

Qantas

Rex's retreat and Virgin's crew crisis open a contract-cycle land grab

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7 POWERS SCORE

6.4_{/10}

STRATEGIC VERDICT

Restore trunk frequency, then sell contracted reliability before Virgin stabilises_{2, 1}

TOP OPPORTUNITY

Reliability-backed corporate and government trunk contracts with cross-brand reaccommodation SLAs_{1, 3}

A\$150M-A\$300M recurring trunk contract revenue (analyst estimate; contract values confidential)

BIGGEST THREAT

Virgin Australia: Velocity-linked ChatGPT distribution, free same-day Flex changes and deep sale-fare volume_{4, 5, 6}

Competitive risk to monitor

MARKET MOMENTUM

STABLE

Corporate trunk renewals are winnable, but only if Qantas first repairs the frequency it cut in April 2026._{2, 1}

MARKET SIZE

A\$22B (est., domestic passenger, loyalty, premium long-haul and freight pools)

Total addressable market

THE NUMBERS BEHIND THE POSITION

How Qantas Stacks Up - Visualised

Three views of the commercial position. Each chart answers a different question: where the structural power sits, where the market money lives, and which moves to prioritise. Read each one alongside its plain-English summary.

Chart 01 - Structural Power

Where the business has real, defensible advantage.

The radar is heavy on Scale, Network and Switching: the largest domestic network, a two-currency loyalty duopoly with Velocity, and airline-operated SYD terminals. Process is the weakest spike. Disruption recovery, cabin fencing and corridor allocation are latent capabilities, not productised ones, and the April 2026 cuts and recent incidents undercut any reliability claim. Counter-positioning is strongest on Project Sunrise, where no Australian rival is building ultra-long-haul non-stop.^{2, 7, 8}

Read this if you have 30 seconds

Structural power is high. Operational proof is the gap, so the biggest scoring gains come from turning group depth into contracted reliability.

7 POWERS RADAR



Chart 02 - Where the Money Lives

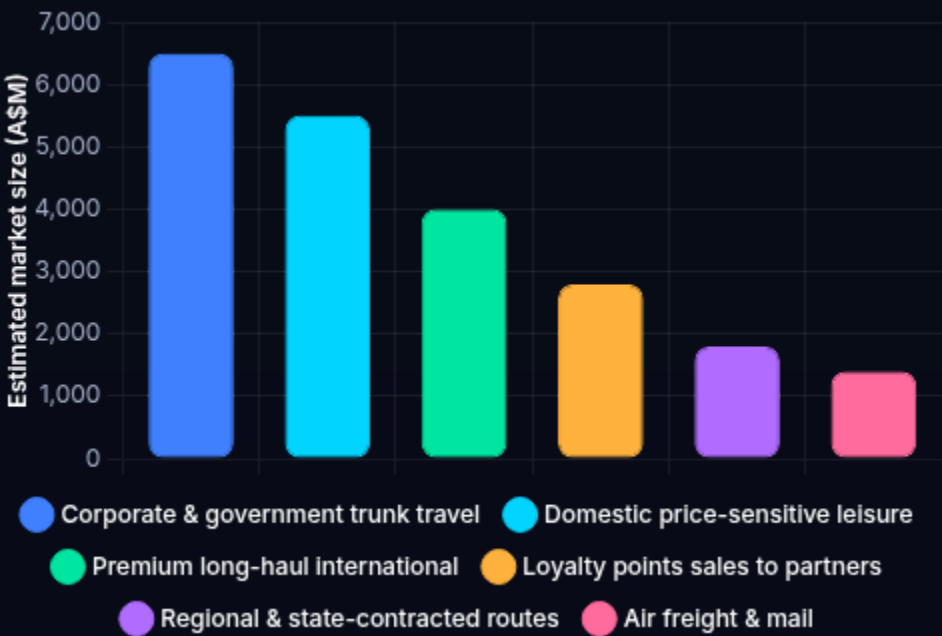
The segments that matter, ranked by size.

Sizing is an analyst estimate; the input has no revenue split. Corporate trunk and premium long-haul are the highest-yield pools. Loyalty points are the highest-margin, capacity-independent pool. Regional is small but underwritten by public money as Rex contracts, and freight is a price-taking pool.^{9, 10}

Read this if you have 30 seconds

About A\$10.5B sits in corporate trunk and premium long-haul, where Qantas's network and Sunrise moat matter most.

MARKET SEGMENTS BY SIZE



STRATEGIC PLAY PRIORITY SCORES

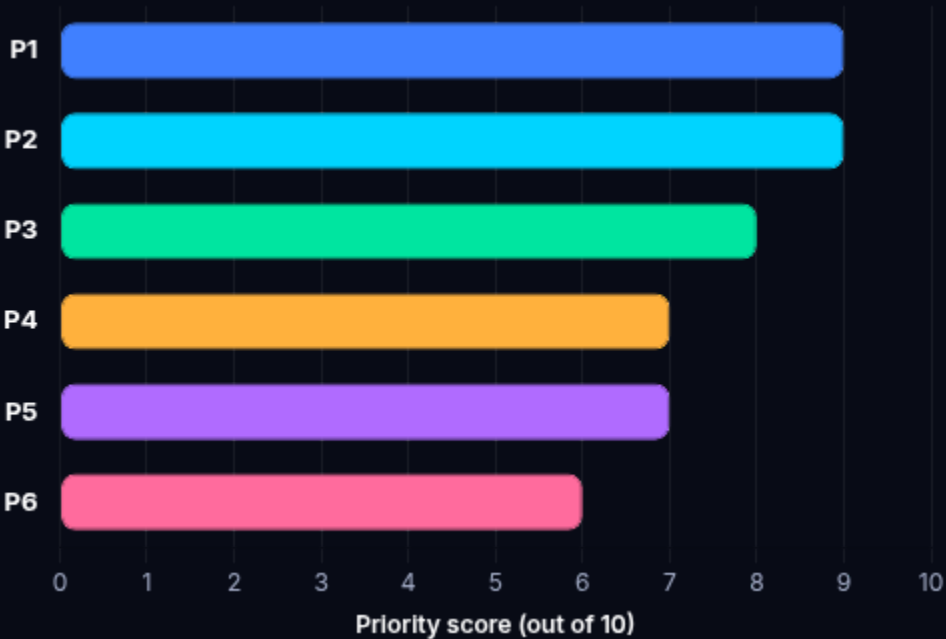


Chart 03 - Where to Move

Strategic plays, ranked by priority and claimability.

Two plays score 9: reliability-backed trunk contracts, and Qantas-Jetstar corridor reallocation that funds them. Both use existing assets during a live Virgin labour crisis. Sunrise pre-sale scores 8 but depends on Airbus delivery. Regional capture and loyalty-channel defence score 7,

- P1** Reliability-backed trunk contracts: cross-brand same-day reaccommodation SLAs sold into Virgin-held corporate and government accounts at renewal
- P2** Qantas-Jetstar corridor allocation: hand Tasmania-style price-led demand to Jetstar and redeploy mainline narrowbodies to restore cut trunk frequencies
- P3** Pre-sell Project Sunrise into multi-year corporate contracts and re-fence the overlapping long-haul cabin ladder
- P4** Regional capture as Rex retreats: Griffith-model backfill in Tasmania, Mildura and Orange, plus a tender-ready Roma-Brisbane bid
- P5** Loyalty-linked AI-agent booking bundling group inventory, Qantas Holidays, Hotels and points-plus-pay to neutralise Virgin's flights-only ChatGPT channel
- P6** Canberra loyalty defence: Qantas Holidays packages via Sydney to stop Velocity cross-selling Qantas-status government travellers

capped by fleet availability, ACCC optics and Virgin's AI first move. [1](#), [11](#), [4](#)

READ THIS IF YOU HAVE 30 SECONDS

Sequence internal moves first (reallocation, fencing), then contract-cycle moves (SLAs, tenders). Park acquisitions behind regulatory signals.

THE SIX-CARD BRIEFING

If you only read six things, read these.

The biggest signals across market, opportunity, competition, and strategic direction. Each card links to its full evidence section below.

Market & Demand

DEMAND INTELLIGENCE

- Take Virgin-held corporate and government trunk accounts at renewal with contracted reliability SLAs on Sydney-Melbourne, Sydney-Brisbane, Melbourne-Brisbane and East Coast-Perth. The offer: cross-brand same-day reaccommodation across Qantas, QantasLink and Jetstar, on-time-performance service credits, and protected peak-hour inventory. - HIGH priority
- Reallocate Qantas and Jetstar capacity corridor by corridor. Hand bag-light Tasmania leisure demand to Jetstar and redeploy the freed mainline narrowbody time to rebuild the trunk business-hour frequencies cut in April 2026. - HIGH priority
- Pre-sell Project Sunrise non-stop Sydney-London (late 2027) and Sydney-New York (mid-2028) capacity into multi-year corporate agreements. Price the time saving of three hours or more explicitly by cabin. - HIGH priority
- Backfill Rex's regional retreat (two Tasmanian services, Mildura, Orange winter stops) using the Griffith 78-seat model. Position QantasLink for the Roma-Brisbane state re-tender. - MEDIUM priority

FULL ANALYSIS >

Top Profit Pools

HIGHEST MARGIN

- Corporate & government trunk travel
- Domestic price-sensitive leisure
- Premium long-haul international
- Loyalty points sales to partners

FULL ANALYSIS >

Competitor Threats

FIELD ASSESSMENT

- Virgin Australia - 7.2/10
- Jetstar - 6/10
- Rex Airlines - 3.5/10

FULL ANALYSIS >

OPPORTUNITY ANALYSIS

Key Opportunities

COMMERCIAL UPSIDE

→ Take Virgin-held corporate and government trunk accounts at renewal with contracted reliability SLAs on Sydney-Melbourne, Sydney-Brisbane, Melbourne-Brisbane and East Coast-Perth. The offer: cross-brand same-day reaccommodation across Qantas, QantasLink and Jetstar, on-time-performance service credits, and protected peak-hour inventory.

→ Reallocate Qantas and Jetstar capacity corridor by corridor. Hand bag-light Tasmania leisure demand to Jetstar and redeploy the freed mainline narrowbody time to rebuild the trunk business-hour frequencies cut in April 2026.

