

Indonesia's Low-Cost Carrier Competitive Landscape: An Analysis of 7 P's

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Abstract

This study examines the competitive strategies of four leading low-cost carriers (LCCs) operating in Indonesia—Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet—through the lens of the 7Ps marketing mix framework. Amidst intensifying competition and evolving passenger expectations, Indonesian LCCs must now differentiate beyond price. Using a qualitative-comparative approach, the research analyzes how each airline performs across seven dimensions: Product, Price, Place, Promotion, People, Process, and Physical Evidence. Data were collected from secondary sources, including official airline websites, mobile application ratings, national transportation statistics, and the Top Brand Index 2024. Findings reveal distinct strategic postures among the carriers. Citilink and Indonesia AirAsia lead in balancing affordability with service quality and digital integration, while Super Air Jet positions itself as a youthful, brand-driven entrant. Although dominant in market share, Lion Air continues to face challenges in service consistency and customer experience. The study highlights that operational maturity, service delivery, and human capital are critical for sustained competitiveness. The analysis also demonstrates the increasing importance of customer-facing digital systems and physical branding as sources of perceived value in a low-cost context. This research contributes to the growing literature on service marketing in aviation and provides strategic insights for airline managers seeking differentiation in price-sensitive markets. Future studies are encouraged to integrate passenger perspectives and explore the role of sustainability in LCC strategies.

Keywords: low-cost carriers, 7Ps marketing mix, airline competition, Indonesia, service differentiation.

A. INTRODUCTION

Over the last three decades, low-cost carriers (LCCs) have played a pivotal role in reshaping the structure of global air travel. By emphasizing simplified operations and competitively low fares, these airlines have disrupted traditional aviation markets and opened up flying to broader, more cost-conscious segments of the population (Baxter & Srisaeng, 2022; Gößling & Dolničar, 2022). Built around a lean business model that strips away non-essential services and prioritizes efficiency, LCCs have helped make air travel more accessible, especially in regions where price sensitivity governs travel behavior. In the case of Indonesia, the model has found fertile ground, driven by growing internal movement, an expanding middle class, and the logistical complexities of a nation comprised of thousands of islands. Established players such as Lion Air, Citilink Indonesia, and Indonesia AirAsia continue to dominate, but the entry of newer competitors like Super Air Jet has heightened competition, offering passengers a broader array of affordable flight options and further diversifying the local aviation market (Murtivia & Azhar, 2023; Setiawan et al., 2024).

The Indonesian low-cost carrier sector is increasingly characterized by a dynamic mix of aggressive pricing tactics, digital innovation, and finely tuned service strategies. While Lion Air continues to focus on scaling its network through extensive route expansion, competitors like Citilink and AirAsia have shifted their emphasis toward refining the passenger experience, placing particular weight on operational dependability and digital connectivity (Cristina et al., 2022; Koharudin & Simarmata, 2024). However, as the sector grows, so too do the underlying challenges—flight delays, inconsistent service delivery, and fragmented digital performance have all emerged as significant factors that now influence how passengers perceive brands and, ultimately, where their loyalties lie (Joshi & Lee, 2025; Sipayung & Sirait, 2024). Furthermore, evolving consumer behavior—shaped by generational expectations, varying levels of digital literacy, and differing socioeconomic contexts—has added another layer of complexity to how airlines must position themselves within an increasingly competitive landscape (Setiawan et al., 2024).

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Although academic interest in Indonesia's low-cost carriers has seen a noticeable rise in recent years, there remains a lack of thorough comparative research—particularly studies grounded in widely recognized service marketing frameworks. The 7Ps model comprises product, price, place, promotion, people, process, and physical evidence, and is a useful way to study how service businesses create and maintain their competitive advantage. In Indonesia, the 7Ps marketing mix helps review classic factors such as prices and sales methods and highlights everyday operations that greatly impact the airline business. The service experience as a whole now influences passenger impressions, the predictable actions of employees, and how physical items are aligned with the company's message. Surprisingly, even in areas where guests are interested in value, new research indicates that how well customers are served greatly matters. Simply putting time and money in the back seat will likely make passengers look at other choices rather than travel again with the same company. Because of this, value now reflects experience, dependability, and how someone feels about a brand.

With the market constantly evolving, Indonesian low-cost carriers rely increasingly on technology and changeable operations to distinguish themselves. Citilink is a good case for this. A centralized tracking system was brought in to aid passengers by making checking and baggage collection less stressful. While increasing reliance on mobile tools, AirAsia boosted the features available to passengers in its app for more self-service (Cristina et al., 2022; Murtivia & Azhar, 2023). The rest of the industry is changing, too: being inexpensive is not enough to stay in the lead. Those who succeed now can efficiently mix their experience and how they help customers, keeping prices low and making their services smart and hassle-free for digital and discerning travelers.

This research analyzes the strategies of four Indonesian low-cost air carriers—Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet—by applying the 7Ps marketing mix. By studying the application of an airline's strategies in these areas, the research hopes to reveal areas where the airline is different, gives impressive service, and can be improved. The paper adds to academic discussions on service marketing in aviation and guides those in the industry navigating the fast-changing Indonesian low-cost airline industry.

B. LITERATURE REVIEW

Global Perspectives on Low-Cost Carriers

For thirty years, low-cost airlines (LCCs) have played a major role in changing the aviation business and gradually replaced full-service airlines (FSAs). LCCs have expanded air travel to many who want affordable prices because they are designed around efficient management, speedy aircraft turnarounds, and simple one-way routes. While FSAs depend on organized hubs and distinct service tiers, LCCs have managed to keep things easy for passengers. As a result, things are now much easier to scale up, control expenses, and update to meet new demands. Having the ability to adjust during a crisis worked well for LCCs in the COVID-19 pandemic, as their lower fixed costs and quick route changes made them recover quicker (Baxter & Srisaeng, 2022; Fontanet-Pérez et al., 2022; Savchina & Pavlinov, 2024; Wang, 2024).

