



The Opportunities and Challenges of Halal Tourism Industry in Indonesia: A SWOT Analysis

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Abstract

The rapid global growth of the tourism industry has positioned halal tourism as one of the most promising sectors in Muslim-majority countries. Indonesia, with its large Muslim population and rich natural and cultural diversity, holds significant potential to become a leading destination in the halal tourism market. This study aims to examine the opportunities and challenges faced by Indonesia's halal tourism industry and to formulate strategic recommendations for its development. Employing a descriptive qualitative method with a phenomenological approach and SWOT analysis, this study explores internal and external factors influencing the industry. The findings reveal that Indonesia's strengths lie in the growing Muslim population, increasing awareness of the halal lifestyle, and government support through institutional coordination. Meanwhile, the main challenges include relatively low-quality infrastructure compared to competitors, limited technological integration, and the absence of specific financial and legal frameworks for halal tourism. The study recommends a growth strategy through horizontal integration, emphasizing digital branding and social media promotion, as well as the urgency of establishing a national law on halal tourism. The novelty of this research lies in its comprehensive positioning of Indonesia's halal tourism industry using SWOT analysis to bridge the gap between potential and policy direction, offering strategic insight for policymakers and industry stakeholders.

Keywords: *halal, tourism, industry, SWOT, Indonesia*

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1. INTRODUCTION

Tourism has long been recognized as one of the most dynamic and promising sectors of the global economy. Over the past few decades, the tourism industry has expanded rapidly and emerged as a major contributor to economic growth worldwide¹. The proliferation of tourism destinations and sustained investment flows have positioned tourism as a key source of foreign exchange earnings, employment creation, business development, and infrastructure expansion. In many contexts, the overall business volume generated by tourism now equals or even exceeds that of traditional export sectors such as oil, food products, or automobiles. Consequently, tourism has become a central pillar of international trade and one of the primary income sources for many developing economies². Beyond its direct economic contributions, tourism generates substantial spillover effects across related industries, including construction, transportation, telecommunications, and services. However, the magnitude of tourism's contribution to economic well-being is closely linked to the quality, sustainability, and revenue-generating capacity of tourism offerings.

At the global level, tourism continues to demonstrate strong resilience and sustained growth, reaffirming its role as a major engine of employment generation and economic expansion. The sector is widely acknowledged as a strategic driver of development, with halal and Islamic tourism increasingly emerging as significant segments within the broader tourism industry. According to the latest World Travel & Tourism Council (WTTC) annual research, in 2024 the travel and tourism sector generated approximately US\$10.9 trillion in global GDP, accounting for around 10% of the world economy when direct, indirect, and induced effects are considered. In employment terms, the sector supported nearly 357 million jobs worldwide—equivalent to almost one in every ten jobs globally. On the demand side, domestic tourism expenditure reached US\$5.3 trillion, while international visitor spending increased markedly to US\$1.9 trillion, reflecting renewed global mobility and a robust post-pandemic recovery in tourism activities³.

Within this global context, Indonesia has experienced a notable recovery and renewed growth in its tourism sector. Recent findings from the World Travel

¹ Jinlin Zhao, *The Hospitality and Tourism Industry in China: New Growth, Trends, and Developments* (CRC Press, 2018); Beiqi Shi, Jinlin Zhao, and Po-Ju Chen, "Exploring Urban Tourism Crowding in Shanghai via Crowdsourcing Geospatial Data," *Current Issues in Tourism* 20, no. 11 (2017): 1186–1209.

² UNWTO (United Nations World Tourism Organization), "Tourism: An Economic and Social Phenomenon," 2020, <https://www.unwto.org/why-tourism>.

³ World Travel & Tourism Council (WTTC), "WTTC's 2025 Economic Impact Research (EIR)" (United Kingdom, 2025), <https://researchhub.wttc.org/product/indonesia-economic-impact-report>.

& Tourism Council (WTTC) Economic Impact Research (2025) indicate that in 2025 the travel and tourism sector is projected to contribute IDR 1,269.8 trillion to the national economy, equivalent to 5.5% of Indonesia's GDP, thereby surpassing pre-pandemic performance levels. The sector is also expected to support nearly 14 million jobs, representing approximately 9.3% of total national employment. In terms of expenditure, international visitor spending is forecast to reach IDR 344 trillion in 2025—almost 12% higher than its 2019 peak—while domestic tourism spending is projected at IDR 381.4 trillion. These trends underscore the sector's growing resilience and its strategic importance in Indonesia's broader economic recovery agenda⁴.

Among the tourism segments experiencing the most sustained expansion globally is Muslim travel. Muslim tourists are increasingly seeking destinations that offer authentic, meaningful, and value-aligned experiences that extend beyond conventional leisure tourism. This evolving demand has positioned Muslim travelers as one of the fastest-growing segments in the global tourism market. According to the 2025 Mastercard–CrescentRating Global Muslim Travel Index (GMTI), international Muslim tourist arrivals reached 176 million in 2024, reflecting a 25% increase from the previous year, and are projected to rise to 245 million by 2030. By that time, total Muslim travel expenditure is expected to reach USD 230 billion, highlighting both the sector's expanding economic significance and its strategic relevance for destinations pursuing inclusive and resilient tourism development⁵.

