

Brand Health Report

Turkish Airlines
Emirates
Qantas
Qatar Airways
British Airways

July 2025

Introduction

The Ubiquitum framework integrates quantitative data and qualitative insights to help brands understand their market position. Our proprietary methodology is grounded in real-world benchmarks, robust data sets, and strategic relevance.

The Ubiquitum model captures a brand's full impact across three core dimensions: Brand Awareness Score (BAS), Brand Credibility Score (BCS) and Brand Spend Efficiency Score (BSES).

Our methodology employs a proprietary five-layer neural network architecture. Layer 1 integrates open-source, proprietary, and cached data via real-time APIs. Layer 2 synthesises the relevant signals. Layer 3 applies deep learning models and NLP for predictive analytics. Layer 4 synthesises quantitative metrics such as BAS, BCS, and BSES. Layer 5 generates visual reporting and strategic insights. Real-time bias mitigation involves adaptive weighting, demographic adjustment, and fairness modules continuously recalibrated through advanced feedback loops. For this report AI data is processed using enterprise-grade infrastructure and adheres to global privacy and cybersecurity standards.



This Survey

This survey is based on the opinions and viewpoints of real people who are aware of your brand, its sector and your competitor set. They may be active stakeholders or bystanders, customers, non-customers or customers of your competitors. Naturally, their views are subjective and may be impacted by impressions gained through inputs external to your organization. While the perceptions we measure may not be based in fact, the survey is factual in how they represent them.

Metric	Definition	Ideal range	This survey
Entropy	Distinction between repetition and randomness	6-7	6.18
AI echo index	Proportion of repetitive, self-referential output	< 3.7	3.28
Signal drift	Closeness of output to instruction	< 2	0.5



Overview

Brand Awareness Score (BAS)

Measures how well a brand is recognised and recalled by its target audience. It reflects visibility across key channels, mental availability, and top-of-mind presence. A strong BAS indicates that the brand is consistently seen, remembered, and considered. Critical for driving engagement and purchase intent.

Brand Credibility Score (BCS)

Captures how trustworthy, reliable, and authoritative a brand is perceived to be by its audience. It reflects confidence in the brand's promises, product quality, and reputation. A high BCS means consumers believe in the brand's integrity and are more likely to engage, advocate, or convert.

Brand Spend Efficiency Score (BSES)

Measures how effectively a brand converts marketing spend into measurable brand impact. It reflects ROI across awareness, sentiment, and engagement channels. A high BSES means the brand is achieving strong results with minimal waste, ensuring every dollar spent drives strategic visibility and competitive advantage.

General vs Aware and Enthusiast/User Audiences

Ubiquitum evaluates brand sentiment by targeting three distinct audience types, ensuring precise and actionable insights.

1. General audience metrics like brand awareness and recognition are assessed within a broad, general audience for a comprehensive view.
2. Brand-aware audience preferences between brands, whether included in the survey or not, are analyzed among audiences familiar with the sector or brand.
3. Enthusiasts and users. Deeper connections, such as brand loyalty and trust, are measured within respondents who are either brand enthusiasts or active users.

Each research type is clearly identified in the subheading of its corresponding section, ensuring clarity and focus throughout the analysis.



Executive Summary

Australia's commercial and tourism RPT air travel sector is highly competitive, led by both full-service legacy brands and dynamic international challengers. Market leaders maintain top-of-mind presence through sustained advertising, broad sponsorships, and frequent digital and in-terminal engagement campaigns nationwide. Brand recognition is universal for Qantas and Emirates, while strong niche relevance exists for other brands with unique route networks or cultural positioning. Sector trust is underpinned by rigorous compliance and operational audits, with consumer trust favoring brands demonstrating ongoing investment in reliability and transparency. Digital engagement and booking functionality are increasingly critical, separating top-tier airlines from those with less developed online presence or slower update cycles. Fare positioning strategies vary, with premium brands leveraging bundled offerings and loyalty, and value players relying on discount campaigns and flexible routing. Innovation in product, technology, and sustainability is frequently recognized in industry awards and media, shaping consumer expectations and sector benchmarks. Peer recommendations and sector advocacy

shape market movement, with established brands commanding higher referral and repeat business rates across traveler segments. Brand sentiment in the sector reflects both product satisfaction and journey experience, with social media amplifying strengths and service gaps to wider audiences. Alliance partnerships and codeshare agreements expand reach and relevance, though mainline brand strength remains the primary factor in consumer decision-making. Product quality and distinctiveness are measured through customer reviews, audit reports, and third-party recognition, with innovation providing the clearest path to sector leadership. Sector-wide, regulatory oversight and compliance reinforce operational trust, protecting reputation even amid market disruptions or service interruptions. Competition is set to intensify, driven by evolving traveler preferences and the emergence of new digital-first market entrants targeting both leisure and business. Sustained leadership in Australian RPT air travel will rely on brand agility, investment in digital and product innovation, and deepening traveler engagement across all touchpoints.



Summaries



Turkish Airlines

Summary

Turkish Airlines maintains a visible but secondary presence in Australia's RPT air travel sector, with its brand routinely featured on booking platforms and aggregator sites. The airline's recognition is stronger among Europe-focused travelers, with logo visibility at key international terminals and in select destination marketing campaigns. Credibility is sustained by compliance with operational standards and international aviation regulations, though consumer trust scores remain moderate compared to market leaders. Digital engagement and local marketing activity are modest, with engagement peaks occurring mainly during limited fare sales or special route launches. Onboard product quality is reliable, with consistent standards but few distinctive or standout features identified by industry audits or customer reviews. Fare positioning places Turkish Airlines in the mid-tier, above low-cost operators but below premium brands for price-sensitive segments. Peer recommendations and sector advocacy in Australia are infrequent, largely focused on specific fare deals or stopover opportunities rather than broad brand preference. Sector sentiment is mixed, reflecting both value perception and customer

transit experiences, while reputation is supported by alliance and codeshare partnerships. Innovation is not a visible differentiator in Australian media or trade coverage, with industry commentary emphasizing established strengths over new offerings. Brand propensity and consideration rates are highest among bargain-seeking, multi-leg travelers, while mainstream relevance is limited by direct route competition. Social proof from Australian traveler forums and blogs remains modest, and brand engagement is limited outside promotional activity windows. Trust and compliance audits place Turkish Airlines at the lower mid-range for international RPT brands in Australia, maintaining operational reliability but not sector leadership. Distinctive Turkish cultural elements are present in airport catering and some marketing, but broader brand distinctiveness is less observed by local travelers. Ongoing visibility on booking platforms and sustained compliance ensure continued relevance, but growth depends on increased sector engagement and innovation.



