

## COMPETITIVE POSITIONING OF INDONESIA'S TOURISM SECTOR FOR UAE TRAVELLERS

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### Abstract

This study evaluates Indonesia's tourism potential for visitors from the United Arab Emirates (UAE) utilizing the Boston Consulting Group (BCG) Matrix, PESTLE analysis, and Porter's Five Forces framework. BCG studies indicate that sectors such as accommodation and beverage lead the market yet are experiencing a decline whilst local tour packages and training have demonstrated significant growth despite their limited market share. PESTLE research identifies political, economic, and technological factors as primary drivers whilst Porter's Five Forces highlights intense rivalry with alternative halal destinations. The research advocates for service innovation, digital marketing, and halal certification to enhance competitiveness. Moreover, environmental sustainability and strategic partnerships with industry stakeholders are essential for sustaining long-term success.

Keywords: BCG Matrix, Indonesia Tourism, PESTLE Analysis, Porter's Five Forces, UAE Tourists

### Introduction

Foreign tourists frequently express greater satisfaction with their travel experiences than domestic tourists, primarily due to the enhanced sense of escapism and hedonic value they obtain from being in a novel and culturally distinct environment (Ponsignon et al., 2021). The quality and distinctiveness of local attractions, along with the cultivation of a robust sense of place, significantly influence foreign tourists' contentment with place attachment and dependence mediating the connection between attractions and total satisfaction (Shaykh-Baygloo, 2021). The motivations of foreign tourists differ, although cultural, hedonic, and gastronomic interests significantly impact sites with substantial legacy, such as World Heritage Sites, where visitor segmentation identifies diverse categories including cultural, emotional, and alternative tourists (López-Guzmán et al., 2019; Menor-Campos et al., 2020). In many situations, such as India, foreign tourists are attracted by cultural history and distinctive experiences like tea tourism; yet, concerns regarding hygiene and safety may diminish enjoyment (Gupta et al., 2022). Geostatistical investigations indicate that the spatial and temporal patterns of foreign visitor flows are essential for optimising resource allocation and strategic planning in host nations (Stupariu et al., 2023).

Tourist expenditure is affected by a complex interaction of factors, including socio-demographic traits, trip-related variables, destination enjoyment, and psychological elements such as desires and wealth. Research repeatedly demonstrates that income, age, nationality, duration of stay, and accommodation type are key drivers of tourist expenditure (Brida & Scuderi, 2013), both overall

and within individual categories such as accommodation, gastronomy, and shopping (Brida et al., 2023; García-Sánchez et al., 2013). Contentment with the destination can enhance expenditure, and many spending categories are frequently interrelated, indicating that increased spending in one domain can influence expenditures in others (Disegna & Osti, 2016). Analytical methodologies have progressed from traditional regression models to more advanced techniques such as Dirichlet regression and stochastic frontier models, which more effectively represent budget allocation across various expenditure categories and the optimal potential expenditures (Pellegrini et al., 2021). Research underscores the significance of accounting for both pre-arrival expenditures (such as reservations) and those incurred at the destination, in addition to the influence of trip purpose and activities engaged in (Gómez-Déniz et al., 2020). Moreover, macro-level factors such as the economic status of tourists' home nations and personal goals influence expenditure habits, providing valuable insights for focused marketing and pricing initiatives (Alfarhan et al., 2023).

Outbound tourism from the UAE has experienced substantial growth, propelled by the nation's wealthy populace and robust enthusiasm for overseas travel. Research indicates that brand equity, brand awareness, brand association, and brand loyalty significantly affect the propensity of UAE citizens to visit international places, becoming them a crucial target market for global tourist boards and agencies (Abruruman et al., 2020). The COVID-19 pandemic has altered travel tastes with digital technologies and virtual experiences increasingly influencing outbound travel selections and marketing efforts. Travellers from the UAE have a strong preference for quality, distinctive experiences, and value with their selections shaped by socio-economic considerations and the reputation of locations (Seshadri et al., 2023). The UAE's vigorous economic growth and emphasis on entrepreneurship have led to a rise in outbound travel as inhabitants pursue varied experiences elsewhere (Alhowaish, 2016). Moreover, the nation's commitment to religious tolerance and cultural openness domestically has cultivated a global perspective among its populace, thereby promoting foreign tourism. The trends in UAE outbound tourism indicate a combination of wealth, internet interaction, and a preference for premium, culturally enriching travel experiences.

