

Cluster Analysis of Visitor Perceptions Toward Indonesia's Tourism Marketing Mix in Dubai

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Abstract

This study examines the impressions of 174 visitors to the Wonderful Indonesia booth at Arabian Travel Market (ATM) Dubai 2024 regarding the 7P marketing mix (Product, Price, Place, Promotion, People, Process, and Physical Evidence) with a Likert scale questionnaire ranging from 1 to 5. The k-means analysis technique categorizes respondents into three clusters according on perceptual similarities, with Cluster 2 (62.64%) representing the most favourable group and Cluster 3 (20.11%) the most critical. ANOVA results indicate significant differences ($p<0.001$) among clusters, particularly in Price ($F=116.144$) and Process ($F=96.267$), which are the primary distinguishing factors. The examination of Euclidean distance indicates that the greatest gap between Clusters 2 and 3 is 4.592 signifying significant polarization of perceptions. The results demonstrate that Product achieved the greatest score (Mean=4.45) whereas Process and Price represented the primary deficiencies in Cluster 3. The strategic implications underscore the necessity for marketing distinction through segmentation particularly by enhancing service protocols and modifying pricing structures. This study offers an empirical foundation for formulating Indonesian tourism strategies in the global market.

Keywords: 7P Marketing Mix; Arabian Travel Market; Indonesian Tourism; K-means Clustering; Market Segmentation

Introduction

A phenomenon known as perception takes place when the brain analyses information to give meaning or action to the information that is received (Bartoshuk & Schiffman, 1977). This can be performed through the utilisation of a variety of systems, including feelings, and memories (Ding & Wu, 2022). In the framework of tourism, travellers comprise a crucial component that has the potential to supply perception pertaining to each aspect of tourism. Perceptions of a location can be either positive or negative, depending on the evaluation of the tourist's experience (Li et al., 2017) however, perception does not always have a direct impact on total pleasure (Dogru-Dastan, 2022). These perceptions can be either positive or negative because tourists may have either a positive or bad impression of the destination. There are many other aspects that might influence tourists, such as the degree of health and safety that is present at a location, as well as the services that are offered by local tourism businesses (Polas et al., 2022). One example of this perspective is when a tourist judges the cuisine of a location based on the quality of the food that is available there. This perspective provides an image of a destination that is based on the experience of external actors (Gorji et al., 2023; Rahman et al., 2018).

Tourist perceptions can be gathered from various sources, one of them is tourist exhibition – in this study, the Arabian Travel Market (ATM) in Dubai serves as the data source. Tourism exhibitions function as potent marketing instruments enabling tourist enterprises to display their offerings, establish new partnerships, and engage a broader audience on both national and international scales (Krakhmalova, 2018; Lisyuk et al., 2020). These events can markedly enhance visitor attendance and invigorate local economies, as exemplified by the Echigo-Tsumari Art Triennale (Cai et al., 2020) in Japan which fosters sustainable tourism and demographic revitalisation. Exhibitions promote innovation and knowledge exchange by assisting tourism stakeholders in comprehending market trends and customer perceptions (Victoria & Marina, 2021). Moreover, exhibitions facilitate the advancement of tourism infrastructure by highlighting its capacity to draw diverse stakeholders and stimulate investment (Wan, 2022).

This paper employs the 7P marketing mix framework (product, price, place, promotion, people, process, and physical evidence) as its core theoretical lens to analyze the exhibition tourism sector. The justification for this framework lies in its comprehensive ability to address the unique service-based and experiential nature of tourism. While traditionally applied in commercial marketing, the 7Ps are particularly suited to tourism as they encompass not only the core offering ('product' and 'price') but also the critical service delivery elements ('people' and 'process') and the tangible environment ('physical evidence') that shape the tourist experience. Consequently, this paper reviews literature demonstrating that the strategic application of the 7Ps—especially product, place, people, and process—is a significant factor in enhancing tourist decision-making and overall satisfaction, thereby establishing a coherent argument for its relevance in the exhibition context (Putri & Facrureza, 2023; Ho et al., 2022). Conversely, price, promotion, and physical evidence may occasionally exert a diminished impact contingent upon the setting of the tourist destination (Fakhrul & Hasan, 2020). Certain regions prioritise the promotion and enhancement of physical amenities to attract more tourists and the "place" element (accessibility) and the quality of service are the principal determinants of tourist satisfaction (Warganegara & Nurya, 2023). Within the framework of sustainability, the 7P model can be augmented to 7P+ by incorporating elements of economic, social, and environmental sustainability that has been implemented in Bali to promote sustainable tourism (Iswara et al., 2020). Moreover, marketing strategies grounded in the 7Ps have proven pertinent in addressing post-pandemic challenges as tourists increasingly anticipate ethical and sustainable tourism activities (Rahmawati, 2020).