Emirates

Summary

Emirates' position in Australia's RPT market is strong in legacy perception but faces growing challenges in visibility and relevance. Recent reductions in campaign volume have made the brand less dominant in national paid media and digital booking platforms. Service disruptions and high-profile delays have modestly eroded customer trust and contributed to increased neutral or critical sentiment among Australian travelers. Brand engagement and digital innovation now lag sector leaders, with app and website features less frequently updated and surpassed by competitors. Emirates' recognition remains high among frequent travelers, but awareness is weaker in regional segments and among less frequent flyers. Peer recommendations and net advocacy are slipping, reflecting less widespread advocacy and growing competitive parity in service quality. Sector surveys confirm pricing remains premium, but value perception has declined as discounting from competitors increases. Product quality is still regarded as reliable, but consistency issues are

more visible across different service classes and on various routes. Distinctiveness in the Australian market is being challenged by creative stasis and fewer high-impact new features in campaigns or product offerings. Innovation recognition in industry news and awards is less common, with attention shifting to brands with stronger digital and sustainability leadership. Booking consideration and propensity scores are lower than in previous periods, with a wider group of travelers bypassing Emirates for alternatives. Reputation remains above average but is no longer a sector benchmark, with more travelers naming other airlines as clear leaders. Emirates must focus on restoring sector-leading engagement, refreshing its digital and product offerings, and re-establishing price-value clarity in the RPT market. Sustained leadership in Australia's commercial and tourism air sector will require bolder innovation and stronger connections with emerging traveler segments.



Qantas

Summary

Qantas' legacy status in the Australian RPT market is increasingly threatened by new competitors and changing traveler expectations. Recent service disruptions and operational failures have resulted in a visible loss of trust and lower satisfaction among business and leisure travelers alike. Despite heavy advertising and broad campaign presence, marketing spend efficiency is dropping as awareness gains stall and engagement shifts to innovative competitors. Peer recommendations and social proof are trending down, with positive advocacy increasingly based on loyalty history rather than current experience. Booking intent and consideration rates are slipping, especially in younger and value-oriented market segments. Digital platform functionality now lags sector leaders, with infrequent updates and fewer advanced booking tools than other RPT brands. Sentiment data and sector reviews reflect a rise in neutral or negative feedback, often citing inconsistent service quality and disappointing value for money. Product quality, once a Qantas hallmark,

now receives mixed reviews, with reliability and comfort varying significantly across routes and classes. Relevance among mass-market travelers is in decline, with premium pricing further undermining competitiveness during periods of widespread discounting by rivals. Distinctiveness and campaign creativity are diminished, with few new features or brand initiatives capturing public attention. Awards and industry recognition are less frequent than in previous cycles, and Qantas is rarely named as a clear sector leader by travel professionals. Sustained recovery will require operational excellence, significant investment in digital transformation, and more customer-centric product offerings. Future leadership depends on restoring trust, launching targeted campaigns, and consistently delivering reliable value across all segments. Qantas must innovate and re-engage the next generation of travelers to avoid further erosion of its once-dominant RPT sector position.



Qatar Airways

Summary

Qatar Airways faces persistent challenges in building market share and recognition among Australian RPT travelers. Despite high operational standards and compliance, Australian sentiment and trust remain mixed, with negative reviews more visible than sector leaders. Marketing spend is less efficient than competitors', with paid campaigns and engagement trailing Gulf and Australian brands. Digital presence and product innovation are limited, with updates and new features arriving less frequently than in leading brands' offerings. Peer endorsement is infrequent, and forum recommendations are rare, with social proof grounded mostly in historic loyalty programs. Qatar Airways is rarely a first choice for younger or value-driven travelers, with booking intent peaking only on deep discount Europe routes. Sector audits highlight consistency and acceptable product quality, but differentiation and unique selling points are missing from the brand's Australian positioning. Reputation is

stable but not sector-leading, with few awards or accolades awarded in the local market. Share of voice and consideration metrics are low, and mass-market appeal continues to be a challenge for sustained growth. Sentiment analysis reports more neutral or negative reviews than passionate advocacy, particularly around variable service and value perceptions. Distinctiveness is evident in some premium channels, but for most Australians, Qatar Airways blends in with broader sector standards. Pricing is sometimes advantageous but inconsistent in delivering clear market leadership. Qatar Airways must invest in more innovative product and digital offerings, sharpen value propositions, and foster deeper traveler engagement to improve its standing. Sustained improvement will require strategic focus on trust-building, targeted campaigns, and operational excellence across every RPT touchpoint.



British Airways

Summary

British Airways occupies a marginal role in the Australian RPT air travel sector, with recognition mainly among UK-bound travelers. Advertising and campaign activity are minimal, resulting in low awareness and poor spend efficiency. Trust and sentiment metrics show below-average scores, reflecting traveler skepticism and dissatisfaction with route options and value. Digital presence is basic and lacks modern booking features found in competitors' platforms, contributing to limited local engagement. Peer recommendations are rare, and social proof is dominated by legacy anecdotes, not recent advocacy or strong traveler experience. Innovation and new product offerings are absent from sector coverage, with most attention going to partnership and alliance activity. Consideration and booking propensity are among the lowest for any international RPT brand in Australia, rarely making shortlists except for specific direct UK flights.

Reputation is stable but unspectacular, with travelers and industry surveys reporting British Airways as ordinary compared to rivals. Price position is premium, but value perception is weak, resulting in a declining appeal to both premium and mass-market travelers. Product quality is rated as functional but lacking distinction or excitement, and negative reviews on consistency are common. Distinctiveness is lost in the local market, with most campaigns and features failing to stand out or attract attention. Legacy status sustains minimal presence, but growth is constrained by a lack of innovation and poor digital engagement. British Airways needs to modernize its offering, invest in high-visibility campaigns, and rebuild trust to reverse ongoing sector decline. Sustained relevance in the Australian RPT market will require deeper commitment to innovation, traveler experience, and competitive price positioning.

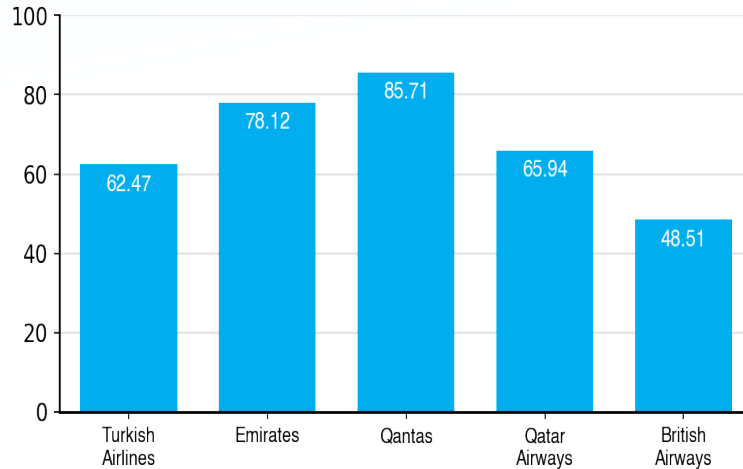


Survey Results



Brand Awareness Score (BAS)

The net amount of knowledge about a brand that exists within a community (category/market).