Prior studies predominantly concentrated on the motivations and actions of tourists from the UAE, either in general or within specific regional destinations. Research focusing on the expenditure behaviors of UAE visitors in Indonesia utilizing analytical methodologies like the BCG Matrix remains scarce. This study seeks to address the existing gap in the literature by mapping and evaluating expenditure patterns through the frameworks of business strategy (BCG Matrix, Porter's Five Forces) and macro-environmental factors (PESTLE). This study's findings are anticipated to offer novel insights to the tourism literature, specifically about market segmentation and competitive tactics for destinations aimed at attracting high-spending tourists, primarily from the UAE, using Indonesia as a distinctive case study.

This study intends to examine the expenditures of Emirati tourists in Indonesia. Owing to insufficient data, the author calculates the average tourist expenditure based on the spending of Emirati visitors in Indonesia; nonetheless, the evaluated tourist population is only comprised of those visiting Indonesia. The expenditure segmentation analysed comprises 10 elements: accommodation, beverages,

domestic flights, local transportation, auto rentals, entertainment, health and beauty care, training, local trip packages, and miscellaneous expenses. The author utilises the Boston Consulting Group (BCG) Matrix analytical framework to examine the pertinent concerns of visitor demand in Qatar. The BCG results are further analysed via the lens of PESTLE theory and Porter's Five Forces framework. This technique enables the study to address tourist demand and enhance destination competitiveness. This research is anticipated to significantly benefit inbound tourism policymakers in the Middle East, particularly in the UAE, and serve as a reference for the tourist sector involved in inbound tourism.

### **Literature Review and Theoretical Framework**

The Boston Consulting Group (BCG) Matrix aids the tourism industry by assisting destination management in analysing their portfolio of offerings. While previous research has applied the BCG Matrix to tourism businesses and destinations (Mardiana, 2012; Sabaya et al., 2023), its application to tourist expenditure categories represents a novel contribution. This study adapts this classic strategic tool to analyse not products, but how tourists “spend” their money across different categories (e.g., accommodation, entertainment, local transportation). This innovative application allows managers to see which expenditure categories are “Stars” (high growth, high share) or “Cash Cows” (low growth, high share), providing a data-driven basis for investment and marketing decisions (Bernal Escoto et al., 2021). For instance, understanding these patterns can help a destination decide whether to invest in premium accommodation marketing or in developing high-growth potential sectors like local experience packages.

PESTLE analysis benefits the tourism industry by helping stakeholders anticipate external macro-environmental factors. This study leverages the PESTLE framework to contextualize the findings from the BCG Matrix. For example, a “Question Mark” category in the BCG analysis (e.g., health and beauty care) can be further understood through a PESTLE lens: could a change in social trends (wellness tourism) or economic factors (disposable income) influence its future growth? This integrated approach answers the call for more holistic strategic analysis in tourism, as suggested by Antošová et al (2021) and Shelemetieva et al (2020) by linking internal expenditure data with the external environment.

Porter's Five Forces analysis provides a framework for understanding industry competitiveness. This study utilizes this framework to move beyond mere description of expenditure patterns and toward prescriptive strategy. The analysis of the bargaining power of suppliers or threat of substitute products directly informs how Indonesian tourism stakeholders can enhance the destination's overall competitiveness and attractiveness for the UAE market (Pangarkar & Prabhudesai, 2024; Porter, 2018). It helps translate the “what” from the BCG Matrix into the “why” and “how” to develop sustainable competitive advantages.

