



The Evolution of Qatar Airways in Australia's International Air Travel Market

Glenn Baxter*

School of Tourism and Hospitality Management, Suan Dusit University, Prachaup Khiri Khan, 77110 Thailand

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Abstract

The objective of this study was to examine the evolution of Qatar Airways in Australia's international air travel market. The study covers the period 2009 to 2021. Qatar Airways' Australian route network has evolved since the airline first commenced services to Melbourne in 2009. The airline expanded its Australian route network in 2012, when it introduced services to Perth, Western Australia. Adelaide and Sydney were added to the airline's Australian route network in 2016. In 2018, Canberra joined the airline's Australian route network. The airline introduced services to Brisbane in 2020, thus giving it five Australian gateway airports. In May 2022, Qatar Airways and Virgin Australia signed a partnership agreement which includes a codeshare agreement and loyalty partnership benefits. The new codeshare agreement will enable Qatar Airways' passengers to travel to 35 destinations throughout Virgin Australia's domestic network. In addition, Qatar Airways passengers will also have access to Virgin Australia's recently relaunched short-haul international markets including Fiji and Queenstown, New Zealand. Qatar Airways inbound and outbound passenger traffic exhibited an upward growth trend from 2009 to 2019. Qatar Airways annual enplaned inbound passengers increased from a low of 2,468 passengers in 2009 to a high of 611,716 passengers in 2019. The airline's enplaned outbound passengers increased from a low of 2,407 passengers in 2009 to a high of 663,444 passengers in 2019. Importantly, Qatar Airways continued to serve Australia's international air travel market in both 2020 and 2021. However, the COVID 19 pandemic and the related government response measures had an impact on the airline's passenger traffic in both 2020 and 2021. The case study also revealed that throughout the study period Qatar Airways deployed larger aircraft types, for example, the Airbus A350-1000 and the Airbus A380, to accommodate the higher levels of passenger demand in the Australian markets that it served.

Introduction

The global aviation sector is comprised of an ecosystem of air transport-related service providers, such as airlines, aircraft maintenance services, ground

services providers, and airports (Tsiotas, Erdem & Mert Cubukcu, 2020). The commercial air transport industry has helped to shape the world over the past century by growing economic prosperity, stimulating trade, and

* Corresponding Author
email: g_glennbax@dusit.ac.th

cultivating tourism development (O'Connell, 2018). Airlines and tourism have now developed an important symbiotic relationship (Bowen, 2010; Debbage & Debbage, 2022; Dileep & Kurien, 2021; Duval, 2013; Iatrou & Tsitsiragou, 2016). Nowadays, air transport has become an important part of a broader travel and tourism sector (Yavuz, Olgaç, Günay Aktaş & Mert Kantar, 2020). Accordingly, air transport plays a very important role for the tourism industry (Bows, Anderson & Peeters, 2009). This is because the transportation of tourists to their destinations may only be possible by air (Sarilgan, 2016). One of the most significant developments in the global airline industry in recent times, has been the rapid increase in the rise of Qatar Airways, as well as Emirate Airline and Etihad Airways (Coates Ulrichsen, 2017; Fan, 2019). Indeed, Middle Eastern airlines are changing the dynamics of international aviation, and consequently, Emirates Airline, Qatar Airways and Etihad Airways, have quickly emerged as the new global challengers (O'Connell, 2011). These airlines have reshaped global aviation markets through the development of their hub airports, which enable them to connect any two points in the world with a transit stop at their hub (Coates Ulrichsen, 2017). These airlines have experienced very strong growth in their passenger traffic (Wald, 2016). Over the past decade or so, Qatar Airways has become one of the world's leading airlines. The airline has developed a hub-and-spoke route network system that links its hub in Doha to international destinations located in Africa, Central Asia, Europe, Far East, Middle East, Oceania, South America, South Asia, and North America (Soni, 2016).

Australia is especially reliant upon the air transportation services due to its relatively remote geographical location (Baxter & Srisaeng, 2018; Srisaeng & Baxter, 2017). As a result, international airline services facilitate passenger mobility, cultural ties, tourism, and agricultural and merchandise trade. Australia's tourism industry is very reliant upon the provision of international services that link Australia to key markets throughout the world. This is especially the case for Australia given that international air travel is the dominant transportation mode.

Objective

The objective of this study is to examine the development of Qatar Airways in Australia's international air travel market, in terms of the enplaned inbound and outbound passengers, and the airline's passenger market

share. A secondary objective is to examine the development of Qatar Airways Australian route network development since the airline first commenced services to Melbourne, Australia in 2009. The study period is from 2009 to 2021.

The remainder of the paper is organized as follows: Section 2 presents the literature review. Section 3 outlines the research method that underpinned the in-depth case study. The Qatar Airways case study results are presented in Section 4. Section 5 provides the concluding remarks on the research findings.

Background

Airline competition and market share

In the global airline industry, airlines compete for both passengers and for market-share. These commercial and strategic objectives are attained from the frequency of flights offered and the departure schedule on each route served; the price (air fare) charged, relative to competitors, to the degree to which the regulatory framework permits price competition; as well as the quality of service and products offered by the airline, including airport and in-flight amenities, and/or restrictions on discount fare products (Belobaba, 2016, p. 67).

The key characteristics of the full-service network and long-haul low-cost carrier business models

In the global air transport industry, airline passenger services are provided by low-cost carriers (LCCs), full-service network carriers (FSNCs), regional airlines, and charter/holiday airlines (Inkson & Minnaert, 2022; Whyte & Lohmann, 2017).

Since the full-service network carriers (FSNC) route network is often designed to link regional, continental, and intercontinental air routes, the typical full-service network carrier's (FSNC) fleet is usually quite heterogeneous in nature. Thus, the full-service network carrier's (FSNC) aircraft fleet range in size from small regional jets to long range wide-body aircraft. Importantly, the full-service network carriers (FSNCs) endeavor to have the right aircraft in place for each route alone. This results in a broad range of available seating capacities, but also suggests a multiple aircraft manufacturer strategy (Clark, 2007; Koch, 2010). Improved aircraft technologies have allowed aircraft to fly faster and farther. This advance in aircraft technology has provided airlines with greater flexibility to operate ultra-long-haul flights (Law & Lin, 2022). This is especially important for the case study that follows,

given Australia's quite remote geographical location.

