



Exploring Foreign Muslim Tourist Preferences in Halal Tourism: A Study of Indonesia's Halal Market

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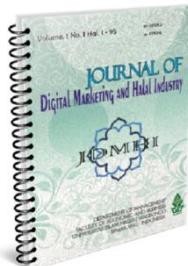
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ABSTRACT

This study investigates the preferences of foreign Muslim tourists in Indonesia's halal tourism sector, with a particular focus on their expectations regarding halal accommodation, products, destinations, and regulations. This study aims to identify deficiencies in policy implementation, infrastructure development, and international marketing that impede Indonesia's potential as a prominent global halal tourism destination. A qualitative research methodology was employed, incorporating interviews and focus group discussions with seven stakeholders: religious scholars, tourism operators, business owners, and foreign Muslim tourists. Data were analyzed using NVivo 12 and Atlas 7 software to extract key themes and insights. The findings revealed significant inconsistencies in halal certification, infrastructure, and international marketing strategies. Foreign Muslim tourists prioritize halal-certified services, cultural authenticity, and inclusivity. However, the inadequate implementation of halal standards, limited halal-friendly infrastructure, and ineffective international promotion efforts constrain Indonesia's capacity to attract more Muslim travelers. Policy recommendations include the enhancement and standardization of halal certification processes, improvement of halal-friendly infrastructure, and implementation of targeted international marketing campaigns. Strategies to promote inclusivity among non-Muslim tourists have also been proposed to support sustainable growth. This study offers novel perspectives by integrating cultural identity, contemporary tourism approaches, and global expectations. It examines the intersection of faith-based travel and accessibility and presents practical suggestions for establishing Indonesia as a leading destination for halal tourism.

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Introduction

Halal tourism has emerged as a rapidly growing segment of the global travel industry, with Muslim travelers projected to reach 230 million by 2028, generating an estimated USD 225 billion (Maffei & Hamdi, 2022). This growth surpasses that of the general tourism industry, making it one of the fastest-expanding sectors (El-Gohary, 2016; Rahman et al., 2024). The rise of halal tourism has prompted both Muslim-majority and non-Muslim countries to adapt their offerings to cater to Muslim travelers' needs, including halal-certified restaurants, Shariah-compliant hotels, and prayer facilities (Yan et al., 2017). Research on halal tourism has identified four main areas of focus: tourist satisfaction, government policies, innovative business opportunities, and the Muslim tourism market (Izza et al., 2021).

The halal tourism sector, currently valued at approximately USD 2.3 trillion, represents a significant economic opportunity worldwide (Akram, 2020; Nor et al., 2023). As the halal tourism industry continues to expand, it has gained particular traction in Southeast Asia, with Malaysia actively promoting Sharia-compliant tourism since 2006 (Jaelani, 2017). While Malaysia has positioned itself as a leader in the halal tourism market, Indonesia, despite its strong Muslim demographic, still faces challenges in fully capitalizing on this opportunity.

Indonesia, with the world's largest Muslim population, has immense potential to become a global center for halal tourism. Its natural beauty, rich cultural heritage, and

growing Muslim-friendly infrastructure position it to benefit from the booming halal tourism market (Rasyid, 2019; Sahir et al., 2021). However, Indonesia lags behind countries like Malaysia, Thailand, and Singapore in halal tourism development (Rasyid, 2019). Despite the government's efforts, including the promotion of key halal destinations such as Lombok, Aceh, and West Sumatra (Subarkah et al., 2020), significant obstacles remain.

The country's halal tourism infrastructure is still underdeveloped, with insufficient halal-certified facilities and limited stakeholder understanding of halal tourism principles (Pasarela et al., 2022; Vizano et al., 2021). Additionally, Indonesia faces challenges in promoting halal tourism to global markets, due to a lack of innovative marketing and a fragmented certification system (Meirezaldi, 2020; Sahir et al., 2021). The government's efforts in organizing familiarization trips, international exhibitions, and media campaigns have not yet translated into substantial growth in foreign Muslim tourist arrivals.

Despite these challenges, Indonesia's position on the Global Muslim Travel Index (GMTI) has steadily improved, from 67 in 2018 to 73 in 2023, signaling the country's ongoing efforts to enhance its halal tourism infrastructure (GMTI, 2024). This progress indicates that Indonesia is making strides toward becoming a prominent halal tourism destination, alongside Malaysia, but it still requires targeted marketing strategies and further development of its infrastructure to fully realize this potential.

Figure 1 shows that over the past six years,

Indonesia has demonstrated a consistent increase in its Global Muslim Travel Index (GMTI) score, progressing from 67 in 2018 to 73 in 2023 (GMTI, 2024). This positive trajectory indicates Indonesia's sustained efforts to enhance its halal tourism sector through improved infrastructure, services, and overall offerings to accommodate Muslim travelers. The peak score in 2023 signifies that Indonesia will share its premium position globally for halal tourism destinations alongside Malaysia (Statista, 2023). Notwithstanding this achievement, the country continues to face challenges in translating its high rankings into substantial growth in foreign Muslim tourist arrivals, underscoring the need to strengthen international marketing strategies and policy implementation further.

Figure 1.
Indonesia's Global Muslim Travel Index (GMTI) Rankings Over Time (2018-2023)



Source: (GMTI, 2024; Statista, 2023)

The literature on halal tourism has primarily focused on broad industry trends and government policies, but there is a gap in research regarding the specific market segmentation of halal tourists. Market segmentation is crucial for understanding

the diverse needs of Muslim travelers and tailoring offerings accordingly. While quantitative studies have often focused on demographic and behavioral data, qualitative methods have yet to be fully utilized in understanding the deeper motivations and preferences of halal tourists (Sahir et al., 2021; Vizano et al., 2021). This gap in research limits the ability of destinations like Indonesia to effectively address the unique needs of halal tourists.

