



Qatar Tourists to Indonesia in Boston Consulting Group (BCG), PESTLE, and Porter's Five Forces

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Abstract

Foreign travellers have an important part in deciding the progress of a tourist site. Understanding international tourist expenditure is critical due to fast changes in segmentation. Despite its tiny size, Qatar is a country rich in oil and gas making it one of the wealthiest in terms of GDP per capita, with 72,760 USD, dominated by the industrial sector (50.3%) and services (49.5%). Thus, Qatari citizens provide a prospective market for inbound tourists to Indonesia. This research employs Boston Consulting Group (BCG) methodology as a foundation to examine Qatari tourist expenditure in Indonesia based on spending segmentation. In the follow-up, BCG outcomes are described using PESTLE theory and Porter Five Forces theory. It is intended that findings of this analysis would serve as a marketing strategy for Indonesian tourism products to Qatar in next years.

INTRODUCTION

Tourists are one of the things that can considerably contribute to destination income in terms of tourism development. In the context of inbound tourism, international travellers are the primary source of foreign exchange income, necessitating special attention. Foreign tourists have a significant impact on a region's economy, not just as visitors. For instance, as a result of the Bali bombing catastrophe, the province's growth rate fell by 3.39 percent in 2022. The tragedy occurred again in 2005, and economic development slowed in 2005-2006. These two instances led to a decline in the number of foreign tourists. This is because the increasing number of international visitor visits and foreign exchange revenues from the sector can be used to assess a country's tourism quality (Aktar et al., 2014).

Foreign visitor behavior effects the shift in trends in a destination (Sumarjaya & Tari Tastrawati, 2017), hence product providers must constantly adapt the products they give to tourists (Amanah et al., 2018). Understanding tourist behavior is useful for determining the potential of the best product to give these tourists (Pulido-Fernández & Sánchez-Rivero, 2010). Studying tourist behavior can help forecast tourist interest in returning to previously visited sites (Johns & Gyimóthy, 2002). Several research on tourist segmentation have also been undertaken, including those on cultural destinations (Chen & Sasias, 2014; Huh et al., 2006), nature destinations (Lima et al., 2012), and sports tourism (Hungenberg et al., 2016).

In addition to a tourist's wealth, the nation of origin also influences how much he spends on his holiday (Alegre et al., 2011). This is due to the fact that each ethnicity has a different reason for traveling which determines whether or not the tourist has a propensity to spend a lot of money on vacation (Marrocu et al., 2015). Because in addition to spending money when they are at the destination, travellers must consider how they will handle their finances for other occasions or locations such

purchasing airline tickets and consuming goods while they are abroad. Sociodemographic factors like wealth or employment type also have an impact on psychological traits like purchasing habits (Štefko et al., 2022).

When we talk about Qatari visitors, we mean high-end tourists because the state of Qatar is one of the wealthiest in terms of GDP per capita. Tourism is one of the long-term development industries identified in Qatar's National Vision 2030, which intends to diversify the economy (Saleh et al., 2021). Qatari visitors have high standards in their native country and expect the same when they visit their destination country. In this scenario, the feature that can be stated to be highlighted in the treatment of Qatari visitors is safety at the destination, as there are rights that ensure tourists a safe and happy travel experience (Ali Mahgoub & Gdiri, 2020). This rights approach is significant for Qatari visitors overseas because it acknowledges the necessity of safety and legal protection in foreign travel.

Segmentation, targeting, and positioning can be considered key disciplines in marketing strategy; errors in these areas are likely to be costly and lead to failure; doing it right is a critical prerequisite for business success (Schlegelmilch, 2022). This model is regarded as adequate for strategic tourist planning in terms of the excellence of the product to be sold, determining the market for marketing, and understanding the product's position among competitors. This is because the end product must be examined for its features, which requires policymakers, both government and private firms, to collaborate in delivering and meeting tourist demand (Gilbert, 1990). BCG analysis is continued with pestle theory which allows for the analysis of the external environment that influences tourist development, in this case marketing in the market country, which is combined with other sectors such as politics, economy, social, technology, law, and environment (Oleksyuk & Slipetsky, 2023). Pestle's theory will also be used with Porter's five forces model to assess an industry's competitiveness and attractiveness (Andriotis, 2004).

