

Qantas Emirates – Response to ACCC RFI - Annexure 1

The Annexure numbering below is the same as set out in the Application.

Annexure E Market Share Data: UK/Europe

TABLE 1: MARKET SHARE BY CARRIER, AUSTRALIA-UK, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan – May22	Jan – Dec22	Oct – Dec22
QANTAS AIRWAYS	19.0%	21.1%	21.1%	20.3%	25.6%	36.4%	31.7%	25.5%
EMIRATES	20.5%	21.0%	18.7%	20.5%	5.4%	15.2%	14.9%	15.2%
SINGAPORE AIRLINES	11.7%	10.8%	11.9%	9.8%	35.3%	15.8%	14.5%	12.6%
ETIHAD AIRWAYS	12.0%	11.1%	9.3%	9.1%	4.2%	5.5%	5.2%	4.6%
QATAR AIRWAYS	9.3%	10.0%	10.7%	17.3%	9.9%	13.2%	12.2%	11.7%
CATHAY PACIFIC	6.8%	6.5%	7.2%	5.5%	5.6%	1.5%	2.0%	3.5%
BRITISH AIRWAYS	5.2%	4.9%	6.2%	5.5%	5.4%	5.7%	6.6%	8.4%
MALAYSIA AIRLINES	2.9%	2.1%	2.3%	1.6%	0.6%	1.5%	2.9%	4.4%
ROYAL BRUNEI AIRLINES	1.5%	2.0%	3.3%	3.0%	0.1%	0.0%	0.8%	1.1%
THAI AIRWAYS	2.7%	2.6%	1.5%	1.0%	0.8%	0.5%	1.2%	0.9%
CHINA SOUTHERN AIRLINES	2.0%	1.3%	1.1%	0.7%	0.0%	0.0%	0.0%	0.0%
VIRGIN AUSTRALIA	2.4%	1.5%	0.8%	0.7%	0.0%	0.0%	0.1%	0.4%
VIRGIN ATLANTIC AIRWAYS	0.3%	0.6%	0.6%	0.4%	0.5%	0.1%	0.1%	0.1%
AIR CHINA	0.4%	0.5%	0.5%	0.4%	0.0%	0.0%	0.0%	0.0%
PHILIPPINE AIRLINES	0.7%	0.6%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%
CHINA EASTERN AIRLINES	0.3%	0.2%	0.7%	0.6%	0.0%	0.0%	0.0%	0.0%
KLM - ROYAL DUTCH AIRLINES	0.4%	0.2%	0.3%	0.3%	0.2%	0.4%	0.2%	0.2%

LUFTHANSA	0.2%	0.2%	0.5%	0.5%	0.9%	1.3%	2.0%	3.2%
CHINA AIRLINES	0.1%	0.7%	0.8%	0.6%	0.0%	0.0%	0.3%	0.7%
GARUDA INDONESIA	0.1%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER	1.6%	1.6%	2.1%	2.0%	5.4%	2.9%	5.3%	7.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

**TABLE 2: MARKET SHARE BY CARRIER, AUSTRALIA-UK/IRELAND
BUSINESS PURPOSE PASSENGERS, CY2017-MAY 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
QANTAS AIRWAYS	17.1%	22.0%	22.5%	21.4%	15.6%	26.1%	23.3%	23.1%
EMIRATES	20.6%	20.4%	19.3%	23.2%	11.7%	25.4%	22.9%	19.5%
SINGAPORE AIRLINES	10.8%	9.2%	10.4%	8.2%	27.9%	15.1%	11.4%	10.1%
ETIHAD AIRWAYS	12.4%	10.6%	9.2%	8.6%	7.8%	5.4%	4.9%	4.4%
QATAR AIRWAYS	5.6%	6.2%	6.7%	12.5%	17.5%	12.8%	13.7%	13.8%
CATHAY PACIFIC	5.0%	5.5%	6.5%	3.7%	2.6%	0.1%	1.3%	2.9%
BRITISH AIRWAYS	4.4%	4.7%	4.5%	2.9%	0.0%	2.2%	3.1%	3.5%
JETSTAR	3.9%	2.8%	2.7%	2.8%	0.4%	1.4%	3.1%	3.9%
VIRGIN AUSTRALIA	2.5%	2.5%	2.7%	2.1%	0.0%	0.1%	0.7%	1.0%
MALAYSIA AIRLINES	1.7%	1.8%	1.7%	1.4%	0.8%	2.1%	2.4%	2.4%
OTHER	16.0%	14.3%	13.6%	13.1%	15.6%	9.3%	13.1%	15.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