The full-service network carriers (FSNC) business model is typically based upon the operations of a hub-and-spoke route network (Vespermann & Holztrattner, 2010). As a result, a key characteristic of the full-service network carriers (FSNCs) route network design is the operation of large hub airports within their hub-and-spoke route network system (Baxter, Srisaeng & Wild, 2018; Castillo-Manzano, López-Valpuesta & Pedregal, 2012; Feitelson, 2019). In the full-service network carriers (FSNC) hub-and-spoke route system, airlines develop their networks by combining features from non-stop and multi-stop routing patterns. The hub operational system is based on flights arriving from multiple points (spokes) at a hub airport where passengers, baggage and air cargo connect to flights departing to multiple points. Following a short turnaround period, an equally large number of turn-around departures travels out along spoke routes from the hub. The hub airport thereby acts as a gathering and consolidation point for flights operating to multiple destinations (Dempsey & Gesell, 1997; Reynolds-Feighan, 1994). The full-service network carriers (FSNC) often operate long-haul and short haul services and connect smaller feeder air travel markets to larger trunk air routes (Franke, 2018). The hub-and-spoke system, by offering a wide variety of origins- and-destinations (O & Ds) markets, thus, enables airlines to exploit other economies of market presence. Combining substantial volumes of domestic traffic with international traffic through hubs further enhances this favorable advantage (Button, Haynes & Stough, 1998). In addition, many airlines around the world structure their route networks into short haul, medium-haul, and long-haul services (Baxter & Bardell, 2017). The hub-and-spoke strategy of the full-service network carriers (FSNCs) has typically resulted with a focus on primary airports, being those airports, which belong to a highly populated urban area/region or business centres, and usually serving more than several million passengers per annum. While these airports guarantee sufficient passenger traffic to fill the number of flights necessary to efficiently operate the hub, and hence, provide the infrastructure required to cope with the peaks resulting from hub operations, this strategic focus often results in disadvantages for airlines when it comes to punctuality. Primary airports, being a preferred destination for all types of airlines, tend to suffer from congestion and generate flight delays and operational bottlenecks (Koch, 2010). In addition, many airlines around

the world structure their route networks into short haul, medium-haul, and long-haul intercontinental services (Baxter & Bardell, 2017).

The full-service network airline's product/service strategy is predicated on discrete travel class differentiation, by offering a full range of services to all passengers (Koch, 2010). Thus, the demand for airline services can be distinguished by two principal market segments: business travelers – those travelling for business related purposes (these passengers typically desire frequent flights to a wide range of destinations, require quality service, and are willing to pay a price premium for these services) and leisure travelers. Leisure traveler usually require the lowest prices and are less concerned with the quality of services provided or the number of destinations served by the airline (Doganis, 2019). Because of the superior product provided by the full-service network carriers (FSNCs), these airlines predominantly target the corporate and government sectors, as well as individuals who are frequent flyers and who are willing to pay a premium fare for their air travel (Lohmann & Spasojevic, 2018).

Research Methodology

Research approach

The research undertaken in this study used an in-depth longitudinal case study research design (Derrington, 2019; Hassett & Paavilainen-Mäntymäki, 2013; Neale, 2019). The primary advantage of an in-depth longitudinal case study research design is that it shows change and growth in an outcome over time (Kalaian & Kasim, 2008). An in-depth qualitative case study also allows for the exploration of complex phenomena (Remenyi, Williams, Money, & Swartz, 2010; Yin, 2018). In addition, an in-depth case study enables a researcher(s) to gather and use rich, explanatory information in their study (Ang, 2014; Mentzer & Flint, 1997). In-depth case studies also enable researchers to connect with real world practice (McCutchen & Meredith, 1993).

Data collection

The enplaned passenger data was sourced from the Bureau of Infrastructure, Transport and Regional Economics (BITRE). The study was therefore based on the secondary data. The three principles of data collection as recommended by Yin (2018) were followed: the use of multiple sources of case evidence, creation of a database on the subject and the establishment of a chain of evidence.

Data analysis

The data collected for the study's case study was examined using document analysis. Document analysis is quite commonly used in case studies. Document analysis focuses on the information and data from formal documents and a firm's records that are collected by a researcher(s) when conducting their study (Andrew et al., 2011; Yin, 2018). Following the guidance of Scott (2014) and Scott and Marshall (2009), the documents gathered in the present study were examined according to four criteria: authenticity, credibility, representativeness and meaning.

In the present study, significant information was extracted from the secondary data collected using thematic analysis (Braun & Clarke, 2022; Guest, MacQueen & Namey, 2012). The thematic analysis was performed five discrete stages. First, the collected data was arranged according to its relevance to the study. In the second stage, the organized data was coded and recoded and was subsequently classified into meaningful groups. In the third stage, the most relevant themes were searched and extracted from the classified data. In the fourth stage, the themes that had been produced were checked to ensure that they appropriately represented the meanings found in the data set as a whole. In the fifth and final stage, the themes were defined, named, and presented in the case study (Ojogiwa, 2021).

Following the guidance of Yin (2018), the study's documents were downloaded and stored in a case study database. All the documents gathered for the study were all written in English. Each document was carefully read, and key themes were coded and recorded in the case study research framework (Baxter, 2021; Baxter & Srisaeng, 2022).

Results

An Overview of Qatar Airways

Qatar Airways was established in 1993 (Hamad MA Fetais, Al-Kwif, Ahmed. & Khoa Tran, 2021; Sulistya & Ginaya, 2020), and is the national airline of the State of Qatar (Hasoh, Seanyen, Choyprasis, Premmnisakul & Srayudh, 2021; Petcu, 2021). The airline originally served key destinations in the Middle East (Kuljanin & Kalić, 2016). However, Qatar Airways now operates across the world from its hub at Doha Airport (Miller, 2016). As previously noted, Qatar Airways has developed a hub-and-spoke route network system that links its hub in Doha to international destinations located in Africa, Central Asia, Europe, Far

East, Middle East, Oceania, South America, South Asia, and North America (Soni, 2016). Qatar Airways ability to expand the scope of its services has been assisted by Qatar's "Open Skies" air services policy as well as the code-sharing agreements with many other oneworld alliance members, such as, British Airways (Alkaabi, 2016). Code-share agreements in the airline industry enable partner airlines to coordinate their operations to serve destinations that they do not physically serve (Brueckner, 2001; Vowles, 2000). In addition, code-sharing arrangements enable airlines to market and create a more extensive route network (Whyte & Lohmann, 2017). Qatar Airways has also made strategic investments in other airlines, and these include its investment in the International Airline Group (IAG), LATAM, Cathay Pacific Airways, and China Southern Airlines (Morrell, 2021).

In October 2013, Qatar Airways became a member of the oneworld global airline alliance. Following Qatar Airways' membership of the oneworld alliance, Doha Airport grew into the first Middle East-based global alliance hub (Kuljanin & Kalić, 2016). In 2014, a new airport opened in Doha, which was capable of handling International Civil Aviation Organization (ICAO) Code F designated aircraft, for example, the Airbus A380 aircraft (Kuljanin & Kalić, 2016). Qatar Airways was an early customer for the Airbus A380 aircraft (Andersson, 2005). Qatar Airways was the launch customer for both Airbus A350-900 and the Airbus A350-1000 aircraft (Vasigh & Azadian, 2022).

Importantly, Qatar Airways did not stop providing services during the recent COVID-19 pandemic, and the airline carried stranded people to their homes on scheduled and charter flights. During the peak period of the COVID-19 pandemic, May 2020, Qatar Airways was flying to 33 destinations and as of December 2020, the airline was able to reinstate the flights to over 110 destinations around the world (Tunali, 2022).

