The Mapping of Quality Tourists Prospects for Indonesia's Tourism Markets

**Addin Maulana[1]*; Chamma Fitri Putri Pradjwalita Koesfardani[2];
I Dewa Gede Richard Alan Amory[3]**

[1-3]Directorate of Strategic Study, Deputy of Strategic Policy Development, Ministry of Tourism
and Creative Economy of the Republic of Indonesia
Jln. Medan Merdeka Barat No.17, Jakarta Pusat 10110, Indonesia
[1]addin.maulana@yahoo.co.id; [2]chammafitri@gmail.com; [3]richardalanamory@gmail.com

ABSTRACT

The research aimed to identify which countries could be segmented as a potential tourism market for Indonesia to increase quality tourists. It applied quantitative methods with descriptive statistical analysis techniques to describe the average expenditure per visit and the length of stay. It was conducted by modifying the quadrant model. The result shows that there are countries included in the market with the prospect of quality tourists. Those are Saudi Arabia, Netherlands, Sweden, Switzerland, Belgium, Russia, France, Germany, Austria, Finland, Italy, Spain, Norway, Denmark, Canada, United Kingdom, New Zealand, USA, Portugal, Egypt, Pakistan, and Australia. The government needs to optimize those countries to become the main market. Therefore, the revenue from the tourism sector can be better optimized.

Keywords: quality tourists, tourist prospects, Indonesia's tourism markets

INTRODUCTION

With the growing demands in recent decades, tourism is one of the fastest-growing industries in the world (González & Holtmann-Ahumada, 2017; Gnanapragasam, 2018). It becomes an essential factor in the current economy (Glaesser, Kester, Paulose, Alizadeh, & Valentin, 2017; Jangra & Kaushik, 2018). Moreover, it has a high multiplier effect compared to other sectors (Leri, 2011). It promotes economic growth and is considered an invisible export because of its ability to collect foreign exchange and real exports of other commodities (Mariyono, 2017). Tourism development aims not only to increase foreign exchange earnings, but also create employment opportunities, stimulate the growth of the tourism industry, and trigger overall economic growth (Windayani & Budhi, 2017). It is what makes tourism for several countries determine as one of the leading sectors because it has the lift and prospects for high economic growth trends. Indonesia is one of the

countries that establish tourism as one of the leading sectors. Central Bank of Indonesia recorded that travel service receipts (exports) in 2019 had 2,96% growth compared to 2018. It showed the increase in travel service receipts from USD 16,43 billion in 2018 to USD 16,91 billion in 2019 (Bank Indonesia, 2020). This positive growth in the last five years proves that the tourism sector is one of the crucial sectors in Indonesia.

Tourism has an essential role in a country's economy, so it is crucial to pay attention to aspects of demand from tourism and factors that can influence it (Maulana, 2018). Two factors determine tourism demand. First, it is push factors. Those are internal and intangible factors that arise from travelers' desire to escape their mundane life. Second, it is pull factors. The factors are related to the tangible features and characteristics of a destination, including cultural capital, number of hotel rooms, transportation, and tourism (Lin & Deng, 2018). Tourist expenditure is often indistinctly used as measures of tourism demand

(Rosselló-Nadal & He, 2019). An important policy goal for governments is to increase expenditures by inbound tourists (Rudkin & Sharma, 2017; Sharma, Woodward, & Grillini, 2020). To increase tourist expenditure, it is necessary to do several steps, including promotion by targeting potential markets based on market segmentation, especially quality tourists (Leri, 2011).

The theoretical studies related to quality tourists are very limited. From the tourists' perspective, quality tourists are classified as middle to upper income (Sukaatmadja, Wardana, Purbawangsa, & Rahanatha, 2017). They have more potential in terms of expenditure (Gilmore, 2017; Maulana, 2018), length of stay, and its dispersion (Tourism Australia, 2018). From the destination perspective, quality tourists are those who understand the concept of sustainability. It is because they generally benefit local communities more from their behavior to preserve it. They also have higher expenditure patterns than those who do not understand the concept of sustainability (Nickerson, Jorgenson, & Boley, 2016). Thus, the researchers conclude that quality tourists are those who can provide a greater positive impact in terms of economy and participate in maintaining the sustainability of the areas they visit in terms of preserving nature and culture. From several indicators that can be used as benchmarks for quality tourists, this study will focus on two indicators, namely expenditure and length of stay. The indicators are ready to use as there are relatively available data.