By employing a market segmentation approach, this study aims to uncover the motivations that drive Muslim travelers, thus providing a more nuanced understanding of the halal tourism market. Understanding the diverse needs of these travelers will allow Indonesia to develop more targeted marketing strategies and infrastructure that cater not only to Muslim travelers but also to non-Muslim tourists, ensuring a balance between inclusivity and halal compliance. Furthermore, this research will contribute to the literature by offering a context-specific application of market segmentation in Indonesia's halal tourism sector, filling the gap left by previous studies that have predominantly focused on conventional tourism markets.

Literature Review

Sustainability Challenges and Opportunities in Indonesia's Post-Pandemic Halal Tourism Sector

Indonesia's halal tourism sector, which was rapidly growing before the pandemic, now faces significant sustainability challenges in the post-COVID-19 era. Before the pandemic, Indonesia had many

opportunities to develop halal tourism by leveraging its diverse destinations and government support (Meirezaldi, 2020). However, the pandemic drastically reduced tourist numbers (Buckley, 2021; Gaffar et al., 2022). As the industry begins to recover, innovation and environmental concerns have emerged as key factors in sustaining halal tourism development, with innovation having a particularly strong influence on tourist experiences (Amalia et al., 2024).

Maintaining halal certification standards and addressing food-related issues remain ongoing challenges (Meirezaldi, 2020; Sahir et al., 2021). To ensure sustainable growth in the post-pandemic era, the industry must adapt to new conditions and uncertainties (Jiang et al., 2023). This adaptation involves developing innovative tourist attractions, halal products, and services that support the long-term sustainability of Indonesia's halal tourism sector. Sustainable halal tourism must align with environmental (Sofyan et al., 2022), economic (Chowdhury et al., 2024), and social responsibilities (Boğan & Sarışık, 2019).

During the recovery period, Indonesia is prioritizing efforts to support local communities and eco-friendly tourism initiatives (Fahlevi, 2023; Santoso et al., 2022). These efforts are essential for not only attracting Muslim travelers but also ensuring that tourism benefits local economies and minimizes environmental impacts. Indonesia's Ministry of Tourism has focused on integrating sustainability into its strategic plans, encouraging

businesses to adopt green practices while promoting halal-compliant services (Subandi et al., 2022). For example, in regions like Lombok, efforts have been made to rebuild the tourism sector by emphasizing eco-friendly destinations that cater to both religious and environmental consciousness (Keliat & Sentanu, 2022). This aligns with global trends where sustainability has become a critical factor for tourists, particularly post-COVID, who are now more aware of the environmental and social impacts of their travel choices (Tjiptono et al., 2022).

Although empirical quantitative studies on halal tourism have provided valuable insights into factors such as tourist satisfaction, word-of-mouth (WOM), and loyalty (Wardi et al., 2018; Abror et al., 2019), most of these studies rely on structured surveys and statistical models that focus on measurable outcomes. While these studies effectively identify broad patterns, they tend to emphasize easily quantifiable factors like satisfaction scores, engagement levels, and religiosity metrics. For instance, many studies have explored how satisfaction with halal-certified facilities affects the likelihood of promoting destinations through WOM (Wardi et al., 2018), and how religiosity influences engagement with halal tourism services (Abror et al., 2019). However, these quantitative approaches often overlook the deeper subjective dimensions of tourist experiences.

Table 1.*Overview of High-Citation Empirical Studies in Halal Tourism in Indonesia (Scopusbased)*

Author(s)	Research Type	Concept	Distinction	Dimensionality
Wardi, Y., Abror, A., & Trinanda, O. (2018)	Empirical: Quantitative	Halal tourism and satisfaction	Halal attributes' impact on satisfaction and WOM	Unidimensional: Satisfaction, WOM
Abror, A., Wardi, Y., Trinanda, O., & Patrisia, D. (2019)	Empirical: Quantitative	Halal tourism, religiosity, and customer engagement	Relationship between halal tourism, religiosity, customer engagement, and satisfaction	Multidimensional: Satisfaction, Customer Engagement
Ainin, S., Feizollah, A., Anuar, N.B., & Abdullah, N.A. (2020)	Empirical: Quantitative	Sentiment on Halal tourism	Sentiment analysis of multilingual tweets on halal tourism	Multidimensional: Origin, Valence, Destination
Ratnasari, R.T., Gunawan, S., Mawardi, I., & Kirana, K.C. (2020)	Empirical: Quantitative	Halal certification and behavioral intention	Impact of halal certification and emotional experiences on satisfaction and intention	Multidimensional: Certification, Satisfaction, Emotional Experience, Intention
Suhartanto, D., Dean, D., Wibisono, N., & others (2021)	Empirical: Quantitative	Halal tourism loyalty	Drivers of halal tourist loyalty	Multidimensional: Experience, Quality, Value, Satisfaction
Abror, A., Patrisia, D., Trinanda, O., Omar, M.W., & Wardi, Y. (2020)	Empirical: Quantitative	Religiosity and WOM	Religiosity's influence on Muslim-friendly tourism, satisfaction, and WOM	Multidimensional: Religiosity, Engagement, Satisfaction, WOM
Katuk, N., KuMahamud, K.R., Kayat, K., & others (2021)	Empirical: Quantitative	Halal certification for tourism marketing	Attitudes of food operators towards halal certification in Indonesia	Multidimensional: Certification, Attributes, Attitudes
Adinugraha, H.H., Nasution, I.F.A., Faisal, F., & others (2021)	Conceptual	Halal tourism regulations	Regulation of halal tourism by DSN-MUI and local government	Unidimensional: Regulations, Sharia, Implementation
Suhartanto, D., Gan, C., Andrianto, T., & others (2021)	Empirical: Quantitative	Holistic halal tourist experience	Classification of halal and recreation experiences	Multidimensional: Experience, Satisfaction, Intention
Berakon, I., Wibowo, M.G.,	Empirical: Quantitative	Technology acceptance in	Factors determining intention to use halal tourism apps	Multidimensional: Trust, Knowledge, Ease of Use, Usefulness