### **Research Method**

The authors' principal strategy in this research is the Boston Consulting Group (BCG) marketing methodology. This matrix aids businesses, particularly in the tourism sector, by identifying two key dimensions: market growth, which reflects the product's potential for market development, and relative market share, which

measures the product's sales in relation to competitors. This facilitates the evaluation of the products' market positioning. The authors categorise competitors into 10 groups according to data from Statistics Indonesia for 2023 and 2024: accommodation, beverage, domestic flight, local transportation, car rental, entertainment, health-beauty care, training, local tour packages, and other. The four quadrants of the BCG matrix are cash cow, star, question mark, and dog. The dog quadrant signifies that market products are starting to diminish in attractiveness, potentially resulting in minimal revenue or even financial losses compared to the original investment. The question mark quadrant signifies intense competition for the product, as it is either newly introduced to the market or lucrative in a different area. The star quadrant signifies that the product possesses a substantial market share and is experiencing growth, whereas the cash cow quadrant denotes that the product is established in the appropriate market, generating consistent revenue and sustaining other items.

Researchers utilise PESTLE analysis, in conjunction with the BCG matrix, to evaluate external influences that may impact an organisation or business that factors are political (government policy, political stability, legislation, and tariffs can significantly influence corporate operations), economic (inflation, interest rates, economic growth, and currency exchange rates can influence consumer purchasing power and operational expenses), social (demographics, culture, lifestyle, and educational attainment can affect market demand and consumer preferences), technology (innovation, research and development, automation, and technical advancements can influence corporate efficiency and competitiveness), legal (employment laws, consumer protection statutes, and industry regulations can affect business operations), and environmental (climate change, sustainability, and environmental regulations significantly influence business operations and corporate social responsibility). Alongside PESTLE, the writer utilized Porter's Five Forces analysis as a framework to assess the competitiveness and appeal of an industry, encompassing five forces; threat of new entrants, bargaining power of suppliers, bargaining power of buyers, threat of substitute products or services, and competition in industries.

## **Results and Discussion**

### **a) Boston Consulting Group Analysis**

The secondary data included in this study was published in 2023 and 2024 and sourced from Indonesia Statistics. The data is derived by multiplying the average expenditure by the total number of visitors from the UAE in that specific year. The information is divided into ten categories; accommodation, beverage, domestic flight, local transportation, vehicle rental, entertainment, health-beauty care, training, local tour packages, and other.

Table 1. Expenditure Per Person

Segmentation	Net revenue (in dollar)	
	2023	2024
Accommodation	1001.6	729.91
Beverage	408.53	327.58
Domestic flight	84.46	67.4
Local transportation	118.19	97.64
Vehicle rental	62.23	64.43
Entertainment	158.63	171.77
Health-beauty care	22.23	18.51
Training	2.95	5.15
Local tour package	27.74	42.61
Other	12.42	32.92

Source: Indonesia Statistics, 2025

Two key ideas in company analysis and marketing strategy are growth rate and relative market share, particularly when using techniques such as Boston Consulting Group (BCG) Matrix. The formula is as follows:

Growth Rate Formula  
Formula

$$\frac{VPN-VPN1}{VPN1}$$

Relative Market Share

$$\frac{VPN}{VPPN1}$$

Note:

VPN= Sales volume last year

VPN1= Previous year sales volume

VPPN=Competitor's last year's sales volume

The following findings were determined by researchers based on market growth, market share in the previous year, highest competitor share, and relative market share.

Table 2. Market Growth, Market Share in the Previous Year, Highest Competitor Share, and Relative Market Share

Category	Market Growth	Market Share 2023	Highest Competitor Share	Relative Market Share
Accommodation	-23%	47%	21%	2.228188534
Beverage	-15%	21%	47%	0.448795057
Domestic flight	-16%	4%	47%	0.092340152
Local transportation	-13%	6%	47%	0.133769917
Vehicle rental	10%	4%	47%	0.088271157
Entertainment	15%	11%	47%	0.235330383
Health-beauty care	-12%	1%	47%	0.025359291
Training	85%	0%	47%	0.007055664
Local tour package	63%	3%	47%	0.05837706
Other	181%	2%	47%	0.045101451