→ Pre-sell Project Sunrise non-stop Sydney-London (late 2027) and Sydney-New York (mid-2028) capacity into multi-year corporate agreements. Price the time saving of three hours or more explicitly by cabin.

→ Backfill Rex's regional retreat (two Tasmanian services, Mildura, Orange winter stops) using the Griffith 78-seat model. Position QantasLink for the Roma-Brisbane state re-tender.

FULL ANALYSIS >

7 POWERS ANALYSIS

Strongest Powers

STRATEGIC ADVANTAGE

→ Scale - 8/10

→ Network - 7/10

→ Switching - 7/10

→ Brand - 7/10

FULL ANALYSIS >

STRATEGIC DIRECTION

Top Plays

PRIORITISED MOVES

→ Reliability-backed trunk contracts: cross-brand same-day reaccommodation SLAs sold into Virgin-held corporate and government accounts at renewal - 9/10

→ Qantas-Jetstar corridor allocation: hand Tasmania-style price-led demand to Jetstar and redeploy mainline narrowbodies to restore cut trunk frequencies - 9/10

→ Pre-sell Project Sunrise into multi-year corporate contracts and re-fence the overlapping long-haul cabin ladder - 8/10

→ Regional capture as Rex retreats: Griffith-model backfill in Tasmania, Mildura and Orange, plus a tender-ready Roma-Brisbane bid - 7/10

FULL ANALYSIS >

Everything beneath the headlines, in twenty-one structured sections.

The pages above gave you the verdict. The pages below give you the working - starting with how this report was built and what it analysed, then the market structure mapped, the profit pools quantified, each of the 7 Powers assessed individually, the strategic plays sequenced, and finally every cited source listed in full. Click any section header to expand it.

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How We Built This

METHODOLOGY



10 PAGES CRAWLED ACROSS 3 COMPETITORS · 6 SEARCH QUERIES · 50 SOURCES CITED AS EVIDENCE - EVERY CITATION TRACEABLE IN THE APPENDIX.

This report draws on three strands of public evidence: competitor websites, Google Search results for the client, its competitors and the domestic air travel category, and Google News coverage. In total, 63 sources inform the analysis, and each finding in the appendix links back to the specific page, search result or article it came from. We have tried to separate what the evidence shows from what it merely suggests, and where coverage is thin or signals conflict, the text says so plainly.

3

Competitors analysed

10

Web pages crawled

0 client · 10 competitor

6

Search queries run

9

SERP results captured

40

News articles

50

Sources cited as evidence

drawn from 63 crawled

OUR APPROACH

- Every finding is tied to a source id listed in the appendix, so any claim can be checked against the original page, search result or article.
- Virgin Australia, Jetstar and Rex Airlines were each examined through the same crawl and search process, so comparisons rest on like-for-like evidence.
- Six search queries covered the Qantas brand, each named competitor and the broader domestic air travel category, capturing 9 organic results and 4 related questions.
- Forty news articles were reviewed to test website and search positioning against how the market is actually being reported.

WHAT THIS REPORT DID NOT DO

- The client website crawl returned no pages, so Qantas's own positioning is inferred from search results and news coverage rather than from its site content.
- Competitor evidence rests on 10 crawled pages across three airlines, a narrow sample that reflects a single point in time rather than complete sites or subsequent changes.
- The research uses publicly available sources only, with no paywalled industry data, fare or booking data, or primary interviews, and the AI-assisted analysis was reviewed but not exhaustively human-verified.

COMPETITORS EXAMINED

Virgin Australia

Jetstar

Rex Airlines

DATA SOURCE TYPES

Client website crawl

Google Search (client)

Google News

Competitor website crawl

Google Search (competitors)

MARKET OVERVIEW

Australian domestic aviation is a duopoly-plus. Qantas Group spans the full-service, low-cost and regional tiers, and Virgin Australia is the only national-scale rival. Rex is collapsing into subsidised regional niches. Its owner has spent \$27m and fixed no planes, and it is cutting Tasmanian, Mildura and Orange services. Qantas raised fares and cut domestic flights in April 2026, so corporate buyers now pay more for less frequency. Virgin is simultaneously strong commercially (ChatGPT search, free same-day Flex changes, one million sale fares) and weak operationally (crew revolt, cancellations). Opportunity sits in contracted trunk reliability, regional backfill as three million Australians face lost access, and uncontested Sunrise non-stop premium yield. [10](#), [12](#), [2](#), [1](#), [9](#)

RECOMMENDED DIRECTION

Turn group depth into sellable reliability. First, reallocate price-sensitive leisure demand on corridors such as Tasmania to Jetstar and redeploy mainline narrowbodies to restore the business-hour trunk frequencies cut in April 2026. Second, sell a contracted reliability tier (cross-brand same-day reaccommodation, SYD lounge recovery, OTP service credits) into Virgin-held TMC and panel renewals while Virgin's crew dispute persists. Virgin's free same-day Flex changes show it will contest on flexibility, so Qantas must move ahead of it. In parallel, pre-sell Sunrise premium volume, backfill Rex routes organically using the Griffith template, and close the AI-distribution gap. [13](#), [5](#), [14](#), [4](#)

KEY FINDINGS

- The April 2026 fare rises combined with domestic flight cuts took frequency away from corporate buyers, the attribute they pay for, which exposes Qantas at every TMC and panel renewal. [2](#)
- Virgin is operationally fragile but commercially aggressive. It faces a crew revolt with cancellations, yet runs ChatGPT flight search tied to Velocity, free same-day Flex changes and one million sale fares from \$49. [1](#), [4](#), [5](#), [6](#)
- Rex is a pure operator in terminal decline. Its owner spent \$27m and fixed no planes, it has cut Victorian and Tasmanian services, and cash is 'critically low'. Its regional routes are opening, but its goodwill is intact. [10](#), [15](#), [16](#), [17](#)
- Project Sunrise gives Qantas the only Australian non-stop Sydney-London and Sydney-New York product, saving at least three hours, from late 2027 and mid-2028. [8](#), [18](#), [11](#)
- Qantas's own reliability and labour exposure is live: a Sydney-Melbourne smoke evacuation, the QF122 engine priority landing, and regional ground crews voting for possible strike action. The SLA plays must be priced conservatively. [7](#), [19](#), [20](#)

REVENUE OPPORTUNITIES

- Reliability-tier trunk contracts aimed at Virgin-held corporate and government accounts at renewal: est. A\$150M-A\$300M recurring revenue if 5-10% of contested trunk corporate volume moves. [1](#)
- Qantas-Jetstar corridor reallocation, starting with Tasmania, redeploying mainline from sub-A\$150 leisure seats to restored trunk business frequency: est. A\$80M-A\$150M yield uplift. [13](#) , [21](#)
- Pre-sold Sunrise corporate and premium contracts plus long-haul cabin re-fencing: est. A\$100M-A\$250M annual premium revenue secured before launch. [18](#) , [11](#)
- QantasLink backfill of Rex-vacated routes on the Griffith model: roughly A\$8.5M a year in fares per added daily 78-seat return (assumption-based), plus trunk feed. [14](#) , [15](#) , [12](#)
- Loyalty-linked AI-agent booking bundling flights, hotels, holidays and points-plus-pay to neutralise Virgin's ChatGPT move and win back OTA package leakage: est. A\$30M-A\$60M protected and incremental margin. [4](#) , [22](#)



BUSINESS TYPE

Qantas is Australia's national full-service airline group. It combines mainline, QantasLink regional, the Jetstar low-cost carrier, Frequent Flyer, lounges, freight and holidays. Its economics run on premium trunk yield and a loyalty pool that does not depend on seat capacity. [8](#)

MARKET STRUCTURE

Australian domestic aviation is a duopoly-plus. Qantas Group occupies three price layers: full-service, low-cost through Jetstar, and most of regional through QantasLink. Virgin Australia is the only independent rival at national scale. Rex is a retreating regional operator propped up by public money: its new owner spent \$27m and fixed no planes. Upstream supply is concentrated in the Boeing/Airbus duopoly, fuel, and slot-constrained Sydney, where domestic terminals are airline-run. Margin pools upstream and at the loyalty layer, while flying is squeezed. The April 2026 fare rises and domestic capacity cuts showed cost pass-through at network level. Regional routes are the only fragmented flying zone, with 3m regional Australians at risk of losing access by 2030. [2](#) , [10](#) , [9](#) , [23](#)

COMPETITIVE POSTURE

Qantas holds the structural high ground: terminals and slots, the only Australian ultra-long-haul program, and two of the three domestic price tiers. Its exposure is at the edges. Virgin is moving fastest, with its first Canberra international route, flight search inside ChatGPT and aggressive sale cadence, but crew revolt is eroding its reliability case at corporate renewal. Rex has goodwill but no capital. Qantas's own reliability incidents and ground-crew strike votes cap how far it can push premium pricing. [24](#) , [4](#) , [1](#) , [20](#)



Demand is splitting three ways: -

PREMIUM LONG-HAUL (RISING):

Sydney-New York non-stop from mid-2028 saves at least three hours and opens a segment no Australian rival contests. -

PRICE-LED LEISURE (GROWING, LOWER YIELD):

growth is moving to secondary gateways, including Virgin's Canberra-Bali and Jetstar's Colombo route. -

REGIONAL (UNDERSERVED):

supply-driven collapse puts 3m Australians at risk of losing air access by 2030 while underlying demand persists. Corporate and government trunk demand is stable, but share is decided at contract renewal on reliability. The April 2026 fare rises combined with frequency cuts put that reliability case under strain. Buyers are openly asking about new entrants, a clear signal of appetite for competition.^{18, 24, 9, 25}

HIGH DEMAND SEGMENTS

- Non-stop ultra-long-haul premium travel (Sydney-London from late 2027, Sydney-New York from mid-2028) on the purpose-built A350-1000ULR. This is the highest-yield rising segment and has zero domestic competition.^{18, 11}
- Short-haul international leisure from non-Sydney gateways. Virgin's Canberra-Bali runs at a \$449 return and Jetstar has launched Colombo. Volume is growing, yield is lower, and Virgin has taken first-mover position in Canberra.^{24, 26}
- Regional capacity backfill as Rex cuts Victoria and Tasmania services. The QantasLink Griffith expansion shows communities are pulling for well-capitalised capacity.^{14, 15}
- Unbundled ancillary spend in the low-fare tier. Jetstar's overhead-bag charge sits on top of \$48 Tasmania fares, and the ancillary pool accrues to Qantas Group.^{21, 13}
- AI-mediated flight discovery. Virgin's ChatGPT integration opens a distribution channel outside GDS and OTAs, where Qantas has no documented presence.⁴