Long-term, low-cost carriers rely on adding other services to their basic ticket prices to earn more profit. By relying on these new revenue sources, low-cost airlines can earn profits without charging high ticket fares (Mumbower et al., 2022). At the same time, new digital technologies have improved LCCs' strategy, providing customers with simple booking, dynamic prices set by algorithms, and personalized marketing offers based on their actions (Baxter & Srisaeng, 2022; Rachmandika & Alamsjah, 2023). More importantly, the LCCs have focused on areas ignored by other airlines and sparked extra interest in secondary cities, avoiding the obstacles of crowded big airports. Consequently, more people can use air travel as a way to move easily, something convenient and helpful, rather than only being able to afford it to a few chosen customers (Mumbower et al., 2022; Wang, 2024).

Marketing Strategy Frameworks in the Airline Industry

In recent years, service marketing within the airline industry has increasingly embraced structured strategic models, with the 7Ps framework—encompassing Product, Price, Place, Promotion, People, Process, and Physical Evidence—gaining recognition as a particularly effective tool for analysis. This framework allows for a more layered understanding of how airlines create and convey value in a service-

driven and emotionally charged environment. Unlike tangible goods, air travel involves intangible, high-stakes experiences that demand reliability in delivery and perception. The 7Ps model addresses these challenges by assessing both the operational and physical aspects of service and the experiential factors that play a critical role in shaping overall passenger satisfaction (Ariffin & Nameghi, 2023; Günay & Maral, 2023).

Within this structure, the "Product" encompasses more than just flying; it includes aspects such as comfort, brand identity, in-flight amenities, and the overall travel journey (Awadh, 2023). The "People" component—especially frontline employees such as flight attendants and check-in staff—is pivotal in shaping customers' perception of service reliability and emotional assurance (Du, 2023). "Price," meanwhile, has evolved through dynamic pricing systems, which allow airlines to respond in real time to market demand while optimizing revenue (Samunderu, 2023). As for "Place," the rise of digital booking channels has revolutionized distribution, enabling airlines to reach passengers directly through websites, apps, and third-party aggregators (Kim & Hwang, 2023).

Promotional efforts have likewise become more sophisticated. Airlines now utilize targeted social media outreach and data-driven campaigns to build brand recognition and encourage repeat engagement (Ismail, 2022). "Physical Evidence" refers to all the sensory and visual cues that passengers encounter—from cabin interiors to digital app design—collectively reinforcing the airline's positioning. Finally, "Process" addresses the operational flow behind service delivery, including check-in, boarding, and flight punctuality. In a post-pandemic landscape, airlines are being pushed to rethink these processes to prioritize safety, flexibility, and digital ease—all key to meeting shifting passenger expectations (Sipayung & Sirait, 2024; Yang et al., 2024; Ma & Wang, 2023).

Operational Strategies and Consumer Behavior in LCCs

As the low-cost aviation industry evolves, airlines are increasingly challenged to balance sustaining operational efficiency and responding to shifting passenger expectations. Finding the cheapest tickets is usually important, but a good number of travelers now also put more weight on a travel service's timeliness, dependability, and how easy it is to use their website or app (Chow et al., 2022; Praja et al., 2023). Many LCCs adapt by investing in digital technology to boost performance and their relationship with customers. Especially on mobile platforms, most airlines now offer tools like tracking baggage, using self-service check-in methods, and getting current updates on flights. Although they are often thought of as tools that save time, such improvements help to form loyal customer relationships and strong brand ties (Tamara, 2023).

More broadly, recent research underscores that perceived value—shaped by the interplay between pricing and the quality of service delivery—has become a central factor in how consumers make airline choices. Viewed through the 7Ps marketing mix, it is clear that elements like staff conduct, process consistency, and the dependability of the service itself carry considerable weight in driving satisfaction and encouraging repeat business (Ogbunamiri & Agu, 2022; Sipayung & Sirait, 2024). Among these, operational punctuality stands out as a baseline expectation that passengers are rarely willing to compromise on and continues to distinguish leading carriers in an intensely competitive environment. In this setting, offering the lowest fare is no longer enough. Long-term success now rests on a carrier's capacity to weave reliability, responsiveness, and seamless digital interaction into every layer of its service model. Firms now have to ensure their operating strategies align with what today's smarter and tech-savvy customers expect, or they will lose relevance and decline over time.

The Indonesian Low-Cost Carrier Landscape

Indonesia's domestic aviation development has seen a major impact lately, largely due to the fast rise of LCCs. Because of its many islands, increased need for inexpensive transportation between them, and digitally literate youth, the country is perfect for LCCs to succeed. Dominating this segment are four major players: Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet. All four airlines try to reduce costs as much as possible, and each one has created strategies that fit their target customers, either seeking low prices or high-tech options (Farida & Setiawan, 2022; Sipayung & Sirait, 2024). Lion Air, in particular, has sought to build a large route network, linking main cities to smaller ones to reach more people fast. Still, the rapid development has revealed weaknesses in how things are run, mainly regarding

airline punctuality and the level of service (Sipayung & Sirait, 2024). For branding, United heavily uses digital channels like social media to ensure young travelers stay aware of them.

Instead, Citilink Indonesia mixes low fares with limited extras, which puts it in a hybrid role. Providing affordable fares that include improved flight and online services, Citilink relies on its related airline, Garuda Indonesia, to show its service is refined—while not increasing prices (Cristina et al., 2022). Indonesia AirAsia, though, has made frequent promotions and high digital engagement central to its strategies, using apps and loyalty offers to keep customers and build an appeal to tech-savvy people. The latest addition, Super Air Jet, aims to bring its brand to youths and celebrate local cultures. To appeal to modern Indonesia's tastes, the airline's branding and advertising focus on aspects viewed differently from most LCCs (Ananda, 2022; Rifai et al., 2023). Besides focusing on appearance, the airline seeks out routes largely ignored by big firms to improve regional connections and support traveling within the country (Maisham et al., 2022).

Since competition in low-cost flying is increasing, the four airlines are now challenged to improve their operating plans further. Keeping costs low and supporting new technologies, consistent service, and better customer experiences is now more difficult. This competition not only reflects fare differences and broad networks but also shows how Indonesian LCCs adjust to newer expectations and unique needs of local and international travel (Rene Baxter & Kris Srisaeng, 2022).

