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Article

Comparative analysis between Garuda Indonesia and Lion Air: A study of Indonesia's leading airlines

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Abstract: This paper compares Garuda Indonesia and Lion Air, two leading Indonesian airlines, focusing on their operational, financial, and strategic differences. Garuda, a state-owned full-service airline, targets business and international travelers with a focus on premium services and safety, while Lion Air, a low-cost carrier (LCC), caters to budget-conscious passengers through affordability and extensive domestic coverage. The study highlights Indonesia's reliance on air travel due to its archipelagic geography and explores how these airlines shape market competition and passenger experiences. Employing qualitative and quantitative analysis, the paper uses industry reports, financial data, and customer reviews to examine their operational efficiency and market strategies. It finds that while Lion Air's low-cost model is cost-effective, its safety record impacts customer trust. Garuda Indonesia, on the other hand, struggles with financial sustainability. The study suggests that a balanced regulatory approach could enhance national connectivity and economic growth by supporting both service models.

Keywords: aviation; comparison; positioning; security; Garuda; Lion Airline

1. Introduction

Indonesia's geography as an archipelago necessitates a robust and reliable aviation sector to connect its islands [1]. Examining Indonesian Government Strategies in the aviation sector post-COVID-19 pandemic. Journal of Contemporary Governance and Public Policy recognizes Air travel remains one of the most important forms of transportation within the country, and Garuda.

Indonesia and Lion Air are the two key players in this market. Garuda, the state-owned flag carrier, and Lion Air, a privately owned low-cost carrier (LCC), target different passenger segments [2]. The purpose of this research is to explore the operational, financial, and strategic differences between these two airlines, as well as the implications of their contrasting approaches to passenger experiences and market dynamics. Garuda Indonesia, as a full-service carrier, and Lion Air, as a low-cost carrier (LCC), represent different strategies for serving passengers. Investigating these models provides insights into how each airline meets the needs of different traveler segments, including premium and budget-conscious passengers. Lion Air has faced significant safety challenges in the past, while Garuda Indonesia has worked to improve its safety and service standards [3]. A comparison is crucial to understanding how safety measures, operational practices, and customer service affect airline reputations and customer trust. With increasing competition in the global and regional aviation markets, understanding how these two major airlines position themselves provides insights into competitive strategies and market share, influencing future policy decisions in the aviation sector [4]. A robust aviation industry is essential for Indonesia's tourism sector and overall economic growth. Comparing the strategies and performance of its two major airlines helps gauge the future potential of the aviation industry in supporting the economy [5].

By examining the operational, financial, and strategic differences between Garuda Indonesia and Lion.

Air, the study provides fresh insights into how full-service carriers and low-cost carriers (LCCs) operate in a highly competitive market like Indonesia [6]. This comparison will deepen understanding of the trade-offs between premium services and cost-efficiency in the airline industry. The study offers a comprehensive view of how these two airlines compete for different passenger segments. It sheds light on how full-service and low-cost models coexist and shape the broader aviation landscape in Indonesia, which is crucial for policymakers and industry stakeholders [7].

2. Historical overview

2.1. Garuda Indonesia

Garuda Indonesia is the oldest airline in the country, established in 1949 following Indonesia's independence. The airline initially served domestic routes before expanding into the international market. Over the years, Garuda has positioned itself as a full-service carrier, offering premium services on both domestic and international routes. It has maintained a long-standing reputation for high-quality service, receiving numerous accolades, including a five-star Skytrax rating and being named "World's Best Cabin Crew" multiple times [8].

Garuda's fleet consists of a mix of aircraft suited for short-, medium-, and long-haul flights, including Boeing 777-300ERs and Airbus A330-900neos for international services, and Boeing 737-800s for domestic routes. However, Garuda has faced financial struggles due to high operating costs, increased competition, and economic downturns, particularly during the COVID-19 pandemic [9].

2.2. Lion air

Lion Air entered the Indonesian aviation market in 1999 as a low-cost carrier and rapidly grew to become the country's largest airline by passenger volume. Catering to the needs of price-sensitive travelers, Lion Air offered affordable ticket prices and an extensive domestic network. Despite being a relatively young airline, its rapid expansion was fueled by Indonesia's growing middle class and the increasing demand for budget travel [10].

Lion Air primarily operates Boeing 737 aircraft and has the largest fleet in Indonesia, focusing heavily on short-haul domestic flights and regional routes in Southeast Asia. However, its aggressive expansion and cost-cutting measures have sometimes compromised safety and operational reliability, as evidenced by several high-profile accidents [11].