Within this study, the term product denotes goods and services along with its characteristics including quality and features that fulfill consumer needs (Philip & Armstrong, 2013). Conversely, price highlights the alignment between cost and service value considering competition and quality (McCarthy, 1978). The term place encompasses locations and the distribution of access such as through online travel agencies (OTAs) to assist consumers (Hoffman & Bateson, 2010). Conversely, promotion refers to marketing messages, such exhibitions or magazines, aimed at enhancing purchasing interest (Rafiq & Ahmed, 1995). People' refers to employees and personnel who embody the company's values in interactions with customers. 'Process' denotes the service procedures and flow of interactions between providers and consumers (Wirtz & Lovelock, 2021). 'Physical evidence' encompasses the tangible cues (environment, logos, design, etc.) that help set customer expectations and reduce misunderstandings (Oliver, as cited in Zeithml et al., 2021).

K-Cluster analysis is a proficient technique for categorising respondents according to their impressions of the 7P marketing mix (Product, Price, Place, Promotion, People, Process, Physical Evidence) within the framework of tourism exhibits, such as the Arabian Travel Market (ATM) in Dubai. This analysis enabled researchers to identify the segmentation of Indonesian booth visitors with analogous perceptual features, allowing for the refinement of marketing techniques. The ATM Dubai exhibition draws diverse industry participants from multiple cultural and commercial backgrounds, so employing 7P perception-based segmentation will enhance the comprehension of varying preferences and elevate visitor experience (Xaiver et al., 2020). A study conducted by Orlov & Kankhva (2022) demonstrated that K-Cluster analysis can uncover perceptual patterns that remain obscured by traditional descriptive analysis, particularly within the realms of tourism and event marketing. A clustering-based methodology is effective in addressing the intricacies of the worldwide market, particularly within the rapidly evolving tourism industry of Dubai market (Kotler et al., 2017). Therefore, this study aims to identify distinct cluster of visitors based on their perceptions of the 7P marketing mix at ATM Dubai 2024, and to determine which marketing mix elements significantly differentiate these clusters.

Method

This article presents quantitative analysis of data from Arabian Travel Market in Dubai 6-9 May 2024, focusing on the perceptions of Indonesian booth visitors regarding the 7Ps (Product, Price, Place, Promotion, People, Process, and Physical Evidence) or marketing mix. The respondents, 174 in all, were visitors who came directly to the Wonderful Indonesia booth. The questionnaire asked seven questions regarding marketing mix. Respondents' answers were evaluated using a Likert scale ranging from 1 (very low rating) to 5 (very high rating). Table 1 illustrates the distribution of respondents across each cluster following k-means analysis: cluster 1 has 30 respondents (17.24% of the total), cluster 2 consists of 109 respondents (62.64% of the total), and cluster 3 includes 35 respondents (20.11% of the total).

Table 1. Cluster Membership		
Number of Cases in each Cluster		
Cluster	1	30.000
	2	109.000
	3	35.000
Valid		174.000
Missing		.000

(Source: Researcher Finding (2025))

Table 2, Iteration History, illustrates the iterative procedure executed by the k-means analysis to attain convergence. During the initial iteration, the variation in cluster centres was significant, with subsequent changes of 2,095 (Cluster 1), 2,183 (Cluster 2), and 2,138 (Cluster 3). This signifies that the cluster centres are still experiencing considerable modifications as the algorithm has only recently commenced data grouping. During the second cycle, the alteration in cluster centres significantly diminished to 0.293 (Cluster 1), 0.051 (Cluster 2), and 0.318 (Cluster 3), suggesting that the clusters are beginning to settle. In the third iteration, the alteration in cluster centres was zero (0.000), signifying that the algorithm had achieved convergence and no additional modifications were required.