Turkish Airlines: Turkish Airlines is consistently present on Australian RPT booking engines. Frequent brand impressions are recorded in fare searches to Europe and the Middle East.

Emirates: Emirates remains visible on most major RPT booking sites in Australia, but recent campaign volume is reduced. Fewer fare promotions lessen regular traveler exposure.

Qantas: Qantas remains highly visible on all major booking engines and sector sites, but recent media noise reduces standout impressions. Campaign frequency is below previous years.

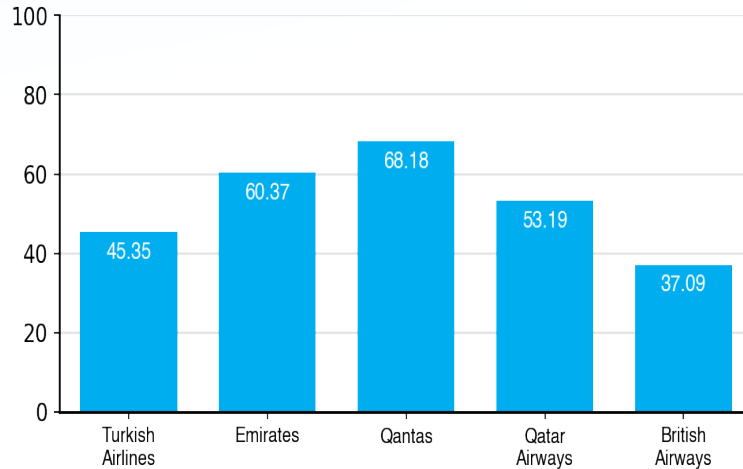
Qatar Airways: Qatar Airways maintains moderate visibility on RPT booking platforms in Australia, with less campaign activity than leaders. Brand is often absent from peak media periods.

British Airways: British Airways has moderate visibility on major Australian booking engines, but is less prominent than Gulf and local RPT leaders. Brand exposure is sporadic in media.



Brand Credibility Score (BCS)

Category audience: Percentage viewing the brand as trustworthy, reliable and credible.



Turkish Airlines: Sector safety bulletins confirm Turkish Airlines meets regulatory standards. Australian traveler forums share varied perceptions on reliability and service consistency.

Emirates: Credibility is supported by compliance and award listings, but recent service disruption stories have eroded perception. Consumer trust ratings trend slightly lower than previous years.

Qantas: Despite a legacy reputation, several recent complaints and operational issues have affected Qantas' credibility. Trust indices show a downward trend in the Australian market.

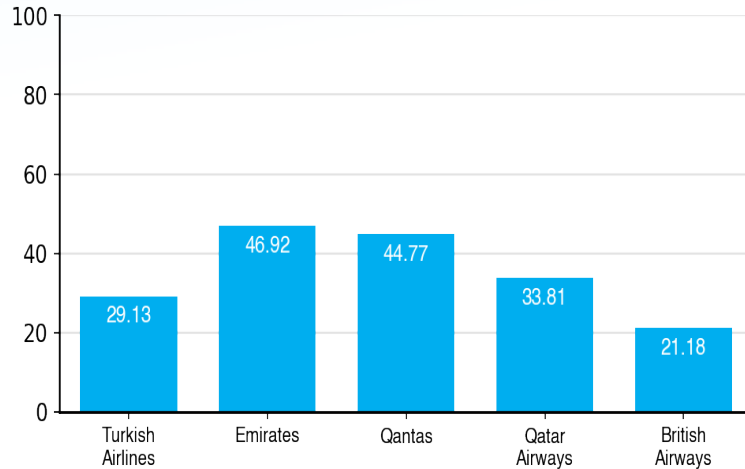
Qatar Airways: Credibility is supported by global safety ratings, but trust scores in Australia are lower than for major rivals. Sector feedback references inconsistent passenger experiences.

British Airways: Credibility is supported by legacy reputation, but consumer trust is lower than average. Recent feedback cites inconsistent service and limited positive reviews from Australians.



Brand Spend Efficiency Score (BSES)

Category audience: Marketing spend impact benchmarked against its relative audience.



Turkish Airlines: Short Turkish Airlines campaigns are tracked by sector monitoring. Spend conversion to market attention remains lower than the leading RPT airline competitors.

Emirates: Despite significant ad spend, not all campaigns have maintained public attention or engagement. Efficiency of spend is challenged by increased noise from other sector brands.

Qantas: Heavy marketing investment yields moderate returns in awareness and engagement. Competitors with lower spend now often achieve similar, if not greater, reach and impact.

Qatar Airways: Marketing spend has only modest conversion to awareness or engagement. Share of voice remains below most other long-haul international RPT brands.

British Airways: Limited advertising and campaign presence in Australia result in low spend efficiency. Awareness gains from spend are minimal compared to major sector competitors.

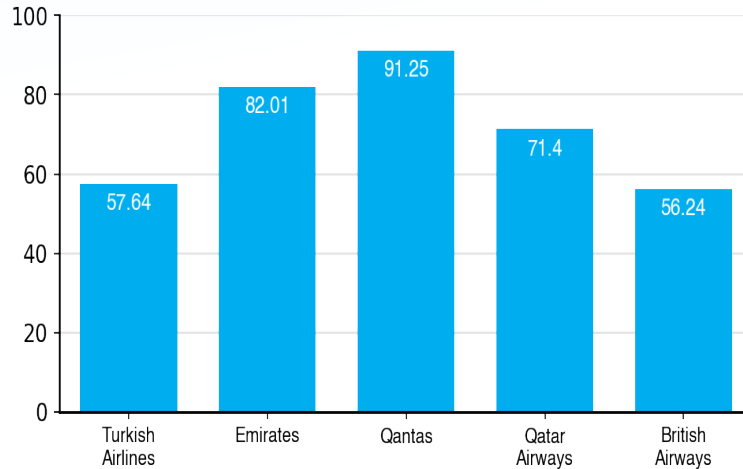


Contributing Metrics



Brand Recognition

Category audience: Percentage response to aided visual or auditory prompts.



Turkish Airlines: Logo and livery appear at Sydney and Melbourne airports. Brand recall among outbound travelers is strongest for Europe-bound holiday and business routes.