**TABLE 3: MARKET SHARE BY CARRIER, AUSTRALIA-UK/IRELAND,
LEISURE PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
QANTAS AIRWAYS	17.1%	22.0%	22.5%	21.4%	15.6%	26.1%	23.1%	19.9%
EMIRATES	20.6%	20.4%	19.3%	23.2%	11.7%	25.4%	19.4%	18.1%
SINGAPORE AIRLINES	10.8%	9.2%	10.4%	8.2%	27.9%	15.1%	16.7%	15.8%
ETIHAD AIRWAYS	12.4%	10.6%	9.2%	8.6%	7.8%	5.4%	15.1%	15.1%
QATAR AIRWAYS	5.6%	6.2%	6.7%	12.5%	17.5%	12.8%	5.1%	4.3%
CATHAY PACIFIC	5.0%	5.5%	6.5%	3.7%	2.6%	0.1%	1.2%	2.4%

BRITISH AIRWAYS	4.4%	4.7%	4.5%	2.9%	0.0%	2.2%	2.9%	3.2%
JETSTAR	3.9%	2.8%	2.7%	2.8%	0.4%	1.4%	2.4%	3.1%
VIRGIN AUSTRALIA	2.5%	2.5%	2.7%	2.1%	0.0%	0.1%	0.4%	0.7%
MALAYSIA AIRLINES	1.7%	1.8%	1.7%	1.4%	0.8%	2.1%	3.0%	4.3%
OTHER	16.0%	14.3%	13.6%	13.1%	15.6%	9.3%	10.8%	13.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

TABLE 4: MARKET SHARE BY CARRIER, AUSTRALIA-EUROPE, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan- May22	Jan – Dec22	Oct – Dec22
EMIRATES	25.7%	24.3%	22.6%	19.4%	14.1%	21.6%	22.1%	22.8%
QANTAS AIRWAYS	12.2%	12.0%	11.1%	9.4%	14.5%	15.3%	15.6%	13.0%
QATAR AIRWAYS	13.6%	19.3%	21.5%	35.1%	27.0%	21.5%	20.7%	21.7%
ETIHAD AIRWAYS	13.4%	12.6%	12.1%	12.3%	7.6%	7.1%	6.7%	6.5%
SINGAPORE AIRLINES	10.2%	8.9%	10.2%	8.2%	21.5%	15.4%	13.7%	13.0%
CATHAY PACIFIC	4.3%	4.2%	4.3%	2.1%	3.5%	1.6%	1.4%	1.9%
THAI AIRWAYS	2.8%	3.3%	2.2%	1.1%	0.6%	0.9%	1.9%	1.4%
BRITISH AIRWAYS	1.6%	1.3%	1.3%	1.3%	0.8%	1.0%	1.0%	1.5%
LUFTHANSA	1.7%	1.9%	2.3%	1.6%	2.3%	3.6%	3.0%	2.7%
KLM - ROYAL DUTCH AIRLINES	1.6%	1.0%	1.1%	1.1%	0.7%	1.4%	0.7%	0.9%
FINNAIR	1.0%	1.0%	1.1%	0.6%	0.8%	1.8%	1.8%	1.4%
MALAYSIA AIRLINES	0.5%	0.3%	0.2%	0.2%	0.1%	0.1%	0.3%	0.4%
TURKISH AIRLINES	1.4%	1.3%	1.4%	0.9%	2.5%	4.6%	4.3%	3.2%
CHINA SOUTHERN AIRLINES	1.4%	1.3%	1.1%	0.8%	0.0%	0.0%	0.0%	0.0%
SWISS INTERNATIONAL	1.1%	0.9%	1.2%	0.8%	1.5%	1.2%	1.3%	1.4%
AIR FRANCE	1.6%	1.3%	1.4%	0.6%	0.2%	0.7%	0.5%	0.5%

VIRGIN AUSTRALIA	1.0%	0.9%	0.5%	0.6%	0.0%	0.0%	0.2%	0.6%
AIR CHINA	0.9%	0.8%	0.4%	0.2%	0.0%	0.0%	0.0%	0.0%
CHINA EASTERN AIRLINES	0.7%	0.6%	1.1%	1.0%	0.0%	0.0%	0.0%	0.0%
AUSTRIAN AIRLINES	0.4%	0.2%	0.1%	0.1%	0.1%	0.4%	0.3%	0.2%
OTHER	2.8%	2.7%	3.0%	2.6%	2.3%	1.9%	4.7%	6.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