Convergence occurs when the variation in cluster centres is minimal or absent, as demonstrated in the third iteration. The statement "Convergence achieved due to minimal or no alteration in cluster centres" indicates that the method terminates as the cluster centres are optimal. The greatest absolute coordinate change is 0.000, and the final iteration is the third, indicating that just three iterations are required to achieve a stable solution. The minimal distance of 6.245 between the first cluster centres suggests that the initialization is sufficiently distinct, allowing the algorithm to operate effectively without becoming ensnared in inferior local solutions. The rapid iteration process, comprising of three stages, coupled with a significant reduction in variance, suggests that the data exhibits a discernible pattern, enabling k-means to effectively discern inherent clusters. Rapid convergence signifies that the clustering outcomes are dependable and uniform.

Table 2. Iteration History

Iteration History ^a			
Iteration	Change in Cluster Centres		
	1	2	3
1	2.095	2.183	2.138
2	.293	.051	.318
3	.000	.000	.000

(Source: Researcher Finding, 2025)

The primary method employed is k-means analysis, an unsupervised learning technique that categorises respondents according to similarities in their judgements of the 7Ps. This approach divides data into three clusters (K=3) by minimising the variance of the Euclidean distance between data points and their centroids (Ikotun et al., 2023). The choice of three clusters is founded on theoretical principles (distinct market segmentation) and the elbow method test to achieve a balance between group homogeneity and heterogeneity.

The researchers employed ANOVA (Analysis of Variance) to ascertain the significance of variations among clusters. This test ascertains the statistical significance of mean differences in 7P scores among clusters ($\alpha=0.05$). The integration of k-means with ANOVA offers benefits in data-driven market segmentation; nevertheless, it is constrained by its reliance on random initial centroid initialisation. This study tackles this issue through numerous iterations to guarantee cluster stability.

Findings and Discussion

Table 3 presents descriptive statistical data including seven mix marketing variables with a total of 174 respondents (N) for each variable. Notably, the observed scores for some variables ranged from 2 to 5 (Product, Price) whereas others ranged from 1 to 5, indicating that no respondent rated Product or Price at the very lowest level. This reflects that while most aspects received the full range of responses, Product and Price were never deemed 'extremely insignificant' by any visitor. The product exhibits the greatest average (Mean = 4.4540) with a standard deviation of 0.90321, suggesting that respondents are generally quite satisfied with its quality which may enhance customer loyalty (Kotler, 2010). Simultaneously, the pricing has a mean of 4.1839 (SD = 0.96204) suggesting that it is generally well-regarded, despite the greater variability in evaluation compared to the goods.

The promotion has a mean of 3.8046 (SD = 1.06265), suggesting that the promotional method is seen as fairly effective albeit with some variability in responses. Currently, the mean for product is 3.8218 (SD = 1.19604) indicating a generally favourable assessment. People achieved a mean score of 3.7989 (SD = 1.18751) indicating that contacts with employees or customer service are regarded as rather fairly good. The mean for physical evidence is 3.8851 (SD = 1.21575), indicating that marketing support facilities are relatively effective. The process exhibits a mean of 3.8851 (SD = 1.27606) same to that of physical evidence, although possesses the biggest standard deviation. This indicates that the service process of Indonesian tourism products is seen as rather satisfactory, yet with a diverse range of dissatisfaction levels.

Table 3. Descriptive Statistics

Descriptive Statistics					
	N	Minimum	Maximum	Mean	Std. Deviation
PRODUCT	174	2.00	5.00	4.4540	.90321
PRICE	174	2.00	5.00	4.1839	.96204
PROMOTION	174	1.00	5.00	3.8046	1.06265
PLACE	174	1.00	5.00	3.8218	1.19604
PEOPLE	174	1.00	5.00	3.7989	1.18751
PHYSICAL EVIDENCE	174	1.00	5.00	3.8851	1.21575
PROCESS	174	1.00	5.00	3.8851	1.27606

(Source: Researcher Finding, 2025)

According to the findings of the k-means final cluster analysis in table 1, respondents can be categorized into three segments depending on their impressions of Indonesia's tourist marketing mix. Clusters 1, 2, and 3 exhibit distinct disparities in their evaluation of the seven components of the marketing mix; product, price, promotion, place, people, physical evidence, and process. Cluster 2 exhibits the highest scores across nearly all dimensions, signifying that this group demonstrates significant care for all marketing mix components. Conversely, Cluster 3 gives the lowest scores to all elements, indicating general discontent with or disengagement from Indonesia's tourism offerings.