3. Literature review

The Indonesian aviation industry has attracted considerable scholarly attention due to its unique characteristics as an archipelagic nation, high demand for domestic flights, and rapid growth in low-cost air travel. The following section reviews the literature related to the key dimensions of comparison: airline operational performance, safety standards, customer satisfaction, financial health, and market positioning.

3.1. Airline operational performance

Airline operational performance is typically evaluated through metrics such as on-time performance, fleet utilization, and network efficiency. According to studies by Forsyth et al. [12], airlines that maintain operational efficiency, especially in on-time performance, tend to have better customer retention and brand loyalty. Garuda Indonesia has consistently ranked high in operational performance, largely due to its full-service nature and focus on punctuality, with a 95% on-time performance in 2022 [13]. By contrast, while having a larger number of domestic flights, Lion Air has struggled with operational inefficiencies, posting significantly lower on-time rates [14].

The importance of network efficiency in Indonesia is highlighted by Sugiyanto et al. [15], who emphasize that airlines serving geographically fragmented markets must prioritize route optimization and frequency. Garuda's mix of long-haul and domestic routes shows a balanced approach to serving both business and leisure travelers. Lion Air's model, primarily focused on short-haul domestic flights, sacrifices some efficiency for volume, aiming to maintain an aggressive schedule that often leads to delays [16].

3.2. Safety records and standards

Safety remains a significant factor for airline competitiveness, particularly in emerging markets where rapid fleet expansion can strain safety infrastructure. To maintain a balance between expansion and safety compliance is crucial for long-term success in the aviation industry. Garuda Indonesia's safety record has improved dramatically over the past two decades. After being blacklisted by the European Union in 2007, Garuda revamped its safety protocols and fleet modernization, resulting in a return to the EU's safe airline list and its current Skytrax five-star rating [17–19].

Lion Air, however, presents a different narrative. Scholars such as Budd and Ison [20] have examined the challenges of safety in low-cost airlines, pointing out that rapid expansion and cost-cutting measures can compromise safety standards. Lion Air's expansion strategy has led to several high-profile accidents, most notably the crash of Flight 610 in 2018, which brought global scrutiny to the airline's safety practices. According to Subagio [21], Lion Air's safety lapses have not deterred domestic passenger growth, largely due to the lack of low-cost alternatives and the airline's affordability [22–24].

3.3 Customer satisfaction and service quality

Customer satisfaction in the airline industry is multifaceted, incorporating service quality, pricing, and customer experience. Novianty et al. [25] suggest that full-service airlines, like Garuda Indonesia, can command higher customer loyalty through enhanced in-flight services, reliability, and frequent flyer programs. Garuda's GarudaMiles loyalty program and its commitment to providing premium in-flight services contribute to its consistently high customer satisfaction ratings. Studies by Skytrax have shown that Garuda's cabin crew consistently rank among the best globally, reinforcing the airline's premium positioning [26–28].

Lion Air's focus on cost minimization has led to lower service quality, as Huang [29] noted, arguing that low-cost airlines often trade off customer service for price competitiveness. While Lion Air provides a no-frills experience, passengers often cite issues with flight delays, poor communication, and limited in-flight services. However, as many studies, including those by Tan [30], have highlighted, the price sensitivity of the Indonesian market means that a significant portion of passengers is willing to accept these compromises in exchange for cheaper fares [31–33].

3.4. Financial performance and market dynamics

The financial health of airlines is often impacted by their ability to manage operational costs, pricing strategies, and external factors such as fuel prices and economic downturns. Studies by Morrell [34] indicate that full-service carriers like Garuda Indonesia typically face higher operational costs due to their service offerings, fleet composition, and global route networks. Garuda's financial struggles, particularly during the COVID-19 pandemic, have been well-documented, with the airline requiring government bailouts and debt restructuring to survive. Financial reports indicate that Garuda continues to operate under significant debt, which constrains its ability to compete with leaner low-cost carriers [35–38].

Lion Air, despite its safety and service challenges, has maintained strong financial performance, driven by its low-cost structure and high passenger volumes. According to a study by O'Connell [39], the low-cost carrier (LCC) model has allowed airlines like Lion Air to dominate domestic markets by offering affordability over amenities. Lion Air's large fleet of Boeing 737s and focus on high-frequency domestic routes allow it to operate with lower costs, resulting in larger profit margins in pre-pandemic times. Post-pandemic recovery has been quicker for Lion Air than Garuda, due to its focus on the domestic market, which has rebounded faster than international travel [40–42].