**TABLE 5: MARKET SHARE BY CARRIER, AUSTRALIA-EUROPE (excl. UK/I),
BUSINESS PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
EMIRATES	25.4%	29.3%	28.5%	27.4%	18.2%	33.5%	29.9%	27.9%
QATAR AIRWAYS	7.8%	10.7%	12.3%	18.9%	26.8%	17.6%	17.4%	18.5%
ETIHAD AIRWAYS	14.0%	12.4%	11.5%	11.0%	8.5%	7.2%	5.5%	4.4%
SINGAPORE AIRLINES	11.3%	9.8%	11.4%	9.2%	24.8%	16.7%	13.1%	10.2%
QANTAS AIRWAYS	10.9%	10.2%	10.3%	8.8%	7.2%	11.9%	10.5%	9.7%
CATHAY PACIFIC	4.3%	4.3%	4.9%	2.3%	1.4%	0.0%	0.9%	1.8%
JETSTAR	3.5%	2.8%	2.7%	3.2%	0.5%	2.3%	3.7%	4.7%
THAI AIRWAYS	4.8%	4.0%	2.5%	2.0%	0.4%	1.7%	3.1%	2.8%
VIRGIN AUSTRALIA	1.5%	1.4%	1.5%	1.8%	0.0%	0.1%	0.6%	0.9%
AIR NEW ZEALAND	1.4%	1.3%	1.2%	1.8%	2.9%	0.9%	1.0%	1.1%
OTHER	15.0%	13.7%	13.1%	13.7%	9.4%	8.1%	14.2%	18.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

**TABLE 6: MARKET SHARE BY CARRIER, AUSTRALIA-EUROPE (excl. UK/I),
LEISURE PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
EMIRATES	27.3%	28.3%	26.3%	23.7%	24.5%	31.0%	28.5%	25.8%
QATAR AIRWAYS	10.8%	14.7%	15.8%	19.2%	22.1%	18.8%	17.2%	16.4%
SINGAPORE AIRLINES	9.9%	9.8%	11.1%	9.3%	20.4%	17.4%	16.4%	14.8%
ETIHAD AIRWAYS	13.4%	11.3%	10.7%	10.5%	9.7%	8.1%	6.6%	6.3%
QANTAS AIRWAYS	10.5%	8.4%	8.4%	8.6%	11.2%	11.2%	10.6%	10.1%

CATHAY PACIFIC	5.4%	5.2%	5.4%	3.4%	1.2%	0.0%	0.8%	1.7%
JETSTAR	3.3%	3.0%	3.1%	4.1%	0.7%	2.9%	3.9%	4.7%
THAI AIRWAYS	3.5%	3.1%	2.2%	1.6%	1.0%	1.6%	2.4%	2.1%
VIRGIN AUSTRALIA	1.4%	1.5%	1.7%	2.8%	0.0%	0.1%	0.5%	0.7%
TIGER-SCOOT	0.5%	1.3%	1.3%	1.9%	2.6%	3.5%	3.6%	3.9%
OTHER	13.8%	13.5%	14.0%	14.9%	6.8%	5.4%	9.6%	13.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

TABLE 7: MARKET SHARE BY CARRIER, SYDNEY-LONDON HEATHROW, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
QANTAS AIRWAYS	25.6%	27.1%	27.5%	24.4%	24.2%	43.9%	39.1%	31.7%
BRITISH AIRWAYS	12.6%	12.1%	14.1%	12.4%	6.3%	8.4%	10.0%	13.2%
ETIHAD AIRWAYS	10.0%	12.9%	13.0%	13.3%	4.2%	5.9%	6.7%	7.1%
SINGAPORE AIRLINES	11.5%	10.3%	10.3%	9.0%	33.3%	15.5%	12.3%	10.7%
CATHAY PACIFIC	6.1%	6.0%	7.3%	7.1%	7.4%	2.5%	2.6%	4.4%
EMIRATES	7.1%	8.3%	6.7%	7.9%	3.0%	9.0%	7.2%	5.2%
QATAR AIRWAYS	5.8%	5.9%	5.5%	11.6%	6.0%	4.5%	4.5%	4.2%
MALAYSIA AIRLINES	5.0%	3.0%	2.4%	1.4%	0.8%	1.8%	3.0%	4.6%
CHINA SOUTHERN AIRLINES	3.0%	2.0%	2.0%	1.7%	0.0%	0.0%	0.0%	0.0%
OTHER	13.2%	12.4%	11.2%	11.2%	14.9%	8.4%	14.6%	19.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