Cluster 2 had average scores above 4 on almost all factors. They place significant importance on product (4.76), price (4.60), and physical evidence (4.55), suggesting that they perceive Indonesia as a destination offering high-quality tourism items, competitive pricing, and adequate facilities and physical evidence. Their high ratings for Promotion (4.34) and Place/accessibility (4.51) suggest that effective marketing efforts have reached this group, and they view Indonesian destinations as conveniently accessible.

Cluster 1 exhibits a moderate evaluation, achieving the greatest ratings in product (4.50) and price (4.37) while demonstrating lower results in areas such as people (2.23) and place (2.80). This indicates that while they perceive Indonesian tourism items and pricing as satisfactory, they are less impressed with the service quality and the distribution and location aspects. Promotion is rated only average by Cluster 1 (mean 3.00), suggesting that Indonesia's marketing initiatives have not been particularly effective for this group. Cluster 3 is the most critical (least satisfied) group with the lowest scores across nearly all dimensions particularly in process (2.09) and price (2.74). The very low Process score indicates discontent with service-related procedures (for example: ticket purchase, visa processing). However, the comparatively higher People score

(3.46) suggests that, despite other frustrations, interactions with local people were generally positive for this cluster.

Table 4. Final Cluster Centers

	Final Cluster Centers		
	1	2	3
PRODUCT	4.50	4.76	3.46
PRICE	4.37	4.60	2.74
PROMOTION	3.00	4.34	2.83
PLACE	2.80	4.51	2.54
PEOPLE	2.23	4.34	3.46
PHYSICAL EVIDENCE	2.83	4.55	2.71
PROCESS	3.90	4.46	2.09

(Source: Researcher Finding, 2025)

Table 2 presents the distances between the final cluster centroids in the clustering study. Clusters 1, 2, and 3 are depicted in rows and columns with the numerical values in the cells denoting the Euclidean distances between the cluster pairs. The distance between Cluster 1 and Cluster 2 is 3,542, but the distance between Cluster 1 and Cluster 3 is 2,937. A smaller distance value indicates a closer association between the clusters. This data is crucial for comprehending the degree of separation or overlap among the groups in the analysis.

The table indicates that Cluster 1 and Cluster 3 exhibit the closest distance (2.937), signifying a greater similarity in attributes relative to other pairs. Cluster 2 and Cluster 3 have the greatest distance of 4,592, signifying a substantial disparity between them. Cluster 1 and Cluster 2 exhibit a distance of 3,542, showing a modest degree of similarity. In practical terms, the small distance between Clusters 1 and 3 suggests these two segments share relatively similar attitudes (both being less satisfied groups), whereas Cluster 2 stands apart. This information can be useful in evaluating the robustness of the segment definitions.

A significant distance between clusters, such as between Clusters 2 and 3, signifies that the two groups are markedly separate and exhibit minimal overlap. This may indicate that the characteristics differentiating the two groups are highly pronounced. Conversely, a minimal distance (for instance, between groups 1 and 3) suggests that the delineation between the two groups may be ambiguous and requires re-evaluation to see if the cluster separation is appropriate or necessitates modification of the clustering approach.

Table 5. Distances between Final Cluster Centers

Distances between Final Cluster Centers			
Cluster	1	2	3
1		3.542	2.937
2	3.542		4.592
3	2.937	4.592	

(Source: Researcher Finding, 2025)

Following the cluster analysis, which classifies data according to similar characteristics, the researcher uses an ANOVA (Analysis of Variance) test to compare the means of the clusters and

evaluate whether there are significant differences as shown in Table 3. Within the context of this discussion, the analysis of variance (ANOVA) is utilised to evaluate the differences in the perspectives of Dubai ATM visitors about seven marketing aspects, specifically the marketing mix, among the formed clusters.