Several previous studies have focused on identifying the relationship between the length of stay and expenditure variables. They show a positive relationship between the length of stay and expenditure. It means the longer a tourist stays in a destination, the more expenditure is made (Wang, Rompf, Severt, & Peerapatdit, 2006; Wang, Fong, Law, & Fang, 2018; Aguiló, Rosselló, & Vila, 2017). Meanwhile, other studies show a negative relationship between the length of stay and expenses (García-Sánchez, Fernández-Rubio, & Collado, 2013; Barros & Machado, 2010).

Length of stay has become one of the most important indicators when monitoring tourism activity (Montaño, Rosselló, & Sansó, 2019). It is an important determinant of the overall economic impact in tourism (Aguilar & Díaz, 2019). It means the number of days spent by tourists in a country outside of their residence (Suastika & Yasa, 2015). Tourists who visit only for short periods tend to stay centrally and visit only the major tourist attractions. However, the longer-stay tourists visit a greater range of attractions, explore more peripheral regions, and generate more diverse economic, social, and environmental impacts (Barros & Machado, 2010). From a destination perspective, the length of stay is one factor determining the size of the tourism revenue (Wijaya, 2017). Tourists' length of stay is a variable of key importance for the tourism destination due to its crucial effect on overall tourism expenditure (Thrane & Farstad, 2012). Length of stay is found to have a significant impact not only on total expenditures but also on expenditures related to lodging, meals and restaurants, transportation, attraction and festival, and shopping (Wang et al., 2006). The time spent by tourists in an area is one of the most important factors influencing tourists' expenditure (Dinas Pariwisata Kabupaten Bantul, 2019).

Understanding the patterns and activities of expense when visiting a particular destination is a key issue in strategic facility planning (Salgado-Barandela, Barajas, & Sánchez-Fernández, 2018). Tourists' expenditure is an indicator that influences the income derived from the tourism sector (Munanda & Amar, 2019). The cost of traveling is one factor that affects the tourist's interest in visiting a tourist attraction (Nugroho, Gunawan, Awirya, & Nurman, 2017). Higher household income has been positively associated with higher spending behavior and longer length of stay for the cases of outside accommodation expenditures. It is especially for restaurants and transport activities (Aguiló et al., 2017). Several variables influence travel expenditure other than household income, such as the number of adults and people in the travel party, length of stay, and travel distance (Wang et al., 2006). There are four types of tourism based on the number of visits and expenditures. First, it has a low number of visitors, but a high average daily visitor spending. This type includes activities related to nature, adventure, eco, cultural, heritage, medical, health, community, and small meetings tourism. Second, it has low visitor numbers and average daily visitor spending. It is more likely formed by domestic and diaspora tourism. Third, it has high visitor numbers and average daily visitor spending. It is related to game and convention tourism. Fourth, it has a high number of visitors but low average daily spending. It includes mass and cruise tourism (Nicely & Palakurthi, 2012). When tourists feel a sense of escaping and forgetting daily life, they consider that the price is worth paying, and a destination conveys good value for the price (Moon & Han, 2019).

Tourists with more expenditure accompanied by the more extended length of stay are certainly an ideal market for a destination. This type of tourist generally will create more business opportunities for the visited destination. Later, it is expected to provide more economic impact for all stakeholders, including the local community, the private sectors, and the government sectors. Based on Presidential Regulation number 18/2020 regarding Concerning National Middle-Term Development Plan For 2020-2024, in the next five years, the increase in the added value of tourism focuses on increasing the length of stay and tourist expenditure as a result of improving accessibility, attractions, and amenities (Presiden Republik Indonesia, 2020). The high demand for the tourism sector is one of the leading sectors of the national economy as a foreign exchange earner. It requires the government to optimize its resources to bring quality tourists, who can positively impact the

destinations they visit.