3.5. Market positioning and competitive dynamics

Market positioning is critical in an airline's ability to capture and retain market share. According to Musa and Isha [43], full-service carriers must focus on differentiation through quality, while low-cost carriers excel by focusing on price competition and volume. Garuda Indonesia's position as a full-service airline targets premium and international travelers. Its SkyTeam alliance membership and international connectivity underscore its global aspirations, although its financial challenges have limited its competitiveness in some markets [44–47].

Lion Air's market positioning is distinct, catering to the budget-conscious traveler. As studied by Flouris and Walker [48], Lion Air's ability to offer low fares and high flight frequency has allowed it to capture the majority share of domestic passengers. Its focus on secondary airports and underserved routes also gives it a competitive edge, particularly in smaller cities where full-service carriers have a limited presence. This positioning aligns with the findings of Scheraga [49], who argues that low-cost carriers thrive in developing markets with large middle-class populations seeking affordable air travel [50–53].

4. Methodology

This study employs a mixed-methods approach, combining qualitative and quantitative data to conduct a comparative analysis of Garuda Indonesia and Lion Air. The methodology is structured around three core areas: data collection, analysis, and the validation of findings. By integrating both secondary data sources and expert insights, the study aims to comprehensively assess the two airlines' performance across various dimensions.

4.1. Data collection

Data were sourced from primary and secondary channels. Secondary data came from airline reports, industry publications, government and aviation authority documents (e.g., IATA, ICAO), academic studies, and third-party ratings such as Skytrax and AirlineRatings. Key data included: On-time performance metrics, financial statements, safety audit reports, and customer satisfaction ratings. Primary data were supplemented with expert opinions from aviation professionals, including consultants, pilots, and regulatory members with insight into Indonesia's aviation sector. Data were analyzed both qualitatively and quantitatively.

4.1.1. Quantitative analysis

Operational Performance: Metrics such as on-time performance (OTP), fleet size, and flight frequency were compared between the two airlines. Descriptive statistics identified trends in punctuality, route efficiency, and reliability [54,55]. Financial data, including revenue, profit margins, and debt ratios, were analyzed to compare pre- and post-pandemic performance [56]. Comparative safety analyses were based on accident rates and safety violations from aviation safety databases and reports [57].

4.1.2. Qualitative analysis

Customer Service: Customer reviews from platforms like Skytrax were analyzed thematically, identifying recurring service issues and comparing airlines. Expert interviews provided deeper insights into customer experiences and loyalty [58].

Airline Operational Performance: Airline operational performance is assessed through metrics like on-time performance and fleet utilization. Studies show that airlines with efficient operations, particularly in punctuality, achieve higher customer retention [59]. Garuda Indonesia excels in operational performance, with a 95% on-time performance rate in 2022. In contrast, Lion Air, despite a larger number of domestic flights, has faced operational inefficiencies, including lower on-time rates [60]. Network efficiency is crucial in Indonesia, with airlines needing to optimize routes across a geographically fragmented market. Garuda's mixed long-haul and domestic routes contrast with Lion Air's high-frequency short-haul domestic operations, which often sacrifice efficiency for volume [61].

Safety Records and Standards: Safety is a critical factor for competitiveness, especially in emerging markets where fleet expansion may strain safety measures. Garuda Indonesia has made significant safety improvements after being blacklisted by the EU in 2007, achieving a return to the EU's safe list and a Skytrax five-star rating [62]. Conversely, Lion Air's rapid expansion and cost-cutting measures have led to several high-profile safety incidents, including the 2018 Flight 610 crash. Despite safety lapses, Lion Air's affordability keeps it a popular choice for domestic passengers [63].

Customer Satisfaction and Service Quality: Customer satisfaction is influenced by service quality, pricing, and overall experience. Full-service carriers like Garuda Indonesia are known for high customer loyalty due to their premium in-flight services and frequent flyer programs [64]. Garuda's GarudaMiles loyalty program and its cabin crew's high rankings contribute to customer satisfaction [65]. Lion Air, focusing on cost minimization, offers lower service quality in exchange for competitive prices, which many Indonesian passengers accept.

Financial Performance and Market Dynamics: The financial health of airlines is impacted by their ability to manage operational costs and external factors like fuel prices. Full-service carriers like Garuda face higher operational costs, especially when maintaining global routes and a diverse fleet. Garuda's financial difficulties, particularly during the pandemic, required government bailouts and debt restructuring. In contrast, Lion Air's low-cost model has enabled strong financial performance, with higher passenger volumes and quicker post-pandemic recovery [66].