At the time of the present study, Qatar Airways aircraft fleet was comprised of 29 Airbus A320-200, 1 Airbus A321-200, 6 Airbus A330-200, 8 Airbus A330-300, 34 Airbus A350-900XWB, 19 Airbus A350-1000, 10 Airbus A380, 30 Boeing 787-8, 7 Boeing 787-9, 9 Boeing 777-200LR, and 53 Boeing 777-300 ER aircraft (Qatar Airways, 2022). Qatar Airways has adopted the full-service network airline business model. According to Ehmer et al. (2008, p. 5), a "full-service network carrier is an airline that focuses on providing a wide range of pre-flight and onboard services, including dif-

ferent service classes, and connecting flights”.

The Development in Qatar Airways Australian Route Network

On December 6, 2009, Qatar Airways commenced services to Melbourne, Australia. The service operated three days per week and was operated by a Boeing B777-200LR aircraft (Elliot, 2009; Qatar Airways, 2009). On July 3, 2012, Qatar Airways began serving Perth, with the Boeing 777 deployed on this route. The airline operated three non-stop flights between Doha and Perth each week and upgraded this to a daily service from the 1st of December 2012 (Tourism Council Western Australia, 2012). In April 2014, Qatar Airways switched to the larger Boeing 777-300ER on its Melbourne route to meet the rising passenger demand. The Airbus A380 aircraft was introduced on the airline’s Melbourne services from June 30, 2017 (Maslen, 2016).

Qatar Airways confirmed that it would begin flights to Sydney effective from March 1, 2016, using a Boeing B777-300ER aircraft. The launch of its new Sydney-Doha route was made possible after the Australian and Qatari governments approved an increase in available air services capacity between the two countries (Australian Aviation, 2015; Centre for Aviation, 2015). In March 2016, Qatar Airways launched Boeing B777-300ER services from Doha to Sydney (Gulf News, 2016). Qatar Airways began its services to Adelaide in May 2016 — and was the first airline to operate Airbus A350 aircraft into Australia (Juniper, 2022). In September 2016, Qatar Airways boosted the capacity and product offering on its Sydney-Doha flights after upgauging its daily service from the Boeing B777-300ER to the Airbus A380 aircraft (Australian Aviation, 2016).

In February 2018, Qatar Airways commenced a daily Doha-Sydney-Canberra-Sydney-Doha rotation using a Boeing 777-300ER aircraft on the route (Australian Aviation, 2018a; Frawley, 2018). On 1 May 2018, Qatar Airways upgraded the aircraft used on its services to Perth to the Airbus A380 aircraft (Australian Aviation, 2017). The Airbus A380 increased available seating capacity by 44 per cent, as the Airbus A380 is considerably larger than the Boeing 777-300ER aircraft, that was previously operated on this air route (Australian Aviation, 2018b). In November 2019, Qatar Airways replaced its Boeing 777-300ER aircraft with an Airbus A350-1000 on its daily Doha/Sydney/Canberra/Sydney/Doha air route (Australian Aviation, 2019a). Effective March 29, 2020, Qatar Airways increased its capacity in the Adelaide air travel market following the

introduction of the larger capacity Airbus A350-1000 aircraft on the route (Australian Aviation, 2019b). In March 2020, Qatar Airways began operating a thrice-weekly Boeing 777-300ER service between Doha and Brisbane (Curran, 2022). On May 14, 2020, Qatar Airways began thrice weekly Airbus A350-1000 services from Brisbane to Doha (Milne, 2020). Qatar Airways was able to introduce its new services to Brisbane after the Australian government relaxed a long-standing treaty that had previously limited the number of services the airline could provide (Thorn, 2020).

British Airways and Qatar Airways ratified a United Kingdom to Australia partnership agreement that came into effect on May 29, 2020. The initial agreement was five years in duration (Piccioni, Stolfa & Musso, 2022). In May 2022, Qatar Airways and Virgin Australia signed a partnership agreement which includes a codeshare agreement and loyalty partnership benefits. A new codeshare agreement will enable Qatar Airways’ passengers able to travel to 35 destinations on Virgin Australia’s domestic network on a single booking. These Australian destinations include Cairns, Gold Coast, Alice Springs, and Broome. Under the agreement, Qatar Airways passengers will also have access to Virgin Australia’s recently relaunched short-haul international markets including Fiji and Queenstown, New Zealand. Virgin Australia’s customers and members of the airline’s Velocity Frequent Flyer loyalty program will be able to access Qatar Airways’ global route network, via the airline’s hub in Doha (Brandler, 2022).

The Development of Qatar Airways Passenger Traffic and market share in Australia’s International Air Travel Market

Qatar Airways annual enplaned inbound passengers from Qatar to Australia (all services) and the year-on-year change (%) for the period 2009 to 2021 is presented in Figure 1. One passenger enplanement measures the embarkation of a revenue passenger, whether originating, stop-over, connecting or returning (Holloway, 2016). As can be observed in Figure 1, Qatar Airway’s annual inbound passengers (all services) exhibited an upward trend from 2009 to 2019. The overall upward trend for the period 2009 to 2019 is demonstrated by the year-on-year percentage change line graph, which is more positive than negative, that is, all bar two values are above the line. Figure 1 shows that there was a very pronounced spike in this metric, at which time it increased by 2,507.37% on the 2009 levels. The

reason for this very large increase is that 2010 was the first full year of the airline's operations in Australia. There was a further six significant increases in Qatar Airways inbound passenger traffic during the study period. These increases were recorded in 2012 (+37.39%), 2013 (+52.97%), 2014 (+18.58%), 2016 (+78.10%), 2017 (+25.05%), and 2018 (+27.83%), respectively (Figure 1). The significant increase in 2012 could be attributed to the commencement of services to Perth, Western Australia. The increase in 2013 reflected the first full year of services to Perth plus a high level of demand for Qatar Airways services in the Melbourne air travel market. The very significant increase in the airline's inbound passenger traffic in 2016 could be attributed to the commencement of services to Adelaide and Sydney, together with the introduction of the Airbus A380 on its Sydney services in September 2016. In 2017, Qatar Airways was able to increase its inbound passenger traffic because of a quite high level of demand for its services from Doha to Australia. In 2018, Qatar Airways added a second service to Sydney, which included a service to Canberra. In addition, the Airbus A380 was deployed on its route to Perth. Also, in 2018, Qatar Airways increased its available capacity to Adelaide through the deployment of the larger Airbus A350-1000.