To produce quality tourists visiting Indonesia's tourism market, it is important to conduct a study of potential market mapping used as a quality market prospect. Improving international tourism has an important significance and impact. It is not only as the main indicators of the country, but also as the development of many economic sectors (Krasnokutskiy, Kulchittskij, Perova, Bystrova, & Khizhnaya, 2016). The research aims to identify which countries can be segmented as a potential tourism market for Indonesia to increase quality tourists. It is expected to be useful for the government in allocating promotional budgets in markets/countries that can produce quality tourists. Therefore, the research becomes significant to be used as an input in making tourism policy development in Indonesia.

METHODS

The research uses quantitative methods with descriptive statistical analysis techniques to describe the average expenditure per visit and length of stay. The data are displayed with a quadrant model illustrated through graphs. It is to facilitate understanding and answer existing problems. The quadrant model defines four basic perspectives that can help expand the understanding of a given phenomenon by combining precision and focus with a broad scope and a clear overview (Tønnesvang, Hedegaard, & Nygaard, 2015). The quadrant method is divided by the grid and formed cells of the same size. The number of points in each cell is random and generally in a rectangular shape (Aidi, 2009).

In practice, the use of the quadrant method usually helps to determine the satisfaction of service. X variable shows service performance, and Y variable is customer expectation called Importance Performance Analysis (IPA). Four quadrants are produced from X-axis and Y-axis according to their degree of performance and importance (Chen, 2018). This method is commonly used in various fields, such as e-commerce websites (Andry, Christianto, & Wilujeng, 2019), health care (Izadi, Jahani, Rafiei, Masoud, & Vali, 2017), and transportation (Sum, Champahom, Ratanavaraha, & Jomnonkwao, 2019). In the research, the modification of variables is formed into four quadrants with the average expenditure per visit as the X-axis, and the average length of stay as the Y-axis. Secondary data are used to determine the average visitor expenditure and length of stay of foreign tourists. The data are from international visitor arrivals statistics of 2018 by Badan Pusat Statistik (Central Bureau of Statistics).

The meeting between the X-axis and Y-axis is marked by the national average of the entire market. Based on these provisions formed four quadrants in Figure 1, Quadrant I means that the market generally has a length of stay above the national average. However, the expenditure per visit is below the national average. Markets in this quadrant have the potential to be maximized by specific strategies to increase the amount of expenditure per visit. Quadrant II contains markets that generally have a length of stay and expenditure per visit below the national average. In here, several strategies need to be implemented to maximize the potential tourists. Quadrant III shows the length of stay below the national average, but expenditure per visit is above the national average. Quadrant IV presents the main market prospects because the length of stay and expenditure per visit are above the national average. The market in this quadrant needs to be maintained because it contains a ready and potential market. In other words, Quadrant IV is where the quality tourists mostly come from.
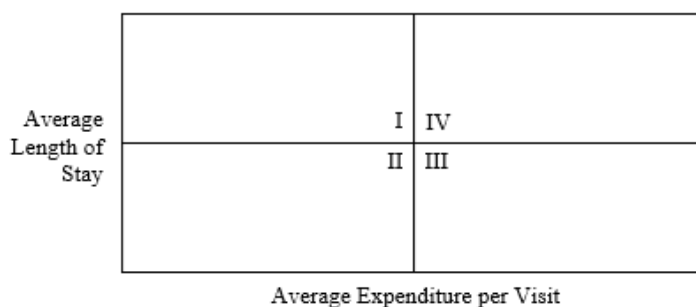

Figure 1 Illustration of Quadrant Modifications

RESULTS AND DISCUSSIONS

The report of international visitor arrivals of 2018 was released in August 2019, containing the average expenditure and length of stay. Passenger exit survey is conducted to obtain average expenditure by Badan Pusat Statistik. Meanwhile, the average length of stay is obtained from immigration data (Badan Pusat Statistik, 2019). This calculation is based on the data from 2015 to 2018. However, because of the continuation, the data gap occurs in data of 2017.