The literature distinguishes between *Islamic tourism*, *halal tourism*, and *Muslim-friendly tourism*, although these terms are often used interchangeably⁶. *Islamic tourism* refers to travel activities that are explicitly grounded in Islamic teachings and Sharia principles, encompassing both religiously motivated journeys (such as Hajj and Umrah) and other forms of travel that emphasize faith-based values and conduct⁷. In contrast, *halal tourism* adopts a service-oriented perspective, referring to tourism activities that provide halal-compliant products and services—such as halal food, prayer facilities, and the avoidance of prohibited elements—without necessarily requiring religious motivation⁸.

Meanwhile, *Muslim-friendly tourism* represents a more inclusive and market-driven approach, focusing on destinations and services that accommodate the practical needs of Muslim travelers while remaining accessible to non-Muslim tourists⁹. This concept emphasizes flexibility, service availability, and cultural

⁴ World Travel & Tourism Council (WTTC), "Travel & Tourism Economic Impact Research (EIR)," 2025, <https://wttc.org/research/economic-impact>.

⁵ CrescentRating, "The 10th Edition of the Mastercard-CrescentRating Global Muslim Travel Index (GMTI) in 2025," 2025, <https://www.crescentrating.com/reports/global-muslim-travel-index-2025.html>.

⁶ Alexander Preko, Iddrisu Mohammed, and Leeford Edem Kojo Ameyibor, "Muslim Tourist Religiosity, Perceived Values, Satisfaction, and Loyalty," *Tourism Review International* 24, no. 2–3 (2020): 109–25.

⁷ Michele Carboni, Carlo Perelli, and Giovanni Sistu, "Is Islamic Tourism a Viable Option for Tunisian Tourism? Insights from Djerba," *Tourism Management Perspectives* 11 (2014): 1–9.

⁸ Mohamed Battour et al., "The Perception of Non-Muslim Tourists towards Halal Tourism: Evidence from Turkey and Malaysia," *Journal of Islamic Marketing*, 2018.

⁹ F N Addina and I Santoso, "Concept of Halal Food Development to Support Halal Tourism: A Review," in *IOP Conference Series: Earth and Environmental Science*, vol. 475 (IOP Publishing,

sensitivity rather than full Sharia-based structuring¹⁰. Based on these distinctions, this study adopts *Muslim-friendly tourism* as its primary analytical framework, as it best reflects the contemporary tourism development strategies pursued by many destinations, including Indonesia.

The rapid expansion of Muslim-friendly travel is further supported by the broader growth of the global Islamic economy. Recent evidence from the Global Islamic Economy Report indicates that in 2023 Muslim consumer spending across key halal economy sectors reached approximately US\$2.43 trillion and is projected to increase to US\$3.36 trillion by 2028. Within this ecosystem, Muslim-friendly travel has emerged as one of the fastest-growing segments, with an estimated compound annual growth rate of 12.1%, and is expected to reach a market value of around US\$384 billion by 2028. This momentum is reinforced by proactive policy initiatives and targeted investment strategies among OIC countries. The Global Islamic Economy Indicator (GIEI), which evaluates enabling ecosystems across 81 countries, consistently ranks Malaysia, Saudi Arabia, Indonesia, the UAE, and Bahrain as leading hubs for Islamic economy development. These countries are increasingly prioritizing halal tourism, supported by rising intra-OIC investment flows and the integration of digital innovation with ethical, values-based consumption. At the same time, non-OIC countries are also strengthening their competitive positioning by enhancing halal infrastructure and culturally sensitive tourism services, reflecting the growing global competitiveness of the Muslim travel market¹¹.

Earlier insights from the GMTI 2018 report further identified several key drivers behind the rapid growth of halal tourism, including the expansion of the global Muslim population, rising disposable incomes among Muslim middle-class consumers, the growing influence of millennial Muslim travelers, improved access to travel information, and the increasing availability of Muslim-friendly tourism services. Additional contributing factors include Ramadan travel patterns and the diversification of travel-related business models. Collectively, these dynamics have encouraged many countries to systematically develop halal tourism strategies, with GMTI 2018 emphasizing four critical focus areas: accessibility, communication, environment, and services¹².

Against this backdrop, Indonesia continues to play a significant role in the Muslim-friendly tourism landscape. According to the Global Muslim Travel Index (GMTI) 2025, Indonesia ranked fifth globally, declining from its previous top position due to ongoing challenges related to infrastructure quality, connectivity, and service assurance. Despite this shift, Indonesia remains highly competitive, as evidenced by its broader performance in the Islamic economy. The State of the Global Islamic Economy (SGIE) 2024/2025 ranks Indonesia third globally, placing

2020), 12053; Syed Ahamed Suban, Kumar Madhan, and Shameem Shagirbasha, "A Bibliometric Analysis of Halal and Islamic Tourism," *International Hospitality Review*, 2021.

¹⁰ Battour et al., "The Perception of Non-Muslim Tourists towards Halal Tourism: Evidence from Turkey and Malaysia"; Erhan Boğan, "Halal Tourism: The Practices of Halal Hotels in Alanya, Turkey," *Journal of Tourism and Gastronomy Studies* 8, no. 1 (2020): 29–42.

¹¹ Salaam Gateway, "State of the Global Islamic Economy (SGIE) 2024/25 Report," 2025, <https://salaamgateway.com/specialcoverage/SGIE24>.