Halal tourism, being an intersection of religious and leisure experiences, involves emotional, psychological, and cultural layers that are not easily captured through surveys or numerical data. This represents a significant research gap, particularly in understanding the motivations and preferences of Muslim travelers. To address this gap, this study adopts a qualitative approach using in-depth interviews and focus group discussions (FGDs) to explore the lived experiences of tourists, focusing on how they perceive halal offerings, their expectations, and emotional responses. Qualitative research will also uncover how tourists from different cultural backgrounds interpret the "halalness" of a destination, based on their personal or regional norms. These insights offer a richer, more nuanced understanding of the complexities of tourist behavior (Brown, 2010).

Segmentation Strategies in Halal Tourism

Market segmentation is a critical marketing strategy (Dolnicar, 2022), allowing businesses to categorize travelers based on factors such as demographics, behavior, geography, and psychographics (Najmi et al., 2010; Perera et al., 2020; Zečević & Kovačević, 2017). In the context of halal tourism, segmentation is particularly effective because it addresses the diverse religious requirements and lifestyle preferences of Muslim travelers, which can vary significantly by region, age, and level of religiosity (Najmi et al., 2010).

For example, some tourists may prioritize strict Shariah compliance, while others may seek cultural experiences or eco-friendly

travel that also adheres to halal principles. By using segmentation, businesses can tailor their services to meet these needs. For instance, younger Muslim travelers, particularly millennials and Generation Z, may be more interested in adventure tourism or halal-certified leisure activities, whereas older travelers or families may prioritize destinations with prayer facilities and halal-certified hotels. Furthermore, psychographic segmentation, which groups tourists based on their values, beliefs, and lifestyle choices, can help design experiences that go beyond basic halal compliance to include elements such as health-conscious tourism and halal wellness retreats.

Although Indonesia has made significant strides in promoting halal tourism by designating regions like Lombok and Aceh as halal destinations, it has not fully capitalized on segmentation strategies to the extent of countries such as Malaysia (Nor et al., 2023; Peristiwo, 2020). Malaysia, a pioneer in halal tourism, has effectively implemented a comprehensive segmentation strategy targeting diverse Muslim travelers, from those seeking luxury travel to those interested in cultural and heritage tourism (Jaelani, 2017; Subarkah et al., 2020). This approach has allowed Malaysia to cater to a broader audience and provides a sustainable competitive advantage.

To fully leverage its halal tourism sector, Indonesia must adopt a more nuanced segmentation strategy that goes beyond geographic and demographic factors. Segmenting the market based on geographic, demographic, psychographic,

and behavioral criteria allows tourism stakeholders to customize services and marketing campaigns for different groups of tourists. This segmentation strategy has proven effective in countries like Malaysia,

where it has attracted diverse groups, including millennials, luxury travelers, and health-conscious individuals (El-Gohary, 2016; Vargas-Sánchez & Moral-Moral, 2019).

Table 2.
Potential Segments in Halal Tourism

Segmentation Type	Description	Key Features	Examples of Halal Tourism Context
Geographic Segmentation	Based on the tourist's location or destination geography	Region-based tourism, local or international focus.	Lombok, Aceh (Indonesia), Malaysia, Japan
Demographic Segmentation	Based on age, gender, income, or family structure.	Muslim millennials, family-friendly, or luxury segments	Halal adventure tours for Muslim millennials
Psychographic Segmentation	Based on tourists' values, beliefs, lifestyle, or religious devotion.	Focus on religiosity, health-conscious, eco-friendly	Religious tourism: Hajj/Umrah packages, halal wellness tours
Behavioral Segmentation	Based on tourists' behaviors, spending habits, or loyalty to destinations.	Repeat travelers, loyalty programs, travel frequency.	Halal culinary tourism: Halal food tours, gastronomic experiences

By identifying specific segments, the government can create targeted marketing campaigns that appeal to various groups of Muslim tourists (see Table 2), such as millennials, families, and luxury travelers. This helps attract a diverse range of tourists, ensuring a steady flow of visitors year-round. Tourists who feel that their specific needs are being addressed are more likely to have a positive experience, leading to higher satisfaction and WOM promotion, both critical for the long-term sustainability of halal tourism.

Method, Data, and Analysis

Segmentation approaches are generally classified into *a priori* and *a posteriori* approaches. Benefit segmentation is part of

the *a posteriori* approach, where the composition of the segments is not known in advance. This method is exploratory, meaning that researchers first need to collect and analyze data before identifying homogeneous segments. The *a posteriori* approach is particularly useful for uncovering unknown phenomena, making it ideal for this study, which aims to explore and identify the composition of unknown segments. Therefore, qualitative methods were employed to gain in-depth insights into the topic.