C. METHODS

A qualitative-comparative method is used in this study to review the strategic positioning of four leading Indonesian low-cost carriers: Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet. These carriers' big influence in the industry and their original approach to operations and marketing made them good choices. Each year, the TBI lists Indonesia AirAsia (16.10%), Citilink (15.90%), and Lion Air (13.60%) as Indonesia's top airline brands. Super Air Jet was missing from the 2024 TBI list, even though its domestic market share increased, just as Lion Air did. Together, they make up over two-thirds of Indonesia's domestic flights, indicating they are well-represented in the country's low-cost world.

For this study, the central tool for analysis is the 7Ps marketing mix framework: Product, Price, Place, Promotion, People, Process, and Physical Evidence. Many researchers in service marketing rely on this framework to structure and analyze how each airline outlines and promotes value in the competitive industry (Saputri, 2019). In addition, I applied a method for analyzing competitors to find and visualize the strengths of each carrier since this is standard practice in aviation research. All information used for this study was publicly available and collected between April 23 and April 30, 2025. AirlineStat.com consulted official websites, the Ministry of Transportation's air transport figures, the Top Brand Index for its data, and reviews from consumers on digital stores. The study reviewed readily found promotional and digital content across different media platforms.

The researcher found several related indicators to assess the results of each 7Ps dimension. Factors we looked at were how many domestic routes airlines offer, how often they arrive on schedule, how often they promote, how passengers feel about their apps, and the sharpness of their brand. All the data were combined into a matrix to show the important patterns and parts where the companies differed. The matrix formed the basis for designing a map illustrating how all the airlines are positioned in Indonesia's low-cost airline business.

D. RESULTS AND DISCUSSION

Products

Here, we discuss how Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet manage and deliver their core products among domestic fliers. All four airlines follow the low-cost model, yet their choice of ways to offer the "Product" in the marketing mix is not the same due to their target customer groups, approach to networks, and service ideas. Lion Air's operational scale makes it unique; it serves more destinations in Indonesia than any other airline group and includes 241 routes to 37 towns. Covering so much ground follows a plan to target regional markets and connect major cities with small regional hubs across the archipelago. Nevertheless, the same broad network is not balanced by comparable action to widen the services offered. An onboard experience is given that is the same for all except those who want to pay extra. Some common things, including seating tiers, loyalty points, or many services in one

package, are still hard to find. For this reason, Lion Air's focus in the market is on providing access to many routes rather than creating an improved experience for its passengers.

Citilink Indonesia sells more people on affordability with some added features where they can. Carrying passengers on 145 routes across 36 domestic airports, the airline is guided by sales appeal instead of just trying to reach all corners of the country. Citilink puts several extra services into its passenger product packages, unlike Lion Air. To achieve this, airlines have added improved seats, prepared combinations of services, and curtailed in-flight entertainment—features that few low-cost carriers offer regularly. By doing this, the airline aims to be a “value carrier” by catering to low-price travelers and those who prefer something more stylish without paying much higher prices than full-service airlines.

Indonesia AirAsia has chosen a different way from the others. Because it covers just 21 airports with 83 routes, its operations are limited in scope but basic. The airline ensures its operations are consistent and efficient, using only Airbus A320 aircraft. The company's unique value is found in how easily customers can use digital features, greatly improving their journey. The mobile app environment makes it easy for travelers to select where to sit, purchase additions, and handle tickets or baggage, all from their phones. The airline's simple food and drink service is well matched by its powerful digital channels and clear brand messages for customers who value convenience, independent travel, and dependability. Both approaches demonstrate that the LCC sector's "Product" dimension is not limited to just providing a flight. The way products are shaped in Indonesia is changing with increasing skills in the sector and new things passengers want.

Super Air Jet, which joined the other carriers most recently, stands out because it uses a youthful brand image, focuses on cultural aspects, and chooses its network growth wisely. By the beginning of 2025, the airline will manage 22 airports and 107 flight routes targeted toward fast-growing secondary locations. By using this approach, new travelers are targeted outside the crowded and competitive hubs most people use. The company ensures it provides services that reflect the latest trends and relate to Indonesians to stand out in the maturing low-cost aviation market of the country. They should do business in areas with less competition from old low-cost companies rather than compete on crowded routes like the legacy ones. Super Air Jet's product centers on design appeal, social media engagement, and digital fluency—aligning its physical product (e.g., beige livery, minimalist cabin) with a broader lifestyle proposition. At the same time, lacking in traditional service depth, its brand narrative and route strategy appeal strongly to the digitally native, budget-conscious millennial and Gen Z segments.

The Table below illustrates the comparative product scope of the four airlines:

Table 2. Domestic Network Comparison (Q1 2025)

Airline	Domestic Routes	Airports Served	Positioning Focus
Lion Air	241	37	Volume-driven, national coverage
Citilink Indonesia	145	36	Selective, demand-researched routes
Indonesia AirAsia	83	21	Lean, high-utilization routes
Super Air Jet	107	22	Secondary cities, youth alignment

Source: Research data, 2025

The evidence suggests that Indonesian LCCs diverge significantly in their interpretations of what constitutes a competitive airline product. Lion Air bets on market saturation and route ubiquity; Citilink mixes scale with experiential layering; AirAsia leverages digital infrastructure to enrich a minimalist core; and Super Air Jet offers a lifestyle-aligned service with high brand affinity among younger consumers. These strategic choices reveal that within the constraints of the LCC model, "product" is not defined solely by price or network volume but by the intelligent orchestration of touchpoints, brand story, and consumer expectations. This differentiation is consistent with broader findings in service marketing literature, which argue that in high-involvement services like air travel, perceived value stems not only from functional utility but also from brand coherence, psychological comfort, and alignment with self-image. Today, product strategy for low-cost carriers means focusing on good customer stories and a similar experience throughout, not just on new routes or seating numbers.