¹² Crescent Rating, "Global Muslim Travel Index 2018," 2018, <https://www.crescentrating.com/reports/mastercard-crescentrating-global-muslim-travel-index-gmti-2018.html>.

first in modest fashion and second in both Muslim-friendly tourism and halal cosmetics. These findings suggest that while Indonesia possesses strong comparative advantages rooted in its large Muslim population and rich cultural diversity, further policy efforts are needed to strengthen tourism infrastructure and reduce regional disparities. Current strategic priorities include enhancing halal assurance systems, accelerating digital integration, and promoting tourism development beyond Java at the provincial level—measures that are essential for reclaiming leadership in future Muslim travel rankings¹³.

Beyond national tourism programs, Indonesia's potential for halal-based tourism is supported by both internal and external factors. Internally, the country benefits from vast natural resources and a large Muslim population. According to data from the Directorate General of Population and Civil Registration, Indonesia's population reached 272.23 million in June 2021, with Muslims accounting for approximately 236.53 million people, or 86.88% of the total population¹⁴. Geographically, Indonesia is the world's largest archipelagic nation, comprising more than 17,508 islands, offering extensive coastal and cultural tourism potential. This diversity provides a strong foundation for halal tourism development, provided that cultural expressions and tourism practices remain aligned with Sharia principles and halal standards.

Externally, Indonesia's halal tourism prospects are reinforced by global recognition through indices such as GMTI 2018, international halal tourism awards, and sustained growth in international tourist arrivals, particularly from OIC countries such as Malaysia, as well as non-OIC markets including China, Singapore, and Australia. These dynamics underscore the importance of ensuring that both core and supporting tourism services provide Muslim-friendly facilities. Finally, the development of halal tourism is also strategically important for attracting high-spending tourists from the Middle East, a region that accounts for some of the world's largest tourism expenditures. While halal tourism primarily caters to Muslim travelers, it is not exclusive to them; rather, it represents a subcategory of tourism that emphasizes inclusivity, ethical standards, and value-based services, making it equally attractive to non-Muslim tourists¹⁵. Despite its substantial potential, official assessments—including the 2015 Ministry of Tourism report on sharia tourism development—indicate that halal tourism in Indonesia has yet to reach its optimal level. If prioritized and systematically developed, halal tourism could become a leading sector capable of significantly enhancing Indonesia's economic growth and global tourism competitiveness.

With all the potential that Indonesia has, the halal tourism industry should be optimized for the sake of building the economy and prospering people's lives. Therefore, it is deemed necessary to further examine the opportunities and challenges of halal tourism in Indonesia as well as strategies to optimize the opportunities and answer the challenges faced. Several previous studies or research have examined halal tourism in Indonesia from various aspects. Hendri Hermawan

¹³ CrescentRating, "The 10th Edition of the Mastercard-CrescentRating Global Muslim Travel Index (GMTI) in 2025."

¹⁴ Dukcapil (Direktorat Jenderal Kependudukan dan Pencatatan Sipil Kementerian Dalam Negeri), "Data Kependudukan," 2022, <https://dukcapil.kemendagri.go.id/>.

¹⁵ Hatem El-Gohary, "Halal Tourism, Is It Really Halal?," *Tourism Management Perspectives* 19 (2016): 124–30.

Adinugraha et al.¹⁶ describe halal tourism in Indonesia in terms of the Indonesian Council of Ulama National Sharia Board (DSN-MUI) fatwa and the government regulation. This research found that the large number of public requests for halal tourism visits in Indonesia resulted in the need for normative and positive regulation that regulates. Therefore, the MUI issued and stipulated fatwa Number: 108/DSN-MUI/IX/2016 regarding the implementation of tourism based on sharia principles and West Nusa Tenggara Regional Regulation Number 2 of 2016 concerning Halal Tourism.

Yuliani Dwi Lestari et al.¹⁷ explore the effect of three destination competitiveness attributes: core resources and attractors, supporting factors and destination management on the tourist perceived behavioral control, perceived value, trust and tourists' intention to visit halal tourism destination in Indonesia. The results showed that perceived behavioral control, perceived value and trust directly influences the intention to visit halal tourism. Subsequently, supporting factors also directly affect the intention to visit halal tourism, whereas the other attributes of destination competitiveness that is core resources and attractors and destination management have an indirect relationship or act as mediating variable to the intention. Destination management performs as a driving force of intention to visit halal tourism through the three variables, namely, perceived behavioral control, perceived value and trust. Meanwhile, core resources and attractors only have an indirect relationship through trust.

Prajasari¹⁸ analyze the halal tourism market in Indonesia through the approach of Muslim tourist behavior both in terms of current supply and potential demand. By using a combination method as a research approach, this study found that tourists are dominated by the millennial generation and women, where differences in gender and age generations also indicate behavior and needs in traveling. In the end, there are at least seven strategies that can be done to develop halal tourism, such as (1) regulations; (2) acceleration of halal certification; (3) optimization of supporting facilities and infrastructure; (4) cooperation with business actors and travel agents; (5) approaching religious and community leaders; (6) cooperation with airlines; and (7) actively involved in national and international promotion.