Phase 1: Literature Review

The first phase involved conducting a comprehensive literature review, focusing on halal tourism and benefit segmentation. Initially, 276 articles were reviewed. A

rigorous screening process, which involved analyzing the abstracts and ensuring thematic alignment with the research objectives, narrowed the selection down to 75 articles. These articles were then further examined in-depth, resulting in the final selection of 40 key articles, each assigned a unique document identifier. Thematic analysis was applied to these articles, focusing on aspects such as tourist preferences, halal certification, marketing strategies, and the integration of cultural and religious considerations. The insights derived from this phase provided the foundation for the subsequent data collection in the interviews and Focus Group Discussion (FGD) phases.

Phase 2: Interviews

In the second phase, in-depth interviews were conducted with a diverse range of participants to understand stakeholder experiences and expectations in Indonesia's halal tourism industry. The participants included religious scholars, tourism operators, business owners, and foreign Muslim tourists. These interviews aimed to explore different perspectives, from religious leadership to tourism management and international tourist experiences. Each interview lasted between 40-60 minutes and was digitally recorded.

The interviews were transcribed and analyzed using NVivo 12 and Atlas.ti software to ensure a thorough and comprehensive analysis of the qualitative data. The use of two software packages was chosen to maximize the advantages of both: NVivo 12 is particularly effective in handling and organizing large qualitative datasets, while Atlas.ti is more flexible for coding complex data and ensuring nuanced

analysis. Both tools enabled the identification of key themes and trends across various participant categories.

Table 3.*Interview Participant Categories*

No	Category	Category	Description
1	Religious Scholar	1	Chairman, Indonesian Ulema Council, Bengkulu Province
2	Tourism Operator	1	Manager of Tourist Destinations
3	Business Owner	1	Owner of Hotel and Restaurant in Lombok
4	Foreign Muslim Tourists	4	Tourists from Malaysia, Brunei Darussalam, Thailand, and France
Total			7

While the sample size is limited, especially for foreign Muslim tourists, this selection was intended to provide a broad yet focused view of the halal tourism experience from both local and international perspectives. Future studies with larger samples could improve the generalizability of the findings.

Phase 3: Focus Group Discussion (FGD)

The third phase involved organizing a Focus Group Discussion (FGD) with a diverse group of stakeholders, including experts, practitioners, and policymakers. The FGD was conducted in West Nusa Tenggara (NTB) Province, selected due to its pioneering role in promoting halal tourism in Indonesia. The purpose of the FGD was

to gather deeper insights into the various benefits sought by global Muslim tourists when choosing halal destinations. The FGD was held with participants representing various sectors of halal tourism.

The FGD sessions were digitally recorded and transcribed. Data analysis was conducted using content analysis, with NVivo 12 and Atlas.ti software. Content analysis allowed for identifying common themes and patterns from the group discussions, focusing on the participants' shared views and individual perspectives.

Table 4.
Interview Participant Categories

No	Category	Category	Description
1	Expert	1	Academic and Researcher in Halal Tourism, Lombok
2	Provincial Government	1	NTB Provincial Tourism Department
3	District Government	1	Central Lombok District Tourism Department
4	Community Tourism Leader	1	Head of the Halal Tourism Village of Setanggor
5	Tourism Activist	1	Tourism Movement Community
6	Halal Tourism Operator	1	Halal tourism operator, Setanggor Village
7	Halal Tourism Business Owner	1	Halal tourism business owner, Setanggor Village

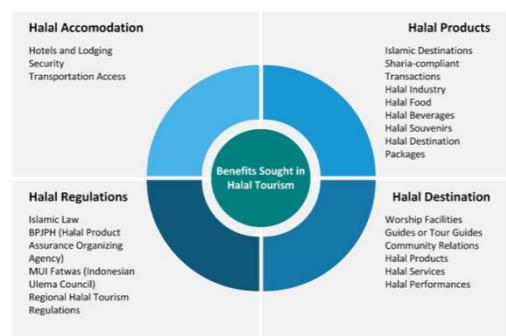
Total 7

Result and Discussion

Based on the interview and Focus Group Discussion (FGD) results with 7 informants, analyzed through thematic analysis, four key pillars of the benefits sought by foreign Muslim tourists when visiting halal tourism destinations in Indonesia were identified: halal accommodation, halal products, halal destinations, and halal regulations (Figure 2).

Figure 2.

Benefits Sought by Foreign Muslim Tourists
Source: Developed for research, 2024



Halal Accommodation

Foreign Muslim tourists visiting Indonesia place significant emphasis on staying in accommodations that align with Islamic principles, often referred to as "halal accommodations." These accommodations are not just about the physical features of the hotel but also encompass aspects such as safety, cleanliness, and adherence to religious standards. Halal accommodation is crucial for ensuring that Muslim travelers can stay in environments where Islamic values are respected. This includes access to

halal food, proper facilities for prayer, and ensuring that the environment is free of anything deemed impure by Islam. In particular, female travelers are highly concerned with safety and security during their stay, reflecting a broader trend in which women prioritize safety while traveling. This concern extends not only to the physical security of the destination but also to the comfort and privacy offered by accommodations.

"The convenience of transportation and hotel accommodations is essential. For instance, after COVID-19, we visited Maninjau, but the hotel facilities were not as good as before. Safety, especially in areas like Bandung, is also a concern for foreign visitors." (Informant 1)

As one informant mentioned, the experience post-COVID in Maninjau, where hotel facilities had deteriorated, highlights the importance of quality in accommodations. This deterioration led to a sense of discomfort, particularly when compared to pre-pandemic conditions, showing how expectations for safety and security were not met. This concern is even more pronounced in bustling urban areas, such as Bandung, where foreign visitors are wary of safety issues in crowded public spaces, such as markets, where theft or harassment might be more common. Muslim travelers, especially those from stricter religious backgrounds, are particularly sensitive to certain environmental factors. One of these factors is the presence of cigarette smoke. Many Muslim tourists consider smoking to be haram (prohibited), based on the interpretations of Islamic law. The presence of smoke in hotel rooms, which is quite common in many parts of Indonesia, detracts from their experiences and can be a

deciding factor in whether they would choose to stay in a particular accommodation.