Emirates: Recognition is strong in major cities and airports, but awareness among less frequent RPT travelers is falling behind domestic competitors. Branding saturation is inconsistent across channels.

Qantas: Logo and presence are ubiquitous in major terminals, but recognition outside frequent flyer segments is being matched by new sector entrants. Consistency is not universal.

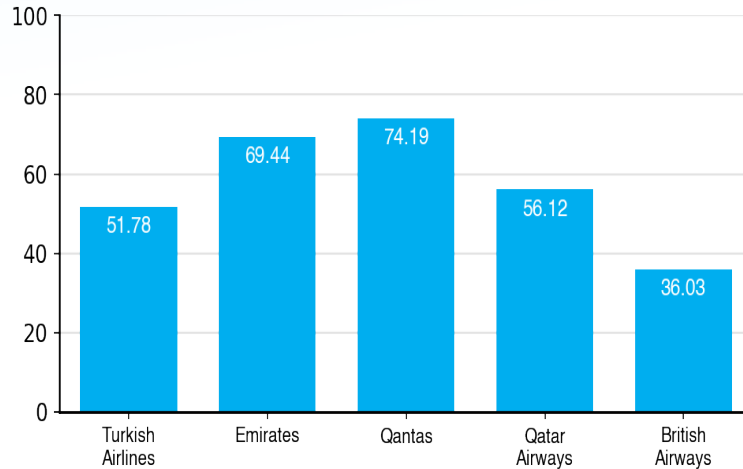
Qatar Airways: Recognition is moderate, primarily among regular Europe or Middle East travelers. Fewer Australians are aware of the brand compared to market leaders.

British Airways: Recognition is highest among UK-bound or frequent international travelers. Broader Australian traveler recall is lower and declining as other brands gain share.



Brand Reach

Category audience: Percentage of audience reached through paid, earned and owned media channels.



Turkish Airlines: Schedules are published across major booking platforms. Codeshare alliances extend presence but mainline flights focus on select international gateways.

Emirates: Coverage includes direct and alliance routes, but reach outside core city pairs is limited. Some regional booking engines exclude Emirates entirely from search results.

Qantas: Qantas' network remains extensive, but aggregator data reveals declining inclusion for some non-core routes. Regional and youth booking engines highlight reduced reach.

Qatar Airways: Direct and alliance flights are found on major engines, but route coverage is narrower than top RPT competitors. Regional platforms under-index for Qatar Airways.

British Airways: Direct flight options from Australia are limited. Alliance codeshares increase technical reach but rarely impact sector-wide booking behavior or local relevance.



Share of Voice

Sector audience: Percentage of paid media presence relative to total sector set.



Turkish Airlines: Turkish Airlines' paid campaigns run during peak sales on aggregator and social platforms. Share of voice ranks below major Middle Eastern and local carriers.

Emirates: Share of voice is lower than in previous periods. Emirates campaigns are less prominent, with budget shifts affecting visibility during Australian peak tourism months.

Qantas: Qantas' paid campaign dominance has faded, with share of voice diluted by strong competitive activity. Media monitoring confirms less peak visibility than prior years.

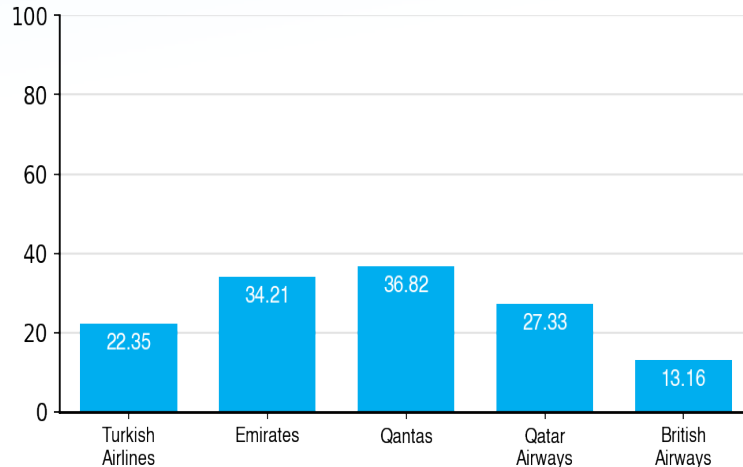
Qatar Airways: Share of voice is low. Qatar Airways runs few high-profile paid campaigns in Australia, with competitive brands occupying more top-of-mind space.

British Airways: Share of voice is weak. Few high-profile campaigns run in Australia, with media monitoring ranking British Airways below all major RPT competitors.



Brand Engagement

Sector audience: Percentage interacting through online content.



Turkish Airlines: Australian digital engagement is modest, peaking during fare promotions. Follower and interaction volumes trail sector leaders in the RPT space.

Emirates: Australian engagement is patchy, with digital interaction rates declining. Sector monitoring shows user participation drops outside major sale periods or partnership announcements.

Qantas: Digital and social engagement remains moderate but is failing to keep pace with innovation leaders. User interaction metrics have declined since last sector reporting cycle.

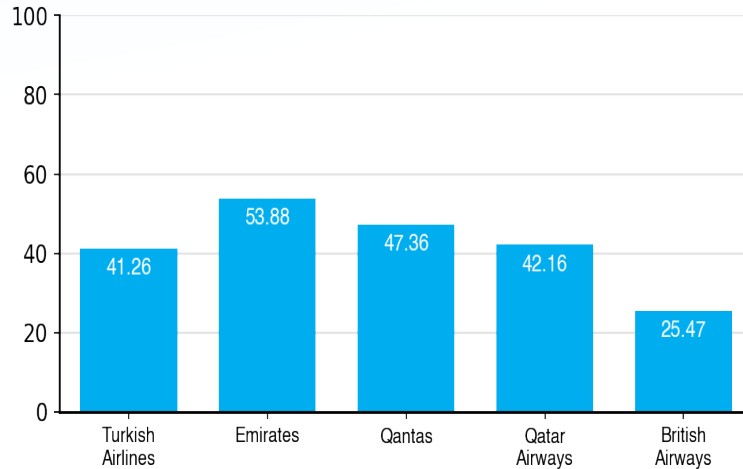
Qatar Airways: Australian social and digital engagement is limited. Sector monitoring indicates engagement spikes only during short-term fare sales or rare PR moments.

British Airways: Australian engagement metrics are very low, with rare spikes during sale periods. Social channels have limited local following and sector impact.



Digital Presence

Sector audience: Percentage interacting with SEO, web, digital advertising and social media.



Turkish Airlines: A local website and booking system are maintained. Feature set and content updates are less frequent than leading carriers' digital offerings.