STABLE DEMAND SEGMENTS

- Corporate travel on the Sydney-Melbourne, Sydney-Brisbane, Melbourne-Brisbane and East Coast-Perth trunks. Travellers fly weekly to monthly and switch only when TMC agreements renew. Virgin's crew revolt makes it the vulnerable incumbent in this cycle.^{1, 2}
- Whole-of-government panel travel. Volume is contract-locked and high-frequency, and panels reward regional-plus-trunk coverage, which favours Qantas plus QantasLink.
- Coalition points purchases by banks, card issuers, retailers and hotels. Buying is continuous and insulated from fuel shocks, in effect a two-currency market of Qantas Frequent Flyer versus Velocity.
- Resource-sector and FIFO roster travel. Volume is very high-frequency and contracted. The segment is inferred rather than evidenced, and specialist charter operators compete for it.
- State-contracted regional routes such as Roma-Brisbane. Volume is stable but locked to the incumbent (Rex) until

re-tender.²⁷

UNDERSERVED DEMAND

- About 3m regional Australians face losing air access by 2030 as ageing fleets and fuel costs break sub-scale operators. This is the largest unserved passenger pool.^{9, 15}
- In Maranoa, 649 residents demanded a better Roma-Brisbane service and were overruled. That latent switching demand becomes contestable at re-tender.²⁷
- Buyers want a challenger to the Qantas-Virgin duopoly-plus. Rex was voted favourite airline while in administration.^{25, 17}
- Day-of-travel disruption and ground-access needs at Mascot are answered by the airport operator, not a carrier. The airport cannot rebook passengers.^{28, 29, 30}
- Disruption-free trunk service is undersupplied. Virgin has crew revolt, Jetstar faces union action, and Qantas had a Sydney-Melbourne smoke evacuation. The most stable operator wins leverage at renewal.^{1, 3, 7}

DEMAND SIGNALS

- The airport operator holds the #1 category result. Generic intent is not owned by any carrier: there are zero ads and no airline booking domain in the top 10.³⁰
- In April 2026 Qantas raised fares while cutting domestic capacity. This is network-level pricing power, now exposed at corporate renewals.²
- Virgin is running relentless sales: 1m fares from \$49, international from \$429 return, and Economy X upgrades from \$8. It is buying leisure share on price.^{6, 31, 32}
- Jetstar is reallocating capacity by suspending Brisbane-Mackay while adding Colombo. The group is pruning thin domestic routes, which leaves regional gaps.^{33, 34}
- Inbound tourism is softening. Qantas and Tourism Australia have launched an offshore push, which puts international-to-domestic feed at risk.³⁵

DEMAND HEATMAP

SEGMENT	TREND	URGENCY	WILLINGNESS TO PAY
Corporate & government trunk travel (SYD-MEL, SYD-BNE, MEL-BNE, East Coast-Perth) ^{2, 1}	STABLE	HIGH	HIGH
Ultra-long-haul non-stop premium (Project Sunrise) ^{18, 11}	RISING	MEDIUM	HIGH
Regional capacity backfill (Tasmania, Mildura, Griffith) ^{15, 9, 14}	RISING	HIGH	MEDIUM
Price-sensitive domestic leisure (Qantas brand) ^{13, 6}	DECLINING	LOW	LOW
Short-haul international leisure from secondary gateways ^{24, 34}	RISING	LOW	MEDIUM
AI-mediated, loyalty-linked booking ⁴	RISING	MEDIUM	MEDIUM
Day-of-travel disruption assurance at SYD ^{28, 36}	RISING	HIGH	MEDIUM

Profit concentrates in two places. The first is the loyalty layer: points sold to banks, card issuers and retailers, which is high-margin and independent of capacity. The second is premium yield: domestic Business at AUD 800-2,500 one-way, international Business at AUD 6,000-15,000 and First at AUD 15,000-30,000+ return. Project Sunrise extends premium yield into non-stop ultra-long-haul from late 2027. Ancillaries are the margin engine of the low-fare tier, and Jetstar's overhead-bag charge keeps that pool inside the group. Regional flying is thin-margin and increasingly underwritten by public money, as Rex's burn of its federal loan shows. Freight and holidays are market-rate pools that add load but carry no pricing power. ^{18, 21, 10}

HIGH MARGIN CATEGORIES

- Partner points sales at negotiated per-point prices. This is the largest capacity-independent pool and is shared only with Velocity.
- Premium long-haul (Business AUD 6,000-15,000; First AUD 15,000-30,000+). Sunrise non-stop adds a time-saving premium that no Australian rival offers. ^{8, 18}
- Domestic Business and corporate trunk fares (AUD 800-2,500 one-way). The April 2026 fare lift was absorbed, but it is exposed at renewal. ²

- Qantas Club memberships (AUD 600-1,100 per year plus joining fee). These are fixed-cost lounges monetised by member throughput.
- Low-fare-tier ancillaries led by Jetstar's overhead-bag charge. Fee revenue sits on top of near-zero-margin headline fares. ^{21, 37}

REPEAT REVENUE

- Continuous partner points purchasing, which runs independent of passenger seasonality and fuel shocks.
- TMC-managed corporate agreements with weekly-to-monthly travellers. Virgin's operational instability makes its accounts contestable at the next renewal. ¹
- Whole-of-government panel volume, locked between tender cycles.
- Status-tier retention and annual or multi-year Qantas Club renewals. These convert infrequent leisure flyers into recurring revenue.
- State-contracted regional routes: recurring, subsidy-backed volume for whoever holds the contract, currently Rex on Roma-Brisbane. ²⁷

SPECIALIST REVENUE

- Ultra-long-haul non-stop capacity on the purpose-built A350-1000ULR, backed by a record 24-hour test flight. This is exclusive among Australian carriers. ¹¹
- Time-critical regional freight (perishables, pharma, express). Rex's Queensland Freight is the incumbent on a weakening network. ³⁸
- Government-underwritten regional service. Rex holds the contracts and federal loan support but cannot deliver fleet remediation. ^{10, 27}
- Points-anchored holiday packages (AUD 1,000-10,000+). OTAs hold Mascot destination intent, so points earn and burn is the only differentiator. ^{22, 39}
- Pets-in-cabin ancillary: Virgin is monetising it city by city and Qantas has no documented equivalent. ⁴⁰

LOW MARGIN / COMMODITY

- Mainline leisure seats on corridors duplicated by Jetstar: Qantas Economy at AUD 150-600 against \$48 Tasmania sale fares, carried at full-service cost. ¹³
- Thin regional routes, where old aircraft and fuel costs push sub-scale operators below break-even and force route cuts. ^{9, 41}
- General air cargo priced per kg at market rate. Qantas Freight is a price-taker against forwarders and Rex Queensland Freight. ³⁸
- Packaged leisure, where high switching to OTAs caps package and accommodation margin. ²²
- Short-haul international leisure sold on sale fares (Virgin from \$429-449 return). Volume grows but yield stays low. ^{24, 31}

Qantas sits between two concentrated supplier layers. Upstream are Boeing/Airbus, fuel, and Sydney airport infrastructure. Downstream are TMCs, GDS and OTAs. It owns the control layers in between: network planning, revenue management, loyalty data, and airline-operated domestic terminals at SYD. Fuel shocks pass straight into fares and capacity, as April 2026 showed. Delivery of the A350-1000ULR sets the Sunrise timeline. Labour is the fragile middle layer: regional ground crews have voted for strike action, and privacy governance is under OAIC scrutiny. Margin escapes the flying layer and pools at the loyalty tier. Distribution control is shifting to AI interfaces, where Virgin moved first.^{23, 2, 11, 20}

UPSTREAM DEPENDENCIES

- Airbus delivery of the A350-1000ULR fleet is the binding constraint on the late-2027 Sunrise launch. Boeing/Airbus duopoly power applies to every Australian carrier.¹¹
- Jet fuel priced against Middle East risk. The April 2026 shock forced fare rises and domestic cuts.²
- Slot-constrained Sydney airport, where the operator sits under ACCC pricing oversight. Airline-run terminals give Qantas partial control.²³
- Unionised workforce. Regional Qantas ground crews voted for possible strike action, which threatens reliability and any SLA-based contract offer.²⁰
- Third-party technology and data suppliers. OAIC breach scrutiny makes supplier security assessments a regulatory dependency for the loyalty data asset.^{42, 43}

DOWNSTREAM REVENUE PATHS

- Domestic fares through direct, TMC and government channels. The April 2026 price uplift is now being tested at renewal.²
- Premium international fares, extended by non-stop Sydney-New York from mid-2028.¹⁸
- Loyalty revenue: points sold to financial services and retail partners, redemption margin, and join fees.
- Holidays and hotels, contested by OTAs that hold Mascot and Sydney destination intent.^{22, 39}
- Inbound international feed onto the domestic network. It is currently softening, which prompted a joint Tourism Australia push.³⁵

CONTROL POINTS

- Airline-operated domestic terminals and slot holdings at SYD are a structural entry barrier that intermediaries and Rex cannot replicate.²³
- Frequent Flyer currency: a two-player coalition market. Virgin is extending Velocity reach into AI discovery.⁴
- Multi-tier brand control. Jetstar's unbundling keeps price-sensitive demand inside Qantas Group, and Virgin cannot copy that allocation.^{21, 13}
- Day-of-travel intent is held by the airport operator. The carrier's rebooking authority is the physical control point it has not yet monetised.^{30, 28}

→ State route contracts lock regional demand to the incumbent until re-tender, and Rex holds them now.²⁷