According to the findings of the analysis of variance (ANOVA), all the variables have a significance value (Sig.) of 0.000, which indicates that there are extremely significant differences in the ways in which visitors perceive each aspect across the different clusters. The fact that the F values are elevated (for example, 40.217 for Product and 116.144 for Price) indicates that the mean differences between clusters are significantly greater than the variances that exist within the clusters.

The price variable has the highest F-value (116.144), indicating considerable differences among clusters in how visitors perceive pricing. This suggests that pricing is the key aspect differentiating the visitor groups. It may be deduced from this that the key aspect that differentiates different visiting groups is the pricing. Product, on the other hand, has the lowest F value (40.217), even though it is still significant. This indicates that product quality does not vary as drastically across clusters as price does.

There are also substantial differences between clusters in the Place ($F = 112.778$) and Process ($F = 96.267$) variables, in addition to the price variable. The positioning of place and process variables have a major impact on the different perspectives that visitors have based on their cluster. Considering the findings of this research, it is recommended that the Indonesian tourism industry at ATM Dubai adopt unique marketing strategies for each cluster particularly regarding the pricing and the quality of the service experience. As an illustration, one cluster might have a heightened sensitivity to pricing, but another cluster might place a higher order of importance on the convenience of location or the quality of service.

Table 6. Anova Test

ANOVA						
	Cluster	Error				
	Mean	Mean				
	Mean Square	df	Mean Square	df	F	Sig.
PRODUCT	22.574	2	.561	171	40.217	.000
PRICE	46.112	2	.397	171	116.144	.000
PROMOTION	41.972	2	.652	171	64.421	.000
PLACE	70.381	2	.624	171	112.778	.000
PEOPLE	54.734	2	.787	171	69.591	.000
PHYSICAL EVIDENCE	64.710	2	.738	171	87.624	.000
PROCESS	74.597	2	.775	171	96.267	.000

(Source: Researcher Finding, 2025)

Conclusion

This study segmented visitors to the Wonderful Indonesia booth at the Arabian Travel Market (ATM) Dubai 2024 based on their perceptions of the 7P marketing mix. The analysis revealed three distinct groups: a highly satisfied cluster (Cluster 2) with consistently high scores across all elements, a highly critical cluster (Cluster 3) with uniformly low ratings, and a moderately satisfied

cluster (Cluster 1) with a mixed evaluation. Cluster 3's notably low scores in Process and Price signify profound dissatisfaction with service delivery and perceived value.

The ANOVA results confirm that the perceptions of these three clusters differ significantly for all 7P elements. Price emerged as the most powerful differentiating factor, followed closely by Place and Process, indicating that pricing strategy, destination accessibility, and service protocols are paramount in shaping visitor satisfaction. Conversely, Product was the least differentiating, though still significant, suggesting a more consistent perception of its quality.

The Euclidean distance analysis further underscores the polarization in visitor experiences. The greatest distance was between the highly satisfied and highly critical clusters, highlighting a stark contrast in their experiences. The relative proximity between the moderately satisfied and critical clusters suggests shared areas of dissatisfaction that need addressing.

These findings underscore the critical necessity for the Indonesian tourism sector to adopt segmentation-based marketing strategies. To effectively cater to these diverse groups, tailored approaches are essential: Cluster 2 should be nurtured through brand advocacy and quality consistency; Cluster 1 requires targeted improvements in customer service (People) and distribution channels (Place); and Cluster 3 demands fundamental changes, particularly in streamlining the service process and enhancing pricing competitiveness. Promotional efforts also need refinement, as they were perceived as less impactful by the neutral segment.

A primary limitation of this study is its sample, drawn exclusively from visitors to a single event, which cautions against broad generalizations. Future research should expand the geographical and contextual scope or employ qualitative methods to explore the underlying reasons for the perceptions held by each cluster. Nonetheless, these findings provide a valuable evidence base for tourism policymakers and industry managers to formulate more focused marketing strategies, with particular attention to improving Physical Evidence and Process, which were identified as the most undervalued aspects aside from price.

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