Source: Researchers' findings, 2025

In data table 2, accommodation has the biggest market share in 2023 at 47%, ahead of beverage at 21%. Sales fell from \$750.22 million in 2023 to \$745.14 million in 2024 due to decreased market growth of 23%. This steady decline highlights the need for a strategy to attract UAE travellers to Indonesia's hotels. Market share for the beverage sector is 21%, compared to 47% for its largest competitor, with market growth dropping 15%. Revenue fell from \$330.59 million in 2023 to \$292.19 million in 2024. The Indonesian beverage sector needs product innovation or more aggressive marketing due to its low relative market share (0.45). Domestic flights make up only 4% of the market, a 16% decline. Revenue fell from \$59.78 million in 2023 to \$56.67 million in 2024. The extremely low relative market share (0.09) suggests strong competitor dominance (47%), showing UAE travellers are less interested in Indonesian domestic flights. Local transport has a 6% market share, although its market growth rate of -13% is higher than other categories that have declined more. Revenue jumped from \$70.22 million in 2023 to \$103.02 million in 2024. Despite the market contraction, Indonesia has increased revenue, either through better service or demand.

The vehicle rental business grew 10% but had 4% market share. Revenue dropped slightly from \$42.55 million in 2023 to \$39.28 million in 2024, demonstrating Indonesia has not fully capitalized on the growing industry. To compete with dominant rivals (47%), services must improve due to the low relative market share (0.09). Entertainment grew 15% with 11% market share. However, revenues fell from \$144.81 million in 2023 to \$106.19 million in 2024. This may be due to fewer UAE tourists or increased competition. To capitalize on market growth, marketing must improve.

Despite a 1% market share, health and beauty revenues rose from \$8.55 million in 2023 to \$18.2 million in 2024. The -12% market growth did not hinder revenue growth, suggesting that Indonesia has attracted more UAE visitors, possibly because to better medical or spa services. Training had the greatest market growth at 85%, but its market share and revenues were low. Local tour package revenues rose 63% from \$16.58 million in 2023 to \$37.74 million in 2024. Both segments might become niche markets for UAE travellers seeking unique Indonesian experiences.

Sales in the "other" category rose 181% from \$8.55 million in 2023 to \$32.5 million in 2024. Its quick growth suggests premium shopping and exceptional vacation experiences are untouched despite its 2% market share. The data shows that while lodging and beverages are prominent, their growth is negative. However, health and beauty, local vacation packages, and "other" seem promising. To attract UAE tourists, the Indonesian tourism sector needs improve service quality and marketing in growing industries.

Accommodation is a cash cow with 47% market share, despite 23% negative growth. This shows that hospitality is a major revenue source that can fund other businesses. However, slowing growth suggests that competitors are eroding Indonesia's competitive edge in this industry (price, villa and hotel quality). Local tour packages (63% growth, 3% market share) and "other" (181% growth, 2% market share) are question marks. Large growth indicates market potential and interest, while a low market share indicates severe competition or a new product. To become stars, these categories require significant marketing and product

development. High-end retail or indigenous tourism experiences may fall under “other” and require aggressive marketing.

Domestic flights and health/beauty care had low market share and negative growth. Although health and beauty care have a small market share, its revenue growth from \$8.55 million to \$18.2 million is encouraging. The specialized industry (e.g., medical tourism) may require concentration rather than cessation due to its small but loyal consumer. At 15% growth and 11% market share, entertainment is nearing star status and needs safeguarding. Maintaining expansion requires improving entertainment options (e.g., concerts, internationally famous amusement parks, high-caliber cultural acts).

These findings support the motivating idea that UAE visitors want unique and hedonistic experiences (Li et al., 2010). The decline in lodging and beverages may reflect that these basic needs have become hygiene factors rather than enjoyment drivers. The rise in tour packages and “other” travel suggests that unique experiential tourism is the main driver of UAE tourist satisfaction and spending. Indonesian stakeholders should invest and innovate in question mark segments with the potential to become stars while maintaining cash cow segment quality to maintain income streams, according to this BCG mapping.