During the study period, there were just two years where the airline's annual inbound passenger traffic decreased on a year-on-year basis. These decreases occurred in 2020 (-68.31%), and in 2021 (-68.40%), respectively (Figure 1). The large decrease in 2020 could be attributed to the government and airline-related measures associated with the COVID-19 pandemic. In 2020, the world airline industry experienced a very sharp and sustained decline in air passenger demand, which had a very adverse impact on the world's airlines passenger traffic (Garrow, Lurkin & Marla, 2022; Xuan, Khan, Su & Khurshid, 2021). The COVID-19 pandemic resulted in an unprecedented crisis for the global air transportation industry, affecting millions of passengers and the key industry stakeholders (Arora, Tuchen, Nazemi & Blessing, 2021). A similar situation occurred in 2021, with the annual decrease in Qatar Airways inbound passenger traffic being affected by the COVID-19 pandemic and the related government pandemic response measures. Australia's response to the COVID-19 pandemic involved the closure of international borders by the Australian Government (D'Souza & Dunshea, 2021). In Australia, travel bans, border closures, and the stay-at-home orders severely

disrupted various industries including the country's aviation industry (Gao & Ren, 2020). As a result of the COVID-19 crisis, governments all around the world closed their international borders and this led to almost all airlines having to drastically reduce their available seat capacity (Deveci, Çiftçi, Zeki Akyurt & Santibanez Gonzalez, 2022). Australia shut its border and prevented any Australian citizens or residents from leaving the country, before later introducing arrival caps for those wishing to return. Australia only later opened in stages, first permitting residents and citizens to fly in November 2021, before opening to students, backpackers, and skilled migrants shortly thereafter (Thorn, 2022). Importantly, during the COVID-19 pandemic, Qatar Airways continued to serve the Australian air travel market. The airline operated three flights per week to Brisbane (Airbus A350-1000), four flights per week to Perth (Airbus A350-1000), daily flights to Melbourne (Airbus A350-1000); and daily flights to Sydney (Airbus A350-1000) (Milne, 2020). It is important to note that air travel demand is cyclical in nature (Dileep & Kurien, 2022; Häty & Hollmeier, 2003), as the consumer demand for an airline's flight exhibits cyclical patterns (Adrienne, Budd & Ison, 2020). This cyclicity is demonstrated by the downturn in passenger demand in both 2020 and 2021.

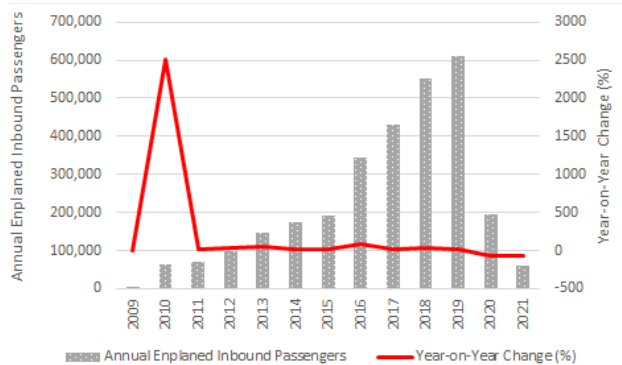


Figure 1. Qatar Airways annual enplaned inbound passengers from Qatar to Australia and the year-on-year change (%): 2009 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

Qatar Airways annual enplaned outbound passengers from Australia to Qatar (all services) and the year-on-year change (%) for the period 2009 to 2021 is presented in Figure 2. Figure 2 shows that Qatar Airways annual outbound passenger traffic also displayed an upward trend from 2009 to 2009, when the airline's

annual outbound passenger traffic increased from a low of 2,407 passengers in 2009 to a high of 663,444 passengers in 2019. This upward trend between 2009 and 2019 is also demonstrated by the by the year-on-year percentage change line graph, which is more positive than negative, that is, all bar two values are above the line. Figure 2 shows that there was a very pronounced spike in this metric in 2010, when it increased by 2359.2% on the 2009 levels. As noted earlier, 2010 marked the first full year of Qatar Airways in the Australian air travel market. Qatar Airways annual outbound passenger traffic grew by 20.32%, reflecting a high level of demand for its services. The introduction of services to Perth in 2012 enabled the airline to increase its outbound passenger traffic by 28.72% in 2012 (Figure 2). The third most significant spike in this metric occurred in 2013, when the airline's annual outbound passenger traffic increased by 62.39% on the 2012 levels. As previously noted, 2013 marked the first full year of Qatar Airways in the Perth air travel market and there was growth in the airline's Melbourne origin passenger traffic. In 2014, the airline attracted a high level of patronage of its service and was therefore able to increase its outbound passenger traffic by 28.62% in 2014 (Figure 2). Figure 2 shows that there was a further significant increase in this metric in 2016, at which time it increased by 76.63% on the 2015 levels. The introduction of services to Adelaide and Sydney in 2016 as well as the introduction of Airbus A380 services contributed to the airline's outbound passenger traffic growth in 2016. This large increase was followed by two quite significant increases in the airline's outbound passenger traffic in both 2017 (+21.67%) and 2018 (+30.77%) (Figure 2). In 2017, the airline experienced a growing level of demand for its services, which had a positive impact on its annual outbound passenger traffic in 2017. As previously noted, in 2018, Qatar Airways added a second service to Sydney, which included a service to Canberra. In addition, the Airbus A380 was deployed on its route to Perth. Also, in 2018, Qatar Airways increased its available seating capacity to Adelaide through the deployment of the larger Airbus A350-1000. As a result, Qatar Airways was able to increase its outbound passenger traffic by 30.77% in 2018.

Figure 2 shows that there were two years in the study period, where Qatar Airways annual outbound passenger traffic decreased on a year-on-year basis. These decreases occurred in 2020 (-59.82%), and 2021 (-68.52%), respectively (Figure 2). These decreases could

be attributed to the adverse impact of the CORONA-19 virus pandemic and the related government pandemic response measures, which contributed to the decrease in passenger demand in both 2020 and 2021, respectively.

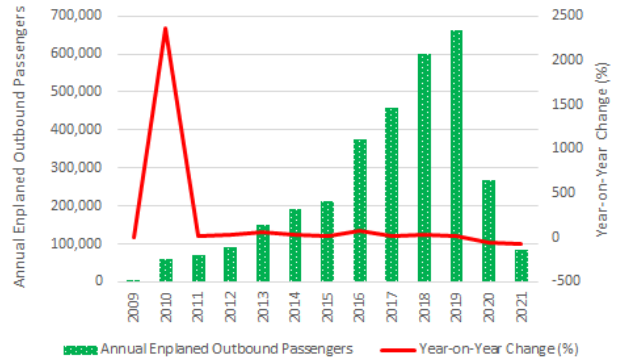


Figure 2. Qatar Airways annual enplaned outbound passengers from Australia to Qatar and the year-on-year change (%): 2009 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

Qatar Airways annual inbound passenger market share and the year-on-year change (%) from 2009 to 2021 is depicted in Figure 3. Figure 3 shows that during the time that the airline has served the Australian market, it has been able to increase its inbound passenger market share from a low of 0.02% in 2009 to a high of 8.71% in 2021. This upward trend can be demonstrated by the by the year-on-year percentage change line graph, where all the values are positive, and thus, are all above the line (Figure 3). Figure 3 shows that there was a very significant spike in this metric in 2010, when it increased by 2,300% on the 2009 level. This large increase reflected the first full year of the airline's services to Melbourne, and the growth in demand for its services to Melbourne in 2010. In 2012, the airline's inbound passenger market share increased by 30.0%, and this market share growth could be attributed to the introduction of services to Perth in 2012 as well as increased demand for its Melbourne services. The airline experienced very strong growth in its inbound passenger market share in 2013, when it increased by 44.61% on the 2012 levels (Figure 3). This large increase reflected the first full year of the airline's services to Perth, and the growth in demand for its services to Melbourne in 2013. Following the addition of Adelaide and Sydney to its Australian route network in 2016, the airline was able to increase its annual inbound passenger market share by 65.45% in 2016 (Figure 3). In 2018, Qatar Airways inbound passenger market share