Price

While low fares are the main reason people fly with low-cost airlines, setting prices in Indonesia's budget airline market is more complex than many realize. Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet choose to generate revenue through different fare types, sales strategies, and passenger segmentation. These differences are explained by business model changes and how prices affect keeping

customers and managing finances. The company uses a pricing structure that offers affordable basic tickets. Doing so is part of the strategy of first-wave LCCs to attract plenty of passengers from across the board, mainly those experiencing air travel for the first time and those using less popular hubs. Because it has a large presence across Indonesia, Lion Air regularly offers lower than other airlines on their most traveled routes. Nevertheless, the simple booking process is only possible because most extra services like baggage allowance, seat selection, and itinerary modification are sold individually. With à la carte pricing, the airline keeps its spot in the broad market and depends on add-on charges to maintain and strengthen its profits.

Since Citilink aims to be between a low-cost carrier and a value service, it uses a more detailed way of setting prices. Though the base prices stay competitive, the airline offers flexible fare classes that include no baggage charge, priority boarding, and certain services during the flight. Because of this system, both those wanting low cost and those needing convenience and flexibility can choose Citilink. They also practice behavioral pricing by flexibly changing their fares according to busy and quiet times in travel, usually connected to holidays or school breaks. Indonesia AirAsia's pricing system is likely the most advanced among all four airlines. Regional airlines associate with major regional networks to use algorithms that track when people book, the routes people frequent, and their past buying habits. The company can offer enthusiastic promotions without risking its margins because it costs little to offer a seat kilometer (CASK). One of the main ways AirAsia earns money involves regular flash sales, seasonal discounts, and offering the AirAsia BIG Points program. In addition, pricing is built into AirAsia's digital services, so upselling or cross-selling happens easily. Built into the booking process—enhancing passenger value and revenue per transaction while reinforcing its image as a tech-forward airline.

The newest player in low-cost flying, Super Air Jet, chooses a fixed-price, open plan that addresses young, technology-savvy travelers. The airline offers clear and affordable basic fares to make things easy for its customers, especially targeting travelers who use their mobile devices. It fits its brand precisely by making things easy and lowering the obstacles to using the platform. Though less money is earned from such services than other airlines, the airline covers it with effective aircraft use, low-cost operations, and flying on less flown routes between cities. Travel group promotions often include discounts for young people and “millennial” offers, which enhance the brand's appearance for Gen-Z while making the prices more relevant to their lifestyle and who they are.

These various pricing techniques confirm that price now serves as multiple methods for companies to separate themselves from the competition. Low-cost carriers in Indonesia are finding it necessary to look beyond prices in their competition. Instead, they rely on pricing to help achieve brand greatness, boost online marketing, and promote customer loyalty in the long haul. The next Table shows the main ways carriers set their prices:

Table 3. Comparative Pricing Strategy Attributes

Airline	Base Fare Strategy	Pricing Model	Ancillary Revenue Focus	Positioning Focus
Lion Air	Ultra-low-cost	À la carte pricing	High (baggage, seats, changes)	Mass-market affordability
Citilink Indonesia	Low with value tiers	Class-based dynamic	Moderate (bundled upgrades)	Hybrid budget/value segment
Indonesia AirAsia	Aggressively competitive	Algorithmic dynamic	High (digitally embedded)	Digital-first, regional affordability
Super Air Jet	Entry-penetration pricing	Flat-rate low fares	Low-Moderate	Youth-centric simplicity

Source: Research data, 2025

All four airlines base a significant part of their branding and customer recruitment on their pricing. Only when the low headline fares represent the type of service, add-ons, and total value passengers seek can airfares truly work. As study authors have shown, perceived value leads to more customer loyalty than the airline price—especially for travelers on Indonesian domestic routes (Ogbunamiri & Agu, 2022; Teng & Tang, 2024). In addition to competing for customers, airlines in Indonesia's LCC segment must comply with regulatory ceilings and floors determined by the government. This means airlines cannot use many different fares or make prices flexible anymore, so they must now create more advanced pricing tools that forecast demand and tailor rates to it, as well as bundle services together. In a heavily regulated industry, using digital pricing tools is not just an efficiency—it helps companies gain an advantage. They

help these companies earn consumers' trust and make fairness clear to all. For this reason, prices in this market are now determined by much more than trying to cut costs. They have been arranged so that access is available, customers are properly grouped, and income is stable with several streams. The best low-cost carriers make pricing part of their long-term plan, keeping up with policy changes and how consumers act.

Place (Distribution)

In this industry, the “Place” aspect of the 7Ps includes all methods that allow customers to interact with the services from the moment they book to afterward. Digital services have now replaced traditional ticket sales methods for budget air carriers. This shift is more than choosing new technology; it involves a new way for airlines to serve their customers. The way leading Indonesian LCCs distribute their product shows increasing use of digital technologies, closely following their greater brand strategies. For example, Lion Air and Super Air Jet handle ticket sales, promotions, and customer contact via the integrated BookCabin shared system. Both companies have their brands, but they profit from using similar airports, which keeps their expenses down and supports their online presence. The site offers basic services such as booking, making payments, and updating schedules, and it has grown stronger with help from leading online travel agencies (OTAs) like Traveloka, Tiket.com, and Pegipegi. These platforms are powerful in reaching price-conscious tourists since they provide a quick way to look at today’s prices and help spread their services to a larger audience.

Unlike local airlines, Indonesia AirAsia has designed its end-to-end distribution system using the AirAsia MOVE application. Thought of as a super app, it does more than arrange flights; it includes things like booking a hotel, ordering a ride, and shopping in its travel and lifestyle sections. The broad digital environment makes customers want to stay longer and makes multi-sales easier for this company than most others. In addition to its digital strength, the airline has opened 16 physical service centers in Indonesia, allowing customers to use services in person instead of online if they find mobile platforms confusing. Citilink Indonesia takes a different approach by blending digital and traditional ways to engage customers. The main ways for booking and interacting with us are through the website and mobile app. Even so, the airline still offers ticket services at physical offices and partners with travel agents operating without online tools in low-access areas. So, Citilink can appeal to everyone, including seniors and business travelers who want to check in at a desk and book the usual way. Citilink’s website specializes in main services and offers loyalty rewards and additional services to improve the booking process. Next, a summary of the distribution methods used by Indonesia’s leading low-cost carriers is given.