From Table 1 (see Appendices), it is identified that the tourists with the highest expenditure per visit while traveling to Indonesia are from Saudi Arabia (US\$2.252,09), Russia (US\$1.854,66), New Zealand (US\$1.805,12), Denmark (US\$1.791,76), Norway (US\$1.790,19), Netherlands (US\$1.773,41), Belgium (US\$1.746,24), Canada (US\$1.728,23), United Kingdom (US\$1.727,39), and Spain (US\$1.696,51). The foreign tourist with the longest average length of stay while traveling to Indonesia come from Netherlands (16,51 days), Sweden (15,66 days), Switzerland (15,50 days), Germany (15,19 days), Belgium (15,18 days), Russia (14,99 days), France (14,76 days), Austria (14,46 days), Norway (14,21 days), and Finland (14,08 days). The lowest average expenditure per visit is Malaysia (US\$757,68). Then, the lowest average length of stay is from Singapore (4,39 days).

The quadrant model is modified by placing the average visitor expenditure on the X-axis and the average length of stay on the Y-axis. This quadrant succeeds in identifying countries that have great potential to generate quality tourists to Indonesia. These countries have higher average expenditure on visits and length of stay compared to the national average. Based on the data, the national average for expenditure is US$1.210,00 per visit, while the length of stay is 8,53 days. These national average figures will later become a meeting point between the X-axis and the Y-axis in quadrant modification.

As seen in Figure 2 (see Appendices), among 35 markets observed, 22 are included in the potential diagram for high-quality markets. In other words, 62,8% of the total markets observed have an average length of stay above the national average. Similarly, the average expenditure per visit is higher than the national average. Those 22 markets are Saudi Arabia, Russia, New Zealand, Denmark, Norway, Netherlands, Belgium, Canada, United Kingdom, Spain, Australia, Austria, France, USA, Egypt, Italy, Pakistan, Switzerland, Sweden, Germany, Portugal, and Finland. These results indirectly support the statement that there is a positive relationship between the length of stay and expenditure. The longer a tourist stays in a destination, the more expenditure is made, as stated by Wang *et al.* (2018), Wang *et al.* (2006), and Aguiló *et al.* (2017). One of the countries with the closest distance to Indonesia is Australia, while other countries have relatively long distances, so it requires longer travel time.

Distance is one of the determining factors for the length of stay of tourists in Indonesia. Countries with longer distances have a relatively longer length of stay than countries with shorter distances. Thus, in Indonesia, the length of stay of foreign tourists is determined by the distance, which impacts travel time from their country of origin. Likewise, the tourists who come from quite far away countries generally have a higher expenditure per visit compared to countries that are close to Indonesia.

Besides, the other 13 markets have several different variations. Sri Lanka, Taiwan, Thailand, Brunei Darussalam, Bangladesh, Philippines, Singapore, and Malaysia have a length of stay and expenditures per visit below the national average. Meanwhile, others such as Hong Kong, South Korea, India, Japan, and China have an average length of stay below the national average. However, the average expenditure per visit is above the national average.

The results of data processing using the modification of the quadrant model are in Figure 3 (see Appendices). several countries can be used as potential markets for Indonesia's tourism (Quadrant IV). It consists of Saudi Arabia, Netherlands, Sweden, Switzerland, Belgium, Russia, France, Germany, Austria, Finland, Italy, Spain, Norway, Denmark, Canada, United Kingdom, New Zealand, USA, Portugal, Egypt, Pakistan, and Australia. These countries have great potential to have more economic impacts than other countries. These countries have an average length of stay and expenditure per visit above the national average (quality tourists). Countries in Quadrant III, such as South Korea, India, Hong Kong, China, and Japan can be optimized as a secondary market for quality tourists. They have expenditure above the national average, but the average length of stay is still below the national average. To make it become a quality market, some efforts need to be made to extend their length of stay in Indonesia.

Some of the countries in Quadrant IV have long-distance to Indonesia. For example, there are USA and European countries. This result is in line with Wang *et al.* (2006). They said that travel distance was one of the consistently essential variables in influencing travel expenditures. It mostly influences shopping, transportation, and total expenditures. This quadrant of quality tourist prospect is essential in improving future Indonesia's tourism development strategies, as also stated by Leri (2011) and Rudkin and Sharma (2017).

It can also be seen that countries in the second quadrant, such as Malaysia, Singapore, and Brunei Darussalam, are relatively close to Indonesia. Apart from that, another factor that causes spending and length of stay below average is their culture, which is not much different from the culture in Indonesia. Moon and Han (2019) said one of the reasons tourists travel was to seek distinctive experiences that differ from their daily lives. The differences that Indonesia has can be highlighted to increase the length of stay and the expenditure of foreign tourists from these countries. One of them is a combination of the richness and uniqueness of nature and various tourist activities that can provide a different experience.