Husni Pasarela¹⁹ describe the obstacles and challenges in the development of halal tourism in Indonesia and propose strategies that can be used to overcome these obstacles and challenges. This study used a qualitative descriptive approach for data collection and uses content analysis techniques. The results of the study showed that the obstacles to the development of halal tourism are the unprepared human resources and the lack of in-depth understanding of stakeholders and the

¹⁶ Hendri Hermawan Adinugraha et al., "Halal Tourism in Indonesia: An Indonesian Council of Ulama National Sharia Board Fatwa Perspective," *The Journal of Asian Finance, Economics and Business* 8, no. 3 (2021): 665–73.

¹⁷ Yuliani Dwi Lestari, Faridatus Saidah, and Aghnia Nadhira Aliya Putri, "Effect of Destination Competitiveness Attributes on Tourists' Intention to Visit Halal Tourism Destination in Indonesia," *Journal of Islamic Marketing*, 2022.

¹⁸ Anniza Citra Prajasari, "How to Promote Halal Tourism through the Stakeholders? Case of Halal Tourism Market in Indonesia," *Jurnal Ilmiah Ekonomi Islam* 8, no. 1 (2022).

¹⁹ Husni Pasarela, Andri Soemitra, and Zuhri M Nawawi, "Halal Tourism Development Strategy in Indonesia," *Konfrontasi: Jurnal Kultural, Ekonomi Dan Perubahan Sosial* 9, no. 1 (2022): 14–26.

community regarding the concept of developing halal tourism, community participation, which lacks innovation in promotional programs and inadequate facilities. Meanwhile, the challenges are the absence of regulations regarding the development of halal tourism in Indonesia and the lack of halal certification from the Indonesian Ulema Council.

Despite the growing body of literature on halal tourism in Indonesia, existing studies predominantly focus on descriptive analyses, policy discussions, or specific operational aspects such as destination branding, service quality, and tourist perceptions. However, there remains a notable research gap in terms of comprehensive strategic analysis that simultaneously examines internal and external factors shaping the competitiveness of Indonesia's halal tourism industry. In particular, limited attention has been given to systematically identifying strengths, weaknesses, opportunities, and threats in an integrated framework that can inform strategic decision-making and long-term industry development. To address this gap, the present study employs SWOT analysis as a structured approach to evaluate the internal and external environments of halal tourism in Indonesia and to identify strategic options that can enhance its competitive advantage²⁰. Accordingly, this research aims to assess the key opportunities and challenges facing the halal tourism industry and to propose strategic directions for its future development. By doing so, the study seeks to contribute a more strategic and holistic understanding of Indonesia's halal tourism landscape, highlighting both its development potential and the constraints that must be addressed.

This study employs a qualitative descriptive design using a library research approach. The data were entirely secondary, obtained through scientific articles, policy papers, official government documents, and other relevant sources related to Indonesia's halal tourism development. Library research was chosen because it allows the researcher to explore conceptual frameworks, policy orientations, and empirical findings documented in the literature, which are crucial for understanding the dynamic landscape of halal tourism without requiring direct field observation²¹. The use of a phenomenological orientation within the library research framework is grounded in the assumption that halal tourism reflects lived social and economic realities embedded within Indonesia's broader religious and cultural context. Therefore, the study seeks to describe and interpret meanings and patterns that emerge from the discourse surrounding halal tourism policy, regulation, and practice.

The data were collected through systematic document analysis of academic journal articles (both national and international), government policy documents (e.g., Ministry of Tourism and Creative Economy reports, halal certification regulations), and industry reports related to halal tourism. The inclusion criteria for documents were: (1) relevance to the themes of halal tourism development, opportunities, and challenges in Indonesia; and (2) availability of empirical or conceptual insights pertinent to Islamic economic principles or tourism strategy. All retrieved data were coded and organized into thematic categories that

²⁰ Freddy Rangkuti, *Analisis SWOT Teknik Membedah Kasus Bisnis* (Gramedia Pustaka Utama, 1998).

²¹ John W Creswell and J David Creswell, *Research Design Qualitative, Quantitative, and Mixed Methods Approaches*, 5th ed. (New York, NY: SAGE Publications, Inc, 2017), <http://www.ceil-conicet.gov.ar/wp-content/uploads/2015/10/Creswell-Cap-10.pdf>.

correspond to the internal and external factors of SWOT analysis. Triangulation was achieved by comparing and cross-validating information across multiple document types and sources²².

Data analysis proceeded in three stages: data reduction, data categorization, and data verification. Data reduction involved selecting, simplifying, and abstracting relevant information aligned with the study's objectives. Data categorization was conducted by classifying reduced data into major themes—strengths, weaknesses, opportunities, and threats—based on recurring concepts across the literature. Last, data verification entailed drawing interpretive conclusions through triangulation and consistency checking between multiple data sources.

To strengthen and deepen the discussion, this study employed a SWOT Analysis Technique as the principal analytical framework. SWOT analysis systematically identifies internal and external factors influencing strategic outcomes²³. The rationale for selecting this approach is its ability to synthesize qualitative insights into structured strategic evaluations, which aligns with the exploratory nature of this research. The SWOT analysis helps organizations face evolving challenges to maintain stability and enhance productivity^{24v}.