Foreign Muslim tourists are highly sensitive to cigarette smoke, which they often find in Indonesia because they consider smoking to be prohibited by Islamic law. The need for cleanliness and family-friendly amenities is emphasized, as Muslim tourists, especially those traveling with families, seek accommodations that cater to children and provide playgrounds or safe environments for them to relax. Additionally, clean, spacious, and nonsmoking rooms are key to ensuring a comfortable stay.

"Hotel facilities, especially the rooms, must be comfortable. We avoided rooms with a strong smell of cigarettes, which is common in Indonesia. Cleanliness and family-friendly amenities are also essential." (Informant 5)

Cleanliness is an important aspect of Islamic life, and it extends to the environment in which Muslim travelers stay. One critical concern is the avoidance of "najis" or impurities such as dogs, which are considered unclean in Islamic jurisprudence. The mere presence of dogs in the accommodation or its surroundings can be a source of discomfort, as it is a religious requirement for Muslims to maintain the purity of their surroundings, particularly when preparing for prayer (salah). Thus, Muslim tourists prefer accommodation that explicitly maintains Islamic standards of cleanliness. Ensuring that these spaces are free from animals considered impure is a sign of respect for their religious obligations and is an essential feature of halal accommodation.

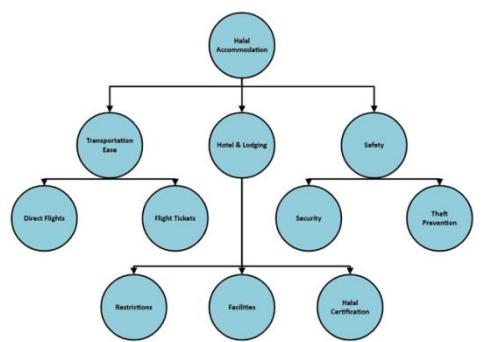
"Muslim visitors are generally uncomfortable with the presence of impure animals such as dogs"

in the accommodation." (Informant 2)

A more detailed breakdown of the benefits sought for halal accommodation is presented in Figure 3.

Figure 3.

Benefits Sought in Halal Accommodation



Halal Products

In addition to seeking halal accommodation, foreign Muslim tourists prioritize finding halal products when visiting halal tourism destinations in Indonesia. These products include not only food and drinks but also souvenirs, sharia-compliant tourism packages, and systems that align with Islamic finance principles. One of the primary concerns for Muslim travelers is the availability of halal-certified foods and beverages. They seek restaurants and vendors that provide food prepared according to Islamic guidelines. For instance, Lombok is recognized for its Muslim-friendly environment, where tourists can enjoy halal cuisine and easily access prayer-like mosques. This reflects the broader expectation that halal products are available not only in major urban centers but also in popular tourism destinations.

"In Lombok, I look for kind people, halal food, mosques, and a Muslim-friendly environment." (Informant 3)

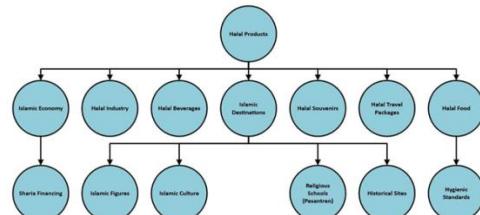
Another key attraction for Muslim tourists is destinations that offer a deep connection to Islamic culture and history. Tourists seek out areas rich in Islamic heritage, including *pesantrens* (Islamic boarding schools), historical sites, and places associated with prominent Islamic figures who have contributed to Indonesia's independence and the spread of Islam. This desire for immersive cultural experiences reflects the broader trend of Muslim tourists to value destinations that reinforce their religious identity.

"Indonesia offers rich Islamic heritage for Muslim tourism, with many provinces having historical figures who contributed both to independence and the strengthening of Islamic practices." (Informant 1)

Beyond food and heritage, Muslim travelers also look for halal-certified souvenirs, such as those made from permissible materials (e.g., avoiding pig leather). In addition, they prefer transaction systems that comply with Islamic finance principles, ensuring that no interest-based or impermissible financial dealings occur. This demand is part of the broader trend to integrate Sharia-compliant business practices into the tourism sector. A more detailed breakdown of the benefits of halal products is shown in Figure 4.

Figure 4.

Benefits Sought in Halal Products



Halal Destinations

Halal destinations are a significant draw for foreign Muslim tourists in Indonesia, who prioritize several key elements when selecting these locations. Tourists appreciate the destinations in which the local community is welcoming and actively engaged in providing a positive, culturally aware experience. Local communities that offer knowledgeable, well-trained tour guides who understand the cultural and historical contexts of the area are highly valued.

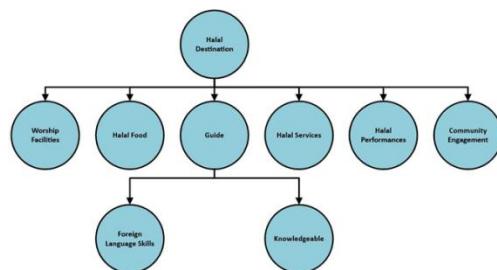
"Local communities need to improve so that when tourists arrive, they are properly guided, and there are enough tour guides who are knowledgeable about the local history and customs." (Informant 5)

The availability of appropriate prayer facilities is critical to halal tourism. Visitors expect well-maintained mosques or prayer spaces within their reaches. In addition, services such as halal entertainment, including shows or attractions that align with Islamic values, and the availability of halal food are important factors in deciding a travel destination.