Market Positioning and Competitive Dynamics: Market positioning is vital for capturing market share. Full-service carriers differentiate through quality, while low-cost carriers excel in price competition. Garuda targets premium and international travelers, with its SkyTeam alliance membership and global connectivity. Lion Air focuses on budget-conscious travelers, operating frequent, low-cost domestic flights, particularly to secondary airports.

4.2. Validation and reliability

The triangulation method used was adopted to ensure the accuracy and reliability of the data. Multiple data sources were cross-referenced to validate the findings. Financial data from airline reports were corroborated with external industry reports and financial publications to ensure consistency. Additionally, findings from the data analysis were presented to aviation experts for review. Their feedback was used to refine interpretations and ensure that the conclusions drawn reflected industry realities. In the context of comparing Garuda Indonesia and Lion Air, the triangulation method involved gathering financial data from various internal and external sources. Internal sources: These included financial data directly from the airline's annual reports, quarterly earnings, and official press releases. These documents offer valuable insights into an airline's revenue streams, profit margins, operational costs, and debt obligations. External sources: To validate these internal reports, data from external industry reports (e.g., reports from IATA, CAPA Centre for Aviation, or OAG) were used. These external sources provide comparative data and allow researchers to benchmark an airline's financial performance against competitors within the industry. Financial publications, such as the Financial Times, and independent financial analysts' reports were also used to corroborate the financial figures. By triangulating data from these multiple sources, the accuracy of the findings was strengthened, ensuring that no single data source would skew the results or lead to misleading conclusions. To further ensure the robustness of the analysis, methodological triangulation was employed by combining both quantitative and qualitative methods. The financial data analysis, including profit and loss statements, balance sheets, and cash flow analysis, provided numerical insights into the airlines' financial health and performance trends. Financial ratios such as return on equity (ROE), debt-to-equity ratio, and operating profit margins were calculated to assess and compare the financial stability of the airlines. Qualitative analysis was used to understand the broader context of the data, such as market positioning, customer satisfaction, and strategic business models. Insights from aviation experts and customer reviews were integrated into the analysis to provide a more complete understanding of the airlines' operations and customer experience. The combination of these approaches ensured a more holistic understanding of the airlines' performance and allowed for cross-validation between financial figures and customer perspectives. The triangulation process was further reinforced by incorporating feedback from aviation experts. These experts, including professionals with experience in airline operations, aviation finance, and market dynamics, were consulted to review the initial findings. Their industry-specific knowledge and experience helped ensure that the interpretations of financial data and operational insights were grounded in real-world aviation practices. Expert feedback: The aviation experts reviewed the data and findings, providing valuable input on issues such as operational efficiency, regulatory compliance, and the impact of global trends on airline performance. For example, feedback on the cost structure of low-cost carriers like Lion Air helped refine the understanding of their sustainability and profitability in the long term. Refinement of interpretations: This expert feedback played a crucial role in ensuring that the conclusions were not only statistically valid but also practically relevant to the current state of the aviation industry. Adjustments were made based on their input to more accurately reflect the competitive landscape, industry challenges, and economic realities that both airlines face. By adopting the triangulation process, the research was able to provide a comprehensive, well-rounded view of the performance of Garuda Indonesia and Lion Air. The cross-referencing of multiple data sources, the integration of different research methods, and the incorporation of expert feedback all contributed to the final findings being robust, reliable, and reflective of industry realities. The conclusions drawn from the research were based on a well-balanced set of data, minimizing the risks of error or bias. The triangulation method has been widely adopted in research for improving the reliability and accuracy of results, particularly in fields such as aviation and business analysis. The triangulation process used in this study was critical in ensuring that the financial analysis and competitive comparison of Garuda Indonesia and Lion Air were accurate, reliable, and grounded in real industry practices [67]. By cross-referencing data from multiple sources, employing various research methods, and incorporating expert feedback, the study ensured that the conclusions drawn about both airlines' financial health, operational performance, and market positioning were well-substantiated and reflective of industry realities (**Figure 1**).

Figure 1. Triangulation method to ensure the accuracy and reliability of the data

5. Comparative analysis

5.1. Operational performance

Garuda Indonesia operates as a full-service airline, providing a range of services that include in-flight meals, entertainment, and wider seat selections. The airline emphasizes comfort and reliability, with a focus on maintaining a high level of on-time performance. According to reports, Garuda Indonesia had an on-time performance (OTP) rate of around 95% in 2022, ranking it among the top airlines for punctuality globally. The airline's mixed fleet allows it to service both short-haul and long-haul routes efficiently.

Conversely, Lion Air operates under the low-cost carrier model, focusing on volume over service quality. The airline has a vast domestic network and serves a large number of routes across Indonesia.