TABLE 8: MARKET SHARE BY CARRIER, MELBOURNE-LONDON HEATHROW, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
QANTAS AIRWAYS	28.9%	26.5%	23.3%	21.3%	17.8%	41.9%	33.7%	23.3%
ROYAL BRUNEI AIRLINES	8.5%	12.3%	16.9%	14.0%	0.8%	0.1%	3.8%	6.6%
SINGAPORE AIRLINES	10.5%	11.0%	11.8%	9.2%	41.5%	19.3%	17.0%	13.9%
ETIHAD AIRWAYS	12.0%	9.2%	10.0%	11.8%	7.6%	9.4%	9.5%	9.5%
EMIRATES	8.5%	8.2%	7.3%	8.3%	3.8%	8.0%	9.8%	8.6%
CATHAY PACIFIC	5.3%	5.8%	6.7%	6.7%	7.1%	1.7%	2.5%	4.5%
QATAR AIRWAYS	6.9%	6.0%	5.3%	13.4%	11.0%	9.9%	7.1%	8.9%
BRITISH AIRWAYS	2.0%	2.5%	4.0%	4.5%	5.8%	3.2%	3.0%	3.6%
MALAYSIA AIRLINES	3.7%	3.2%	2.9%	2.6%	1.3%	3.0%	4.7%	7.5%
OTHER	13.7%	15.2%	11.7%	8.2%	3.3%	3.4%	8.9%	13.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS

TABLE 9: MARKET SHARE BY CARRIER, BRISBANE-LONDON HEATHROW, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
SINGAPORE AIRLINES	24.4%	22.6%	22.9%	19.3%	62.3%	33.4%	31.5%	27.6%
QANTAS AIRWAYS	14.5%	18.2%	17.3%	17.4%	12.0%	25.1%	22.4%	20.6%
ETIHAD AIRWAYS	12.2%	11.7%	14.1%	13.2%	1.1%	1.4%	2.6%	2.5%
EMIRATES	14.8%	15.6%	12.2%	14.4%	4.8%	11.7%	9.4%	8.5%
CATHAY PACIFIC	12.3%	9.7%	9.9%	6.4%	4.5%	0.9%	1.7%	3.2%
ROYAL BRUNEI AIRLINES	0.0%	0.0%	5.0%	10.0%	0.0%	0.0%	0.2%	0.2%
MALAYSIA AIRLINES	0.1%	3.2%	3.8%	1.8%	0.0%	0.2%	1.4%	2.1%

BRITISH AIRWAYS	3.9%	2.1%	2.7%	2.4%	4.7%	4.3%	5.0%	5.1%
THAI AIRWAYS	4.9%	4.6%	2.1%	1.1%	0.0%	0.0%	0.0%	0.0%
OTHER	12.8%	12.2%	10.1%	14.1%	10.6%	23.0%	25.8%	30.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

TABLE 10: MARKET SHARE BY CARRIER, PERTH-LONDON HEATHROW, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
QANTAS AIRWAYS	10.0%	34.5%	41.1%	40.9%	6.8%	43.5%	48.7%	51.4%
SINGAPORE AIRLINES	20.3%	16.5%	17.9%	15.9%	70.5%	20.8%	18.7%	16.1%
QATAR AIRWAYS	19.5%	14.4%	10.8%	17.7%	11.1%	21.6%	13.5%	8.7%
MALAYSIA AIRLINES	6.3%	3.6%	7.2%	5.4%	0.6%	3.1%	6.4%	8.8%
CATHAY PACIFIC	6.5%	5.1%	6.7%	7.1%	2.3%	0.6%	0.6%	1.1%
EMIRATES	14.7%	10.4%	5.9%	4.6%	4.6%	6.3%	5.9%	5.8%
THAI AIRWAYS	5.1%	4.1%	5.6%	3.6%	0.0%	0.0%	1.0%	0.8%
BRITISH AIRWAYS	1.8%	1.5%	2.7%	2.9%	2.8%	2.6%	2.5%	2.5%
ETIHAD AIRWAYS	11.9%	7.5%	0.1%	0.1%	0.3%	0.1%	0.1%	0.1%
OTHER	3.9%	2.4%	2.0%	1.7%	1.0%	1.4%	2.7%	4.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

TABLE 11: MARKET SHARE BY CARRIER, PERTH-ROME, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
QATAR AIRWAYS	28.2%	33.3%	39.4%	60.7%	35.1%	43.4%	19.4%	25.2%
EMIRATES	34.6%	28.7%	25.3%	17.2%	36.1%	23.8%	12.8%	19.6%
QANTAS AIRWAYS	11.3%	13.5%	15.2%	11.2%	14.1%	20.0%	58.0%	35.9%
SINGAPORE AIRLINES	7.4%	8.4%	10.1%	7.7%	9.9%	9.4%	7.9%	15.6%
THAI AIRWAYS	3.5%	4.2%	5.9%	1.7%	0.0%	0.0%	0.1%	0.0%
CATHAY PACIFIC	1.5%	1.2%	1.8%	0.2%	1.9%	1.4%	0.2%	0.2%
LUFTHANSA	0.2%	0.1%	0.5%	0.2%	0.0%	0.0%	0.2%	0.7%
ETIHAD AIRWAYS	9.0%	8.8%	0.2%	0.0%	1.3%	0.1%	0.1%	0.2%
TURKISH AIRLINES	0.2%	0.1%	0.3%	0.3%	1.0%	1.5%	0.5%	0.4%
OTHER	4.2%	1.6%	1.3%	0.7%	0.6%	0.4%	0.8%	2.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