Emirates: Web and app features remain solid, but regular updates are less frequent. Several competitor airlines have leapfrogged Emirates in digital innovation and interactivity.

Qantas: The Qantas website and app show solid functionality, but competitor airlines offer more advanced booking and service tools. Digital update frequency has slowed.

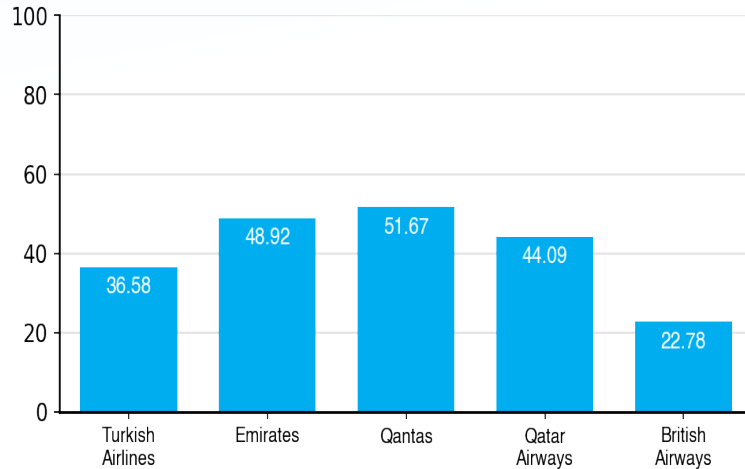
Qatar Airways: Website and booking platforms function but lack advanced features. Digital audits place Qatar Airways below sector leaders in innovation and regular updates.

British Airways: Australian-facing website is functional but lacks modern digital features. Booking experience is basic and not differentiated from legacy sector standards.



Brand Sentiment

Sector audience: Demonstrating a positive attitude to the brand (perceptions/experiences).



Turkish Airlines: Australian traveler sentiment is mixed, noting value and transit experience. Social listening indexes Turkish Airlines in the sector's middle tier for sentiment.

Emirates: Sentiment indexes note an increase in neutral or critical reviews, especially on value and schedule reliability. Positive service stories are less frequent in sector channels.

Qantas: Sentiment surveys reveal rising neutral and negative reviews, particularly around reliability and value. Positive feedback has decreased, especially from infrequent travelers.

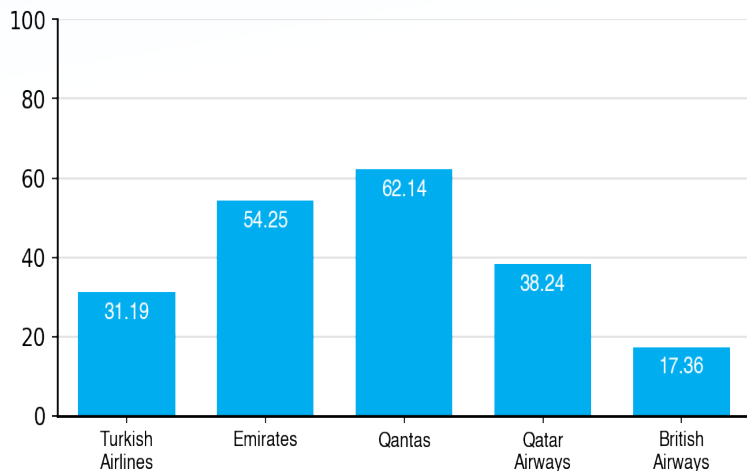
Qatar Airways: Sentiment is mixed to slightly positive but rarely passionate. Australian feedback references variable service experiences and infrequent exceptional journeys.

British Airways: Sentiment surveys capture more neutral and critical views, especially on route options and value. Few positive experiences are cited in Australian forums.



Brand Relevance

Sector audience: Percentage who perceive the brand as aligning with them.



Turkish Airlines: Turkish Airlines is chosen by Australians seeking value and flexibility to Europe. Booking data show sporadic but notable sector relevance.

Emirates: Relevance among premium travelers endures, but mass-market and youth segments show declining interest. Booking logs reveal less frequent shortlisting for secondary routes.

Qantas: Qantas maintains relevance among corporate and premium segments but struggles to engage younger and value-driven travelers. Shortlisting data reflects declining mass-market relevance.

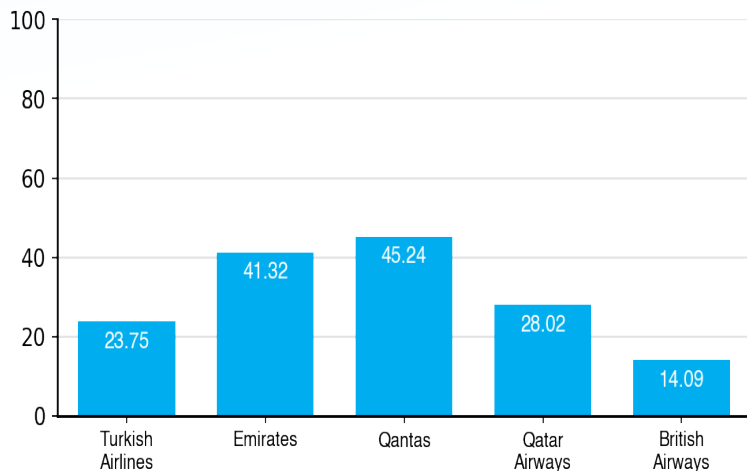
Qatar Airways: Qatar Airways is rarely shortlisted by younger or value-driven travelers. Booking analytics show moderate relevance only for price or loyalty-driven Europe travel.

British Airways: Brand is only relevant for a niche of UK- and Europe-focused travelers. Mass-market and youth booking engines show very limited consideration.



Social Proof

Sector audience: Percentage reporting positive social or actual brand discussion.



Turkish Airlines: Local travel blogs and forums mention Turkish Airlines mainly for fare deals. Peer references are less common than those for established competitors.

Emirates: Peer recommendations on travel forums are down. Social proof is driven by past experiences, with fewer new endorsements from recent travelers in Australia.

Qantas: Qantas appears less frequently in peer endorsement threads and online forums. Social proof is supported mainly by historic loyalty rather than current traveler advocacy.