increased by 21.75% on the 2017 levels. The addition of services to Canberra and a second daily flight frequency made a valuable contribution to the airline's inbound passenger market share in 2018 (Figure 3). During the latter years of the study period, that is 2020 and 2021, Qatar Airways inbound passenger market share displayed strong growth, increasing by 40.06% in 2020, and by 116.66% in 2021 (Figure 3). In 2020, Brisbane was added to the airline's route network and Adelaide services were resumed, both of which contributed to the airline's ability to increase its market share in 2020. In 2021, the overall inbound passenger market declined by 85.43%, whilst Qatar Airways annual enplaned inbound passengers decreased by 68.40%, and, as a result, Qatar Airways carried a higher share of the available passengers, which in turn, led to its higher annual inbound passenger market share. It is also important to note that an airline market share can vary (Yan, Tang & Lee, 2007). Qatar Airways consistent ability to capture market share in response to higher levels of demand for its services is a very favorable outcome for the airline.

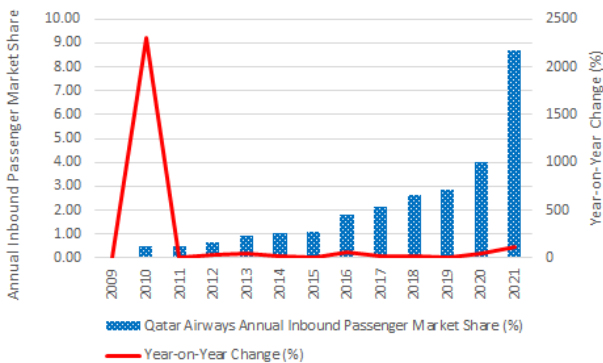


Figure 3. Qatar Airways annual inbound passenger market share and the year-on-year change (%): 2009 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

Qatar Airways annual outbound passenger market share and the year-on-year change (%) from 2009 to 2021 is depicted in Figure 4. Figure 4 shows that Qatar Airways annual outbound passenger market share has displayed an upward trend, increasing from a low of 0.02% in 2009 to a high of 9.84% in 2021. There was a very pronounced spike in this metric in 2010, at which time it increased by 2,100% on the 2009 levels. This large increase reflected the first full year of the airline's services to Melbourne, and the growth in demand for its services from Melbourne to Doha in 2010. In 2012, the airline's

outbound passenger market share increased by 21.56%, and this market share growth could be attributed to the introduction of services to Perth in 2012 as well as growth in the level of demand on its Melbourne to Doha services (Figure 4). There was a further very significant increase in this metric in 2013, when it increased by 54.83% on the 2012 levels (Figure 4). This increase reflected the first full year of operations in the Perth market and the growth in outbound passenger traffic on its Melbourne to Doha services. Qatar Airways annual outbound passenger market share grew by 20.83% in 2014, and this growth reflected the higher levels of demand for its services in both the Melbourne to Doha and Perth to Doha air travel markets (Figure 4). In 2016, Qatar Airways annual outbound passenger market share increased by 63.41% on the 2015 levels. As noted earlier, the airline introduced its services to Adelaide and Sydney in 2016, and these new services made a positive contribution to its annual outbound passenger market share in 2016. Qatar Airways annual outbound passenger market share increased by 24.46% in 2018 (Figure 4), with this increase attributed to the introduction of the second daily service to Sydney, the addition of Canberra to its Australian route network, and the strong growth in outbound passenger on its Adelaide/Doha, Melbourne/Doha, and Perth/Doha services. In 2020, Qatar Airways annual outbound passenger market share increased by 89.80% on its 2019 levels (Figure 4). This trend continued in 2021, when the airline's annual outbound passenger market share increased by 65.10% on the 2020 levels (Figure 4). As previously noted, Qatar Airways annual outbound passenger traffic decreased on a year-on-year basis in both 2020 and 2021, due to the CORONA-19 Pandemic and the related government response measures (border closures, Australian citizen travel restrictions). However, the annual overall passenger market declined at a significantly higher rate than that experienced by Qatar Airways, and, as a result, the passenger traffic carried by Qatar Airways enabled it to achieve a higher outbound passenger market share in both 2020 and 2021, respectively (Figure 4).

Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Adelaide and the year-on-year change (%) for the period 2016 to 2021 is presented in Figure 5. As can be observed in Figure 5, there was an upward trend in the airline's annual enplaned inbound passengers from 2016 to 2019. This upward trend is once again demonstrated by the by the year-on-year percentage change line graph, which is more positive

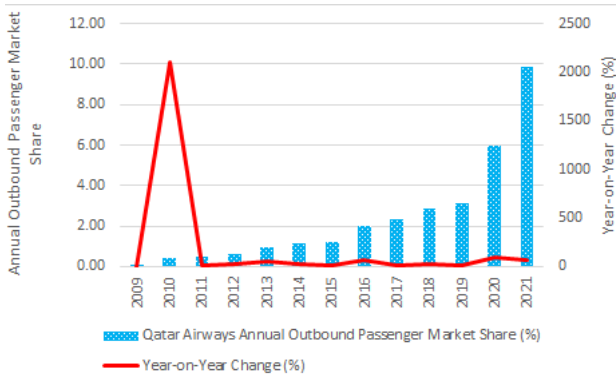


Figure 4. Qatar Airways annual outbound passenger market share and the year-on-year change (%): 2009 to 2021.
Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

than negative, that is, all bar two values are above the line. Qatar Airways was able to increase its inbound passenger traffic quite significantly in both 2017 (+28.28%), and 2018 (+29.16%) (Figure 5), due to the higher levels of demand for its services in both these years. Qatar Airways continued to serve Adelaide in both 2020 and 2021, at which time its inbound passenger traffic decreased by 74.67% in 2020, and by 49.97% in 2021. These annual decreases in traffic could be attributed to the adverse impact of the CORONA-19 virus pandemic and the related government measures had on airline passenger demand in both 2020 and 2021. In addition, Qatar Airways resumed its services to Adelaide, starting from 16 August 2020, with an Airbus A350-900XWB being deployed on the route. The service was operated twice weekly (Qatar Airways. 2020).

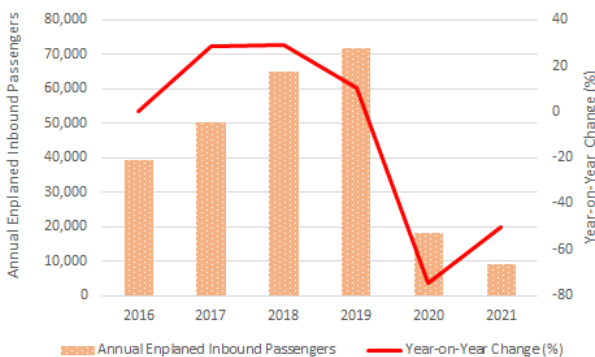


Figure 5. Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Adelaide and the year-on-year change (%): 2016 to 2021.
Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2017-2022).