However, its OTP has often been criticized, with reports indicating an average punctuality rate of around 70%–80%, well below industry standards. The rapid turnover of flights and intense scheduling can lead to delays and operational inefficiencies.

5.2. Safety records

Safety is a critical point of differentiation between Garuda Indonesia and Lion Air. Garuda Indonesia has made significant improvements in its safety protocols following a series of accidents in the early 2000s. After a crash in 2007, the airline revamped its operations, invested in modern aircraft, and improved its training programs, leading to the lifting of a European Union ban on Indonesian airlines. Today, Garuda meets international safety standards and is a member of the SkyTeam alliance, underscoring its commitment to safety and quality [68].

Lion Air, on the other hand, has faced several serious safety incidents. The most notable of these was the 2018 crash of Lion Air Flight 610, a Boeing 737 MAX, which resulted in 189 fatalities. This incident, along with others, has cast doubt on the airline's ability to maintain rigorous safety standards, particularly as it rapidly expanded its fleet and operations. Despite this, Lion Air continues to dominate the domestic market, though its safety reputation remains a concern for some passengers.

5.3. Customer service

Garuda Indonesia is known for its exceptional customer service, consistently ranking among the top airlines globally for passenger satisfaction. The airline's commitment to hospitality reflects Indonesian cultural values, and passengers have access to in-flight entertainment, comfortable seating, and complimentary meals, even on short-haul domestic routes. Frequent flyers can also benefit from GarudaMiles, the airline's loyalty program, which offers rewards and privileges.

In contrast, Lion Air's customer service aligns with the low-cost carrier model, offering minimal frills. Passengers must pay for additional services, such as checked baggage, meals, and seat selection. This business model allows Lion Air to keep ticket prices low, but it has led to a high volume of customer complaints, especially concerning delayed flights and poor communication during disruptions. Nevertheless, for budget-conscious travelers, Lion Air remains a popular option due to its affordability and network coverage.

5.4. Financial performance

Garuda Indonesia has struggled financially in recent years, primarily due to high operating costs and increased competition from low-cost carriers. The COVID-19 pandemic exacerbated these issues, leading to significant losses and a need for government intervention. In 2021, Garuda underwent a restructuring process aimed at reducing its debt and streamlining operations. Despite these challenges, the airline remains a vital player in Indonesia's aviation industry, especially in the premium market segment.

Lion Air's low-cost model has allowed it to maintain strong financial performance, particularly in terms of passenger volume. The airline's ability to operate efficiently with lower costs has enabled it to capture a larger share of the domestic market, despite safety concerns. However, like Garuda, Lion Air also experienced significant financial setbacks during the pandemic, with many flights grounded and a decrease in travel demand. As the aviation industry recovers, Lion Air's strong presence in the low-cost segment is expected to drive its financial recovery faster than Garuda's.

5.5. Market positioning

Garuda Indonesia primarily caters to business travelers, international tourists, and passengers seeking premium services. The airline has positioned itself as a full-service carrier, with a focus on quality and reliability. Its market strategy includes targeting long-haul routes to Europe, Australia, and the Middle East, as well as providing premium services on domestic routes [69].

Lion Air, on the other hand, focuses on the budget-conscious market. Its core customer base includes domestic travelers, as well as passengers flying short-haul regional routes across Southeast Asia. Lion Air’s competitive pricing and frequent flights have made it the preferred choice for many Indonesians seeking affordable air travel.