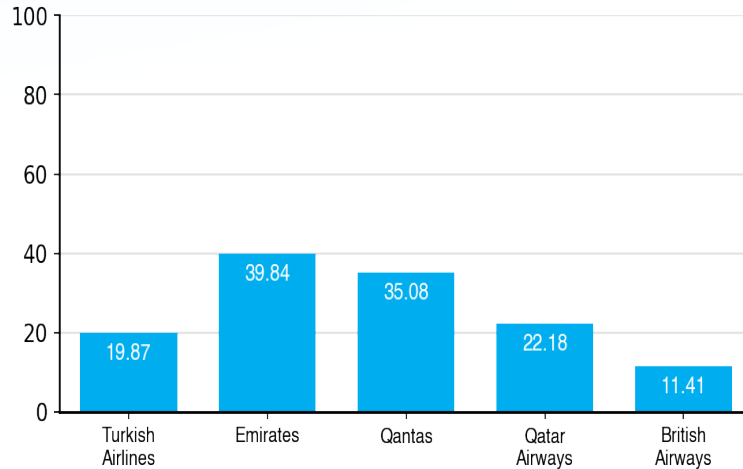
Qatar Airways: Forum and review mentions are infrequent. Social proof relies on legacy loyalty, with few new peer endorsements in the Australian market.

British Airways: Peer recommendations are uncommon. Most social proof references legacy experiences rather than recent advocacy or strong traveler endorsements in Australia.



Innovation Perception

Sector audience: Percentage currently perceiving the brand as adding new value to the sector.



Turkish Airlines: Sector news rarely highlights Turkish Airlines for service innovation. Media coverage in Australia focuses on traditional strengths rather than new offerings.

Emirates: Sector news rarely highlights Emirates for new service launches. Media coverage on innovation is outpaced by competitors focusing on digital and sustainability upgrades.

Qantas: Sector press rarely recognizes Qantas for product or digital innovation. Media focus is largely on operational stability and compliance, not new feature leadership.

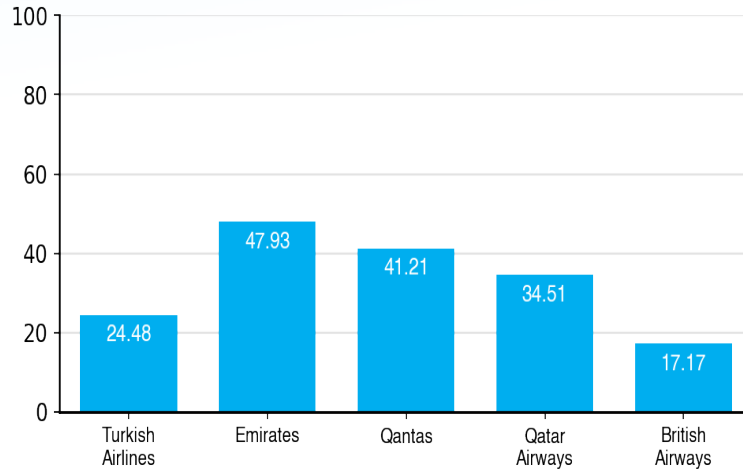
Qatar Airways: Innovation is not a clear differentiator. Media and sector events highlight other brands for new features or sustainability leadership, not Qatar Airways.

British Airways: British Airways is rarely recognized for innovation in the Australian RPT context. Trade and news coverage focus on alliances, not new product features.



Recommendation Rate

Sector audience: Percentage of audience who would endorse the brand to people they know.



Turkish Airlines: Peer recommendations in online forums are infrequent, usually for niche stopover options. Broader sector advocacy is rare in Australian RPT circles.

Emirates: Travel agent surveys indicate fewer Australians are actively recommending Emirates to peers. Net Promoter scores have dropped compared to prior annual benchmarks.

Qantas: Recommendation volumes in travel agent surveys are falling, with more referrals directed toward competitors' new offerings and price points. Advocacy is lower than historic benchmarks.

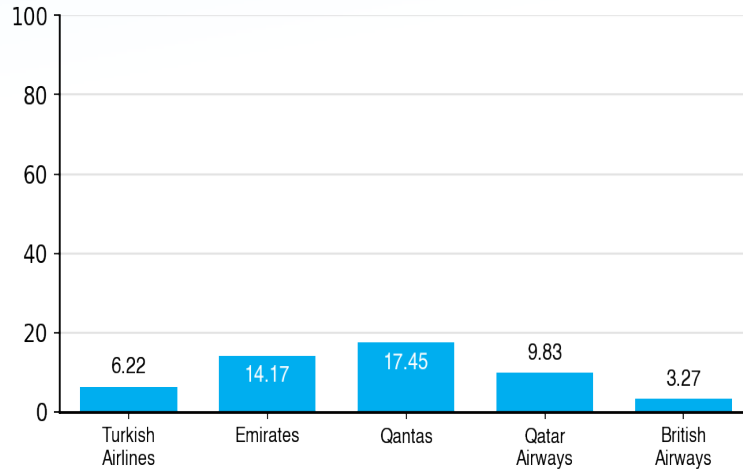
Qatar Airways: Recommendation rates among Australian travel agents and online reviewers are below sector average. Advocacy is declining versus both Gulf and local competitors.

British Airways: Australian travel agents and online reviewers seldom recommend British Airways. Recommendations are mainly based on legacy status, not recent experience.



Brand Propensity

Sector audience: Percentage with stated intention to purchase the brand in the perceivable future.



Turkish Airlines: Booking data show low direct preference for Turkish Airlines among outbound Australians. Propensity rises slightly for multi-stop or discounted Europe routes.

Emirates: Booking intent has softened. Market data indicate more Australian travelers are considering alternatives, especially on routes where pricing or schedule flexibility is limited.

Qantas: Booking intent metrics have declined, with fewer Australians selecting Qantas as first choice. Propensity is strongest among business travelers, but overall trend is negative.

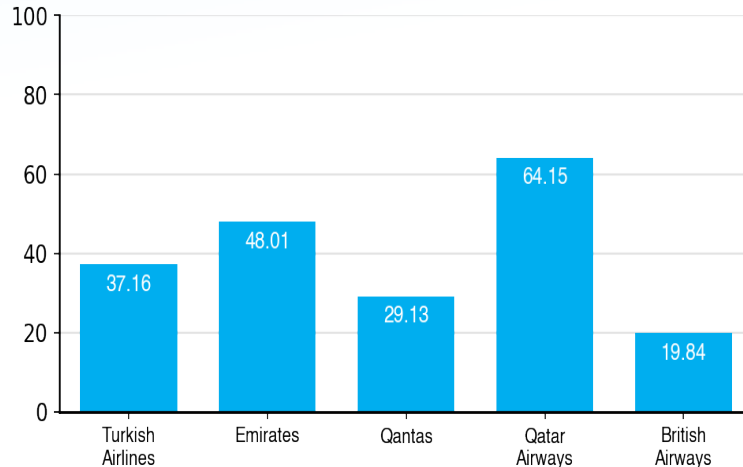
Qatar Airways: Booking intent is low, with fewer Australians selecting Qatar Airways for regular travel. Propensity peaks only for select Europe routes on deep discount.