The Internal Factor Analysis Summary (IFAS) and External Factor Analysis Summary (EFAS) were used to quantify and balance internal and external factors. Each factor was assigned a weight (0.05–0.25) based on its relative importance and a rating (1–5) reflecting the current performance or intensity of the factor²⁵. Weighted scores were then calculated by multiplying each factor's weight by its rating. The results were normalized so that total weights within each SWOT category equaled one (100%). These cumulative scores were plotted on the Internal–External (IE) Matrix, providing a visual representation of Indonesia's halal tourism strategic position.

The weighting and rating of SWOT factors in this study were derived through structured authorial evaluation based on interpretive documentary analysis rather than expert elicitation or survey-based scoring. This approach was adopted due to the exploratory nature of the study and the absence of primary field data. To mitigate excessive subjectivity, researcher judgment was applied systematically using clearly defined criteria, including: (1) the frequency and prominence of issues across national and international policy documents; (2) consistency of findings across multiple academic, institutional, and industry sources; and (3) contextual relevance to Indonesia's halal tourism ecosystem. While such interpretive weighting is recognized in exploratory strategic management studies, it inherently involves a degree of subjectivity that may affect robustness and reproducibility.

²² Creswell and Creswell.

²³ Rangkuti, *Analisis SWOT Teknik Membedah Kasus Bisnis*.

²⁴ Osita Ifediora and Justina Nzekwe, "Organization's Stability and Productivity: The Role of SWOT Analysis an Acronym for Strength, Weakness, Opportunities and Threat," *International Journal of Innovative and Applied Research* 2 (October 1, 2014): 23–32, https://www.researchgate.net/publication/292747707_Organization's_stability_and_productivity_the_role_of_SWOT_analysis_an_acronym_for_strength_weakness_opportunities_and_threat.

²⁵ Ni Putu Lusiana Pratiwi and Made Sudiarta, "Alternative Marketing Strategies For Low Season Period At Courtyard By Marriott Bali Seminyak Resort," *Journal of Applied Sciences in Travel and Hospitality* 2, no. 2 (2019): 109–19, <https://doi.org/https://dx.doi.org/10.31940/jasth.v2i2.1424>.

Strength factors were rated higher (3–5) to indicate competitive advantages, while weaknesses and threats received lower scores (1–2) to reflect relative constraints. This scoring system operates inversely for weaknesses and threats compared to strengths and opportunities. The final cumulative values determined the strategic position of Indonesia’s halal tourism industry on the IE Matrix, serving as the empirical foundation for strategy formulation consistent with *Maqāṣid al-Syarī‘ah* principles²⁶.

	HIGH (3-4)	MEDIUM (2-3)	LOW (1-2)
HIGH (3-4)	I Growth: Concentration through Vertical Integration	II Growth: Concentration through Horizontal Integration	III Retrenchment: Turn-round Strategy
MEDIUM (2-3)	IV Stability	V Growth: Concentration through Horizontal Integration or Stability Profit Strategy	VI Retrenchment: Divestment Strategy
LOW (1-2)	VII Growth Concentric Diversification	VIII Growth: Conglomerate Diversification	IX Liquidation

Graphic 1. SWOT Analysis Position Quadrant
 Source: Pratiwi and Sudiarta²⁷

The validity of data was ensured through methodological triangulation—comparing data from journal articles, official documents, and policy papers—and interpretive consistency across multiple data sources. Although this approach relies on systematic interpretive judgment rather than expert consensus, it remains methodologically acceptable for exploratory strategic studies aimed at synthesizing qualitative data²⁸. Researcher judgment, when applied rigorously, functions as a structured cognitive process rather than subjective intuition, allowing triangulation and theory-based interpretation.

This methodological framework enables the study to generate theoretically grounded and context-specific strategic insights into Indonesia’s halal tourism

²⁶ Azwar Azwar and Jumadil Saputra, “The Role of the Digital Economy in the Development of the Halal Industry and the Sharia Economy in Indonesia: SWOT Analysis,” *JURNAL INDO-ISLAMIKA* 13, no. 1 (2023): 34–49, <https://doi.org/https://doi.org/10.15408/jii.v13i1.32029>.

²⁷ Pratiwi and Sudiarta, “Alternative Marketing Strategies For Low Season Period At Courtyard By Marriott Bali Seminyak Resort.”

²⁸ J D K Dawes and Elizabeth R Landers, “The Effect of a Collaborative Classroom on Clinical Judgment Development in Nursing Students,” *Journal of Nursing Education* 64, no. 6 (2025): 365–71, <https://doi.org/10.3928/01484834-20250130-03>; Sue Noy et al., “Minding Environment, Minding Workers: Environmental Workers’ Mental Health and Wellbeing,” *Global Health Promotion* 29, no. 4 (2022): 8–17, <https://doi.org/10.1177/17579759221081881>; Ravi P Gandhi, Charru Hasti, and Mahim Sagar, “A Grounded Exploration of Regulatory Dynamics and Competitive Forces in the Indian Telecom Network Industry,” *Competition and Regulation in Network Industries* 25, no. 2–3 (2024): 84–109, <https://doi.org/10.1177/17835917241276006>; Simone Sehnem et al., “Upscaling Circular Economy in Foodtechs Businesses in Emergent Countries: Towards Sustainable Development Through Natural Resource Based View,” *Sustainable Development* 30, no. 5 (2022): 1200–1221, <https://doi.org/10.1002/sd.2311>.

industry. By integrating qualitative library research with an interpretive–analytical approach and SWOT–IE Matrix analysis, the study bridges Islamic economic principles and strategic management perspectives. Rather than employing phenomenology in its classical sense—which relies on primary data derived from lived experiences—this research adopts a document-based interpretive analysis to examine policy reports, academic literature, and institutional publications. The combination of interpretive judgment and structured analytical tools supports the systematic identification of feasible strategic options. Consequently, this methodological approach contributes to the growing body of literature that seeks to operationalize Islamic values within evidence-based and methodologically coherent strategic planning for the halal industry.