Table 4. Distribution Channels by Airline

Airline	Primary Digital Channel	OTA Partnerships	Offline Access	Strategy Focus
Lion Air	BookCabin (shared app)	Traveloka, Tiket.com	Limited ticket counters	Cost-efficient, aggregator-reliant
Super Air Jet	BookCabin (shared app)	Traveloka, Tiket.com	Limited ticket counters	Youth-focused, fully digital
Indonesia AirAsia	AirAsia MOVE (super app)	Traveloka, others	16 service centers	Platform-based integration, loyalty-centric
Citilink Indonesia	Website & app + offline	Traveloka, Tiket.com	Ticket counters & agents	Hybrid digital-conventional accessibility

Source: Research data, 2025

When we look at the distribution tactics of Indonesia’s low-cost carriers, it is clear that different airlines have different models for customer access. Robust online bookings due to their use of OTAs and a shared system allow Lion Air and Super Air Jet to be easily found throughout the market. The model they use values making education available to all without requiring each region to invest in different technologies. Unlike others, Indonesia AirAsia has based its distribution system on its digital system. With this approach, customers do not need to work with third parties and enjoy an easy and complete overall experience. By bringing together booking, extra services, and rewards, the platform strengthens the airline’s place in the travel process and keeps the brand in the traveler’s mind. In addition to the internet, Citilink maintains offline locations. While many of its actions are on the internet, the airline still has local ticketing offices and works with traditional agencies in areas where going digital is not common.

This double-service model represents the bank's place between the two major kinds of banks and recognizes Indonesia's uneven digital development.

Such a mixed market has moved distribution from a back-office task to a main strategy for dealing with customers. Airlines that build their technology, as AirAsia did, have access to more customer information for more useful marketing and better services. This way of doing things gives hotels an advantage that OTAs find hard to imitate. Nevertheless, because so many in Indonesia do not have internet, carriers offering only digital solutions risk excluding certain groups. Consequently, the "Place" element serves to streamline operations and distinguish a company from its competitors. Those least-cost carriers that scale online and give everyone access will benefit the most by centralizing distribution to their strategy.

Promotion

Not only do promotional efforts help LCCs sell more tickets, but they also help form their brand message, explain their offers, and support customer loyalty. Since there are restrictions on spending in the LCC model, airlines depend greatly on digital channels, especially social media, to promote their services without great expense. The companies use unique advertising approaches, each expressing a particular view on brand engagement. Network and passenger size have strengthened Lion Air, but its advertising remains moderate. Most of its marketing focuses on lower fares and short-term sales, which are delivered to passengers through the BookCabin app and major online travel agencies. Such campaigns are usually not long-term and instead are based mainly on price changes and offer little support for the brand's general strategy. This business model fits Lion Air's focus on cost-cutting, so improving what customers experience takes a back seat. At the same time, this way of working does not appeal as much to younger travelers since they enjoy interacting with more engaging and story-filled content.

Super Air Jet has adopted a more recent and culturally aware advertising technique. Its youthful brand and late arrival have led to marketing highlighting appealing designs, lifestyle representation, and current trends in social media. Virgin Atlantic uses Instagram and TikTok to share posts and ideas to connect travel to a nice, desirable image. Even though it has not fully launched loyalty programs or data-driven personalization, Super Air Jet has already won over Gen Z by taking on a lifestyle brand image. In contrast, Indonesia AirAsia depends on a fully integrated digital model that uses data to promote its services. The airline uses signature BIG Sales and Free Seats flash sales on its website, app, email newsletters, and social media. The rewards from these promotions are also related to BIG Loyalty, which unites travel and lifestyle spending. AirAsia uses user information to create personalized promotions that fit each person's preferences. This method boosts immediate bookings and loyalty, establishing the airline as an airline that uses technological advances and cares about money. Citilink Indonesia uses a mix of great discounts and messages about having more with less. Rather than only advertising cheap one-way flights, the airline bundles entry-level rates with added features like checked luggage, choosing a good seat, or extras on the plane. Almost every airline promotes special fares during the busiest travel months, such as those around holidays, and caters to people traveling for work or vacation. Citilink uses email campaigns, connects with business allies, and targets online ads over mass marketing. The company does not offer sales like others because it wants to maintain a premium-like brand with occasional affordable offers.

Table 5. Promotional Strategy Comparison

Airline	Core Promotion Style	Platform Focus	Loyalty Integration	Brand Positioning Through Promotion
Lion Air	Flash fare offers	BookCabin, OTAs	None	Price-driven, minimal engagement
Super Air Jet	Social media campaigns	Instagram, TikTok, BookCabin	Limited	Trendy, youth-focused identity
Indonesia AirAsia	Flash sales + loyalty	AirAsia MOVE, web, email	Strong (BIG Points)	High-frequency, data-driven engagement
Citilink Indonesia	Ancillary bundling	Website, email, agents	Moderate (Supergreen Miles)	Value emphasis, selective segmentation

Source: Research data, 2025

Marketers adapt their messaging strategies differently because of differing brand maturity, target market orientation, and technology use. Although many firms rely on spreading the word by repetition,

LCCs must control costs and prevent their brand from becoming like everyone else. The most effective promotions in this sector extend beyond one-off fare drops to become part of a sustained engagement strategy, building brand loyalty and reinforcing differentiated value propositions (Chang & Ku, 2023; Ismail, 2022). AirAsia's model aligns with contemporary service marketing theory that promotes ecosystem-based loyalty integration, while Super Air Jet showcases the power of cultural branding in penetrating emerging youth markets. Lion Air's promotional minimalism may be consistent with its cost strategy but potentially limits its long-term brand equity. Citilink, meanwhile, seeks to strike a balance, preserving brand value while selectively engaging cost-conscious travelers. LCCs in Indonesia have found the greatest differences in their brand identity and digital presence within the "Promotion" element. Since there is tough competition and consumers are always looking for something new, advertisements increasingly emphasize a provider's ability to give as much value for the cost as they are about the price alone.