"Most people in Indonesia do not speak English, which can be challenging for foreign tourists." (Informant 7)

Another frequent concern among Muslim tourists is language barriers, particularly when they interact with tour guides. As many foreign visitors may not speak the local language, they often find it challenging if guides lack proficiency in global languages such as English. A more detailed breakdown of the benefits sought at halal destinations is presented in Figure 5.

Figure 5.
Benefits Sought in Halal Destinations



Halal Regulations

Halal regulations play a pivotal role in shaping the travel experiences of foreign Muslim tourists visiting Indonesia. These tourists expect destinations to strictly adhere to Islamic guidelines and ensure that all services, products, and environments comply with halal standards. This includes adherence to Sharia law, local regulations, and certifications issued by bodies like MUI (Indonesian Ulama Council) and BPJPH (Halal Product Assurance Organizing Agency). In this context, certifications such as those from the MUI are critical in ensuring that halal standards are consistently maintained.

"In Malaysia, we have Jakim, an agency that monitors and certifies halal food, much like MUI in Indonesia." (Informant 4)

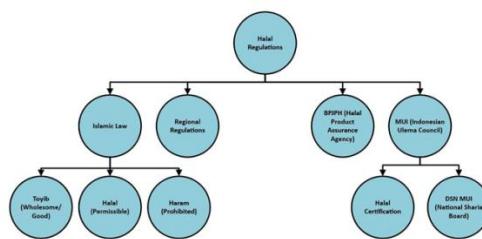
Moreover, the National Sharia Board (DSN MUI) is instrumental in establishing guidelines for halal tourism. This shows how halal tourism has become intertwined with Islamic economic practices, requiring clear guidance on permissible activities for Muslim travelers.

"The National Sharia Board (DSN MUI) is

tasked with creating *fatwas* related to halal tourism, a growing field within Islamic economics." (Informant 6)

By ensuring that halal regulations are well-implemented and widely recognized, Indonesia can better cater to the demands of Muslim tourists. A detailed breakdown of the benefits sought in the halal regulations is shown in Figure 6.

Figure 6.
Benefits Sought in Halal Regulations



Halal Tourism Development

Halal tourism development has several important aspects that shape it. This concept has become a rapidly growing trend in the global tourism industry, especially in countries with significant Muslim populations. Lombok's strong Islamic identity is a critical asset that aligns the region with global demand for halal tourism. As one informant emphasized, "Our people are very Islamic; no one can deny that Lombok is an Islamic region." This cultural heritage not only enriches the tourist experience but also provides authenticity, making Lombok a natural fit for Muslim-friendly tourism. The island's deep-rooted Islamic traditions serve as spiritual and cultural attractions for Muslim tourists seeking destinations that reflect their values and religious practices. The emphasis on

local customs and Islamic history enhances Lombok's potential as a key player in the halal tourism sector. Despite the strong regulatory frameworks supporting halal tourism in Lombok, there remains a gap between policy formulation and implementation. An informant noted, "The regulation provides a strong foundation, but implementation is still lacking." Although local authorities have been proactive in establishing laws to foster the growth of halal tourism, delays in implementing these policies have hindered progress. This disconnection between policy and practice creates challenges in scaling the sector.

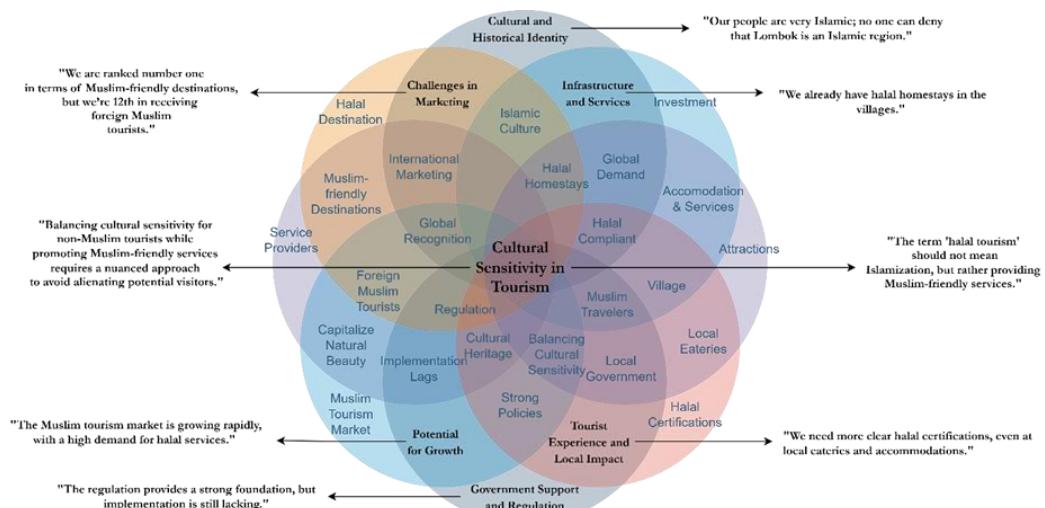
A greater focus on effective implementation, such as consistent halal certifications and clear guidelines for service providers, is necessary to fully realize Lombok's potential as a premium halal destination. Lombok has made considerable progress in the development of a halal-friendly infrastructure, particularly in terms of accommodation. According to an informant, "We already have halal homestays in the villages," indicating that there are ongoing efforts to create a network of compliant services. However, while these initial steps are promising, the expansion of halal accommodation and improvement of other services, such as halal-certified dining options and leisure activities, are essential to meet the rising expectations of foreign Muslim tourists. Building this foundation is the key to ensuring Lombok's competitiveness in the global halal tourism market.