#### **b) PESTLE Analysis**

UAE tourists' travel decisions are heavily influenced by politics. According to Eid et al (2019), perceptions of political stability in the destination country are important precursors to the construction of a positive destination image, which affects tourists' pleasure and their desire to recommend the destination. Good media campaigns boost the UAE's image as a safe and appealing tourist destination, influencing outbound tourism. Inbound tourism has grown in the UAE due to religious tolerance and liberalisation balanced with Islamic beliefs, while outbound tourists are sensitive to political instability and perceived risks (Adamkadiyeva, 2023). Political instability or negative media portrayal in a destination country may deter UAE citizens from travelling, while neutral or stable countries are more likely to attract them (Al Abri et al., 2023). UAE citizens' comfort and desire to travel abroad may depend on their diplomatic connections and reputation.

UAE tourists traveling abroad have major economic impacts worldwide. Outbound tourism represents a significant expenditure outflow, since UAE inhabitants are among the highest per capita spenders on international travel. Much research has examined the effects of incoming tourism on GDP, employment, and economic diversity. Economic uncertainty can impact outbound tourism: According to global studies on tourist consumption and economic policy uncertainty, travellers may prefer shorter, cheaper visits or destinations closer to home due to greater uncertainty (Nguyen et al., 2020). The COVID-19 pandemic reduced outward travel, hurting the UAE's travel industry and the economy of favoured destination nations, while increasing internal tourism as locals sought local alternatives (Nguyen et al., 2022). One hundred five. Tourism spending outside the UAE does not benefit the local economy, which can affect the balance of payments. Outbound travel increases the UAE's global connectivity and may inspire reciprocal inbound tourism through overseas exposure and commercial partnerships. Policymakers must balance the benefits of a globally mobile

population with efforts to sustain local visitor spending, especially during economic or global upheaval (Mannaa, 2020).

UAE outbound tourism has significant societal impacts in host country and domestically. Outbound tourism can increase UAE residents' cultural understanding and global awareness, but it may also change local attitudes and lifestyles as they experience various cultures and practises. Strategic media campaigns and a dedication to safety and hospitality boost the UAE's international reputation, boosting inbound and outbound travel and reinforcing its global connectivity and cosmopolitan identity. Outbound tourism can improve citizens' views of their society and increase their desire for social reform, especially among younger and more educated people (Papastathopoulos et al., 2020). Outbound travel can promote reciprocal tourism and transnational collaborations while draining funds. However, increased travel may cause conflicts between traditional and modern values, making it difficult to balance these benefits with local identity and social cohesion (Stephenson & Ali-Knight, 2010).

Ethical AI practices, personalization, and trust influence the application of AI-driven smart tourism technologies, with perceived value moderating. UAE tourists need user-centric and reliable digital solutions. Digital marketing strengthened by big data and technology advancements can increase travellers' buy intentions, making it crucial for UAE tourism businesses. Internet and mobile usage are linked to increased outbound tourism, especially in high- and upper middle-income countries like the UAE, demonstrating that digital connection drives foreign travel demand (Lee et al., 2022). Smart city and smart tourism projects in Dubai have improved tourist participation and experiences, but digital literacy and resource allocation for advanced technologies like robotics and AI remain concerns (Khan et al., 2017; Kumar et al., 2023). Tourism SMEs in Indonesia use information and communication technologies to increase competitiveness and global reach, but prices, security, and a lack of qualified workers remain (Zaidan, 2017). Technology is improving the convenience, personalization, and pleasure of UAE tourists while changing marketing and service delivery.

Legal and policy factors greatly impact Middle Eastern outbound travel, particularly the UAE. Egypt's outbound travel policy discouraged travel due to stricter visa requirements (Beshay, 2022). National security regulations like the 2017 US travel restriction (Executive Order 13769) reduced Middle Eastern visitor arrivals by 25%, demonstrating how such measures can boost destination trust and reduce tourism exports (Karouzakis & Tzioumis, 2021). Due to increasing risks and hostilities, regional wars and political instability in the Middle East deter outbound tourism and take time to improve (Karimi et al., 2022). Regulation of the Minister of Law and Human Rights No.22 of 2023 and Presidential Regulation No.21 of 2023 regarding the Facilitation of UAE Travelers provide UAE visitors with travel facilities in Indonesia.