People

The marketing mix in aviation relies heavily on "People" to bridge the difference between what a brand claims and the actual customer experience. For low-cost flights, famous for simple services and budget fares, passengers respond best to the friendly human support they receive in the airport and on the plane. People's experiences with airline staff help to determine their opinions, as most airlines provide the same core services to passengers. It is clear from a study of Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet that their approaches to managing employees are guided by the kind of competition each faces, how they are organized, and investments in workforce skills. Lion Air remains challenged regarding delivering customer service on the ground despite being the country's biggest airline by passenger volume. Many complain about rude staff, confusing news during delays, and little or no personal service at the counters. Just as the airline has quickly grown its flyable routes and aircraft fleet, it has not focused equally on training staff or better-serving customers. Consequently, Lion Air often serves many passengers well but struggles to give the guidance and emotional support passengers require outside of regular air travel. Being mostly focused on operations meshes well with its low-cost policy, but strong service is often necessary for a brand to earn returning customers as travelers care more about experiences in addition to savings.

Unlike other companies, Citilink Indonesia reflects its international and premium roots by ensuring its staff offers a sleek service. The staff's recognition is high and related to their friendliness, helping skills, and open explanations, especially when things go wrong with a journey. The airline trains its employees with structured tools, takes their input through customer service surveys, and rewards good results. The main role of front-line staff, brought forward by this service culture, permits Citilink to provide outstanding travel experiences beyond getting customers from A to B. Indonesia AirAsia consistently includes people in its branding plans. Staff appearance, way of speaking, and manners are all put together to reflect the modern, innovative nature of the airline. Training everyone under one program allows Starbucks to offer standard service and keep its brand united across Southeast Asia. Though most of the process is handled with digital tools, customers can still speak to trained staff and rate them highly. AirAsia uses this method by default, adding real human interactions when required, which helps preserve its modern and attention-to-service brand experience. Because it is gaining traction, Super Air Jet values family and 'general' principles when recruiting staff. The airline aims to connect with younger passengers by welcoming young team leaders and adopting a relaxed, personal way of serving them. Even though this strategy makes the brand authentic and stylish in younger people's eyes, it can sometimes cause chaotic ground operations and difficulties in repairing service issues when there are delays. Reviews suggest that while the tone and aesthetic of human interactions feel fresh and engaging, standardization and professionalism in high-pressure situations remain areas for improvement. Nonetheless, Super Air Jet's people strategy reflects a clear intent: to humanize the budget airline experience for a digitally native generation.

The following Table offers a comparative overview:

Table 6. People Strategy Across Indonesian LCCs

Airline	Service Culture Focus	Training & Standards	Public Perception	Alignment with Brand Identity
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Lion Air	Minimal, high-throughput	Limited investment	Mixed to negative	Low-cost efficiency, mass volume
Citilink Indonesia	Semi-premium professionalism	Moderate-high (Garuda link)	Generally positive	Balanced value and trustworthiness
Indonesia AirAsia	Youthful, standardized, efficient	High (ASEAN-wide SOPs)	Consistently positive	Tech-savvy, consistent, cosmopolitan
Super Air Jet	Youth-oriented, informal	Emerging standards	Mixed, brand-friendly tone	Relatable, trendy, early-stage flexibility

Source: Research data, 2025

From a theoretical standpoint, the “People” element directly influences perceived service quality (PSQ), especially in intangible, high-involvement contexts like air travel (Du, 2023). In LCCs, where amenities and price points may be near-identical, the human interface often determines whether a passenger becomes a repeat customer. Consistent with findings by (Chow et al., 2022), airlines with well-trained, empathetic, and empowered personnel score higher in customer retention, even if the physical product remains basic. Moreover, airlines that integrate internal marketing—ensuring staff are emotionally aligned with brand values—tend to foster a service culture that transcends scripted politeness. This is evident in AirAsia’s brand-service coherence and Citilink’s trust-oriented engagement. Alternatively, concentrating on size seems to have made Lion Air less concerned about its people, so it is more likely to face a drop in reputation when needing to adjust services or handle problems. While low-cost carriers tend to focus mainly on efficiency, the “People” side is still very important for a company. Any airline that invests in employee training and recruiting based on culture can form lasting relationships with passengers instead of keeping them as random customers. Because more travelers in Indonesia are knowledgeable about digital tools and expect more, the standard of service chat will likely shift anyone's offer from something affordable to something valuable.

Process

LCCs rely on the “Process” part of their operational structure to keep costs down and provide the same service levels every time. Organized procedures, improved digital use, and streamlined work help control variation and deliver dependable, on-time service—things needed to remain competitive in sensitive markets. Because Indonesia is large and some regions have poor infrastructure, essential internal processes are key factors that set airlines apart. It is clear from the case of Lion Air that when route expansion grows faster than process improvements, problems can occur. Even though the airline operates the same type of Boeing 737 planes, which should help make operations easier, it still faces many problems with carrying out its activities. According to the Ministry of Transportation report, Lion Air’s on-time performance rate was just 63.8% in 2023, one of the lowest in the aviation sector. Many system inefficiencies contribute to slow progress, including messy aircraft turnarounds, problems with team coordination on the ground, and insufficient digital tools—mainly seen at smaller airports that still rely on manual check-in and baggage handling. Because of these gaps, customers face delays, need to wait longer, and cannot always stay updated when there is a problem.

Citilink Indonesia’s investment in making its processes more efficient improved its performance. Citilink has the best on-time performance of all four LCCs, clocking an OTP rate of nearly 84.1% of flights. The airline introduced process innovations such as automated kiosks, mobile passes, and enhanced teamwork to smooth out the flight experience for travelers. You can see that Citilink takes its cues from Garuda Indonesia’s strong discipline and focuses on best industry practices during airport and ground operations. Clear collaborations with main airports Soekarno-Hatta and Juanda have allowed the company to arrange gates more easily, minimizing times between flights and helping maintain a stable service level everywhere. Indonesia AirAsia relies on using digital tools to shape its process model. Although its OTP is behind Citilink at 77.5%, Lion Air compensates for this by giving high importance to being quick and clear about its operations. Automated check-in for luggage, mobile updates on any delays, and the ability to rebook from the airline’s app all improve passenger experience. Customers have embraced the airline’s use of artificial intelligence to solve their issues whenever unexpected difficulties like intense weather or health problems occur. AirAsia’s computer systems aid in advanced forecasts of travel trends and help balance loads, so its identity as a technology leader and airline that puts customers first is recognized.