2. DISCUSSION

To evaluate the opportunities and challenges of the halal tourism industry comprehensively, this study identifies components of the value chain of the halal tourism industry. After that, a strategic analysis is developed based on the strengths, weaknesses, opportunities, and threats (SWOT) of each component of the Value Chain as entry points. The next stage is to map out strategic options and strategic recommendations for the medium and long term.

Halal tourism industry value chain The halal tourism industry cannot be separated from its supporting industries or in this case is included as a series of entry points. Some of these entry points form a halal tourism value chain consisting of tourism destinations, means of transportation, hotels and accommodations, restaurants and cafes, as well as travel and tours. Each entry point that forms the value chain is related to several main and supporting industries. In the 2019-2024 Indonesian Sharia Economic Masterplan, several supporting ecosystems are mentioned at each of these entry points²⁹.

Table 1. Value Chain of Tourism Industry

Value Chain	Main Industry	Supporting Industry
Tourism Destination	<ol style="list-style-type: none"> 1. Media & Recreation Industry 2. Food & Beverage Industry 3. Modest Fashion Industry 4. Hospitality Industry 5. MSME Industry 6. Renewable Energy Industry 7. Islamic Finance Industry 	<ol style="list-style-type: none"> 1. Technology Industry 2. Training & Development Industry 3. Construction Industry
Airlines & Transportation Hub	<ol style="list-style-type: none"> 1. Media & Recreation Industry 2. Food & Beverage Industry 3. Modest Fashion Industry 4. MSME Industry 5. Islamic Finance Industry 	<ol style="list-style-type: none"> 1. Technology Industry 2. Training & Development Industry 3. Construction Industry
Hotel & Accommodation	<ol style="list-style-type: none"> 1. Media & Recreation Industry 2. Food & Beverage Industry 	<ol style="list-style-type: none"> 1. Technology Industry

²⁹ Bappenas, *Masterplan Ekonomi Syariah Indonesia 2019-2024 Hasil Kajian Analisis Ekonomi Syariah Di Indonesia*, ed. Deputi Bidang Ekonomi, 1st ed. (Jakarta: Kementerian Perencanaan Pembangunan Nasional/ Badan Perencanaan Pembangunan Nasional, 2018), https://kneks.go.id/storage/upload/1573459280-Masterplan_Eksyar_Preview.pdf.

Value Chain	Main Industry	Supporting Industry
	<ol style="list-style-type: none"> 3. Modest Fashion Industry 4. MSME Industry 5. Islamic Finance Industry 	<ol style="list-style-type: none"> 2. Training & Development Industry 3. Construction Industry
Restaurant & Cafe	<ol style="list-style-type: none"> 1. Food & Beverage Industry 2. MSME Industry 	<ol style="list-style-type: none"> 1. Technology Industry 2. Training & Development Industry 3. Construction Industry
Travel & Tours	<ol style="list-style-type: none"> 1. Food & Beverage Industry 2. Hotel Industry 3. Airlines 4. MSME Industry 	<ol style="list-style-type: none"> 1. Technology Industry 2. Training & Development Industry

Source: Author's Analysis (2025)

Table 1 above shows that the tourism industry has interrelated relationships with many industries, both main and supporting. This justifies how large the multiplier effect of the development of the tourism sector on the economy is. The simultaneous relationship between these industrial sectors can make a significant contribution to the development of the Islamic economy in Indonesia.

In the halal tourism industry ecosystem, there are opportunities that must be optimized and challenges that must be faced. Opportunities and challenges in aspects such as demand and market, technology and information, regulation, financing, and research and development are summarized in Table 2 below.

Table 2. Indonesian Halal Tourism Industry Opportunities and Challenges

Aspect	Opportunity	Challenge
Demand and Market	<ol style="list-style-type: none"> 1. Growth in the number of Muslims in Indonesia and the world. 2. Income growth of the Muslim middle class. 3. The development of halal tourism activists. 4. Increasing public awareness in implementing a halal lifestyle. 	<ol style="list-style-type: none"> 1. The development of halal tourism in Muslim and non-Muslim countries in the world. 2. International scale halal tourism branding is still weak. 3. The quality of halal tourism infrastructure in competitor countries is relatively better.
Technology and Information	<ol style="list-style-type: none"> 1. The development of digitalization in the tourism industry in general. 2. Developing and increasingly innovative information media. 	Utilization of information technology in the halal tourism industry is still low
Regulation	<ol style="list-style-type: none"> 1. Government support for halal tourism development. 2. The existence of regional regulations related to halal 	<ol style="list-style-type: none"> 1. There is no highest legal parent that regulates the implementation of halal tourism in Indonesia.