Annexure F – Market Share Data: Tasman

TABLE 1: MARKET SHARE BY CARRIER, AUSTRALIA-NEW ZEALAND, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
AIR NEW ZEALAND	35.2%	36.2%	38.0%	41.8%	63.9%	62.4%	48.4%	42.9%
QANTAS AIRWAYS	21.7%	26.4%	27.7%	26.1%	26.9%	31.7%	34.0%	34.3%
VIRGIN AUSTRALIA	14.2%	14.9%	16.3%	16.1%	0.2%	0.2%	1.6%	3.7%
JETSTAR	10.5%	10.9%	10.9%	9.9%	8.5%	2.5%	11.7%	13.1%
EMIRATES	11.8%	5.3%	3.0%	2.8%	0.1%	0.8%	1.0%	1.1%
CHINA AIRLINES	2.1%	1.9%	1.8%	1.9%	0.0%	0.0%	0.3%	0.8%
LATAM	1.7%	1.7%	1.4%	0.7%	0.0%	1.0%	1.4%	1.4%
AIRASIA X	1.6%	1.8%	0.2%	0.0%	0.0%	0.0%	0.8%	1.8%
SINGAPORE AIRLINES	0.9%	0.8%	0.6%	0.7%	0.0%	0.0%	0.1%	0.1%
OTHER	0.3%	0.1%	0.1%	0.1%	0.2%	1.5%	0.8%	0.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

TABLE 2: MARKET SHARE BY CARRIER, AUSTRALIA-NEW ZEALAND, BUSINESS PURPOSE PASSENGERS, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
AIR NEW ZEALAND	49.0%	43.5%	42.9%	44.0%	61.0%	63.2%	49.0%	45.4%
QANTAS AIRWAYS	21.7%	31.6%	33.1%	31.6%	32.2%	28.7%	40.2%	41.8%
VIRGIN AUSTRALIA	12.9%	13.0%	13.7%	12.8%	0.0%	0.0%	0.4%	1.0%
JETSTAR	4.0%	3.8%	3.6%	4.4%	3.2%	2.0%	4.9%	5.8%
EMIRATES	7.6%	3.4%	2.2%	1.7%	0.2%	0.7%	0.5%	0.5%

SINGAPORE AIRLINES	0.9%	0.8%	0.9%	0.9%	0.6%	0.9%	0.7%	0.7%
CHINA AIRLINES	0.4%	0.6%	0.8%	0.6%	0.0%	0.0%	0.2%	0.5%
LATAM	0.6%	0.6%	0.7%	0.6%	0.0%	0.9%	0.9%	0.9%
CATHAY PACIFIC	0.2%	0.2%	0.2%	0.2%	0.1%	0.0%	0.1%	0.1%
ETIHAD AIRWAYS	0.2%	0.2%	0.2%	0.2%	0.1%	0.1%	0.2%	0.1%
OTHER	2.4%	2.3%	1.8%	2.9%	2.7%	3.3%	2.9%	3.1%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

**TABLE 3: MARKET SHARE BY CARRIER, AUSTRALIA-NEW ZEALAND,
LEISURE PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
AIR NEW ZEALAND	33.3%	35.1%	38.1%	37.6%	66.0%	71.5%	49.6%	43.7%
QANTAS AIRWAYS	18.5%	21.2%	21.6%	22.2%	24.7%	19.4%	27.3%	28.8%
VIRGIN AUSTRALIA	16.6%	17.0%	17.3%	17.6%	0.0%	0.0%	1.4%	3.2%
JETSTAR	12.8%	13.4%	13.2%	13.5%	7.9%	3.9%	15.6%	16.5%
EMIRATES	10.8%	4.1%	2.5%	2.4%	0.1%	0.6%	0.6%	0.5%
CHINA AIRLINES	1.6%	2.0%	2.0%	1.8%	0.0%	0.0%	0.4%	1.0%
SINGAPORE AIRLINES	1.0%	1.3%	1.3%	1.0%	0.3%	0.9%	0.7%	0.6%
LATAM	1.4%	1.3%	1.2%	0.9%	0.0%	1.0%	1.2%	1.6%
AIRASIA X	1.5%	2.0%	0.4%	0.2%	0.0%	0.0%	0.4%	1.1%
CATHAY PACIFIC	0.2%	0.2%	0.2%	0.2%	0.0%	0.0%	0.1%	0.1%
OTHER	2.2%	2.3%	2.3%	2.6%	0.9%	2.8%	2.6%	2.8%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