This study aims to analyze the expenditure Qatar tourists in Indonesia. Due to a lack of data, the author averages tourist expenditure based on Qatar tourists' spending in Indonesia, however the number of tourists evaluated only includes those who visit Indonesia. The expenditure segmentation studied consists of ten components: accommodation, beverage, domestic flight, local transportation, car rental, entertainment, health-beauty care, training, local tour packages, and other. To explore the relevant issues, writer proposes Boston Consulting Group (BCG) Matrix analytical framework to analyze Qatar tourist demand. BCG results are then examined in terms of strategy using PESTLE theory and Porter's five forces. Through this approach, this study can contribute to answering tourist demand and preparing a more competitive destination.

RESEARCH METHODS

The authors' primary tactic in this paper is the Boston Consulting Group (BCG) marketing approach. Through the identification of two primary dimensions—market growth, which indicates how quickly the product can develop in the market, and relative market share, which indicates how much the product is sold in comparison to its competitors—this matrix assists businesses in this case, those in the tourism industry, in determining and assessing the position of the products they sell. The authors divide competitors into ten groups based on statistics from Statistics Indonesia 2023 and 2024: accommodation, beverage, domestic flight, local transportation, car rental, entertainment, health-beauty care, training, local tour packages, and other. Business and economic growth, both macro (Maristia, 2020) and micro (Sulasih, 2020), are identified using the BCG matrix. But this technique can also be used in other fields, such as agriculture (Joubert et al., 2011).

The four quadrants of BCG are a cash cow, star, question mark, and dog. The dog quadrant indicates that the products on the market are beginning to lose their appeal, which means they could only bring in a small amount of money or possibly lose money relative to the initial investment. Because the product is either new to the market or profitable in another category, the question mark quadrant indicates fierce rivalry for the product. While the star quadrant indicates that the product has a large market share and is growing, the cash cow quadrant indicates that the product is mature in the correct market by producing steady income and supporting other products.

Following the BCG matrix, researchers apply PESTLE theory as an analysis tool to assess external factors that may affect an organization or business. The factors are as follows:

- Political: Government policies, political stability, laws, and tariffs can all have an impact on corporate operations;

- Economic: Inflation, interest rates, economic growth, and currency exchange rates can affect consumer purchasing power and operations costs;
- Social: Demographics, culture, lifestyle, and education levels can influence market demand and customer preferences;
- Technological: Innovation, R&D, automation, and technological change can impact business efficiency and competitiveness;
- Legal: Employment, consumer protection, and industry regulations can impact business operations;
- Environmental: Climate change, sustainability, and environmental legislation all have an impact on business operations and corporate social responsibility.

In addition to PESTLE, academics employ Porter's Five Forces analysis as a framework to examine the competitiveness and attractiveness of an industry, which includes five forces:

- Threat of new entrants;
- Bargaining power of suppliers;
- Bargaining power of buyers;
- Threat of substitute products or services;
- Competition in industries

RESULTS AND DISCUSSION

The secondary data used in this study was published in 2023 and 2024 and was obtained from Indonesia Statistics. The information is calculated by multiplying the average amount spent by the total number of visitors from Qatar in that particular 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	750.22	745.14
Beverage	330.59	292.19
Domestic flight	59.78	56.67
Local transportation	70.22	103.02
Vehicle rental	42.55	39.28
Entertainment	144.81	106.19
Health-beauty care	8.55	18.2
Training	4.69	4.42
Local tour package	16.58	37.74
Other	8.55	32.5