Being a new budget airline in Indonesia, Super Air Jet chose a lean and scalable approach to its systems. In 2023, the airline had an on-time performance (OTP) of 80.3%, reflecting how much it counts

on simple processes. Standardizing its fleet with Airbus A320 jets, cutting down on fare class choices, and limiting seat selection during boarding has helped Super Air Jet reduce turnaround times and avoid delays. Even though the airline is not as advanced online as Indonesia AirAsia or as strict on processes as Citilink, its simple way of doing things contributes to a lot of utilization and high efficiency. That said, the absence of robust back-office automation and limited integration with smaller regional airports highlight areas for improvement. As the airline grows, developing more advanced systems and expanding its process capabilities will be essential to sustaining its early momentum. The process strategies of Indonesia's LCCs reveal a spectrum of maturity and innovation. Operational performance is no longer determined solely by fleet size or route volume but by the degree to which processes are digitized, standardized, and responsive to volatility. As customer expectations evolve toward speed, transparency, and reliability, process management will remain a cornerstone of sustainable competitiveness in the Indonesian aviation sector.

The Table below summarizes key process indicators and approaches:

Table 7. Process Comparison Among Indonesian LCCs

Airline	Avg. OTP (2023)	Key Operational Features	Process Challenges	Tech Integration Level
Lion Air	63.8%	Extensive route network, scale-based ops	Turnaround delays, manual systems	Low–Moderate
Citilink Indonesia	84.1%	Digital check-in, app-based boarding	Legacy dependency at secondary hubs	Moderate–High
Indonesia AirAsia	77.5%	AI chatbots, real-time disruption handling	Delay management in high-volume slots	High
Super Air Jet	80.3%	Simplified routing, uniform fleet	Airport-level coordination, low automation	Moderate

Source: Research data, 2025

From a service marketing perspective, the “Process” dimension determines the reliability of the service promise. Customers evaluate the fare or product and how seamlessly the airline delivers the journey—from ticketing to arrival. As argued in operational service literature (Yang et al., 2024), effective service delivery processes significantly mediate the relationship between customer expectations and satisfaction. Moreover, in the context of LCCs, process innovation is increasingly linked to crisis responsiveness and agility. The COVID-19 pandemic underscored the importance of flexible check-in systems, contactless service protocols, and modular boarding flows. Airlines like AirAsia adapted quickly through app updates and health status integration, whereas legacy-oriented carriers struggled with procedural rigidity. Process efficiency is not merely an operational concern but a strategic asset in the LCC landscape. In Indonesia, carriers that have invested in digital systems, process transparency, and interdepartmental synchronization are visibly outperforming those still reliant on manual, fragmented workflows. As passenger volumes rise and expectations evolve, process excellence will likely become one of the most durable forms of competitive advantage.

Physical Evidence

In the low-cost airline sector, “Physical Evidence” is critical in shaping perceived service quality and reinforcing brand credibility, particularly when other experiential touchpoints—such as in-flight meals or premium lounges—are minimized. Unlike full-service airlines, which rely on tangible and intangible cues to elevate customer experience, LCCs must extract maximum signaling value from a limited set of tangible assets. These include aircraft cleanliness and maintenance, staff uniforms, gate signage, website and app interfaces, and even the consistency of visual branding across digital and physical environments. In Indonesia, where consumer expectations are rising and price competition is intense, how each LCC manages physical evidence has become an important source of differentiation. While maintaining a dominant position in terms of market share and domestic route coverage, Lion Air continues to attract criticism over the physical state of its service environment. A steady stream of passenger feedback and media reports highlight concerns such as dated cabin interiors, inconsistent cleanliness standards, and recurring issues with in-flight equipment. The airline’s minimalist visual branding—evident in its plain seat designs and worn cabin materials—underscores its ultra-low-cost positioning and raises questions about overall upkeep and attention to detail. Its website and online booking tools also show that the brand is not investing enough. Using old layouts and complicated

navigation stops the website from providing users with the best possible experience. When combined, All of these weaknesses make travel utilitarian, with little connection, consistency between brand touches, or confidence. Many people find the connection with taxi drivers more about a deal than a personalized experience, and in certain circumstances, they feel that this reduces their trust in the supportive role of taxis.

In contrast, Citilink Indonesia delivers a more polished and cohesive physical experience. Its signature lime green branding, paired with clean, modern cabin interiors, creates an atmosphere of reliability and professionalism that stands apart from more bare-bones competitors. Attention to visual and tactile detail is apparent—from consistently maintained cleanliness and updated in-flight literature to thoughtful ambient touches like improved lighting and upgraded seating materials. Citilink's digital platforms, while not overly sophisticated, are functional and user-friendly. The website and mobile app provide a relatively smooth booking experience, though they still trail behind the top regional performers in design and interactivity. Nonetheless, the airline's commitment to visual coherence—from staff uniforms to in-cabin branding—supports its identity as a value-oriented carrier with semi-premium aspirations. Cabin design reinforces this brand positioning with sleek layouts, consistent livery, and clear signage. The airline's red-and-white palette is carried seamlessly across physical and digital touchpoints—from boarding passes to crew attire and app interfaces—offering passengers a sense of continuity and intentional design from check-in to arrival. AirAsia's mobile interface is among the most modern in the region, with a responsive layout, multilingual support, and embedded product suggestions (e.g., baggage, meals, travel insurance). The airline uses physical evidence to support basic expectations and amplify emotional resonance with the brand, primarily through design-centric thinking and lifestyle-based branding strategies. As the newest player, Super Air Jet has deliberately crafted a youth-oriented aesthetic—from its casual yet modern staff uniforms to its minimalist but fresh cabin interiors. Emphasizing simplicity and Instagram-ready design, the airline has built a visual narrative that resonates with Gen Z travelers. Super Air Jet's digital interfaces—while less robust in functionality—are visually appealing, mobile-optimized, and frequently updated with lifestyle content. Its physical assets—such as aircraft livery and seat branding—are consistent, but the airline's limited fleet age also contributes positively to overall physical presentation, with newer aircraft interiors adding a premium-feeling edge despite budget pricing.