Aspect	Opportunity	Challenge
	tourism in several provinces. 3. Coordination of several institutions / ministries in the development of halal tourism. 4. There are already government strategies and policies related to the development of the tourism industry and halal tourism.	2. There is no special regulation that requires Islamic financial institutions to provide financing to the halal industry
Financing	1. The growing and varied Sharia financing. 2. Collaborative opportunities to get financing from banks and sukuk issuance. 3. Development and implementation of sharia insurance schemes for commercial tourism travel.	Sharia financial institutions do not yet have specific financing targets for the halal industry, including halal tourism.
Research and Development	1. There is a special tourism school that also teaches halal tourism. 2. Starting to develop research on halal tourism.	1. Lack of research on market segmentation and preferences for halal tourism in Indonesia. 2. There is no national-level halal tourism curriculum yet

Source: Author's Analysis (2025)

To develop a strategy for developing the halal tourism industry, the current condition and position of Indonesia must be mapped using a SWOT analysis. The mapping of strengths, weaknesses, opportunities, and challenges based on the value chain of the halal food and beverage industry is summarized in Tables 3 and 4 below.

Table 3. Identification of Internal Factors of the Indonesian Halal Tourism Industry

Dimensions	Internal	
	Strengths	Weaknesses
Tourism Destination	1. Indonesia has diverse natural beauty including stunning beaches, mountains, and underwater tourism. 2. Indonesia is rich in culture and cultural heritage. 3. The friendliness of the local community towards foreign tourists creates a special attraction. 4. Indonesia is ranked 2nd as the most visited place by Muslim tourists in the world based on the MasterCard	1. Lack of supporting sector connectivity (access to tourist destinations). 3. The quality of human resources is still low, especially regarding halal tourism. 4. Not yet have massive halal certification, especially the food and beverage industry in tourist destinations.

Internal		
Dimensions	Strengths	Weaknesses
	<p>& Crescent Rating Report on the 2018 Global Muslim Travel Index.</p> <p>5. Several regions in Indonesia, such as the Sembalun Valley Region, Padang, Aceh, and others as the world's best halal destinations at the 2016 World Halal Tourism Awards event.</p> <p>6. The availability of a lot of self-claimed halal food around tourist destinations.</p>	<p>5. Poor facilities such as toilets and prayer rooms at several points of halal tourist sites.</p> <p>6. Language is also an obstacle, especially when foreign tourists visit tourist destinations (except Bali and Lombok).</p> <p>7. Lack of use of technology in making information easy for Muslim tourists.</p> <p>2. 7. There is no regulation that regulates halal tourism guidelines.</p>
Airlines & Transportation Hub	<p>3. Garuda Indonesia was recognized as the world's best airline for halal travelers at the 2016 World Halal Tourism Awards.</p> <p>3. Sultan Iskandar Muda International Airport, Aceh was recognized as the world's best airport for halal travelers at the 2016 World Halal Tourism Awards.</p> <p>4. Almost all airports in Indonesia have Muslim prayer rooms/places of worship.</p> <p>5. Availability of halal-certified restaurants around the airport.</p> <p>6. The number of packaged halal food and beverage products sold in shops providing daily necessities.</p>	<p>1. The infrastructure of prayer rooms at airports is still inadequate</p> <p>2. Poor facilities such as toilets and prayer rooms at bus terminals, train stations and ship ports.</p> <p>3. Lack of condition of public transportation such as buses, trains and ships.</p> <p>4. Low level of security around transportation hubs.</p> <p>5. Foreign languages are still an obstacle when foreign tourists visit, especially in public transportation facilities other than airports.</p>
Hotel & Accommodation	<p>1. Indonesia is ranked 2nd as the most visited place by Muslim tourists in the world based on the MasterCard & Crescent Rating Report on the 2018 Global Muslim Travel Index</p> <p>2. Hotel Sofyan Betawi as the world's best family friendly hotel at The World Halal Travel Awards 2015 in the United Arab Emirates.</p> <p>3. The Rhadana Kuta, Bali was recognized as the world's best family friendly hotel at the 2016 World Halal Tourism Awards.</p>	<p>1. The number of sharia hotels and SPAs is still limited and not properly recorded.</p> <p>2. There is an assumption that sharia hotels have a low market share and do not even produce optimal turnover.</p> <p>3. The minimal role of Islamic Financial Institutions in providing sharia financing, mainly due to the strict requirements of the sharia screening list.</p> <p>4. The Trans Luxury Bandung was recognized as the world's most luxurious family friendly hotel at the 2016 World Halal Tourism Awards.</p> <p>5. 5. Novotel Lombok Resort and Villas was recognized as the world's best halal beach resort at the 2016 World Halal Tourism Awards.</p>