Countries classified as a quality tourist (Quadrant IV) should be considered the main market on which the resources can focus. Seeing its potential, the government should adopt an appropriate marketing strategy to attract more tourists from these countries. Countries with a length of stay below the average, but have expenditures above the national average (Quadrant III) can be classified as secondary markets. The government needs to create attractions that can keep them for staying longer in Indonesia and fill the gaps created by the main market. This mapping can be used as an input for the preparation of regulations derived from the Presidential Regulation number 18/2020 on the National Medium-Term Development Plan for 2020-2024. It mentions how the added value of tourism will be achieved by focusing on increasing the length of stay and the expenditure.

CONCLUSIONS

The measurement of expenditure has become a key economic driver, relevant to the main stakeholders involved in the travel and tourism activity. One of the characteristics of quality tourists is that they are more likely to stay longer and spend more. Thus, strategies to extend travelers' length of stay become important.

It requires expanding product portfolio, developing bundles and packages of tourism-related products, and coordinating the various activities/events provided by the different sectors of the local tourism industry. The Indonesian government needs to make quality tourists as its target market. Thus, the impact of tourism development will be increasingly optimally felt by all stakeholders in all sectors.

The modification of the quadrant model can be used to obtain information by connecting two different variables. It also has an advantage in visual illustration so it can be more easily understood. The research is expected to contribute to the optimization of the quadrant model, which gives enrichment to the presentation of information and perspectives from two different types of data related to one another.

As a limitation, the research only focuses on economic indicators that form quality tourists. Meanwhile, other indicators outside the economy still need to be studied to enrich the research. Therefore, the research on other indicators forming quality tourists should be conducted in the future. Also, research on seasonal patterns of tourist arrivals from countries categorized as a potential market for quality tourists needs to be done to identify the patterns of visits. It aims to know the peak season to determine the right time to carry out promotional activities and fill the gaps (off-season) arising from each of these patterns. Therefore, foreign tourist visits to Indonesia can be optimally achieved

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APPENDICES

Table 1 The Average Expenditure of Visitor per Visit and Length of Stay in 2015-2018