Source: Indonesia Statistics Agency

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. A market, product, or company's growth rate is a percentage that indicates how quickly or slowly it expands over time. The annual growth rate is typically used to measure it. This is significant since businesses can forecast future demand and comprehend market dynamics with growth rates. Businesses might increase their investment in a market with a high growth rate to increase their earnings. Whereas comparing a company's or product's market share to that of its primary rivals in the same industry is known as relative market share. Relative market share in the BCG Matrix is typically computed by dividing the firm's market share by the industry's greatest market share. For instance, the relative market share is 0.5 if a company's market share is 10% and that of its biggest rival is 20%. This is significant because a company's or product's relative market share indicates their competitiveness in the market. Companies

that hold a larger market share than their rivals are better positioned to turn a profit and outlast the competition. The formula is as follows:

Growth Rate Formula

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

Relative Market Share Formula

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

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	-19%	50.0%	20%	2.550189945
Beverage	-28%	19.6%	50%	0.392127654
Domestic flight	-22%	3.8%	50%	0.076052822
Local transportation	20%	6.9%	50%	0.138255898
Vehicle rental	-24%	2.6%	50%	0.052714926
Entertainment	-9%	10.8%	50%	0.214979735
Health-beauty care	74%	1.2%	50%	0.02442494
Training	-23%	0.3%	50%	0.005931771
Local tour package	86%	2.5%	50%	0.0506482
Other	211%	2.2%	50%	0.043615965

Source: Researcher findings (2025)

In terms of market growth trends, local tour packages (+86%) and others (+211%) are expanding rapidly, most likely due to post-pandemic demand for unique experiences. Health-beauty care (+74%) and local transportation (+20%) are also expanding rapidly, driven by wellness trends and urban mobility demands. On the other side, beverage (-28%), vehicle rental (-24%), and training (-23%) are all declining, presumably due to less business travel or competition from alternatives such as ride-sharing. Accommodation (-19%) may represent pressure from sites such as Airbnb.

Accommodation has a dominant 50% market share with a high RMS (2.55), showing great dominance over competitors (the highest competitor is 20%). Training (0.3%), health-beauty care (1.2%), and vehicle rental (2.6%) have small market shares, implying that they are specialized categories or face fierce rivalry. Only Accommodation (2.55) is a market leader, serving as a potential "cash cow." The remaining categories are either "question marks" (high growth, low share) or "dogs" (low growth, low share). The strongest of these are beverage (0.39) and entertainment (0.21). Following the BCG analysis, the researcher applied PESTLE theory as follows:

3.1 Politics

Qatar's foreign policy, as a tiny emirate with significant geographical and demographic limits, requires special attention (Tyukaeva, 2023). Qatar does not have a dedicated tourism ministry, but the country's tourism issues are overseen by Qatar Tourism (QT) which succeeded the Qatar National Tourism Council pursuant to Decree Number 15. Qatar's city, Doha, has been awarded the Arab Tourism city for 2023. As a result, Qatar has emerged as the Arab region's primary tourist destination. Since 2011, Qatar has developed the Qatar National Vision 2023, which incorporates tourism. In terms of this idea, Qatar's tourism industry accounts for 4.3% of total revenue.

3.2 Economy

Qatar is one of the richest countries in the world in terms of GDP per capita. As of 2025, Qatar's GDP per capita was 72,760 USD (24/2) and was led by the industrial sector (50.3%) and services (49.5%). In terms of independence, Qatari tourism can be said to be able to drive the country's economy (Alhowaish, 2016) with various supporting factors such as a modern airport that is one of the main hubs for global flights, international events such as the 2022 FIFA World Cup, cultural tourism such as museums, and luxury accommodations spread throughout Doha (Yap et al., 2022). With these criteria, Indonesian merchants can appeal to Qatari tourists by offering luxury packages.

3.3 Social

The cultural and religious parallels between Indonesia and Qatar can be leveraged to attract visitors by prioritizing halal tourism, which is already being implemented in various places, including Lombok. Furthermore, given Qatar's GDP, which is one of the greatest in the world, luxury goods marketing can be pushed in the country with the caveat that the product target is in the market share and market growth quadrants that cross the line. In addition, Indonesian Embassy offers an Indonesian language training program for foreign speakers (Andriyanto et al., 2024) promoting cultural engagement between the diaspora and foreigners.