British Airways: Booking intent is very low, with few Australians nominating British Airways as a first-choice carrier. Propensity is almost entirely legacy-driven.



Price Position

Sector audience: Percentage with a positive perception of price/quality quotient.



Turkish Airlines: Turkish Airlines fares are lower than premium competitors but above deep-discount brands. Mid-tier positioning is confirmed by ongoing public fare tracking.

Emirates: Price positioning remains premium, but value perception suffers from less aggressive discounting. Several competitors offer better deals during seasonal campaigns.

Qantas: Premium pricing persists, but consumer willingness to pay is weakening amid aggressive discounting by other brands. Value perceptions are in steady decline.

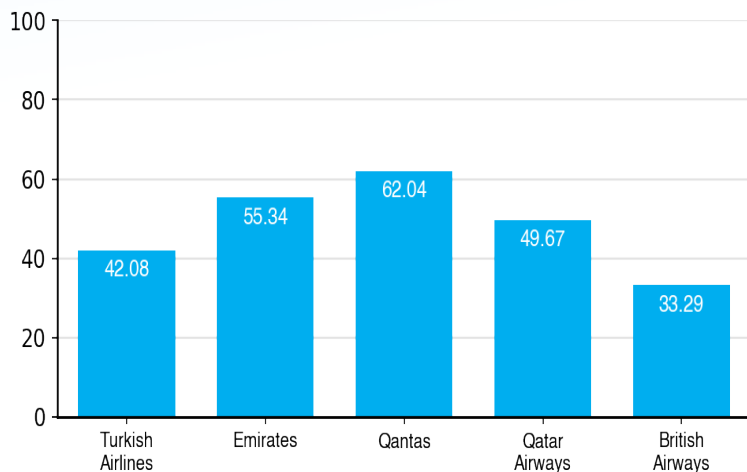
Qatar Airways: Fare audits show Qatar Airways generally undercuts premium competitors but does not match low-cost brands. Price advantages are only sporadically visible.

British Airways: Fares are generally at a premium, but value is questioned by most travelers. Competitive price offers from other carriers are more attractive in this market.



Brand Trust

Sector audience: Percentage who perceive integrity and reliability as key brand attributes.



Turkish Airlines: Compliance records confirm safety and operational standards. Trust surveys place Turkish Airlines in the lower middle among RPT international operators.

Emirates: While operationally reliable, sector trust studies report declining confidence due to recent complaints and high-profile flight delays in Australia.

Qantas: Trust remains high by global standards but is down domestically. Ongoing service disruptions and media scrutiny have eroded consumer trust in the core market.

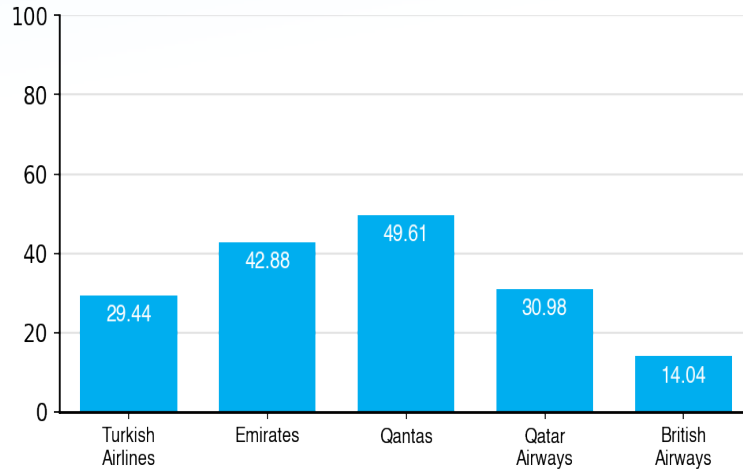
Qatar Airways: Trust scores are stable but not sector-leading. Negative incident reports and variable service experiences temper overall trust among Australian RPT travelers.

British Airways: Sector audits and consumer studies show below-average trust. Recent operational complaints and limited sector presence undermine perceptions in Australia.



Brand Consideration

Sector audience: Percentage inclusion on selection shortlist.



Turkish Airlines: Australians consider Turkish Airlines mainly for multi-leg, value-driven journeys. Consideration falls when direct or frequent flyer preferred options exist.

Emirates: Consideration scores are slipping. More booking platforms record Australians bypassing Emirates for other brands with stronger loyalty programs or better price-service tradeoffs.

Qantas: Qantas is less frequently shortlisted by value and younger travelers. Sector logs show rising bypass rates for leisure and low-fare segments.

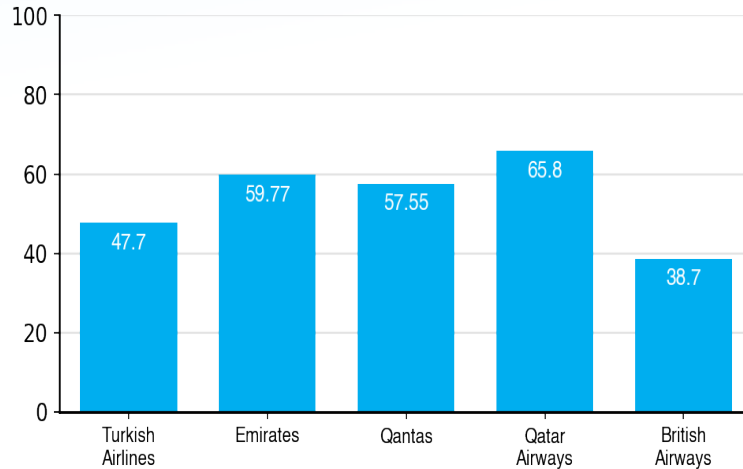
Qatar Airways: Consideration rates are modest, limited mostly to travelers seeking loyalty points or unique routing. Mass-market appeal is lacking.

British Airways: Consideration rates are among the lowest in the RPT sector. Brand is rarely shortlisted except for direct UK travel or specific loyalty programs.



Product Quality

Sector audience: How well a product meets customer expectations, consistently.



Turkish Airlines: Onboard standards are reliable but not exceptional. Sector audits report consistent service with few standout features or product innovations.

Emirates: Product standards remain strong, but feedback is increasingly mixed on consistency. Customer reviews point to service quality fluctuations across different classes and flights.

Qantas: Inconsistent product experiences and recent negative reviews on key routes have reduced Qantas' average quality score. Top-tier service is less reliable than before.