MARGIN LEVERAGE POINTS

- Hand bag-light leisure demand to Jetstar and redeploy mainline narrowbodies to restore the trunk frequency cut in April 2026, lifting yield per seat.^{21, 2}
- Re-fence overlapping Economy, Premium Economy and Business bands and price the three-hour-plus Sunrise time saving by cabin.¹⁸
- Offer contracted reliability SLAs and cross-brand reaccommodation against Virgin's crew-disrupted operation. Speed matters, because Virgin is already countering with free same-day changes for Flex fares.^{1, 5}
- Consolidate the leased 49,000 sqm Mascot head office, a permanent cut to non-flying fixed cost.⁴⁴
- Backfill regional routes Rex has vacated using the Griffith 78-seat model, and fill regional belly-hold with time-critical freight.^{14, 15}

06

Competitive Field

MARKET

COMPETITOR	POSITIONING	STRENGTH	WEAKNESS	THREAT
Virgin Australia ^{1, 4, 5, 24}	Single-brand value-hybrid full-service	Velocity, AI distribution, sale volume	Crew revolt, cancellations	HIGH
Jetstar ^{13, 21, 3, 33}	In-group low-cost unbundled carrier	A\$48 fares, ancillary fees	ASU action, route suspensions	MEDIUM
Rex Airlines ^{17, 27, 10, 16}	Distressed regional community carrier	Consumer goodwill, state contracts	No capital, ageing fleet	LOW

OPPORTUNITY ANALYSIS

04 sections

07

Opportunity Map

OPPORTUNITY

OPPORTUNITY	TYPE	UPSIDE	DIFFICULTY	DEFENSIBILITY	PRIORITY
Take Virgin-held corporate and government trunk accounts at renewal with contracted reliability SLAs on Sydney-Melbourne, Sydney-Brisbane, Melbourne-Brisbane and East Coast-Perth. The offer: cross-brand same-day reaccommodation across Qantas, QantasLink and Jetstar, on-time-performance service credits, and protected peak-hour inventory. 1 , 5 , 2	Contract share capture (B2B / B2G)	HIGH. These travellers fly weekly to monthly on Domestic Business fares of AUD 800-2,500 one-way, and each account moved locks in multi-year volume. The window lasts only while Virgin's crew revolt continues. Virgin already offers Flex holders free same-day changes, so Qantas's differentiator has to be guaranteed recovery, not flexibility alone.	MEDIUM	MEDIUM	HIGH
Reallocate Qantas and Jetstar capacity corridor by corridor. Hand bag-light Tasmania leisure demand to Jetstar and redeploy the freed mainline narrowbody time to rebuild the trunk business-hour frequencies cut in April 2026. 2 , 13 , 21	Yield and capacity reallocation	MEDIUM-HIGH. It moves mainline seats from sub-AUD 150 leisure fares into corporate trunk yield on the same fleet. It is also the precondition for credible reliability SLAs. Jetstar's overhead-bag charge makes the brand split cleaner.	MEDIUM	HIGH	HIGH
Pre-sell Project Sunrise non-stop Sydney-London (late 2027) and Sydney-New York (mid-2028) capacity into multi-year corporate agreements. Price the time saving of three hours or more explicitly by cabin. 8 , 18 , 11	Premium long-haul contract pre-sale	HIGH. This is the highest-yield pool (Business AUD 6,000-15,000, First AUD 15,000-30,000+ return), and no Australian rival is building ULR capability. Pre-selling converts fixed A350-1000ULR fleet cost into contracted volume before launch.	HIGH	HIGH	HIGH
Backfill Rex's regional retreat (two Tasmanian services, Mildura, Orange winter stops) using the Griffith 78-seat model. Position QantasLink for the Roma-Brisbane state re-tender. 15 , 10 , 9 , 14	Regional route and state-contract capture	MEDIUM per route. Each route adds regional fares plus trunk and international feed and strengthens regional coverage in government panel tenders. The underserved pool is 3m regional Australians at risk of losing air access by 2030.	HIGH	MEDIUM	MEDIUM
Launch a loyalty-linked AI-agent booking channel that sells Qantas, QantasLink and Jetstar flights, Qantas Holidays, Qantas Hotels and points-plus-pay in a single transaction. This neutralises Virgin's flights-only ChatGPT integration with Velocity. 4 , 22	Distribution channel defence	MEDIUM. It protects Frequent Flyer engagement and direct-channel share, and wins back package attach (AUD 1,000-10,000+ per booking) that currently leaks to OTAs such as trip.com.	MEDIUM	MEDIUM	MEDIUM

Qantas's highest-value moves are contract and allocation plays, not new capacity. Virgin Australia's crew revolt opens corporate and government trunk renewals, but Qantas can only exploit it after restoring the business-hour frequency it cut in April 2026. The way to do that is to push bag-light Tasmania leisure demand onto

Jetstar. Project Sunrise is the only uncontested premium pool, and pre-selling it de-risks the A350-1000ULR bet before late 2027. Regional backfill of Rex's retreat is real but constrained by fleet availability and the ACCC. Virgin's ChatGPT integration with Velocity is the one area where Qantas is visibly behind and must close quickly. [1](#) , [2](#) , [11](#) , [15](#) , [4](#)

08

Niche Opportunities

OPPORTUNITY



NICHE	WHY IT EXISTS	WHO CAPTURES IT	WHY VULNERABLE	UPSIDE
Rex-vacated regional routes: Tasmania, Mildura and Orange 15 , 12 , 10 , 16	Rex is cutting supply because it lacks capital, not because demand has gone. It has axed Tasmanian services, scaled back Mildura and pared back Orange stops over winter.	Rex Airlines on a shrinking schedule. The vacated frequencies are currently unserved.	The new owner spent \$27m and fixed no planes, and executives flagged that cash was critically low. Rex cannot credibly restore frequency.	Route-level fares plus trunk feed. The illustrative, assumption-based estimate is about AUD 8.5m a year per added daily return on a 78-seat aircraft, before connecting revenue.
Roma-Brisbane (Maranoa) Queensland state-contracted route 27 , 16	Queensland extended Rex's contract even though 649 residents demanded change, so the expressed demand stays unmet until re-tender.	Rex Airlines, under the extended state contract.	Rex's financial distress and public community anger give the state political cover to switch operator at the next tender.	Stable, subsidy-backed volume locked in for the contract term, plus a reference case for other state-contracted regional routes.
Time-critical regional Queensland freight: perishables, pharmaceuticals and express 38 , 9	Rex runs Queensland Freight on the same fragile regional network that is losing capacity. Time-critical cargo pays above general per-kg rates.	Rex Queensland Freight and fragmented regional logistics providers.	Fleet stagnation puts uplift reliability at risk, and reliability decides the purchase for cold-chain cargo.	Incremental belly-hold yield on existing QantasLink sectors with near-zero capex. It also improves the economics of marginal regional routes.
Canberra-origin international leisure: the Velocity leakage point 24 , 31	Virgin took first-mover position with Canberra's first-ever international route, Canberra-Bali from AUD 449 return, which sits below the top of the Qantas domestic one-way band.	Virgin Australia.	The route runs only 3 weekly frequencies on sale pricing, with the crew dispute live. Canberra travellers already hold Qantas status from government travel.	Direct yield is low. The real value is stopping Velocity from building balances among high-frequency government flyers. Qantas Holidays packages connecting via Sydney avoid any need for new aircraft.
Day-of-travel disruption and ground access at SYD (Mascot) 30 , 28 , 29 , 36	Buyers ask what happened at Sydney Airport today and how to get from Mascot station to the domestic terminal. The airport operator, not a carrier, answers.	Sydney Airport (#1 organic result) and shuttle intermediaries listed on Tripadvisor.	The airport can inform passengers but cannot rebook them. Qantas operates its own domestic terminal and holds rebooking authority across three brands.	A paid or status-included disruption-assurance tier, plus renewal leverage with corporate accounts from owning the recovery moment.

Every exploitable niche traces back to competitor capital or operational failure. Rex's retreat from Tasmania, Mildura and Orange, its cash crisis and its fixed-no-planes record open regional routes, Queensland freight lanes and the Roma-Brisbane re-tender to QantasLink. Community goodwill toward Rex means entry must follow the Griffith model, not force. Virgin's Canberra-Bali launch is a loyalty threat more than a yield threat, because it gives Velocity a way into Qantas's government-traveller base. Day-of-travel disruption intent at SYD

sits with an airport that cannot rebook anyone. That gap is the cheapest one for Qantas to close, since it already controls the terminal. [15](#) , [10](#) , [17](#) , [24](#) , [28](#)



Qantas prices breadth, not precision. The April 2026 fare rises alongside domestic frequency cuts charge corporate buyers more for less of their main value driver, and that mismatch will surface at TMC and panel renewals. On leisure corridors, a 3x-12x headline gap between Jetstar's AUD 48 Tasmania fares and Qantas Economy (AUD 150-600) is not defended by an explicit all-in price, even as Jetstar's overhead-bag charge hands Qantas the argument. Premium Economy sits in an overlapping band, and Sunrise's time saving of three hours or more is unpriced. Meanwhile Virgin is commoditising flexibility with free same-day changes and legroom upgrades from AUD 8. [2](#) , [13](#) , [37](#) , [18](#) , [5](#)

UNDER-CAPTURED VALUE

- The Sunrise non-stop time saving of three hours or more is not yet priced into any corporate contract or cabin differential. The highest-yield attribute Qantas will own has no price attached to it. [18](#) , [8](#)
- Schedule integrity is not contracted or charged for. Qantas has cross-brand recovery depth that Virgin lacks, while Virgin is already monetising flexibility through free same-day changes on Flex fares. [5](#) , [1](#)
- Qantas Economy inclusions (checked bag, locker space, points earn) are not expressed as an all-in price against Jetstar's fare plus bag fees. The value exists but is invisible at the point of purchase. [21](#) , [13](#)
- Regional routes are valued on standalone fares. Their trunk feed, Frequent Flyer enrolment and government-panel coverage value go uncounted, which undervalues backfilling Rex routes. [14](#) , [9](#)
- Qantas earns nothing from disruption assurance. The day-of-travel moment is held by Sydney Airport's flight-details page, even though only Qantas can rebook. [30](#) , [28](#)