3.4 Technology

Qatar is an especially interesting case because its significant investments in education, information and communication technologies (ICT), research and development (R&D), coastal development, and tourism have all been highly intertwined in practice and from a national policy standpoint over the last decade (Weber, 2014). With so many digital facilities available in Qatar, marketing must transition from traditional to digital, utilizing online platforms to make it easier for Qatari visitors to arrange their journeys to Indonesia. Collaboration with online travel agents such as booking.com or virtuosso can be a viable marketing strategy in Qatar. Furthermore, social media platforms such as Instagram and Snapchat are being used to their full potential.

3.5 Legal

When visiting Indonesia, Qatari citizens are not required to obtain a visa. In other words, tourists from that nation will receive a visa upon arrival at the entrance point, which may be an airport, port, or land crossing. Qatari citizens can visit other ASEAN nations without first applying for a visa, including Malaysia, Laos, and Myanmar. This rule is based on the protection of foreign tourists' rights, such as security and safety when traveling.

3.6 Environmental

Based on supply, Indonesia has numerous fascinating places, such as Lake Toba and Raja Ampat. However, direct flights from Doha to Indonesia only arrive at two airports: Soekarno-Hatta Airport and I Gusti Ngurah Rai Airport. This issue should be considered while selecting places advertised in the Qatar region.

The final analysis is Porter's five forces model, which examines the competitiveness and attractiveness of an industry by considering five forces: the threat of new entrants, supplier bargaining power, buyer bargaining power, threat of substitute products or services, and industry competition. In general, the Indonesian tourism business welcomes newcomers. However, in terms of supply, significant expenditures are required in halal tourism and luxury accommodation. Indonesia may also sell halal tourist branding, as seen by various destinations such as Lombok, as well as its reputation as the world's most Muslim country. The challenge is that Indonesia does not provide special treatment to Qatari visitors when they visit Indonesia, therefore other countries are expected to take a larger percentage of Qatari tourists in the Southeast Asia region.

For supplier bargaining leverage, accommodation, such as five-star hotels, must be the primary product in the Qatar region's marketing efforts. Furthermore, hotels must work with travel brokers as tourist carriers to boost the appeal of nearby sites. The government, as part of its partnership with the Qatari government, can potentially give investment to strengthen supply. Then, as a country with one of the highest GDP per capita in the world, Qatari visitors have a lot of purchasing power and choose premium tourism experiences, which gives them considerable negotiating power. They have significant bargaining power because to the abundance of destinations in Southeast Asia. In other words, Qataris are more likely to choose destinations that offer halal services, comfortable accommodations, and luxury amenities. This highlights the need for public service providers in Indonesia to meet their customers' needs. However, it is important to understand that the comparison between the prices charged and the services provided can also be a deciding factor for visitors.

Countries such as Malaysia and Thailand offer halal tourism, which instantly becomes Indonesia's rival, as do countries near Qatar such as Arab countries and Turkey, which have shorter flight distances and hence pose external product risks. In this scenario, the items given by the Indonesian industry are highly competitive and plentiful, thus there are no limits on the product. Luxury lodgings, in addition to halal trip packages, may be found in places like Bali and NTB. The next step is to develop branding so that Qatari visitors are attracted and try to travel to countries other than those surrounding Qatar. In terms of rivalry in the business, Indonesia should try to market alternative tourism such as virtual tourism or entertainment tour package campaigns because Qatari visitors have the second largest relative market share and the highest market growth among other categories.