One of the primary obstacles for Indonesia, including Lombok, is the effective marketing of halal tourism offerings on an international scale. Despite being ranked

"number one in terms of Muslim-friendly destinations," Indonesia only ranks 12th in receiving foreign Muslim tourists (FGD, Moderator). This disparity suggests that while Indonesia's recognition as a halal destination is high, the country is struggling to convert this recognition into actual tourist arrivals. Strengthening international marketing strategies, particularly through digital channels and partnerships with travel agencies in Muslim-majority countries, could help bridge this gap. With the global demand for halal tourism on the rise, Lombok is well positioned to capitalize on this trend. The Muslim tourism market is expanding rapidly, and an informant observed that *"the Muslim tourism market is growing rapidly, with a high demand for halal services."* This growth provides Lombok with significant opportunities to attract more tourists by leveraging its natural beauty and

Figure 7.

Key Dimensions of Cultural Sensitivity in Halal Tourism



Islamic cultural heritage, and improving its halal services. Investing in tourism infrastructure and marketing, and ensuring consistent halal certifications, will enable Lombok to tap into this lucrative market.

The tourists appreciate Lombok's Islamic atmosphere. They often encounter inconsistent standards for halal certification across services. As discussed in the FGD, *"We need more clear halal certifications, even at local eateries and accommodations."* The lack of universally recognized and enforced halal standards can undermine tourists' confidence in the authenticity of the services they receive. Ensuring that all providers from small eateries to luxury hotels adhere to strict halal guidelines significantly improves the tourist experience and bolsters Lombok's reputation as a trustworthy halal destination.

Figure 7 shows that one of the challenges in promoting halal tourism is ensuring that it does not alienate non-Muslim tourists. As one government official explained, "The term 'halal tourism' should not mean Islamization, but rather providing Muslim-friendly services." This sentiment underscores the need to strike a balance between catering to Muslim tourists and ensuring that non-Muslim visitors are not excluded. A nuanced approach is required to promote Muslim-friendly services without imposing restrictions on others, allowing Lombok to appeal to a broader range of tourists. Halal tourism development offers significant potential, driven by its strong cultural identity and the growing global demand for halal services. However, to fully harness these opportunities, it is essential to address gaps in implementation, marketing, and certification, while maintaining cultural sensitivity.

Discussion

This study provides a comprehensive look at the factors that influence foreign Muslim tourists' experiences in Indonesia's halal tourism sector, filling a critical gap in the literature. While previous studies (El-Gohary, 2016; Maffei & Hamdi, 2022) have largely focused on market growth and tourist satisfaction, this study extends this discourse by emphasizing the interplay of cultural identity, regulatory challenges, infrastructure needs, marketing strategies, and cultural sensitivity. In doing so, it offers a nuanced view of how Indonesia can develop its halal tourism sector by addressing both internal challenges and global expectations. This strong Islamic identity aligns with the findings of Rasyid

(2019) and Jaelani (2017), who argued that cultural heritage is a significant driver in attracting Muslim tourists. However, this study deepens our understanding by showing how Lombok's deep-rooted traditions not only attract tourists but also serve as an essential competitive advantage. By offering a tourism experience that reflected the values and practices of the Muslim community, Lombok enhanced its appeal to a global audience. Despite a strong regulatory foundation such as local government policies aimed at fostering halal tourism, implementation remains insufficient for informants and previous studies (Meirezaldi, 2020; Subarkah et al., 2020). This finding emphasizes a critical gap consistent with the findings of Sahir et al. (2021), who also noted that the incomplete implementation of halal certification standards hampers the growth of the sector. This gap highlights the need for more robust efforts by policymakers to bridge disparities between policy and practice. The novelty here lies in identifying not only the existence of the regulatory framework but also the specific ways in which its inadequate execution undermines the sector's growth potential.

Government efforts to provide halal-compliant services, particularly accommodations, are commendable. However, this research reveals that, while these developments are crucial, they remain insufficient to meet the increasing expectations of foreign Muslim tourists. Prior research (Katuk et al., 2021; Vizano et al., 2021) has similarly discussed the necessity of expanding halal services beyond accommodation, and this study

substantiates this claim by illustrating the need for a more comprehensive offering of halal products and services. This novel insight lies in the specific identification of gaps, such as halal dining options and leisure activities, which, if addressed, could significantly enhance Lombok's appeal. One of the most striking findings of this study is the disparity between Indonesia's global recognition as a halal destination and its actual performance in attracting Muslim tourists. This supports Rasyid (2019) argument that Indonesia's marketing efforts lag behind those of other countries such as Malaysia and Singapore. The novelty of this study is that it provides empirical evidence that highlights not only the gap, but also missed opportunities in international marketing campaigns. Strengthening digital marketing and building strategic partnerships with travel agencies, especially in Muslim-majority countries, is an essential step forward (Rahman et al., 2024; Subarkah et al., 2020).