PREMIUM PRICING OPPORTUNITIES

- Sunrise Business and First priced at the top of the AUD 6,000-15,000 and AUD 15,000-30,000+ bands. The only rivals are foreign one-stop carriers that cannot match elapsed time. [11](#) , [18](#)
- A reliability-tier fee inside TMC and panel agreements, justified by guaranteed reaccommodation. Rival disruption at Virgin and ASU action at Jetstar give procurement teams a reason to pay. [1](#) , [3](#)
- An all-in Economy leisure fare family on Tasmania-type corridors, priced at a published fixed premium over the Jetstar fare plus bags. It should launch alongside Jetstar's overhead-locker charge. [37](#) , [45](#)
- Re-fenced Premium Economy. The overlapping estimated bands (Economy AUD 1,000-3,500, Premium Economy AUD 3,000-7,000, Business AUD 6,000-15,000) leak yield both ways. Clear value steps based on flexibility, lounge access and status credits would push buyers toward the AUD 7,000 ceiling.
- A door-to-gate transfer bundle at SYD with points earn, sold into fare families and packages. Buyers are already pricing Mascot rail and walking options into their total trip cost. [46](#) , [29](#)

COMMODITISED AREAS

- Domestic leisure headline fares have collapsed to sale floors: Jetstar from AUD 48 to Tasmania and Virgin with a million fares from AUD 49. Mainline Qantas cannot win on price here. [13](#) , [6](#)
- Short-haul international leisure from secondary gateways is price-led, with Virgin returns at AUD 429-449. It is low-yield territory for the Qantas mainline model. [24](#) , [31](#)
- Extra-legroom and seat ancillaries are commoditising. Virgin sells Economy X upgrades from AUD 8 and Rex sells Rextra Legroom. [32](#) , [47](#)
- General air freight is priced per kilogram at market rates. Qantas Freight is a price-taker against forwarders and Rex Queensland Freight. [38](#)
- Holiday packages and Sydney destination products are held by intermediaries (trip.com, Tripadvisor). Qantas Holidays differentiates only through points earn and burn. [22](#) , [39](#)

Qantas's operational weakness is coordination, not capability. It cut trunk frequency in April 2026 without protecting the corporate renewals that depend on it. Mainline and Jetstar run duplicated capacity on the same leisure corridors, and Jetstar exits regional routes such as Brisbane-Mackay without a visible group backfill. Its own reliability record is exposed: a Sydney-Melbourne smoke evacuation, the QF122 engine priority landing, and a strike vote by regional ground crews. These undercut any SLA pitch until fixed. The fixes are systemisation: cross-brand reaccommodation built on tools such as Jetstar's Flow optimiser, a repeatable Griffith launch playbook, and consolidation of the 49,000 sqm Mascot head office. [2](#) , [33](#) , [7](#) , [20](#) , [48](#)

PROCESS GAPS

- Capacity decisions are not linked to contract exposure. The April 2026 fuel-driven cuts removed trunk frequency, the attribute corporate and panel buyers pay for, ahead of their renewals. [2](#)
- There are no corridor brand-boundary rules. Qantas mainline and Jetstar sell the same Tasmania demand at very different price points, with duplicate cost bases on shared corridors. [13](#) , [37](#)
- Group regional exits are uncoordinated. Jetstar is suspending Brisbane-Mackay with no evidenced QantasLink backfill, handing regional frustration to rivals. [33](#)
- There is no AI-agent booking workflow. Virgin is live in ChatGPT, routing intent to Velocity, and Qantas has no documented equivalent. [4](#)
- Long-haul fare fencing is weak. Overlapping Economy, Premium Economy and Business bands let buyers trade down or buy Business at the bottom of its band, and this has not been fixed ahead of the Sunrise cabin configuration.

FULFILMENT GAPS

- Qantas's own reliability incidents weaken the SLA pitch: a Sydney-Melbourne cabin smoke evacuation and a QF122 engine-related priority landing at Christchurch. [7](#) , [19](#)
- Regional Qantas ground crews voted for possible strike action (TWU cites 97 per cent). This directly threatens regional backfill and reaccommodation delivery. [20](#)

- Day-of-travel recovery is ceded to the airport. Stranded passengers turn to Sydney Airport and social media rather than to Qantas.^{30, 36}
- Door-to-gate ground access at Mascot is unserved by any carrier. Shuttle and transfer demand goes to Tripadvisor-listed operators.^{29, 39}
- Regional fleet capacity for backfill is unverified. Industry-wide ageing aircraft and fuel costs make aircraft availability, not demand, the binding constraint.⁹

SYSTEMISATION OPPORTUNITIES

- Build a group-wide reaccommodation engine across Qantas, QantasLink and Jetstar inventory. It can extend the AI fleet-optimisation capability Jetstar has already built in-house.⁴⁸
- Set up joint Qantas-Jetstar corridor planning with a cannibalisation dashboard that tracks switching between the two brands and leakage to Virgin as the overhead-bag charge lands.²¹
- Create a renewal calendar and automated reporting of on-time performance and service credits for Virgin-held TMC and panel accounts, sequenced to hit renewals while the crew dispute persists.¹
- Turn Griffith into a repeatable regional launch template covering a community-named aircraft, council partnership and added services. It can be deployed route by route onto Rex's Tasmanian and Mildura cuts.^{14, 15}
- Convert the review of the leased 49,000 sqm Mascot head office into a permanent reduction in non-flying fixed cost, using competing states' incentives as bargaining leverage.⁴⁴



Qantas's scale advantage sits in three pools: trunk frequency across Qantas, QantasLink and Jetstar; the Frequent Flyer coalition; and Project Sunrise ultra-long-haul capacity that no Australian rival is building. The April 2026 fare rises and domestic cuts proved network-level pricing discretion. They also gave away the frequency corporate buyers pay for. Rex is structurally sub-scale: it is cutting Victorian and Tasmanian routes, and its owner has spent \$27m while fixing no planes. The binding limits on Qantas are Airbus and Boeing delivery timing, ACCC share scrutiny, labour friction, and duplicated Qantas-Jetstar cost bases on shared corridors. Verdict: Qantas does not need more scale. It needs to redeploy existing mainline capacity from low-yield leisure seats back to corporate trunk frequency, and to backfill Rex's regional retreat route by route.^{2, 11, 10, 15}

AVAILABLE ADVANTAGES

- Qantas has the largest domestic network, spanning the full-service, low-cost and regional tiers. That breadth spreads terminal, crew-base and revenue-management fixed costs across more departures. It also lets Qantas absorb fuel shocks through capacity discipline, as the April 2026 fare rises and flight cuts showed.²
- Project Sunrise is a capital threshold no Australian carrier is crossing. Purpose-built A350-1000ULR aircraft will fly non-stop Sydney-London from late 2027 and Sydney-New York from mid-2028, cutting at least three hours. That

concentrates International Business (AUD 6,000-15,000) and First (AUD 15,000-30,000+) yield inside Qantas.^{8, 18, 11}

→ Qantas has the best-capitalised regional network while Rex bleeds cash. QantasLink added Griffith-Sydney services on a 78-seat aircraft. Over the same period, Rex's owner spent \$27m, fixed no planes and said cash was critically low.^{14, 10, 16}

→ Belly-hold freight rides on passenger capacity that is already flown, so incremental cargo carries low marginal cost. Qantas can undercut sub-scale regional freight, such as Rex's Queensland Freight, on per-kg lanes and still earn contribution.³⁸

→ Customer acquisition cost is near zero at national scale. The generic category query shows zero ads and no carrier owning discovery, because demand is brand- and loyalty-directed. The only intent held by others sits with the airport operator and travel intermediaries.^{30, 22}

BARRIERS TO SCALE

→ Airbus delivery timing caps Sunrise. Qantas controls neither the late-2027 London start nor the mid-2028 New York start, and exact fleet count and renewal timing are unknown.^{11, 18}

→ ACCC scrutiny and Rex goodwill block the fastest route to regional scale, which would be consolidation. Rex was named Australia's favourite airline over Qantas and Virgin, and Queensland extended its contract despite community objection.^{17, 27}

→ Labour friction inside the group limits frequency restoration and reliability commitments. Regional Qantas ground crews have voted for industrial action, and the union is taking action at Jetstar.^{20, 3}

→ Duplicated Qantas-Jetstar cost bases dilute the scale benefit. Jetstar sells Tasmania leisure demand at sale fares from AUD 48 while Qantas mainline carries full-service cost on the same origin-destination pairs.¹³

→ Reliability incidents undercut the case for scale-backed service commitments: a Sydney-Melbourne smoke evacuation and the QF122 engine priority landing.^{7, 19}

ACTIONABLE PLAYS

→ Hand bag-light Tasmania leisure demand to Jetstar, which starts charging for overhead lockers next year. Redeploy the freed mainline narrowbody time to the business-hour trunk frequencies cut in April 2026.^{21, 2}

→ Backfill the Victorian and Tasmanian routes Rex has vacated using the Griffith template: a community-named 78-seat aircraft plus trunk feed. Illustrative only: one daily return at 75% load and an AUD 200 average fare yields roughly AUD 8.5m a year.^{14, 41}

→ Turn three-brand spare capacity into a contracted reaccommodation SLA for corporate trunk accounts while Virgin cancels flights amid its crew revolt.¹

→ Pre-sell Sunrise premium capacity into multi-year corporate agreements, with the three-plus-hour time saving explicitly priced. This converts fixed ULR fleet cost into contracted yield before launch.¹⁸

→ Fill regional Queensland belly-hold with time-critical perishables and pharmaceuticals, and build a tender-ready Roma-Brisbane bid, as Rex's Queensland position weakens.^{38, 27}

Network economies in Australian domestic aviation still sit with the carriers, not an aggregator. The category query shows zero ads and a fragmented top 10 led by Sydney Airport's flight page, trip.com and Tripadvisor, with no OTA owning airline choice. Qantas holds the strongest genuine network effects in three places. The first is the two-sided Frequent Flyer coalition, where Velocity is the only counterweight. The second is hub-and-spoke density across trunk, regional and oneworld feed. The third is Sunrise non-stop gateways. Two leaks are opening at the edges. Virgin has placed flight search inside ChatGPT, tied to Velocity. Sydney Airport holds day-of-travel disruption intent that only the carrier can resolve. Verdict: Qantas should defend the loyalty network by linking it to new interfaces, not by owning channels. [30](#) , [22](#) , [4](#) , [28](#)