Country of Residence	Average Expenditure per Visit (in US$)				Average Length of Stay (Number of Days)			
	2015	2016	2018*	Average	2015	2016	2018*	Average
Brunei Darussalam	1.022,23	986,05	1.059,37	1.022,55	5,83	5,36	7,88	6,36
Malaysia	710,00	719,69	843,34	757,68	5,11	5,14	5,84	5,36
Philippines	792,75	766,79	1.164,65	908,06	5,97	5,48	6,38	5,94
Singapore	658,74	588,53	1.049,22	765,50	4,30	4,35	4,53	4,39
Thailand	883,18	910,19	1.490,58	1.094,65	6,22	6,60	7,80	6,87
Hong Kong	1.340,44	1.067,73	1.778,62	1.395,60	7,00	6,58	7,25	6,94
India	1.129,01	1.073,66	1.523,63	1.242,10	6,83	6,57	6,72	6,71
Japan	1.138,45	1.175,95	1.349,55	1.221,32	6,27	6,52	7,22	6,67
South Korea	1.147,19	1.086,50	1.637,74	1.290,48	7,32	7,35	8,28	7,65
Pakistan	1.854,00	1.124,22	1.842,50	1.606,91	9,35	6,79	13,22	9,79
Bangladesh	903,30	733,53	1.311,14	982,66	7,63	4,70	5,85	6,06
Sri Lanka	1.218,12	939,38	1.436,42	1.197,97	7,12	5,56	6,60	6,43
Taiwan	904,47	990,01	1.403,38	1.099,29	6,37	6,29	8,06	6,91
China	1.059,27	1.196,15	1.385,55	1.213,66	6,58	7,13	8,00	7,24
Saudi Arabia	2.241,37	2.237,50	2.277,41	2.252,09	12,27	10,83	12,90	12,00
Egypt	1.721,84	1.545,58	1.740,06	1.634,48	14,98	13,15	15,26	10,79
Austria	1.685,78	1.617,34	1.935,60	1.669,16	16,93	13,61	14,99	14,46
Belgium	1.648,95	1.692,65	2.033,68	1.746,24	13,10	13,93	14,86	15,18
Denmark	1.722,78	1.750,87	1.526,18	1.791,76	16,03	14,21	14,05	13,96
France	1.576,24	1.660,77	1.532,12	1.666,61	15,06	15,11	15,39	14,76
Germany	1.620,91	1.763,95	1.512,44	1.589,71	14,20	13,77	12,77	15,19
Italy	1.593,75	1.860,08	1.866,40	1.632,43	16,65	15,37	17,52	13,58
Netherlands	1.676,00	1.434,08	1.979,46	1.773,41	14,00	13,60	13,49	16,51
Spain	1.307,27	1.458,99	1.530,30	1.696,51	12,68	12,48	7,98	13,70
Portugal	1.436,15	1.581,01	1.752,67	1.432,19	16,30	15,40	15,27	11,05
Sweden	1.718,95	1.676,76	1.378,59	1.589,94	16,39	15,13	14,99	15,66
Switzerland	1.626,99	1.688,02	1.867,15	1.591,43	13,21	12,09	11,15	15,50
United Kingdom	1.387,82	1.412,21	1.480,73	1.727,39	14,59	13,82	13,83	12,15
Finland	1.966,74	1.527,14	1.876,69	1.426,92	15,00	13,33	14,29	14,08
Norway	1.767,11	1.697,01	2.099,87	1.790,19	12,89	14,45	17,63	14,21
Russia	1.619,79	1.647,28	1.721,57	1.854,66	11,42	11,48	11,27	14,99
USA	1.594,32	1.582,25	2.008,11	1.662,88	14,77	12,92	12,54	11,39
Canada	1.616,88	1.620,32	1.823,73	1.728,23	10,33	10,02	9,50	13,41
Australia	1.853,46	1.739,79	1.822,12	1.686,98	13,39	12,09	10,21	9,95
New Zealand	1.268,50	1.505,54	2.129,40	1.805,12	10,03	10,47	11,86	11,90
Average	**1.208,79**	**1.201,04**	**1.220,18**	**1.210,00**	**8,53**	**8,42**	**8,64**	**8,53**

Remarks: *) In 2018, data by nationality
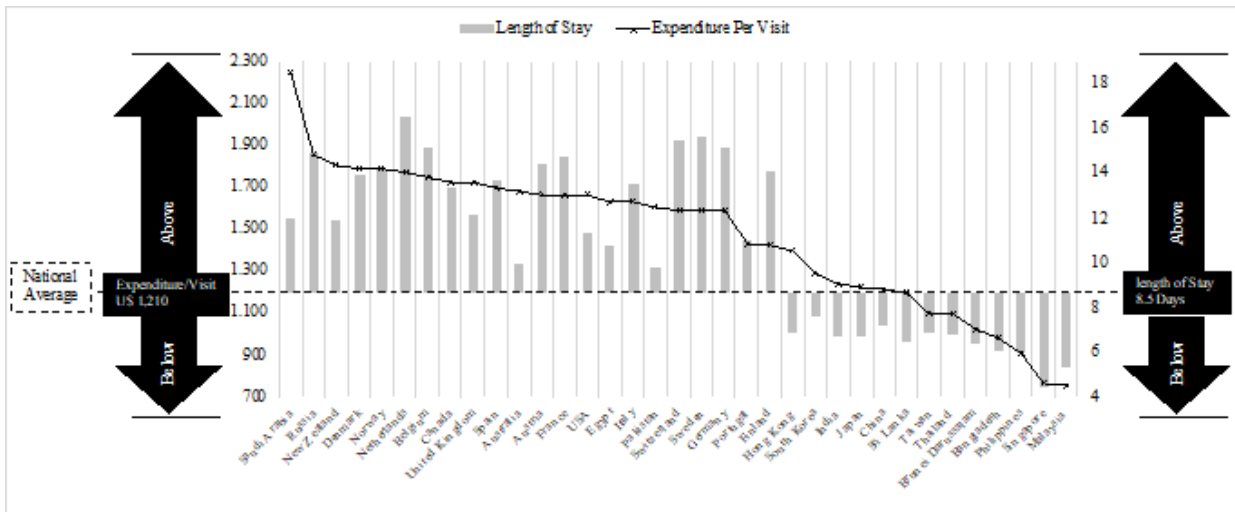
(Source: Badan Pusat Statistik, 2019)