Qatar Airways annual enplaned outbound passengers from Adelaide to Doha, Qatar and the year-on-year change (%) from 2016 to 2021 is depicted in Figure 6. Like the airline’s inbound passenger traffic, Qatar Airways annual enplaned outbound passenger traffic displayed an upward trend from 2016 to 2019, with this trend being again being demonstrated by the by the year-on-year percentage change line graph, which is more positive than negative, that is, all bar two values are above the line. Figure 6 shows that there were two significant annual increases in this metric during the time that Qatar Airways has served the market. These annual increases occurred in both 2017 (+24.36%), and 2018 (+29.46%), respectively (Figure 6), and reflected a higher level of demand for the airline’s services in both 2017 and 2018. Figure 6 also highlights the impact that the COVID-19 pandemic and the related government response measures had on Qatar Airways outbound passenger traffic in both 2020 and 2021. In 2020, Qatar Airways annual outbound passenger decreased by 81.59% on the 2019 levels (Figure 6). A similar situation occurred in 2021, at which time the airline’s annual outbound passenger traffic decreased by 56.0% on the 2020 levels (Figure 6).

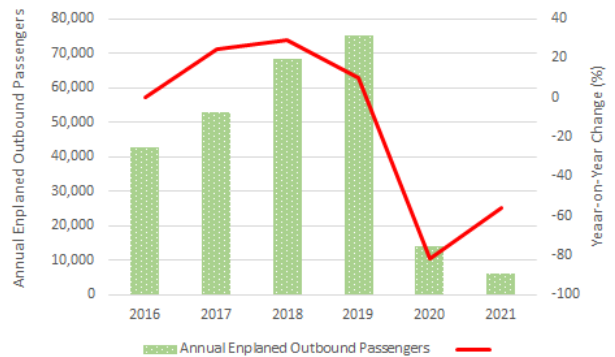


Figure 6. Qatar Airways annual enplaned outbound passengers from Adelaide to Doha, Qatar and the year-on-year change (%): 2016 to 2021.
Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2017-2022).

As noted earlier, Qatar Airways was granted the air services rights by the Australian Government to serve Brisbane in 2020. The airline initially started services with three flights per week, and these were upgraded to a daily service effective on 1 March 2022 (Cusmano, 2022). Qatar Airways also extended their Brisbane service to Auckland, New Zealand in 2020 (Cusmano,

2022; Lui, 2020), at which time it carried 1,284 passengers from Auckland to Brisbane, and 1,181 passengers from Brisbane to Auckland in 2020 (Bureau of Infrastructure, Transport and Regional Economics, 2021). Qatar Airways carried 8,082 passengers between Doha and Brisbane in 2020, and in the same year uplifted 19,615 passengers from Brisbane to Doha, Qatar. Qatar Airways increased its inbound passenger traffic by 19.15% in 2021, at which time it uplifted 9,630 passengers from Doha to Brisbane. In 2021, Qatar Airways outbound passenger traffic between Brisbane and Doha decreased by 35.27% on the 2020 levels. In 2021, the airline uplifted 12,695 passengers from Brisbane to Doha. These services played a key role as the airline was able to help repatriate travellers that had been impacted by the government and airline-related COVID-19 pandemic response measures. There were no reported passengers carried between Australia and New Zealand in 2021 (Bureau of Infrastructure, Transport and Regional Economics, 2021). Qatar Airways initially served Brisbane with its Airbus A350-1000 aircraft, however, these the aircraft assigned to the route changed to a Boeing B777-300ER on 19 September 2020 (Liu, 2020).

During the study period, Qatar Airways served Canberra from 2018 to 2020. In its first year of operations to Canberra, the airline carried 14,701 passengers from Doha, Qatar to Canberra, and 14,238 passengers from Canberra to Doha. In 2019, Qatar Airways uplifted 13,801 passengers from Doha to Canberra, and 12,105 passengers from Canberra to Doha. The airline's inbound passenger traffic decreased by 6.12%, whilst the outbound passenger traffic decreased by 14.98% in 2019, respectively. The airline uplifted 2,492 passengers from Doha to Canberra, and 1,710 passengers from Canberra to Doha in 2020. The lower passenger volumes could be attributed to the impact of the CORONA-19 pandemic and the impact that it had on air travel demand. The impact of the pandemic is reflected in the annual decrease in inbound passenger traffic of 81.94%, and outbound passenger traffic (-85.87%) in 2020.

Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Melbourne and the year-on-year change (%) from 2009 to 2021 is depicted in Figure 7. Figure 7 shows that there was a very significant spike in this metric in 2010, when it increased by 2,507.37% on the 2009 levels. This large increase could be attributed to the airline's first full year of operations in the market together with a strong demand for its services from Doha to Melbourne in 2010. There were

two quite significant annual increases in this metric during the study period. These increases were recorded in 2014 (+19.76%), and 2017 (+21.11%), respectively (Figure 7). As previously noted, Qatar Airways introduced the larger Boeing B777-300ER on its Melbourne route in April 2014 to meet an increase in passenger demand. The larger aircraft type enabled it to carry greater passenger volumes on the Doha/Melbourne air route, and thus, increase its annual inbound passenger traffic. The strong growth in the airline's annual inbound passenger market share in 2017 could be attributed to the operation of the larger Airbus A380 on the route, which provided a significant increase in available seating capacity. The introduction of the Airbus A380 and greater passenger demand resulted in the higher inbound passenger market share in 2017. There were just two years in the study period where the airline's inbound passenger market share decreased on a year-on-year basis. These annual decreases were recorded in 2020 (-69.80%), and 2021 (-67.25%), respectively (Figure 7), and were the result of the downturn in passenger demand due to the CORONA-19 pandemic and the related government pandemic response measures.

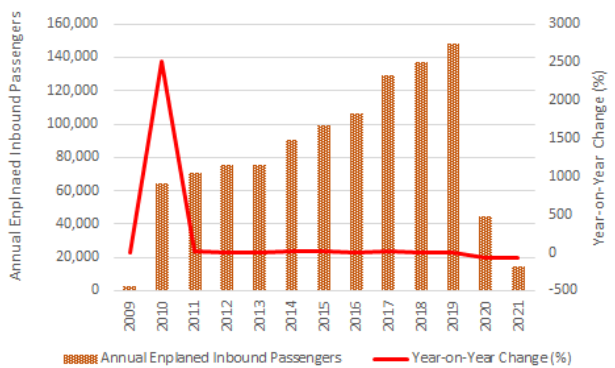


Figure 7. Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Melbourne and the year-on-year change (%): 2009 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Melbourne and the year-on-year change (%) from 2009 to 2021 is depicted in Figure 7. Figure 7 shows that there was a very significant spike in this metric in 2010, when it increased by 2,507.37% on the 2009 levels. This large increase could be attributed to the airline's first full year of operations in the market together with a strong demand for its services from Doha to Melbourne in 2010. There were five quite significant