NETWORK OPPORTUNITIES

- Block Velocity leakage in Canberra. Virgin's first-ever international route from the capital targets a government-heavy catchment that already flies Qantas for work. Qantas can counter with Qantas Holidays packages connecting via Sydney, keeping status-holders' leisure spend in-network. [24](#)
- Add regional communities abandoned by Rex as new network nodes. Each one feeds trunk and international traffic and brings new Frequent Flyer members. Around 3m regional Australians are at risk of losing air access. [9](#) , [15](#) , [14](#)
- Sign SYD rail and shuttle operators as Frequent Flyer earn partners, creating a new partner category. Buyer questions show ground-access cost at Mascot is part of total trip cost. [29](#) , [46](#) , [39](#)
- Take back day-of-travel intent from the airport operator. Sydney Airport ranks #1 and travellers post about being stranded, but only Qantas can rebook across Qantas, QantasLink and Jetstar from its own terminal. [30](#) , [36](#)
- Use Sunrise gateways to multiply alliance value. Non-stop London and New York service, plus oneworld onward connections, raises the value of every domestic spoke feeding Sydney. [8](#)

AGGREGATION OPPORTUNITIES

- No flight aggregator owns the category. The top results are an airport page, a trip.com guide and Tripadvisor tours, so airline-choice intent is uncaptured and there is no intermediary take-rate on domestic seats. [30](#) , [22](#) , [39](#)
- Answer Virgin's flights-only ChatGPT integration with an AI-agent layer that aggregates Qantas, QantasLink, Jetstar, Holidays, Hotels and points-plus-pay in one transaction. [4](#)
- Reposition Qantas Holidays as a points-anchored aggregator against OTAs. It is defensible only where earn and burn drives the booking, because trip.com and Tripadvisor already hold destination intent. [22](#) , [39](#)
- Aggregate multi-brand disruption inventory into a sellable recovery product. Disruption demand is live, and Virgin's crew-driven cancellations leave it unable to match. [28](#) , [1](#)
- Consolidate fragmented regional Queensland cargo onto QantasLink belly-hold as Rex's regional network contracts. [38](#) , [9](#)

MONETISATION PATHWAYS

- Partner points sales and redemption margin are the primary monetisation of the coalition network: high-margin, capacity-light revenue in a two-currency market with Velocity. Growth comes from new partner categories rather than seats.
- Charge a coverage and reliability premium in corporate and government contracts. Network density converts to revenue at renewal, and Virgin's instability makes the premium defensible after the April 2026 fare rises. [1](#) , [2](#)
- Win state-contracted regional routes at re-tender. Contract-underwritten volume plus trunk feed monetises

regional nodes where open-market fares cannot. ²⁷

- Sell Sunrise feed at the top of the premium bands. Domestic and alliance traffic funnels into the non-stop product, which carries a three-plus-hour time-saving premium. ¹⁸
- Monetise access through Qantas Club memberships (est. AUD 600-1,100 a year) and status retention. These turn low-frequency leisure flyers into recurring, network-linked revenue.



Qantas is mostly the counter-positioner, not the victim. Jetstar internalises the low-fare-plus-fees model that mainline cannot copy, and its overhead-locker charge deepens that split. Virgin, as a single-brand hybrid, cannot replicate two-tier corridor allocation or build ultra-long-haul. Foreign hub carriers will not copy non-stop Sunrise without cannibalising their own connecting traffic. The real counter-moves against Qantas come from Virgin on flexibility and channel: free same-day changes for Flex fares, extended COVID credits, and ChatGPT booking tied to Velocity. Rex's only shield is goodwill and ACCC optics, not model superiority. Verdict: Qantas should press multi-brand and Sunrise advantages now, while Virgin's crew revolt persists. ^{21, 5, 4, 17}

INCUMBENT CONSTRAINTS

- Qantas mainline cannot match Jetstar's AUD 48 headline-plus-fees model without gutting the inclusions that justify its AUD 150-600 Economy fares. Group ownership contains the threat but leaves duplicated cost bases. ^{13, 37}
- ACCC optics and Rex's public goodwill limit how aggressively Qantas can absorb Rex's retreat. This is an incumbency penalty that a challenger would not face. ¹⁷
- Passing fuel costs through cuts trunk frequency, which is the exact attribute corporate buyers pay for, and hands Virgin a renewal argument. ²
- TMC and GDS dependence for high-yield corporate volume creates hesitation over going AI-direct, where Virgin has already moved. ⁴
- Qantas's safety-reputation pillar is exposed to incidents: a smoke evacuation and an engine-issue priority landing within weeks of each other. ^{7, 19}

COUNTER PLAYS

- Sell non-stop Sunrise against one-stop foreign hub carriers. Matching the elapsed time would cannibalise their own hubs, so they are structurally reluctant to copy. ^{8, 18}
- Offer penalty-bearing reliability SLAs backed by three-brand reaccommodation. Virgin cannot sign service credits while its crew is in revolt. ¹
- Squeeze Virgin's middle ground. Jetstar takes the bottom tier, and a Qantas all-in leisure fare priced against a Jetstar fare plus bags takes the value tier. Virgin is fighting both ends with \$49 sale fares. ^{6, 21}
- Offer governments a co-funded regional fleet model that Rex's capital base cannot credibly promise, using Griffith as the delivery reference. ^{10, 14}
- Launch ecosystem-breadth AI booking covering flights, Holidays, Hotels and points-plus-pay. Virgin's flights-plus-

EXECUTION RISKS

- Virgin is already productising flexibility with an 'Australian airline-first' free same-day change for Flex fares. That erodes the novelty of a Qantas reliability tier unless SLAs go further.⁵
- The counter-positioning window is temporary. If Virgin settles its crew dispute before key renewals, it can copy the SLA structure.¹
- Airbus delivery slippage turns pre-sold Sunrise contracts into refund exposure.¹¹
- An all-in Qantas leisure fare could cannibalise Jetstar's new overhead-bag ancillary pool, which is already publicly contentious.^{45, 49}
- Qantas's own ground-crew strike vote could break reaccommodation promises mid-contract.²⁰



Switching costs are strong where Qantas owns accrued value or a contract: points balances, status tiers, partner currency, government panels and state route terms. They are weak where buyers anchor on headline fare or package convenience. Virgin is actively lowering the cost of leaving Qantas through \$49 sale fares, \$8 Economy X upgrades, free same-day Flex changes and extended COVID credits. The April 2026 fare rises combined with frequency cuts make corporate renewals the highest-risk switching point. Jetstar keeps price-driven leakage inside the group, and OTAs capture package leakage. Verdict: convert individual status entrenchment into account-level multi-year terms before Virgin's reliability recovers.^{6, 32, 5, 2}

RETENTION LEVERS

- Offer a contracted reliability tier with same-day cross-brand reaccommodation and service credits. It must exceed Virgin's free same-day Flex changes to hold renewals.^{1, 5}
- Replace across-the-board fare rises with protected peak-hour inventory and flexible-fare caps for corporate buyers affected by the April 2026 cuts.²
- Match Velocity status for travellers in won Virgin accounts. Qantas status and lounge entrenchment then raises the account's switching cost at the next cycle.¹
- Launch an all-in leisure fare family on Tasmania corridors, making inclusions tangible once Jetstar starts charging for overhead lockers.^{37, 13}
- Offer Canberra-origin Qantas Holidays packages that keep government-earned points and status in use for leisure.²⁴

LOCK-IN MECHANISMS

- Accrued points balances and earned status tiers are forfeited on switching. This is the strongest individual-level lock-in, and it drives status-retention repeat revenue.

- A coalition currency embedded in partners' products makes switching to Velocity a re-papering exercise. Velocity is the only alternative, and Virgin is extending its reach into AI channels.⁴
- Two-brand capture keeps price-driven trade-down inside the group through Jetstar sale fares. External leakage flows mainly to Virgin.¹³
- State route contracts lock demand to the incumbent until re-tender. That works against Qantas on Roma-Brisbane today and will work for it once Qantas wins such contracts.²⁷
- On thin regional routes, being the sole viable schedule becomes lock-in because air access is non-substitutable.^{14, 9}

ACCOUNT STRUCTURE OPPORTUNITIES

- Offer multi-year corporate trunk agreements with a reliability tier, targeted at Virgin-held accounts sequenced by renewal date.¹
- Bundle regional and trunk coverage for government panels, using QantasLink regional delivery as proof against a distressed Rex.^{14, 19}
- Sell Sunrise corporate agreements with status-linked guaranteed access, locking premium long-haul accounts before the mid-2028 launch.¹⁸
- Offer contracted time-critical freight uplift accounts on regional Queensland lanes to forwarders and postal operators.³⁸
- Create a corporate day-of-travel account tier that bundles SYD ground transfer, lounge recovery and disruption rebooking, taking back the relationship from the airport operator.^{28, 29}



Qantas's brand premium is real but conditional. It holds where buyers pay to reduce risk: corporate trunk travellers on Sydney-Melbourne and Sydney-Brisbane, Frequent Flyer partners buying points, and premium long-haul buyers waiting for non-stop Sydney-London and Sydney-New York. It collapses where buyers anchor on headline fare. Jetstar is selling Tasmania on a bumper sale, and Virgin is pushing one million sale fares from \$49. The brand is also the most visible and most scrutinised carrier in the category. Its press footprint includes fare rises alongside domestic cuts, a Sydney-Melbourne smoke evacuation, an engine-issue priority landing and OAIC breach commentary. Rex, not Qantas, was named Australia's favourite airline. Qantas trust is being drawn down, not compounded.^{2, 6, 7, 17}

TRUST-BASED PREMIUMS

- Project Sunrise carries the widest trust premium in the portfolio. It is the world's first non-stop Sydney-London and Sydney-New York service and cuts at least three hours, which supports International Business at AUD 6,000-15,000 and First at AUD 15,000-30,000+ with no Australian rival in the segment.^{8, 18}
- The Domestic Business premium (AUD 800-2,500 one-way) is widening on reliability as Virgin cancels flights amid a crew revolt. Qantas is spending that premium down by raising fares while cutting the frequency corporate buyers pay for.^{1, 2}

→ The Qantas Economy inclusions premium (AUD 150-600 one-way) becomes easier to defend from 2027, when Jetstar begins charging for overhead-locker carry-on. The all-in gap narrows for travellers carrying bags.^{21, 37}

→ Premium pricing has a hard ceiling: repeated safety and operational incidents cap how far the flag-carrier premium can stretch on price-sensitive routes.^{19, 7}