As the global demand for halal tourism continues to rise, Indonesia is uniquely positioned to capitalize on its natural beauty and Islamic heritage. This study supports Maffei and Hamdi (2022) projection of a rapidly growing Muslim tourism market. The opportunity for growth is significant, but realizing this potential requires investment not only in infrastructure, but also in consistent halal certifications and innovative marketing strategies. This study fills this gap by identifying specific areas where Lombok could improve, offering concrete steps that align with global market trends. While tourists appreciate the Islamic atmosphere, the lack of standardized halal

certifications across services remains a major concern. This finding echoes prior studies (Jaelani, 2017; Sahir et al., 2021) that emphasize the importance of clear and consistent certification in building trust among tourists. This study extends these findings by revealing the negative impact of inconsistencies on tourists' overall experiences, suggesting that a more rigorous certification process could greatly improve visitor satisfaction and boost Indonesia's reputation as a reliable halal destination. One of the key challenges in promoting halal tourism is to ensure that it does not alienate non-Muslim tourists. This study contributes new insights by identifying the delicate balance required to promote a Muslim-friendly environment while ensuring inclusivity for non-Muslim visitors. This nuanced understanding is essential for avoiding the perception of exclusion, thus allowing Indonesia to cater to a broader range of tourists while maintaining its focus on halal tourism (El-Gohary, 2016; Vargas-Sánchez & Moral-Moral, 2019).

This study contributes significantly to the existing literature on halal tourism by addressing critical gaps in policy implementation, marketing strategies, tourist experiences, and cultural sensitivity. It offers a detailed examination of the implementation gap in government policies, highlighting specific deficiencies in execution that hinder the growth of the halal tourism sector. Furthermore, the research advances the discourse on the marketing challenges faced by Indonesia, moving beyond general discussions to pinpoint specific areas for improvement, such as digital marketing strategies and

international partnerships. This study builds on previous research on tourist experiences by underscoring the necessity of clear and consistent halal certifications across all service providers, ranging from small eateries to luxury hotels. Additionally, this study tackles the crucial issue of cultural sensitivity, providing a nuanced perspective on promoting halal tourism without alienating non-Muslim tourists. By exploring these dimensions, this study emphasizes Indonesia's substantial potential to lead the global halal tourism market, while identifying several gaps that require attention. This includes policy implementation, infrastructure development, marketing, and cultural sensitivity. The findings suggest that addressing these gaps could enable Indonesia to establish itself as a premier destination for Muslim travelers, while also appealing to a broader audience. This comprehensive analysis of halal tourism in Indonesia offers valuable insights for policymakers, industry stakeholders, and researchers, aiming to understand and enhance the country's position in this expanding market segment.

Conclusion

This study aimed to explore and understand the factors influencing foreign Muslim tourists' experiences in Indonesia's halal tourism sector, focusing on the challenges and opportunities present, as well as the importance of market segmentation to enhance Indonesia's position as a halal tourism destination. Based on the interviews and Focus Group Discussion (FGD) results, the study identified four key

pillars of benefits sought by foreign Muslim tourists when choosing halal tourism destinations in Indonesia: halal accommodation, halal products, halal destinations, and halal regulations.

However, despite Indonesia's significant potential due to its Islamic cultural heritage and supportive government policies, several significant gaps hinder the development of its halal tourism sector. The key finding of this study is that although a strong regulatory framework exists, inconsistent implementation, insufficient halal-compliant infrastructure, and ineffective marketing strategies are the primary barriers to optimizing Indonesia's halal tourism potential.

This study also identifies the crucial role of market segmentation in addressing the diverse needs of Muslim travelers. While Malaysia has successfully implemented a comprehensive segmentation strategy, Indonesia has yet to fully capitalize on this approach, especially in identifying specific tourist segments, such as younger Muslim travelers, luxury travelers, and environmentally-conscious travelers. By adopting a more nuanced segmentation strategy, Indonesia can develop targeted marketing strategies and infrastructure to cater to both Muslim and non-Muslim tourists, ensuring a balance between inclusivity and halal compliance. Furthermore, this research contributes to the literature by offering a context-specific application of market segmentation in Indonesia's halal tourism sector, filling the gap left by previous studies that have predominantly focused on conventional tourism markets.

Limitations of the Study

This study has several limitations. One of the key limitations is the relatively small sample size, particularly for foreign Muslim tourists, who were selected only from a few countries, including Malaysia, Brunei Darussalam, Thailand, and France. While the selected participants provide a broad yet focused view of the halal tourism experience, expanding the sample size and including a more diverse range of tourists could strengthen the findings and make them more generalizable. Additionally, although the study uses qualitative methods to gather in-depth insights, these methods may not fully capture the entire spectrum of Muslim tourists' experiences. Future research with larger samples and mixed methodologies could further enhance the validity and scope of the findings.

Implications of the Study

This study makes a significant contribution to the halal tourism literature by emphasizing the importance of market segmentation in developing halal tourism in Indonesia. The findings have important implications for government policy and tourism industry stakeholders in Indonesia. First, the government needs to enhance the implementation of halal certification standards and improve coordination among stakeholders to ensure that these standards are consistently applied across the tourism sector, from accommodations to food and entertainment services. Second, there is an urgent need to improve marketing strategies, particularly through digital channels and international partnerships with travel agencies in Muslim-majority

countries, to increase global visibility and attract foreign Muslim tourists.

Furthermore, this study shows the necessity of a more inclusive approach in the development of halal tourism, one that not only meets the needs of Muslim tourists but also creates an environment that is welcoming to non-Muslim visitors. By balancing Muslim-friendly services with inclusivity for all tourists, Indonesia can broaden its appeal as a global tourism destination. Overall, this study identifies and analyzes various barriers and opportunities within Indonesia's halal tourism sector and provides concrete recommendations for further development, which could help position Indonesia as a global leader in halal tourism.

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