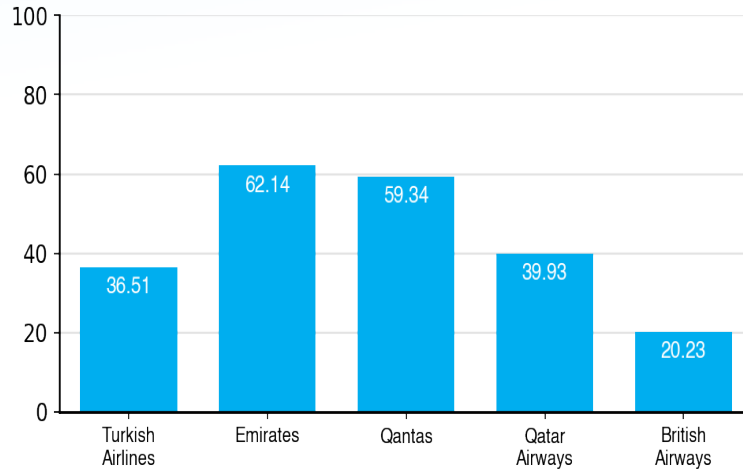
Qatar Airways: Product is rated acceptable but not exceptional in sector audits. Reviews mention comfort and amenities but note inconsistency between flights.

British Airways: Product reviews are average, citing functional but unspectacular inflight experience. Consistency and quality issues are noted by both sector audits and traveler feedback.



Brand Distinctiveness

Sector audience: Audience able to discern unique brand properties.



Turkish Airlines: Brand is noted for Turkish cultural cues in catering and airport presence. Distinctiveness is less evident outside those specific touchpoints.

Emirates: Distinctive branding persists in premium channels, but mainstream visibility is challenged by sector-wide creative stasis. New distinct features are rare in recent campaigns.

Qantas: Distinctive national branding is still present, but creative stagnation has dulled differentiation. New campaigns rarely introduce novel features or unique selling points.

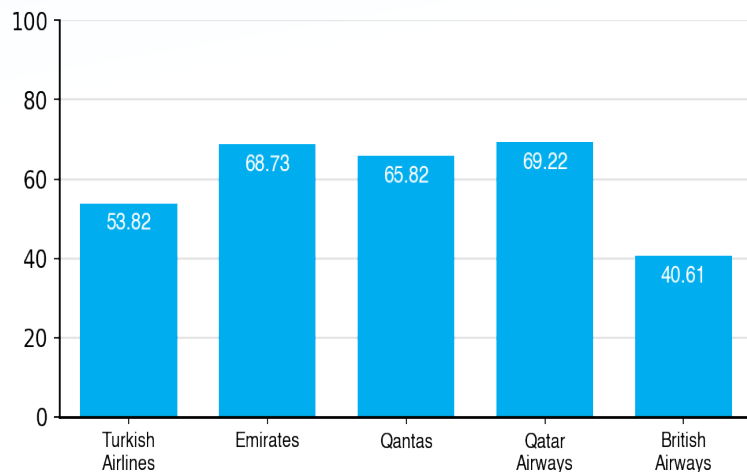
Qatar Airways: Distinctive branding is seen in premium channels, but the wider market finds Qatar Airways less differentiated. Most features are perceived as industry standard.

British Airways: Heritage branding is recognized, but distinctiveness is minimal in the Australian RPT sector. Most features and campaigns fail to stand out from competitors.



Reputation Perception

Sector audience: The Publics overall view of a brands trustworthiness.



Turkish Airlines: Industry publications list Turkish Airlines as a reputable RPT carrier. Sector reputation is steady but rarely highlighted above direct competitors.

Emirates: Reputation scores are above average, but recent sector surveys note Emirates is less often named as a clear market leader in Australia.

Qantas: Reputation scores are solid, but Qantas is no longer always viewed as the sector gold standard. Industry awards are less frequent than in the past.

Qatar Airways: Reputation is stable and above the sector midpoint, yet not leading. Fewer awards and accolades are cited in Australia compared to other brands.

British Airways: Reputation is stable but no longer sector-leading. Recent surveys show more travelers view British Airways as ordinary among international air brands.



Methodology



Methodology

Expanded Metric Calculation Methods

Recognition:

Brand recognition refers to the extent to which consumers can identify and recall a brand based on visual or auditory cues, such as logos, packaging, or advertising campaigns.

Consideration:

Brand consideration is expressed as a percentage of target consumers who would consider a brand when making a purchase in its category.

Share of Voice:

Share of Voice (SOV) is a percentage representing a brand's media spending relative to the total media spending within a specific market and category.

Sentiment:

Brand sentiment is a comparative rating of the overall feeling or attitude that consumers have towards a brand, shaped by their interactions, experiences, and perceptions.

Engagement:

Brand engagement is a percentage rating that measures the combined positivity based on number of followers, post or advertising engagements, comments on posts and online brand mentions.

Reach:

Brand Reach is the estimated proportion of a target audience that has been exposed to the brand through any touchpoint (paid, owned, or earned), within a defined timeframe.



Methodology

Expanded Metric Calculation Methods

Brand Distinctiveness:

The extent to which a brand is seen as unique and recognizable within its competitive category, based on attributes, tone, design, and positioning.

Brand Trust:

Brand trust is the degree to which consumers believe a brand will deliver on its promises, behave ethically, and act in the best interest of its consumers and the community it draws resources from.

Innovation Perception:

Measures the extent to which a brand is expected to increase efficiency and create added value to the industry or sector it competes in.

Digital Presence:

Digital presence measures online visibility, reputation and engagement and is impacted by search effectiveness, advertising reach and frequency, time onsite, and onsite/content engagement

Visual Recall:

This measures the ability of respondents to recognize and recall brand imagery when presented without prompts. Techniques include blurred logo identification and visual memory tasks to test brand imprinting.

Social Proof:

Social proof is a measurement of positive sentiment expressed through a willingness to positively communicate about the brand through referrals or other forms of advocacy.



Methodology

Expanded Metric Calculation Methods

Price Position:

Price position is the perceived or actual rating of a brand's pricing strategy in the context of the competitive set, factoring affordability, premium status, and value justification.

Recommendation Rate:

Recommendation rate is the percentage of customers of a brand who say they would recommend the brand to others, often measured through direct questioning or as part of Net Promoter Score (NPS) frameworks.

Marketing Spend Efficiency:

BSES evaluates how effectively a brand converts its marketing investment into measurable brand outcomes, such as awareness, engagement, and consideration, relative to spend.

Brand Propensity:

Brand propensity is the predicted likelihood that a consumer will choose, purchase, or actively prefer a brand over alternatives within the next decision cycle, based on accumulated emotional, cognitive, and behavioural signals.

Brand Relevance:

Brand Relevance is a percentage value of the extent to which a brand aligns with the personal values, needs, and priorities of its target audience, both functionally and emotionally.

Brand Awareness:

Brand awareness is the extent to which consumers are familiar with a particular brand, including its name, logo, products, and other related assets.

