhibit A of the Program.

Tier 1 Target Markets

Tier 1 Target Markets represent high-priority strategic markets based on business demand, connectivity value, competitive positioning, and long-term sustainability potential.

Current Tier 1 Target Markets include:

- San Francisco, California
- Seattle, Washington
- Boston, Massachusetts
- Austin, Texas

Tier 2 Target Markets

Tier 2 Target Markets represent strategic growth opportunities with strong demand potential and connectivity value.

Current Tier 2 Target Markets include:

- San Diego, California
- Portland, Oregon
- Sacramento, California
- Raleigh, North Carolina

Authority to Modify

The Authority may, in its sole discretion, designate, modify, add, or remove Tier 1 and Tier 2 Target Markets at any time without amendment to the Air Carrier Incentive Program. Market classifications are strategic in nature and may be adjusted as conditions, demand, or service priorities evolve.