RISK REDUCTION MECHANISMS

→ Cross-brand reaccommodation across Qantas, QantasLink and Jetstar is the most credible disruption warranty in the market. Virgin's single brand is currently cancelling flights.¹

→ Virgin has pre-empted part of the flexibility pitch by offering free same-day changes to Flex ticket holders. Qantas's risk-reduction offer must go beyond flexibility to guaranteed recovery.⁵

→ Day-of-travel reassurance at SYD is held by the airport operator. Qantas's brand is absent at the traveller's highest-anxiety moment, despite owning its terminal and rebooking authority.^{30, 28, 36}

→ Passing the OAIC's preliminary breach test gives Qantas a documented governance proof point that lowers perceived data risk for loyalty partners.⁴²

→ In regional markets, Rex's visible financial distress raises continuity risk for state tender assessors. QantasLink's Griffith delivery is the counter-proof.^{10, 14}

AUTHORITY OPPORTUNITIES

→ Pre-sell Sunrise authority into multi-year corporate contracts before late 2027. Test-flight credibility already exists to price the non-stop time saving.¹¹

→ Convert the Griffith model into regional tender authority against a Rex that is cutting routes in Victoria and Tasmania and had its Roma contract extended over community objection.^{15, 27, 14}

→ Qantas owns the only carrier voice in the category results (its newsroom ranks #2). That authority is unconverted into booking or disruption intent, which intermediaries hold.^{44, 22, 39}



Qantas holds no classic cornered resource: no patent, no exclusive licence and no locked supply. Its defensibility is a bundle of semi-exclusive positions. These are Sydney slots and an airline-operated domestic terminal, the Frequent Flyer coalition in a two-currency duopoly with Velocity, three-tier brand control across Qantas, Jetstar and QantasLink, and a purpose-built A350-1000ULR fleet no Australian rival is building. Regional capacity is becoming quasi-scarce as Rex's owner spent \$27m, fixed no planes, and cuts routes in Victoria, Tasmania and Orange. Upstream, Boeing, Airbus, fuel and labour remain open and hostile. Qantas's own regional ground crews have voted for possible strike action, so workforce is a shared vulnerability, not a moat.^{11, 10, 12, 20}

SCARCE RESOURCES

→ Non-stop Sydney-London and Sydney-New York ULR capacity is the only Australian-carrier supply of its kind,

launching late 2027 and mid-2028. [11](#) , [18](#)

- Sydney slot holdings and airline-operated terminal presence at a capacity-constrained airport, where airport pricing sits under ACCC review. [23](#)
- Serviceable regional aircraft capacity is scarce: AFR warns 3m regional Australians face losing air access by 2030, and Rex is retreating route by route. [9](#) , [41](#)
- Group-controlled low-cost capacity (Jetstar) absorbs price-led demand that would otherwise fund an entrant, although Jetstar is also suspending regional routes such as Brisbane-Mackay. [13](#) , [33](#)

RESOURCE CONTROL STRATEGIES

- Backfill Rex-vacated routes with QantasLink using the Griffith template, so that thin routes cannot support a second carrier once served. [14](#) , [15](#)
- Win state route contracts at re-tender. Roma-Brisbane is locked to Rex now, but community opposition makes it contestable. A win locks competitors out for the contract term. [27](#)
- Lock Sunrise premium inventory into multi-year corporate agreements before launch, converting ULR scarcity into contracted volume. [8](#)
- Do not pursue a Rex acquisition. Regulatory exposure and Rex's governance mess make organic capture the only clean path. [50](#) , [16](#)

DEFENSIBILITY

MODERATE overall, with sharp variation by segment. Defensibility is HIGH on Sunrise ultra-long-haul, loyalty points sales and Sydney terminal access. It is MEDIUM on corporate trunk, which is contestable by Virgin at every renewal, and on regional routes, where ACCC scrutiny and Rex goodwill cap share capture. It is LOW in freight and holiday packages, where Qantas is a price-taker. The moat is structural incumbency, not exclusivity. It erodes whenever fuel shocks force Qantas to cut the frequency its premium depends on. [2](#) , [17](#)



Qantas's process edge is latent, not realised. It owns the ingredients for a superior operating system: three-brand corridor allocation, cross-brand reaccommodation, an airline-operated SYD terminal, and in-house revenue management and loyalty data. None of it is productised. Jetstar has built an AI-driven fleet optimisation system, Flow, which proves group capability exists but has not been extended to mainline disruption products. Virgin is moving faster at the customer edge: flight search inside ChatGPT and free same-day changes for Flex holders. Qantas's own reliability record undercuts any process claim, given the smoke evacuation, the QF122 engine issue and regional ground-crew strike votes. Process Power here must be built and proven before it can be sold. [48](#) , [4](#) , [5](#) , [19](#)

PROCESS ADVANTAGES

- Two-brand corridor allocation is unique to Qantas Group. Price-led Tasmania demand sits with Jetstar while mainline narrowbodies are redeployed to trunk frequency, and Virgin has no second brand to replicate this. [13](#) , [6](#)

- An AI fleet-optimisation capability already exists inside the group (Jetstar's Flow). It is a transferable base for group-wide disruption recovery.⁴⁸
- The regional expansion playbook is demonstrated once at Griffith: a community-named 78-seat aircraft with added Sydney services.¹⁴
- Ultra-long-haul operating know-how is proven by the record Melbourne-Toulouse test flight, a capability no domestic rival is developing.¹¹
- Privacy governance processes passed the OAIC preliminary test, a defensible back-office process for a loyalty-data business.⁴²

BUILD DIFFICULTY

HIGH for rivals, LOW-TO-MEDIUM for Qantas. Replicating three-brand reaccommodation, terminal control and a ULR fleet requires network depth and capital that only Qantas holds, and Virgin lacks a second brand while Rex lacks capital. For Qantas, codifying the processes is mostly internal: SLA design, fare-family fencing and cross-brand rebooking rules. The real barrier is proving delivery first. Labour tension across ground crews and incident exposure mean penalty-bearing commitments can only follow demonstrated on-time performance.^{20, 10}

TIME TO ADVANTAGE

Timing is staggered. Revenue-management moves (all-in leisure fares, cabin re-fencing) can land in 3-9 months, timed to Jetstar's 2027 overhead-bag charge. Reliability contracts pay out over 6-18 months, gated by TMC and panel renewal calendars, and the window narrows if Virgin settles its crew dispute. Regional backfill runs 3-24 months, bound by aircraft and tender cycles. Sunrise advantage starts late 2027 for London and mid-2028 for New York, with pre-sale value earlier.^{37, 1, 18}

STRATEGIC DIRECTION

02 sections



STRATEGIC PLAY	POWER	UPSIDE	DIFFICULTY	DEFENSIBILITY	SCORE
Reliability-backed trunk contracts: cross-brand same-day reaccommodation SLAs sold into Virgin-held corporate and government accounts at renewal ^{1, 5}	Scale + Counter-Positioning (three-brand spare capacity, SYD terminal)	Recurring multi-year high-yield trunk volume (Domestic Business AUD 800-2,500 one-way) and a defensible rationale for April 2026 fare rises	MEDIUM	MEDIUM	9/10
Qantas-Jetstar corridor allocation: hand Tasmania-style price-led demand to Jetstar and redeploy mainline narrowbodies to restore cut trunk frequencies ^{2, 13}	Counter-Positioning (two-brand structure Virgin cannot copy)	Higher yield per mainline seat and restored corporate frequency ahead of TMC and panel renewals	MEDIUM	HIGH	9/10
Pre-sell Project Sunrise into multi-year corporate contracts and reference the overlapping long-haul cabin ladder ^{8, 11}	Cornered Resource (ULR fleet) + Brand	De-risks capital-intensive ULR fleet; captures top-of-band Business and First yield uncontested domestically	HIGH	HIGH	8/10
Regional capture as Rex retreats: Griffith-model backfill in Tasmania, Mildura and Orange, plus a tender-ready Roma-Brisbane bid ^{15, 27, 14}	Scale + Network (trunk feed, Frequent Flyer)	Route incumbency plus trunk feed; illustrative ~AUD 8.5m/yr fares per added daily 78-seat return (assumption-based)	MEDIUM	MEDIUM	7/10
Loyalty-linked AI-agent booking bundling group inventory, Qantas Holidays, Hotels and points-plus-pay to neutralise Virgin's flights-only ChatGPT channel ^{4, 22}	Network (coalition loyalty breadth)	Protects Frequent Flyer engagement and wins back package attach (AUD 1,000-10,000+) from OTAs	LOW	MEDIUM	7/10
Canberra loyalty defence: Qantas Holidays packages via Sydney to stop Velocity cross-selling Qantas-status government travellers ²⁴	Switching Costs (points and status balances)	Low direct yield but protects high-frequency government travellers' loyalty currency	LOW	MEDIUM	6/10

EXECUTION PATHWAYS

Month 0-3 (Baseline and design)

Baseline trunk on-time performance after the April cuts. Design SLA thresholds below demonstrated performance, write corridor brand-boundary rules for Tasmania, and audit international cabin-band overlap.^{2, 7}

Month 3-9 (Pilot and price)

Pilot the reliability tier with 2-3 exposed Qantas accounts. Launch the all-in Economy fare family timed to Jetstar's overhead-bag charge. Open the Griffith-style backfill on one Rex-vacated route.^{21, 15}

Month 6-18 (Contract capture)

Take the SLA tier to Virgin-held accounts in renewal-date order while its crew dispute persists. Lock wins into multi-year terms with Velocity status matching.¹

Month 6-12 (Distribution)

Put the AI-assistant booking channel live with group inventory, Holidays and points-plus-pay, and fence it to leisure and member demand to avoid TMC conflict. ⁴

Month 12-30 (Sunrise conversion)

Convert global corporate accounts to delivery-contingent Sunrise agreements ahead of the late-2027 London and mid-2028 New York launches. ¹¹ , ¹⁸

RISK MAP

Reliability credibility gap

HIGH

Qantas plans to sell SLAs while carrying a smoke evacuation, the QF122 engine incident and regional ground-crew strike votes. One failed SLA hands Virgin the renewal argument. ⁷ , ¹⁹ , ²⁰