6. Challenges and opportunities

6.1. Challenges

Garuda Indonesia’s primary challenge lies in its financial difficulties. The airline’s high operating costs, coupled with intense competition from low-cost carriers like Lion Air, make it difficult for Garuda to remain profitable. The airline must continue to reduce its operational costs while maintaining its premium service offering to stay competitive in both domestic and international markets. Indonesia is the world’s largest archipelagic country, with over 17,000 islands spread across a vast expanse of water. One of the unique contributions of both Garuda and Lion Air lies in their ability to provide air connectivity to Indonesia’s isolated islands. Garuda Indonesia, as the national flagship carrier, has historically focused on high-density routes between major cities such as Jakarta, Bali, and Surabaya, while also maintaining regional connectivity, even to remote areas. Its role is often critical in ensuring that even lesser-served islands have access to the mainland and international routes. Lion Air, on the other hand, has focused on low-cost regional connections, which are especially important for the less-developed islands in the eastern part of Indonesia. By utilizing a budget-friendly business model, Lion Air has managed to offer affordable flights to destinations that would otherwise be difficult to reach. The airline’s ability to serve these regions has made it a key player in improving accessibility across Indonesia’s sprawling geography. Both airlines have tailored their fleets to address the operational demands of an archipelagic nation. Garuda, for example, uses a mix of long-haul wide-body aircraft for international flights and narrow-body aircraft for domestic services. Lion Air, operating as an LCC, has focused more on single-aisle, fuel-efficient jets, like the Boeing 737, which are well-suited to short-haul flights connecting the islands. Indonesia’s geography and infrastructure limitations also present a set of unique challenges that both Garuda and Lion Air need to navigate. The archipelago requires airlines to fly longer distances between islands, which leads to high fuel costs and logistical difficulties. Airlines like Garuda Indonesia have higher operational costs associated with long-haul flights and premium services, which may make it difficult to maintain low fares on domestic routes. Lion Air, however, through its no-frills model, has found ways to offset high fuel prices by increasing seat capacity and utilizing more fuel-efficient aircraft. Smaller regional airports often lack the infrastructure to support large aircraft. Both airlines need to adjust their operations to suit the capabilities of these airports, using smaller aircraft to serve islands that are not easily accessible. This contributes to the higher cost of operations, but it also highlights the unique adaptability of these airlines in maintaining service to underserved regions. The Indonesian government plays a significant role in shaping the aviation industry, and both airlines have adapted to the policy environment in their own ways. As the flagship carrier, Garuda has benefited from government support and has been seen as an important tool for nation-building by improving accessibility to remote parts of Indonesia. The airline also adheres to higher safety and service standards, aligning with the government's vision of enhancing Indonesia's global image. This makes Garuda crucial for international connectivity and the promotion of tourism. However, Garuda's adherence to the full-service model means it faces a challenge in maintaining cost efficiency, especially on routes with lower demand. Lion Air, being a low-cost carrier, has benefited from liberalized policies that promote competition and price affordability. The airline has made significant strides in stimulating domestic travel, especially for Indonesians from lower-income households. Lion Air's ability to provide low-cost tickets has made air travel more accessible to a broader population. However, this has come with challenges in terms of safety regulations and compliance with international standards. Airlines in Indonesia, especially Garuda and Lion Air, play a vital role in fostering economic development, cultural exchange, and tourism, all of which are especially important in an archipelagic nation. As one of the world's most visited countries, Indonesia's tourism industry depends heavily on affordable and efficient air travel. Lion Air, by providing low-cost flights to popular tourist destinations like Bali and Jogjakarta, has contributed significantly to the growth of tourism in Indonesia. On the other hand, Garuda, with its full-service offerings, attracts more premium tourists and has bolstered Indonesia's reputation as a tourist destination. A unique challenge for airlines operating in Indonesia is the need to manage safety standards and mitigate the risks posed by both natural (e.g., volcanic eruptions, monsoons) and technical factors (e.g., fleet age, maintenance). Garuda Indonesia has a strong safety reputation, primarily due to its adherence to international safety standards (including IATA's Operational Safety Audit-IOSA). This is a key component of the airline's premium service and global positioning. Lion Air, despite some setbacks related to safety incidents, has implemented significant measures to improve safety standards and address regulatory compliance. The airline has worked to overhaul its image, ensuring that its rapid fleet expansion is accompanied by appropriate safety protocols.

6.2. Opportunities

For Garuda Indonesia, the growing tourism industry in Indonesia presents a significant opportunity. The airline can capitalize on increasing international demand by expanding its routes to key tourist destinations like Bali and Jakarta. Additionally, Garuda can enhance its presence in high-demand markets such as China and India.

Lion Air, with its extensive domestic network, has the opportunity to expand further into underserved markets, particularly in rural Indonesia and neighboring

Southeast Asian countries. The airline's low-cost model gives it a competitive edge in these markets, where affordability is a key driver of demand.

7. Conclusion

The comparative analysis of Garuda Indonesia and Lion Air underscores the contrasting strategies these airlines use to cater to different segments of Indonesia's aviation market. Garuda Indonesia, as the national flag carrier, positions itself as a premium service provider, focusing on delivering high-quality experiences, including in-flight services, reliability, and safety. Its strategy revolves around capturing the business traveler and international market, with a focus on full-service offerings, long-haul routes, and international alliances like SkyTeam. Garuda's emphasis on safety has also led to substantial improvements in its reputation after past challenges, reinforcing its position as a trusted brand for high-end customers.