annual increases in this metric during the study period. These increases were recorded in 2011 (+20.32%), 2014 (+32.53%), 2015 (+10.02%), 2017 (+14.87%), and 2018 (+14.47%) respectively (Figure 7). In 2011, Qatar Airways experienced strong growth in the demand for its services from Melbourne, and this enabled it to increase its passenger traffic quite significantly in 2011. As previously noted, Qatar Airways introduced the larger Boeing B777-300ER on its Melbourne route in April 2014 to meet an increase in passenger demand. The larger aircraft type enabled it to carry greater passenger volumes on the Melbourne/Doha air route, and thus, increase its annual outbound passenger market share. In 2015, Qatar Airways once again experienced strong growth in the demand for its services from Melbourne, and this enabled it to increase its passenger traffic quite significantly in 2015. The strong growth in the airline's annual inbound passenger market share in 2017 could be attributed to the operation of the larger Airbus A380 on the route, which provided a significant increase in available seating capacity. The introduction of the Airbus A380 and greater passenger demand resulted in the higher inbound passenger market share in 2017. The operation of the larger Airbus A380 in 2018 enabled Qatar Airways to accommodate a high level of demand for its services in 2018, and hence, to grow its annual outbound passenger in the Melbourne/Doha air travel market. There were just two years in the study period where the airline's inbound passenger market share decreased on a year-on-year basis. These annual decreases were recorded in 2020 (-55.58%), and 2021 (-65.86%), respectively (Figure 7), and were the result of the downturn in passenger demand due to the

CORONA-19 pandemic and the related government pandemic response measures.

Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Perth and the year-on-year change (%) from 2012 to 2021 is depicted in Figure 9. Figure 9 shows that there was an upward trend in the airline's annual enplaned inbound passengers from 2012 to 2019. Once again, this general upward is demonstrated by the by the year-on-year percentage change line graph, which is more positive than negative, that is, all bar two values are above the line. Figure 9 shows that there was a very pronounced spike in this metric in 2013, when it increased by 234.51% on the 2012 levels. As previously noted, 2013 marked the first full year of operations by the airline in the Perth air travel market. Qatar Airways was able to grow its annual inbound passenger traffic in both 2014 (+17.35%), and 2015 (+10.52%), due to a higher level of demand for its services. A similar trend occurred in both 2018 (+18.17%), and 2019 (+11.65%), at which time the airline was able to increase the demand for its services from Doha to Perth. The increase in 2019 could also be attributed to the deployment of the Airbus A380 aircraft on the route in 2019. This aircraft replaced the Boeing 777-300ER that had been deployed on the route (Eyre, 2019). During the time that Qatar Airways has served the Doha to Perth air travel market, there were just two years where the annual inbound passenger traffic decreased on a year-on-year basis. These annual decreases occurred in 2020 (-67.34%), and 2021 (-85.72%), and these annual decreases could be attributed to the adverse impact of the CORONA 19 pandemic and the related government pandemic response measures.

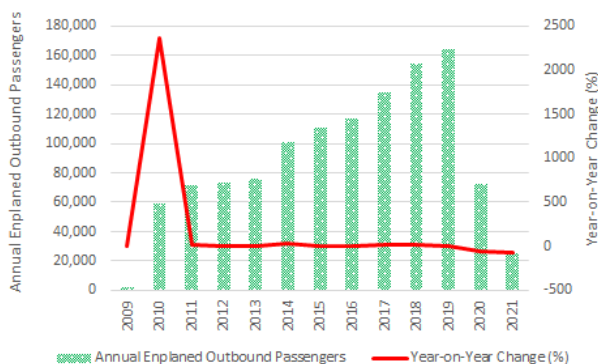


Figure 8. Qatar Airways annual enplaned outbound passengers from Melbourne to Doha, Qatar and the year-on-year change (%): 2009 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

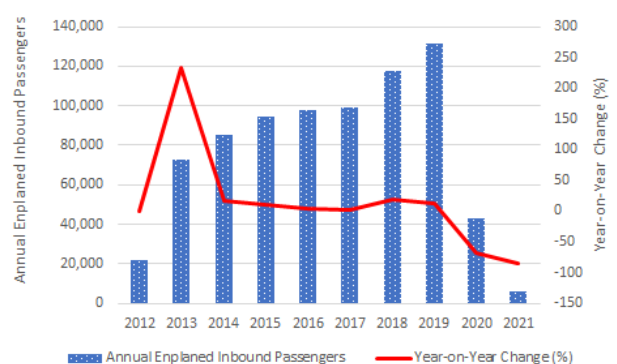


Figure 9. Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Perth and the year-on-year change (%): 2012 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2013-2022).

Qatar Airways annual enplaned outbound passengers from Perth to Doha, Qatar and the year-on-year change (%) from 2012 to 2021 is depicted in Figure 10. As can be seen in Figure 10, Qatar Airways has been able to increase in the patronage of its flights throughout the study period. Consequently, there was an upward trend in this metric from 2012 to 2019, with this trend also being demonstrated by the by the year-on-year percentage change line graph, which is more positive than negative, that is, all bar two values are above the line. Figure 10 shows that there was a very substantial increase in this metric in 2013, when it increased by 305.93% on the 2012 levels. As noted throughout this paper, 2013 marked the first full year of operations by the airline in the Perth air travel market. Qatar Airways also recorded strong growth in its annual outbound passenger traffic in 2014, when it increased by 24.56% on the 2013 levels (Figure 10). This increase reflected an increased demand for the airline's services in the Perth to Doha air travel market in 2014. A similar situation occurred in 2015, when the airline was once again able to increase its outbound passenger traffic by 12.86%, with this increase reflecting Qatar Airways ability to accommodate the higher level of passenger demand on its services from Perth (Figure 10). Figure 10 also shows that Qatar Airways was able to increase its annual outbound passenger in both 2018 (+20.96%) and 2019 (+13.93%), respectively (Figure 10). These increases could be attributed to the growth in the market in 2018 and 2019, with the deployment of the Airbus A380 in 2019 providing the airline with extra seating capacity. This larger aircraft type made it possible for the airline to accommodate the growth in its enplaned outbound passenger traffic in 2019. Like the inbound market from Doha to Perth, the airline's outbound passenger traffic decreased in both 2020 (-64.45%), and 2021 (-79.70%), due to the impact of the COVID-19 pandemic and the measures implemented by governments in response to the pandemic. In addition, Qatar Airways operated its final Airbus A380 flight on March 31st, 2020. Following that, the Boeing B777-300ER, Airbus A350-900XWB, and occasionally the Airbus A350-1000 were deployed to Perth in the then difficult circumstances of closed borders and only slowly loosened entry restrictions (Pearson, 2022).

Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Sydney and the year-on-year change (%) from 2016 to 2021 is depicted in Figure 11. As can be observed in Figure 11, Qatar Airways

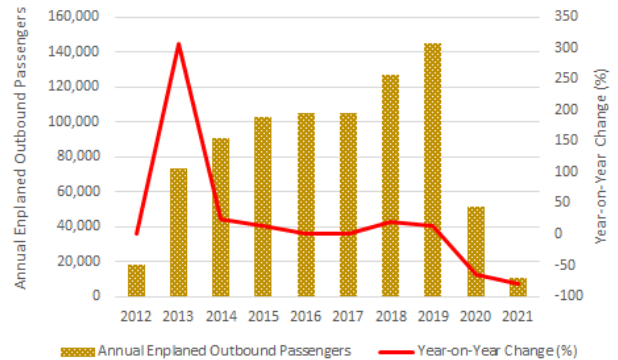


Figure 10. Qatar Airways annual enplaned outbound passengers from Perth to Doha, Qatar and the year-on-year change (%): 2009 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2010-2022).

annual inbound passenger traffic displayed a general upward trend from 2016 to 2019, reflecting the greater demand for its services to Sydney. This upward trend is once again demonstrated by the by the year-on-year percentage change line graph, which is more positive than negative, that is, all bar two values are above the line. Figure 11 shows that there were three years in the study period where there were very significant increases in the airline's annual enplaned inbound passengers. These increases occurred in 2017 (+50.30%), 2018 (+42.24%), and 2019 (+14.37%), respectively (Figure 11). The very significant increase in 2017 could be attributed to the airline's first full year of operations in the Sydney air travel market as well as the increased seating capacity of the Airbus A380, which was deployed on the route in September 2016. The significant increase in 2018 could be attributed to the introduction of a second daily service to Sydney, which attracted higher levels of customer patronage of Qatar Airways service. In 2019, Qatar Airways was able to grow its demand for its services to Sydney very successfully. This was a very favorable outcome for the airline. Figure 11 shows that the airline's annual inbound passenger traffic from Doha to Sydney was very adversely impacted by the CORONA-19 pandemic and the related government pandemic response measures. As a result of these factors, the airline's outbound passenger decreased by -68.59% in 2020, and by 71.91% in 2021 (Figure 11).

Qatar Airways annual enplaned outbound passengers from Sydney to Doha and the year-on-year change (%) for the period 2016 to 2021 is presented in Figure 12. Figure 12 shows that Qatar Airways was able to increase its annual outbound passenger traffic over the

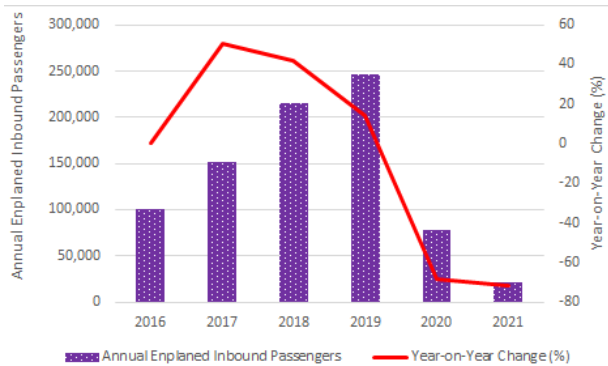


Figure 11. Qatar Airways annual enplaned inbound passengers from Doha, Qatar to Sydney and the year-on-year change (%): 2016 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2017-2022).

period 2016 to 2019. During this period, there were two very significant increases in this metric, with these annual increases occurring in 2017 (+47.55%), and 2018 (+42.06%), respectively (Figure 12). The very significant increase in 2017 could be attributed to the airline's first full year of operations in the Sydney air travel market as well as the increased seating capacity of the Airbus A380 (deployed on the route in September 2016), which enabled the airline to accommodate the higher levels of demand for its services in 2017. The large increase in 2018 could be attributed to the introduction of a second daily service to Sydney. Figure 12 also shows that the airline's annual outbound passenger traffic from Sydney to Doha was also very adversely impacted by the CORONA-19 pandemic and the related government pandemic response measures. As a result of these factors,

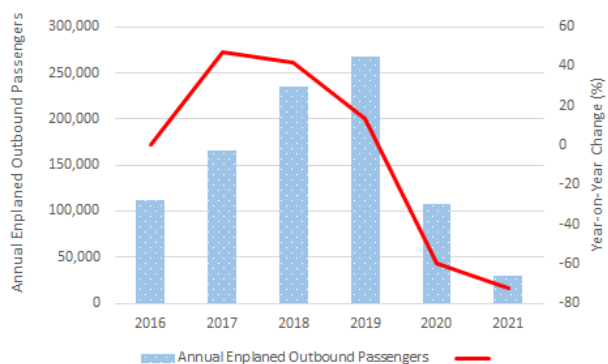


Figure 12. Qatar Airways annual enplaned outbound passengers from Sydney to Doha, Qatar and the year-on-year change (%): 2016 to 2021.

Source: Data derived from Bureau of Infrastructure, Transport and Regional Economics (2017-2022).

the airline's outbound passenger decreased by 59.94% in 2020, and by 72.16% in 2021.

Conclusions

Using an in-depth qualitative longitudinal case study research design, this study has examined the evolution of Qatar Airways, a major global full-service network airline, in Australia's international air travel market. The period of the study was from 2009 to 2021. The qualitative data used in the study was analyzed by document analysis. The study was underpinned by a case study research framework that followed the guidance of Yin (2018).

Qatar Airways Australian route network has evolved since it first commenced services to Melbourne in 2009. Perth, Western Australia was added to the airline's Australia route network on 3 July 2012. The case study revealed that Qatar Airways subsequently increased its flight frequency to/from Perth from three days per week to a daily service on 1 December 2012. Adelaide and Sydney were added to the airline's Australian route network in 2016. The airline began services to Sydney on 1 March 2016, and to Adelaide on 2 May 2016. In February 2018, added an additional service to Sydney that included an extension to Canberra. On 14 May 2020, Qatar Airways added Brisbane to its Australian route network. In 2020, Qatar Airways extended its Brisbane service to Auckland, New Zealand. Qatar Airways Australian route network will be enhanced by its agreement with Virgin Australia in May 2022, whereby Qatar Airways will be able to code share to 35 destinations throughout Virgin Australia's domestic network as well as Virgin Australia's recently relaunched short-haul international markets, which include Fiji and Queenstown, New Zealand. The case also revealed that throughout the study period Qatar Airways deployed larger aircraft types, for example, the Airbus A350-1000 and the Airbus A380, to accommodate the higher levels of passenger demand in the Australian markets that it served.

The case study found that there was an upward trend in Qatar Airways inbound and outbound passenger traffic from 2009 to 2019. Qatar Airways annual enplaned inbound passengers increased from a low of 2,468 passengers in 2009 to a high of 611,716 passengers in 2019. The airline's enplaned outbound passengers increased from a low of 2,407 passengers in 2009 to a high of 663,444 passengers in 2019. Similar trends were observed in the airline's Perth inbound and outbound

passenger traffic, which exhibited an upward trend from 2012 to 2019. From 2016 to 2019, Qatar Airways annual inbound and outbound passenger traffic also exhibited an upward growth trend in both the Adelaide/Doha and Sydney/Doha air travel markets. Importantly, Qatar Airways played an important role in Australia's international air travel market during 2020 and 2021, which was a period where airline passenger was significantly impacted by the CORONA 19 pandemic and the related government response measures. The case study revealed that the downturn in passenger demand and the related government COVID-19 response measures had an adverse impact on Qatar Airways inbound and outbound passenger traffic in both 2020 and 2021.

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