Virgin counter-move

HIGH

Virgin is already offering free same-day changes to Flex holders and running aggressive sales. If its crew dispute settles, the counter-positioning window closes fast. ⁵ , ³¹

Fuel and FX shock

HIGH

Middle East fuel pressure has already forced fare rises and domestic cuts. Restored frequency, regional adds and 20+ hour Sunrise sectors all raise fuel intensity. ²

Airbus delivery slippage

HIGH

Pre-sold Sunrise contracts bind Qantas to start dates it does not control, creating refund and credibility exposure. ¹¹

Regional goodwill backlash

MEDIUM

Rex holds favourite-airline status. A heavy-handed Qantas backfill reads as the dominant carrier exploiting distress and invites ACCC scrutiny. ¹⁷

Data and privacy exposure

MEDIUM

AI-agent booking tied to loyalty balances widens the data surface for a carrier already the subject of OAIC breach commentary. ⁴³

Latent new entrant

LOW

Buyers are actively asking about a new airline, which signals appetite for a challenger if Qantas pricing overreaches. ²⁵



TOP COMMERCIAL OPPORTUNITIES

Corporate trunk capture

Sell cross-brand reliability SLAs into Virgin-held accounts on Sydney-Melbourne, Sydney-Brisbane, Melbourne-Brisbane and East Coast-Perth while Virgin cancels flights.¹

Two-brand reallocation

Push price-led Tasmania demand to Jetstar and restore the trunk frequencies cut in April.^{13, 2}

Sunrise pre-sale

Lock multi-year Business and First volume on non-stop Sydney-London and Sydney-New York before launch, priced on the 3+ hour saving.¹⁸

Regional backfill

Replicate Griffith on routes Rex is cutting in Victoria, Tasmania and Orange, and bid Roma-Brisbane at re-tender.^{14, 12}

AI-channel loyalty defence

Answer Virgin's flights-only ChatGPT integration with an ecosystem-wide bundle of group inventory, Holidays, Hotels and points-plus-pay.⁴

EXPECTED IMPACT

Near-term impact is defensive yield recovery. Restored trunk frequency and an all-in leisure fare family lift yield per mainline seat and blunt procurement pushback against the April fare rises. Over 6-18 months, reliability contracts can move recurring high-yield corporate and government volume away from Virgin, which is locked in until the next renewal. Regional backfill adds incremental route revenue plus trunk feed, with an illustrative ~AUD 8.5m a year per added daily 78-seat return (assumption-based). From late 2027, Sunrise converts a fixed ULR fleet cost into top-of-band premium revenue. Loyalty-linked AI distribution protects the capacity-independent points pool. Exact values depend on route-level and contract data the input lacks.^{2, 11}

RECOMMENDED STRATEGY

Sequence internal moves first, contract moves second and capital moves last. Start with what Qantas controls: Qantas-Jetstar corridor allocation, cabin re-fencing and the all-in fare family, timed to Jetstar's 2027 bag charge. Repair trunk on-time performance, then sell SLAs Qantas can actually meet into Virgin-held accounts in renewal order. The advantage must rest on three-brand depth, because Virgin's free same-day changes already neutralise flexibility alone. Grow regional share organically through the Griffith template and tenders, not by acquiring Rex. Close the AI-channel gap before Velocity entrenches. Pre-sell Sunrise with delivery-contingent clauses. Price every commitment conservatively against fuel, labour and incident risk.^{21, 5, 4}

FINAL DIRECTION

Qantas owns the structure of Australian aviation but is spending its trust. Its moat of three brands, the SYD terminal, coalition loyalty and Sunrise is intact. Its premium, however, is being eroded by fare rises on thinner schedules and a string of incidents. The window is now: Virgin is operationally wounded and Rex is collapsing. Convert structure into contracted reliability, restored frequency and pre-sold Sunrise volume before the competitive gap closes.^{1, 16}

50 CITED SOURCES · DRAWN FROM 63 CRAWLED

Every numbered superscript in this report links to an entry below. Each citation lists the source, who or what it relates to, and where to find it. Where a public URL exists, it's clickable; where a source is internal to the research process (e.g. a search-result snapshot), the link points to where it was captured. The full set of crawled sources is larger than the cited subset shown here - only sources the analysis directly drew on are listed.

1 Virgin cancels flights as ‘exhausted and fed up’ crew revolt

Virgin Australia · News mention of Virgin Australia · 4 days ago

✓ VERIFIED “Virgin cancels flights as ‘exhausted and fed up’ crew revolt”

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2 Qantas raises fares and cuts domestic flights as travel patterns shift due to Middle East turmoil

Qantas · News mention of Qantas · 13 Apr 2026

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3 Union to waive collecting Jetstar charges from passengers

Jetstar · News mention of Jetstar · 3 days ago

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4 Virgin Australia flight search lands in ChatGPT marking a new era of AI-powered travel

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5 Australian airline-first: Virgin Australia to offer eligible Flex ticket holders access to free same-day flight changes

Virgin Australia · News mention of Virgin Australia · 2 July 2026

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6 Virgin Australia treats Aussie travellers to one million sale fares starting from \$49*

Virgin Australia · News mention of Virgin Australia · 20 July 2026

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✓ VERIFIED “Passengers on board a Qantas flight bound for Melbourne from Sydney have been evacuated”

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8 Everything You Need to Know About Project Sunrise

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✓ VERIFIED “Project Sunrise is the codename for Qantas' initiative to operate the world's first long-haulnon-stop commercial flights from Sydney to London and New York”

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9 Regional airlines' failures threaten to leave 3m Australians grounded

Rex Airlines · News mention of Rex Airlines · 17 July 2026

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10 New Rex owner spent \$27m and fixed no planes

Rex Airlines · News mention of Rex Airlines · 19 July 2026

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11 New Qantas plane sets record with mammoth 24-hour test flight

Qantas · News mention of Qantas · 29 July 2026

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“specially built Airbus 350-1000ULR”
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“Project Sunrise flights from late 2027”
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Rex Airlines · News mention of Rex Airlines · 15 June 2026

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Rex Airlines · News mention of Rex Airlines · 21 May 2026

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“Rex Airlines announces service cuts in Victoria and Tasmania”

16 ‘Cash is critically low’: The words haunting Rex execs

Rex Airlines · News mention of Rex Airlines · 18 May 2026

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17 Qantas and Virgin toppled: embattled underdog named Australia's favourite airline

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"Qantas and Virgin toppled: embattled underdog named Australia's favourite airline"
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18 Qantas to fly non-stop from Sydney to New York in 2028

Qantas · News mention of Qantas · 3 days ago

- ✓ VERIFIED

"Qantas plans to start non-stop flights between Sydney and New York from mid-2028"
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"cut at least three hours"
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- ✓ VERIFIED

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19 Qantas flight makes priority landing after engine issue sparks panic over New Zealand

Qantas · News mention of Qantas · 2 weeks ago

- ✓ VERIFIED

"QF122 suffered a suspected engine issue"
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20 Qantas ground crews vote in favour of possible strike action

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- ✓ VERIFIED

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21 Jetstar to slug passengers for overhead bags

Jetstar · News mention of Jetstar · 1 month ago

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22 2026 Mascot Travel Guide: must-see attractions, popular ...

in.trip.com · Market category SERP result for "Airline passenger travel - domestic air travel across Austra" (position 4)

- ✓ VERIFIED

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24 Canberra to Bali: Virgin Australia's first-ever international flight from the nation's capital with \$449 return sale*

Virgin Australia · News mention of Virgin Australia · 22 June 2026

- ✓ VERIFIED

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25 What is the new airline coming to Australia?

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27 Community blindsided as state govt extends Rex airline deal

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28 What happened at Sydney Airport today?

Google PAA · Google "People Also Ask" question for the market category

✓ VERIFIED “What happened at Sydney Airport today?”

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sydneyairport.com.au · Market category SERP result for "Airline passenger travel - domestic air travel across Austr" (position 1)

✓ VERIFIED “Flight Details”

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Virgin Australia · News mention of Virgin Australia · 1 month ago

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32 Virgin Australia drops unbelievable Economy X flash sale from \$8*

Virgin Australia · News mention of Virgin Australia · 25 June 2026

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33 A Change In The Air For Mackay Travellers As Jetstar Mackay Route Suspension Sparks Regional Concern

Jetstar · News mention of Jetstar · 1 month ago

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35 ‘Feels like home’: Qantas taps Robert Irwin in tourism push

Qantas · News mention of Qantas · 4 days ago

✓ VERIFIED “Qantas has teamed up with wildlife conservationist Robert Irwin and Tourism Australia to promote the country overseas in the hope of reversing recent falls”

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36 What a wonderful week in Singapore. Now stuck at Sydney ...

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37 Now Jetstar wants to charge extra for overhead bags. What are your options?

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38 Queensland Freight

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[Virgin Australia](#) · News mention of Virgin Australia · 23 June 2026

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42 Qantas passes the OAIC’s preliminary data breach test: what helped and what organisations should be doing now

[Qantas](#) · News mention of Qantas · 30 July 2026

✓ VERIFIED

"including regular supplier security assessments"

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43 Beyond the breach: What the OAIC’s Qantas report tells organisations about cyber resilience and regulatory risk

[Qantas](#) · News mention of Qantas · 23 July 2026

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45 Is Jetstar's new bag policy really just following the rest of the world?

[Jetstar](#) · News mention of Jetstar · 1 month ago

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"Is Jetstar's new bag policy really just following the rest of the world?"

46 How much does a train ticket from Sydney Airport to Mascot cost?

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"How much does a train ticket from Sydney Airport to Mascot cost?"

<https://www.google.com/search?q=How%20much%20does%20a%20train%20ticket%20from%20Sydney%20Airport%20to%20Mascot%20cost%3F>

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[Rex Airlines](#) · Rex Airlines website page

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[Jetstar](#) · News mention of Jetstar · 3 weeks ago

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49 OPINION: Jetstar’s new carry-on policy is causing a stir - here’s why it might work

[Jetstar](#) · News mention of Jetstar · 1 month ago

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"Jetstar’s new carry-on policy is causing a stir"

50 Ex-Rex boss admits hiding news of airline’s financial woes

[Rex Airlines](#) · News mention of Rex Airlines · 20 May 2026

✓ VERIFIED

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 KnowYourMarket.ai

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