A comparative overview is presented below:

Table 8. Physical Evidence Comparison Across Indonesian LCCs

Airline	Aircraft Cabin Condition	Visual Identity & Branding	Digital Interface Quality	Consistency of Physical Cues
Lion Air	Aging, inconsistent	Minimalist, outdated	Low	Low
Citilink Indonesia	Clean, modern	Polished, coherent	Moderate	Moderate-High
Indonesia AirAsia	Sleek, globalized	Strong, design-forward	High	High
Super Air Jet	New, minimalist	Youthful, visually trendy	Moderate	Moderate-High

Source: Research data, 2025

From a theoretical perspective, physical evidence is a proxy for service quality in high-involvement, low-tangibility settings such as air travel. When passengers cannot “try” the product before purchase, they rely heavily on tangible cues to infer the service provider's reliability, professionalism, and safety. In the case of LCCs, where price parity is often achieved, these physical touchpoints may be the only remaining differentiators in the eyes of the consumer. Moreover, physical evidence is not limited to in-cabin experience. Website UX, app responsiveness, boarding gate visuals, and staff professionalism's presence (or absence) all contribute to a cohesive brand narrative. Airlines that combine digital and physical services often build stronger brand trust, especially with travelers who fly less often. In this situation, physical evidence is important for improving customer views on quality and limiting different opinions. Airlines in Indonesia's low-cost sector, such as AirAsia and Citilink, that present the same identity and customer experience are in a much better position to keep people loyal and develop a strong brand image. As people who fly regionally seek out higher standards and contrast their experiences with global ones, it is obvious that both presentation and service matter equally in the industry. Building trust with consumers depends on visual uniformity, clean environments, and professional use of digital tools, all vital for standing out in a busy market.

Discussion

Examining Indonesia's main low-cost carriers (LCCs) with the 7Ps marketing mix, one can see that simple price is no longer the main factor that gives one airline an edge over rivals. Even though all these companies share basic principles of the low-cost model, their techniques for flying visitors, guest interactions, and how they present the company differ noticeably. Such changes in point systems signify a new direction in what consumers and airlines hope for. Both Citilink Indonesia and Indonesia AirAsia are well-positioned as brands, trying to balance how well they operate with a clear understanding of the value they offer their target consumers. Citilink uses Garuda Indonesia's history to establish itself as a semi-premium airline, as shown in their nearly nonexistent delays, sustainably maintained planes, and devoted professional staff. At the same time, AirAsia focuses on young adults by using its regional recognition, strong online presence, digital platform, and loyalty program to help them return. LCCs today, like both airlines, have changed from simply being low-priced to offering different experiences for modern and digitally connected travelers.

Conversely, Lion Air maintains dominance through scale and price aggression but suffers reputationally from process inefficiencies and inconsistent service delivery. Its physical evidence and personnel strategy lag behind its peers, creating a gap between operational breadth and brand trust. Although this model has historically worked in a volume-based market, it faces increasing risk as Indonesian consumers become more discerning and experience-oriented. Super Air Jet emerges as a disruptor with a targeted generational strategy, emphasizing youth-oriented aesthetics, digital communication, and cultural branding. However, its relative operational inexperience and weaker process integration challenge long-term scalability and reliability. The airline's growing ability hinges on its capacity to professionalize internal systems while preserving its youth-driven appeal.

From a theoretical standpoint, this study supports recent arguments in service marketing literature that LCCs must recalibrate their competitive strategies beyond price by optimizing perceived value across non-price dimensions of the marketing mix (Ma & Wang, 2023; Praja et al., 2023). The case of Indonesia illustrates that strategic differentiation through the 7Ps framework offers a roadmap for consumer targeting and operational excellence. Moreover, the people-process-evidence triad appears decisive in customer retention—validating the shift toward service experience as a strategy in LCC markets. An important managerial implication is the growing need for integrated marketing and operational strategies. For example, digital platforms should serve as promotional tools and extensions of service delivery, facilitating real-time disruption management, upselling ancillary services, and enhancing perceived control. Airlines must also invest in human capital to reinforce brand promises at the point of delivery—especially in a sector where digital automation cannot fully substitute empathetic service.

E. CONCLUSIONS

This study examined the competitive positioning of Indonesia's major low-cost carriers (LCCs)—Lion Air, Citilink Indonesia, Indonesia AirAsia, and Super Air Jet—using the 7Ps marketing mix as an analytical framework. In an industry increasingly characterized by pricing convergence and heightened consumer expectations, the research reveals that strategic differentiation across service dimensions has become a decisive factor in market performance and brand sustainability. Findings indicate that while all four airlines operate within the constraints of a low-cost model, they employ markedly different strategies across the seven marketing dimensions. Citilink and Indonesia AirAsia are more holistic and customer-centric, balancing affordability with operational reliability, digital service innovation, and brand cohesion. Their ability to integrate service quality within a cost-conscious framework suggests that the LCC business model is maturing into a value-driven proposition. Super Air Jet, though still emergent, shows potential as a generational disruptor, leveraging branding and aesthetic design to appeal to a younger market. Lion Air, while dominant in scale, illustrates the limits of cost efficiency when unaccompanied by commensurate improvements in service process, physical evidence, and people management.

Theoretically, this study reinforces the utility of the 7Ps framework in aviation marketing, especially for analyzing service differentiation in homogenous product categories like low-cost air travel. It also affirms the rising importance of process, people, and physical evidence as non-price levers of competitive advantage—dimensions that directly shape customer satisfaction and long-term loyalty. From a managerial perspective, Indonesian LCCs must recognize that sustainable growth will depend on route

expansion or aggressive pricing and how comprehensively they orchestrate their service ecosystems. As digitalization, customer empowerment, and experience expectations reshape the aviation sector, LCCs that evolve their marketing mix into a cohesive, brand-aligned strategy will be best positioned to thrive in an increasingly complex and competitive environment. Future research may enrich these findings by incorporating passenger perception data, expanding comparative studies to include regional or international LCCs, or exploring the role of sustainability and environmental responsibility as emerging factors in the marketing strategies of budget airlines.

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