Figure 2 Graphic of Average Length of Stay
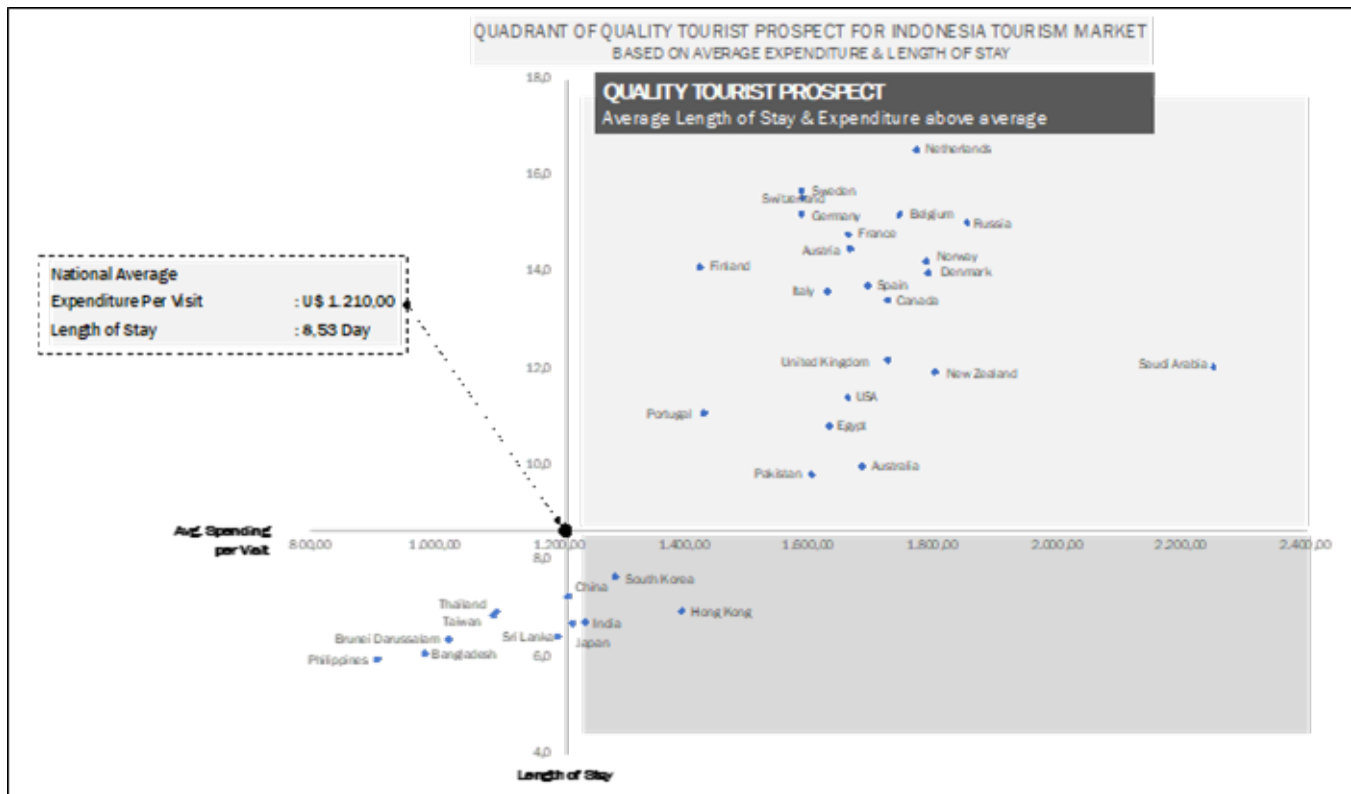and Average Expenditure per Visit

Figure 3 Quadrant of Quality Tourists based on the Average
Visit Expenditure and length of Stay in Indonesia