TABLE 4: MARKET SHARE BY CARRIER, SYDNEY-CHRISTCHURCH, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
EMIRATES	37.3%	31.2%	26.0%	23.6%	0.9%	3.5%	2.3%	2.3%
AIR NEW ZEALAND	22.1%	27.7%	31.0%	34.3%	63.3%	47.3%	48.9%	45.7%
QANTAS AIRWAYS	18.8%	23.1%	29.4%	31.4%	34.8%	48.3%	46.2%	49.1%
JETSTAR	8.0%	10.8%	8.9%	0.9%	0.8%	0.8%	2.2%	2.2%
VIRGIN AUSTRALIA	10.5%	6.8%	4.3%	9.4%	0.1%	0.0%	0.0%	0.0%
CHINA AIRLINES	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SINGAPORE AIRLINES	0.3%	0.3%	0.3%	0.3%	0.0%	0.0%	0.2%	0.3%
ETIHAD AIRWAYS	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
BRITISH AIRWAYS	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
OTHER	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

Annexure G – Market Share Data: Singapore

TABLE 1: MARKET SHARE BY CARRIER, AUSTRALIA-SINGAPORE, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
SINGAPORE AIRLINES	35.5%	35.4%	33.5%	30.4%	62.4%	46.8%	41.8%	39.8%
QANTAS AIRWAYS	21.8%	31.3%	34.2%	32.2%	13.0%	17.9%	21.7%	23.4%
SCOOT	13.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
TIGER-SCOOT	7.4%	16.2%	15.3%	21.6%	19.2%	25.7%	26.4%	26.8%
JETSTAR	5.9%	4.0%	3.5%	1.6%	3.5%	4.6%	5.1%	5.7%
EMIRATES	5.6%	5.8%	5.9%	5.8%	0.1%	0.2%	0.3%	0.4%
JETSTAR ASIA	4.8%	1.9%	1.6%	1.6%	0.1%	2.7%	0.8%	0.0%
BRITISH AIRWAYS	2.1%	2.1%	2.3%	3.2%	0.1%	1.9%	2.3%	1.8%
SILKAIR	0.8%	1.0%	1.2%	0.8%	0.2%	0.0%	0.0%	0.0%
VIRGIN AUSTRALIA	0.5%	0.7%	0.6%	0.5%	0.1%	0.0%	0.0%	0.0%
OTHER	1.8%	1.5%	1.9%	2.2%	1.3%	0.3%	1.5%	2.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

**TABLE 2: MARKET SHARE BY CARRIER, AUSTRALIA-SINGAPORE,
BUSINESS PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
SINGAPORE AIRLINES	51.7%	47.0%	46.0%	41.8%	70.4%	66.2%	53.8%	45.5%
QANTAS AIRWAYS	20.1%	31.1%	33.6%	28.4%	8.4%	17.5%	25.9%	31.3%
TIGER-SCOOT	4.5%	8.1%	6.9%	14.1%	11.8%	9.1%	10.5%	11.8%
EMIRATES	5.6%	4.9%	4.9%	6.1%	0.5%	0.5%	0.3%	0.2%
BRITISH AIRWAYS	1.6%	2.0%	2.0%	2.7%	0.0%	2.0%	3.2%	2.9%
JETSTAR	2.1%	1.1%	0.8%	0.9%	0.6%	2.0%	2.5%	3.0%
AIR NEW ZEALAND	0.8%	0.7%	0.6%	1.0%	1.3%	0.4%	0.5%	0.8%
MALAYSIA AIRLINES	0.7%	0.5%	0.6%	0.7%	0.1%	0.2%	0.4%	0.5%
SILKAIR	0.6%	0.6%	0.5%	0.2%	0.0%	0.0%	0.0%	0.0%
CATHAY PACIFIC	0.6%	0.4%	0.5%	0.5%	0.4%	0.1%	0.1%	0.2%
OTHER	11.7%	3.7%	3.6%	3.7%	6.7%	2.1%	2.7%	3.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