CONCLUSION

The total market growth across all categories is 166%, suggesting robust overall increase despite dips in certain industries. Accommodation experienced a -19% reduction, but still has the largest market share at 50%. Beverage decreased by -28%, accounting for 19.6% of the market and 0.39 relative market share. Domestic flights declined by -22%, accounting for only 3.8% of the market share. Local transportation increased by 20%, with a 6.9% market share and a 0.14 relative share. Vehicle rental fell by -24%, accounting for only 2.6% of the market and a relative share of 0.05. Entertainment declined by 9%, maintaining a 10.8% market share and a 0.21 relative share. Health and beauty care grew by 74%, while having a small market share of 1.2%. Training fell by -23%, making it the lowest category with only 0.3% market share. Local tour packages expanded at the second-fastest rate (86%), accounting for 2.5% of the market. Other services grew the most, by 211%, but still only account for 2.2% of the market.

Most competitors have a 50% market share, apart from Accommodation at 20%. The entire market share (2023) is about 100%, indicating complete market penetration. Relative market shares are typically less than one, except for Accommodation at 2.55, showing dominance. Beverage, domestic flights, and vehicle rental have modest relative shares (<0.4 each). Local transportation and entertainment have moderate relative proportions (0.14 to 0.21). Health-beauty care, training, and local tour packages have the lowest relative share (<0.05). Despite its 211% growth, the "Other" category has a very small relative share (0.04). Accommodation is the only category with a relative share more than one (2.55), indicating market leadership. The data demonstrates high-growth niches (health, tours, and "other") but dominance in slower-growing areas (accommodation, drinks).

The PESTLE and Porter's Five Forces analyses provide a comprehensive understanding of the factors influencing Qatari tourists' travel to Indonesia. From a **PESTLE** perspective, several external factors shape this dynamic. **Politically**, the strong diplomatic ties between Qatar and Indonesia create a favorable environment for tourism. Visa facilitation agreements and bilateral collaborations, such as cultural exchanges and trade partnerships, encourage Qatari tourists to visit Indonesia. **Economically**, Qatar's high GDP per capita and the purchasing power of its citizens make Indonesia an attractive destination due to its affordability and value-for-money experiences. The **social** aspect highlights the growing interest among Qatari tourists in exploring Indonesia's diverse cultural heritage, natural beauty, and halal tourism offerings, which align well with their preferences. **Technologically**, advancements in online travel platforms and digital marketing have made it easier for Indonesian tourism providers to reach Qatari audiences. **Legally**, Indonesia's efforts to streamline tourism regulations and ensure safety for international visitors enhance its appeal. Lastly, **environmentally**, Indonesia's commitment to sustainable tourism practices, such as eco-tourism and marine conservation, resonates with the global trend of responsible travel, attracting environmentally conscious Qatari tourists.

From a **Porter's Five Forces perspective**, the competitive landscape for attracting Qatari tourists to Indonesia can be analyzed as follows:

1. **Threat of New Entrants:** The global tourism industry is highly competitive, with neighboring countries like Malaysia and Thailand also vying for Qatari tourists. However, Indonesia's unique cultural and natural attractions give it a competitive edge.
2. **Bargaining Power of Suppliers:** Local tourism providers in Indonesia, such as hotels, airlines, and tour operators, have moderate bargaining power. Collaborations with Qatari travel agencies and airlines can help reduce dependency on specific suppliers.

3. **Bargaining Power of Buyers:** Qatari tourists have high bargaining power due to the availability of alternative destinations. To attract them, Indonesia must offer competitive pricing, high-quality services, and tailored experiences.
4. **Threat of Substitutes:** Other destinations in Southeast Asia and the Middle East pose a threat, but Indonesia's unique offerings, such as Bali's beaches, Komodo Island, and Borobudur Temple, differentiate it from competitors.
5. **Industry Rivalry:** Intense competition exists within the tourism sector, but Indonesia can leverage its strengths in cultural diversity, natural beauty, and affordability to stand out.

In conclusion, the combination of favorable PESTLE factors and a strategic understanding of Porter's Five Forces positions Indonesia as a compelling destination for Qatari tourists. To fully capitalize on this potential, Indonesia should focus on targeted marketing campaigns, enhancing halal tourism infrastructure, and fostering partnerships with Qatari travel agencies. By addressing these areas, Indonesia can strengthen its appeal and secure a larger share of the growing Qatari tourist market.

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