Although it boosts economic growth and diversity, UAE outbound tourism harms the environment due to increased carbon emissions and energy-intensive tourism infrastructure. The Environmental Kuznets Curve (EKC) model in the UAE shows that as tourism and per capita income rise, carbon emissions initially rise before potentially decreasing if sustainable practices are implemented, emphasizing the need for green standards and clean energy investments to reduce environmental degradation (Majumdar & Paris, 2022). The UAE is one of the world's largest per

capita carbon emitters because to rapid urbanization and artificial attractions. Research suggests that real, emotionally resonant marketing and responsible management might boost tourist satisfaction and environmental sustainability, advancing nature-based and regenerative tourism. Over-tourism, environmental degradation, and policy execution remain challenges. To balance tourism growth and environmental protection, the government and financial sector should support green investments and clean technology (Vij & Vij, 2013).

### **c) Porter Five Forces Analysis**

New competitors pose a moderate risk to Indonesia's UAE-focused tourist business. Malaysia, Thailand, and Turkey provide halal and premium locations, increasing competition (Sayuti, 2023). Indonesia has distinct natural and cultural features like Bali and Lombok that require significant expenditure to replicate. Promotional costs and local alliances reduce the immediate threat. UAE tourists have high purchasing power due to their high expectations for quality services and halal amenities. They often compare prices and quality to the Middle East and Europe (Prayag & Hosany, 2014). To maintain their appeal, Indonesian tourism companies must offer bespoke packages, including halal-certified five-star lodgings.

UAE travellers are at higher risk of substitution from nearby halal tourism destinations like Dubai or Malaysia (MasterCard-CrescentRating, 2016). Summer staycations in the UAE may reduce interest in visiting Indonesia. Indonesia must become an unmatched exotic destination with exclusive experiences. This industry includes hotels, airlines, and travel agents with moderate negotiation power. UAE and Garuda Indonesia control direct flight routes, affecting ticket prices. The plethora of halal-certified hotels in Indonesia gives travellers options, reducing provider dominance. The government and business sector must work together to reduce supply costs.

Tourism destinations compete fiercely, especially Turkey and Malaysia, which promote halal tourism (DinarStandard, 2023). Indonesia has great natural diversity but poor infrastructure and visas. Indonesia must invest in digital marketing and work with UAE influencers to compete. Political and regulatory factors like visa on arrival and halal certification affect Indonesia's competitiveness (Sayekti, 2019). The UAE's "Wonderful Indonesia" campaign and improved aviation connectivity may distinguish it. However, the rupiah exchange rate and security worries may deter UAE travellers.

### **Conclusion**

Indonesian UAE tourist growth is polarized. While accounting for 47% and 21% of the market, housing and drinks saw a 23% and 15% decline, underscoring the need for new marketing strategies and better service. However, local tour packages, training, and others had considerable growth rates of 63%, 85%, and 181%, respectively, although their market share remained low, suggesting potential as a niche market for unique experiential tourism.

PESTLE shows that political and legal issues, such as visa rules and stability, strongly influence UAE tourism. Indonesia must improve its security and Muslim-friendliness while using visa on arrival to increase accessibility. UAE tourists' spending power may be affected by global uncertainties and the rupiah exchange

rate, therefore competitively priced vacation packages without compromising quality are vital. Digitalization and smart tourism are crucial for attracting tech-savvy tourists to the UAE from social and technological perspectives. Digital marketing, influencer partnerships, and AI-driven services like halal travel can boost competitiveness. In Indonesia, internet literacy and technology infrastructure must be improved to ensure a smooth travel experience.

Porter's Five Forces analysis shows fierce competition from Malaysia and Turkey, among halal destinations. Indonesia's natural and cultural assets are competitive, but they need strong infrastructure, dependable halal certification, and clever partnerships with Emirates to improve connection. Add value with luxury eco-tourism or wellness getaways to counteract UAE staycations. Indonesia must implement sustainable tourism practices like eco-friendly accommodations and nature-based tourism packages due to tourism's high carbon emissions. Indonesia can become a top UAE tourism destination and ensure long-term growth by blending nature, marketing, and sustainability.

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