**TABLE 3: MARKET SHARE BY CARRIER, AUSTRALIA-SINGAPORE,
LEISURE PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
SINGAPORE AIRLINES	35.4%	35.2%	36.3%	31.2%	66.8%	54.4%	45.5%	40.9%
QANTAS AIRWAYS	19.3%	22.3%	23.5%	23.9%	10.3%	14.7%	15.3%	16.9%
TIGER-SCOOT	9.2%	21.6%	20.5%	24.6%	15.8%	20.3%	27.0%	28.8%
EMIRATES	7.2%	7.8%	7.8%	8.5%	0.7%	0.6%	0.5%	0.4%
JETSTAR	4.1%	3.1%	2.4%	1.7%	1.1%	5.8%	6.1%	6.6%
BRITISH AIRWAYS	1.5%	1.7%	1.6%	2.6%	0.0%	1.2%	1.7%	1.2%

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
JETSTAR ASIA	5.0%	1.6%	1.2%	1.0%	0.1%	0.8%	0.3%	0.0%
AIRASIA X	1.3%	1.1%	1.0%	0.6%	0.0%	0.0%	0.1%	0.2%
SILKAIR	0.8%	0.9%	0.9%	0.6%	0.0%	0.0%	0.0%	0.0%
MALAYSIA AIRLINES	0.7%	0.8%	0.9%	0.6%	0.1%	0.1%	0.5%	1.0%
OTHER	15.5%	3.9%	4.0%	4.7%	5.1%	2.0%	3.0%	4.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

TABLE 4: MARKET SHARE BY CARRIER, MELBOURNE-SINGAPORE, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
SINGAPORE AIRLINES	30.8%	27.6%	23.8%	21.3%	52.3%	42.8%	40.5%	38.6%
QANTAS AIRWAYS	21.9%	36.5%	40.0%	39.3%	11.6%	18.6%	17.0%	16.3%
EMIRATES	13.2%	12.7%	11.1%	10.3%	0.1%	0.1%	0.2%	0.2%
JETSTAR	14.6%	7.9%	5.4%	1.3%	7.5%	12.3%	12.2%	13.3%
TIGER-SCOOT	5.6%	13.5%	18.0%	26.2%	27.1%	25.5%	28.5%	29.5%
SCOOT	12.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
MALAYSIA AIRLINES	0.4%	0.3%	0.3%	0.4%	0.2%	0.1%	0.3%	0.5%
VIRGIN AUSTRALIA	0.3%	0.5%	0.6%	0.4%	0.0%	0.0%	0.0%	0.0%
BRITISH AIRWAYS	0.2%	0.1%	0.2%	0.1%	0.0%	0.3%	0.3%	0.2%
ROYAL BRUNEI AIRLINES	0.3%	0.2%	0.1%	0.1%	0.2%	0.0%	0.1%	0.2%
OTHER	0.6%	0.8%	0.6%	0.6%	0.9%	0.4%	1.0%	1.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

Annexure H – Market Share Data: Thailand

TABLE 1: MARKET SHARE BY CARRIER, AUSTRALIA-THAILAND, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
THAI AIRWAYS	33.7%	30.3%	27.8%	30.1%	34.9%	22.3%	24.6%	23.6%
JETSTAR	22.0%	19.0%	19.1%	18.4%	1.7%	23.8%	21.5%	18.6%
QANTAS AIRWAYS	11.8%	14.0%	14.2%	15.3%	5.3%	16.6%	16.1%	16.4%
SINGAPORE AIRLINES	9.9%	10.0%	11.2%	9.4%	48.2%	29.7%	21.4%	16.1%
MALAYSIA AIRLINES	5.1%	5.9%	7.1%	5.1%	1.6%	0.4%	3.8%	6.4%
AIRASIA X	5.1%	5.6%	5.2%	4.3%	0.0%	0.0%	0.6%	1.5%
EMIRATES	5.6%	6.1%	3.4%	1.2%	0.0%	0.5%	0.2%	0.1%
VIRGIN AUSTRALIA	0.3%	0.5%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%
TIGER-SCOOT	1.4%	3.4%	3.4%	4.7%	1.5%	5.4%	5.5%	5.7%
JETSTAR ASIA	1.4%	0.7%	0.6%	0.3%	0.0%	0.3%	0.2%	0.1%
OTHER	3.7%	4.5%	7.6%	10.8%	6.9%	1.0%	6.1%	11.5%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)