In contrast, Lion Air, as Indonesia's largest low-cost carrier (LCC), focuses on a volume-driven strategy, prioritizing affordability and domestic coverage. With a large fleet and high-frequency routes, Lion Air has become the go-to option for price-sensitive travelers, particularly in the vast domestic market. Its no-frills service model allows it to offer lower ticket prices, making air travel accessible to a wider demographic across Indonesia's islands. While its affordable flights have enabled it to dominate the domestic market, Lion Air's safety record has been a significant concern, particularly following high-profile accidents like the 2018 crash of Flight 610. These safety issues, combined with frequent operational delays, pose ongoing challenges to the airline's reputation.

Both airlines face distinct challenges moving forward. Garuda Indonesia's financial sustainability is a major hurdle, particularly in the wake of the COVID-19 pandemic, which severely impacted global travel and resulted in heavy losses for the airline. Garuda's high operational costs and reliance on government bailouts have led to debt restructuring efforts, and the airline will need to explore strategies for cost-cutting and route optimization while maintaining its premium positioning. Despite these difficulties, Garuda also has opportunities for growth, especially as international tourism rebounds, and as it can leverage its global alliances to expand its international network and offer seamless connections to foreign markets.

Lion Air, despite its safety concerns, is well-positioned to capitalize on growing demand for domestic air travel, which is expected to rise as Indonesia's economy continues to grow and more people seek affordable travel options. Its low-cost model offers significant growth potential, particularly in underserved and remote regions, where affordable and frequent air travel is essential for connectivity. However, to sustain this growth, Lion Air will need to address its safety and operational reliability issues. Investing in fleet maintenance, enhancing safety protocols, and improving customer service will be critical for maintaining long-term viability and winning back customer trust.

Table 1. Comparison between Garuda Indonesia and Lion Air.

Category	Garuda Indonesia	Lion Air
Financial Challenges	High operating costs, intense competition from low-cost carriers, difficulty maintaining profitability.	Relies on a budget-friendly model to keep fares low despite fuel and operational costs.
Geographical Challenges	Provides air connectivity to remote islands while maintaining a premium service. Operates long-haul and regional flights.	Focuses on low-cost regional connections, making travel accessible to less-developed areas.
Fleet Management	Mix of long-haul wide-body and narrow-body aircraft for domestic and international routes.	Primarily operates fuel-efficient, single-aisle jets for short-haul island connectivity.
Infrastructure Constraints	Faces higher operational costs due to long-haul flights and premium services.	Adjusts operations to suit smaller airports with limited infrastructure, using cost-efficient aircraft.
Regulatory Challenges	Government support as a flagship carrier but struggles to maintain cost efficiency.	Benefits from liberalized policies but faces challenges in meeting international safety standards.
Role in Tourism	Attracts premium tourists and strengthens Indonesia's global image.	Provides affordable travel, boosting domestic tourism and accessibility to popular destinations.
Safety and Compliance	Strong safety reputation, adheres to international standards like IATA's Operational Safety Audit (IOSA).	Has faced safety concerns but is actively improving regulatory compliance and fleet safety measures.
Opportunities	Expansion into high-demand markets (China, India) and international tourism growth.	Further expansion into underserved rural markets in Indonesia and Southeast Asia.

The post-pandemic recovery opportunities for both airlines to reestablish themselves in the market. As travel restrictions ease and demand for air travel increases, Garuda Indonesia and Lion Air can tailor their strategies to meet the evolving needs of passengers. Garuda may benefit from the rise in international tourism and the demand for more secure, reliable, and comfortable long-haul flights. Meanwhile, Lion Air is likely to capture a significant portion of the domestic travel market as price-sensitive travelers and domestic tourists continue to seek affordable travel options across Indonesia's islands (**Table 1**).

Looking ahead, the future of Indonesia's aviation industry will likely see both airlines continuing to play pivotal roles. Garuda Indonesia will cater to premium and international markets, while Lion Air will focus on high-volume, low-cost domestic travel. The coexistence of these two business models—premium full-service and budget no-frills—ensures that both segments of the market are well served. The key to their long-term success will be how well each airline can adapt to changing market conditions, manage operational and financial challenges, and capitalize on opportunities for growth, particularly in the post-pandemic era. This dynamic, where the two carriers complement each other by serving distinct customer needs, is essential for the future growth and sustainability of Indonesia's aviation industry.

8. Limitations

While Garuda Indonesia is a publicly traded company with relatively transparent financial reporting, Lion Air is privately owned, making it more challenging to obtain comprehensive financial data. This can limit the depth of the financial comparison between the two airlines.

The Indonesian aviation market may be subject to external shocks, such as fuel price volatility, regulatory changes, and fluctuating demand, which can skew the findings and make it difficult to isolate the airlines' internal strategies from broader economic influences.