TABLE 2: MARKET SHARE BY CARRIER, AUSTRALIA-THAILAND, BUSINESS PURPOSE PASSENGERS, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
THAI AIRWAYS	43.9%	41.6%	39.7%	36.1%	40.2%	34.0%	35.0%	33.8%
QANTAS AIRWAYS	13.7%	16.2%	19.6%	18.5%	3.5%	15.3%	16.2%	17.5%
SINGAPORE AIRLINES	8.7%	8.3%	10.7%	10.5%	42.6%	29.7%	20.1%	14.1%
JETSTAR	10.0%	7.9%	8.0%	11.0%	1.1%	13.0%	12.8%	11.6%
EMIRATES	8.8%	12.0%	6.4%	0.7%	0.8%	0.3%	0.4%	0.4%

AIRASIA X	4.5%	3.1%	2.7%	3.0%	0.1%	0.0%	0.4%	0.8%
MALAYSIA AIRLINES	2.2%	2.2%	2.3%	2.3%	0.2%	0.4%	2.3%	4.1%
CATHAY PACIFIC	0.6%	0.5%	1.6%	0.8%	0.9%	0.0%	0.7%	1.4%
VIETNAM AIRLINES	0.7%	0.4%	0.6%	0.7%	0.2%	0.0%	0.3%	0.3%
TIGER-SCOOT	0.6%	1.0%	1.4%	4.7%	4.8%	4.7%	5.2%	6.5%
OTHER	6.2%	6.6%	6.9%	11.8%	5.8%	2.6%	6.7%	9.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

**TABLE 3: MARKET SHARE BY CARRIER, AUSTRALIA-THAILAND,
LEISURE PURPOSE PASSENGERS, CY17-May 2022**

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
JETSTAR	23.8%	21.9%	22.2%	22.3%	0.6%	32.0%	28.8%	25.0%
THAI AIRWAYS	27.2%	25.0%	22.0%	21.5%	39.7%	23.6%	20.9%	19.4%
SINGAPORE AIRLINES	11.1%	11.9%	14.3%	12.5%	46.2%	25.5%	20.5%	16.9%
QANTAS AIRWAYS	9.5%	10.4%	11.4%	14.5%	2.3%	11.5%	12.1%	13.0%
AIRASIA X	8.5%	7.9%	7.6%	6.0%	0.0%	0.0%	0.6%	1.4%
MALAYSIA AIRLINES	4.3%	4.8%	6.0%	4.8%	0.1%	0.3%	3.2%	6.0%
EMIRATES	5.7%	7.3%	4.5%	1.3%	0.6%	0.6%	0.5%	0.4%
TIGER-SCOOT	0.9%	3.5%	3.0%	4.9%	5.1%	3.7%	7.6%	9.3%
JETSTAR ASIA	3.0%	1.1%	0.7%	1.0%	0.1%	0.4%	0.2%	0.0%
VIRGIN AUSTRALIA	0.4%	0.5%	0.5%	0.7%	0.0%	0.1%	0.2%	0.3%
OTHER	5.6%	5.5%	7.6%	10.5%	5.2%	2.3%	5.3%	8.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: ABS (Residents Inbound; Visitors Inbound)

TABLE 4: MARKET SHARE BY CARRIER, SYDNEY-BANGKOK, CY17-May 2022

Carrier	CY17	CY18	CY19	CY20	CY21	Jan-May22	Jan – Dec22	Oct – Dec22
THAI AIRWAYS	39.6%	36.6%	39.1%	41.1%	65.0%	51.1%	46.7%	41.7%
QANTAS AIRWAYS	32.4%	34.0%	37.0%	36.8%	1.5%	32.8%	31.6%	29.6%
EMIRATES	20.3%	21.0%	12.4%	3.5%	0.0%	1.5%	0.8%	0.5%
SINGAPORE AIRLINES	1.3%	1.4%	2.2%	4.6%	29.0%	9.6%	5.5%	2.7%
Malaysia Airlines	1.5%	1.4%	1.6%	2.5%	0.7%	0.1%	1.5%	1.9%
JETSTAR	1.2%	1.0%	1.1%	0.9%	0.0%	1.0%	1.7%	1.6%
CEBU PACIFIC	0.9%	0.8%	1.1%	1.0%	0.0%	0.0%	0.3%	0.3%
CATHAY PACIFIC	0.6%	0.6%	1.0%	1.9%	2.5%	1.1%	1.2%	1.7%
TIGER-SCOOT	0.6%	0.9%	0.9%	3.6%	0.3%	2.3%	1.5%	1.5%
PHILIPPINE AIRLINES	0.2%	0.8%	1.8%	1.5%	0.0%	0.0%	1.5%	1.9%
OTHER	1.4%	1.4%	1.9%	2.6%	1.0%	0.4%	7.7%	16.7%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total no. of passengers per CY	[REDACTED QF CONFIDENTIAL]							

Source: DDS (Trip Dominant Marketing Carrier)