The study focuses on Garuda Indonesia and Lion Air as the two dominant players, but there are other low-cost carriers (e.g., Citilink, AirAsia Indonesia) and regional players that also impact market dynamics. This may limit the comprehensiveness of the market analysis by not accounting for their influence on competition and pricing.

Lion Air primarily serves the domestic market, while Garuda Indonesia has a strong international presence. Comparing these two markets directly is challenging due to differing regulatory environments, competition, and customer expectations, which might limit the scope of the comparison.

The study focuses specifically on Indonesia's aviation market, limiting the generalizability of findings to other countries with different regulatory, economic, and infrastructural environments. The dynamics between full-service and low-cost carriers may vary significantly in different regional or international contexts.

9. Practical implications

The practical implications of this study on the comparative analysis between Garuda Indonesia and Lion Air extend to various stakeholders within the aviation industry, policymakers, and the broader economy.

These implications include:

The findings could help the airline refine its premium service offerings while identifying areas for cost reduction to improve financial sustainability. By better understanding its strengths in international routes and customer service, Garuda can focus on enhancing these areas, while addressing operational inefficiencies, particularly as it restructures in a post-pandemic market.

The study offers practical insights into how Lion Air can maintain its dominant position in the low-cost domestic market while improving safety standards and operational reliability. Implementing stronger safety protocols and addressing customer complaints can enhance its reputation, allowing it to grow its market share without compromising on affordability. The research highlights ongoing safety concerns with Lion Air, suggesting a need for tighter regulatory oversight in Indonesia's aviation sector. Policymakers could use the study to push for improved safety standards and stricter enforcement of maintenance and operational regulations, particularly for low-cost carriers.

The findings will be useful for investors and stakeholders in both airlines, guiding investment decisions based on the airlines' financial performance, strategic positioning, and future growth potential. For Garuda, understanding the challenges of maintaining a premium service in a highly competitive and cost-sensitive environment can guide restructuring efforts and investment in fleet modernization and route optimization. For both airlines, the study identifies key areas of improvement in terms of passenger experience. Garuda can capitalize on its strengths by improving premium services further, while Lion Air can focus on operational efficiency and enhancing basic customer service. The airlines can use these insights to tailor their services to meet the evolving needs of post-pandemic travelers.

Both airlines can use the study's findings to better target their respective customer segments. For example, Garuda can continue to market its premium services to business travelers and international passengers, while Lion Air can leverage its affordability and route frequency to attract price-conscious travelers and domestic tourists.

The study's findings can help both airlines align their strategies with Indonesia's broader goals of boosting tourism and economic growth. By improving service quality and safety, both airlines can play a critical role in enhancing tourist experiences and increasing inbound international tourism, contributing to national economic recovery and development.

The study suggests that improving regional air connectivity can drive economic growth by providing better access to remote areas. Lion Air's focus on domestic routes can be crucial for improving transportation in regions with limited travel infrastructure, while Garuda's international services can attract high-value tourists and business travelers, promoting regional development.

The study establishes a foundation for future comparative studies between full-service and low-cost carriers in similar markets. Researchers, regulators, and industry professionals can use the findings to benchmark the performance of other airlines in Southeast Asia or emerging markets with similar aviation industry dynamics.

The findings from this study on Garuda Indonesia and Lion Air offer valuable insights that can be applied to other archipelagic nations and emerging economies facing similar challenges. In countries like the Philippines, Japan, and the Caribbean, which share the geographical complexity of multiple islands, the findings on operational performance and network efficiency can guide the optimization of flight routes and frequencies. Garuda's approach of balancing long-haul and domestic flights, with an emphasis on punctuality, could serve as a model for improving connectivity and operational efficiency in these regions. Similarly, the study's safety findings highlight the need for rapid fleet expansion to be coupled with stringent safety protocols, a lesson relevant to emerging markets like India, Vietnam, and Africa, where airlines are expanding rapidly but face safety challenges. The study's insights into customer satisfaction reveal the trade-offs between service quality and cost, applicable to LCCs in markets such as India, Brazil, and Mexico, where price-sensitive consumers may sacrifice comfort for affordability. The financial performance findings, particularly Garuda's post-pandemic struggles and Lion Air's quicker recovery, offer valuable lessons on financial resilience, applicable to countries like South Africa and Argentina, where economic instability is more pronounced. Lastly, the market positioning strategies of both airlines can inform airlines in emerging economies, such as Thailand, Brazil, and Kenya, on how to balance global competitiveness with domestic market expansion, serving both premium and budget-conscious travelers. These findings can provide strategic guidance for airlines in other emerging and archipelagic markets to navigate the complexities of growth, service, safety, and financial stability.

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