Internal		
Dimensions	Strengths	Weaknesses
Restaurant & Cafe	<ol style="list-style-type: none"> 1. Padang, West Sumatra was recognized as the world's best halal culinary at the 2016 World Halal Tourism Awards. 2. Availability of many self-claimed halal food around tourist destinations. 	<ol style="list-style-type: none"> 1. There is still a low number of halal-certified restaurants and cafes, out of 2,916 restaurants, but only 303 are halal-certified. A total of 1,800 are preparing themselves as halal restaurants. 2. The quality of human resources is still low, especially regarding Halal Tourism. 3. 3. Language is also an obstacle, especially when foreign tourists visit tourist destinations (except Bali and Lombok).
Travel & Tours	<ol style="list-style-type: none"> 4. ERO Tours, West Sumatra was recognized as the world's best halal tour operator at the 2016 World Halal Tourism Awards. 3. www.wonderfullomboksumbawa.com was recognized as the world's best halal travel website at the 2016 World Halal Tourism Awards. 4. ESQ Tours and Travel is recognized as the world's best Hajj & Umrah operator. at the 2016 World Halal Tourism Awards 	<ol style="list-style-type: none"> 1. The lack of travel & tours companies in providing halal tourism packages. 2. Travel & tour company travel packages are still dominated by conventional (non-halal) tourism packages.

Source: Author's Analysis (2025)

Table 4. Identification of External Factors of the Indonesian Halal Tourism Industry

External		
Dimension	Opportunities	Threats
Tourism Destination	<ol style="list-style-type: none"> 1. Availability of DSN MUI fatwa No: 108/ DSN-MUI/X/2016 concerning Guidelines for Tourism Implementation Based on Sharia Principles. 2. Making Padang, West Sumatra, a reference for other destinations in Indonesia in developing Halal Tourism destinations. 3. The Decree of the Minister of Tourism No. KM.40/UM.001/MP/2018. regarding the Indonesian Halal Tourism Logo and the Indonesian Halal Tourism Logo. 	<ol style="list-style-type: none"> 1. The unavailability of a Ministry of Tourism regulation regarding guidelines for the implementation of Halal Tourism, thus hampering the Regional Government and business players in developing Halal Tourism destinations. 2. The complexity and high cost of halal certification is still an obstacle in the halal food and beverage certification process. 3. The lack of quality human resources will have an impact on the quality of service in Halal Tourism destinations which in turn will have an impact on the level of tourist satisfaction.
Airlines & Transportation Hub	<ol style="list-style-type: none"> 1. To make airline companies in Indonesia Muslim friendly by making Garuda Indonesia a benchmark for development. 	<ol style="list-style-type: none"> 1. The lack of quality infrastructure in public transportation centers 2. Supporting facilities in public transportation centers are not

	2. Increasing the number of airports in Indonesia to become Muslim friendly with reference to the Sultan Iskandar Muda International Airport, Aceh which has been recognized as the world's best airport for halal travelers at the 2016 World Halal Tourism Awards.	adequate so that it has an impact on the level of tourist satisfaction.
Hotel & Accommodation	<ol style="list-style-type: none"> 1. The Indonesian population, which is predominantly Muslim, is very much in accordance with the application of the halal concept, especially in hotels. 2. There is a basis for the MUI Fatwa No:108/DSNMUI/X/2016 concerning Guidelines for the Implementation of Tourism Based on Sharia Principles which regulates hotels, spas, saunas, massages, tourist attractions and travel agencies. 3. The Ministry of Tourism is developing 10 provinces of halal tourism destinations, namely West Sumatra, Aceh, Riau and Riau Islands, Jakarta, West Java, Central Java, D.I Yogyakarta, East Java, Lombok NTB and South Sulawesi. 4. Increasing the number of hotels with Muslim Friendly concepts will increase the satisfaction of Muslim tourists by referring to Hotel Sofyan Betawi which won the world's best family friendly hotel at The World Halal Travel Awards 2015 in the United Arab Emirates and Hotel The Rhadana Kuta, Bali which won the World's Best Family Friendly Hotel at the 2016 World Halal Tourism Awards. 5. Increasing the number of resorts with a Muslim Friendly concept referring to Novotel Lombok Resort and Villas which has won the World's Best Halal Beach Resort at the 2016 World Halal Tourism Awards. 	<ol style="list-style-type: none"> 1. The issuance of the Minister of Tourism Regulation No. 11 of 2016 concerning the abolition of the Regulation of the Minister of Tourism and Creative Economy of the Republic of Indonesia Number 2 of 2014 concerning Guidelines for the Implementation of Sharia Hotel Businesses. 3. The absence of laws or ministerial regulations related to the implementation of sharia-based tourism. 4. Lack of quality human resources who understand sharia. 5. Lack of MUI Sharia Supervisory Board (DPS) who are experts on sharia hotels.
Restaurant & Cafe	With the majority of the Indonesian population being Muslim, the understanding of halal food ingredients and the process of making halal food has been qualified. This is expected to be	<ol style="list-style-type: none"> 1. The cost of halal certification is relatively high. 2. The process of halal certification is relatively complicated so that it hinders halal food and beverage

	a great potential to increase the number of halal-certified restaurants and cafes in Indonesia.		business actors from obtaining halal certification.
Travel & Tours	The large number of potential halal tourism destinations makes this industry lucrative for travel & tours businesses in developing halal tourism programs.	1.	There is no clear law on halal tourism from the Ministry of Tourism
		2.	There are no complete and clear technical regulations and regulations related to halal tourism, thus hampering the travel & tours industry in summarizing halal tourism programs.

Source: Author's Analysis (2025)

From the results of the identification of internal and external factors in the environmental analysis of the Indonesian Halal Food Industry both in terms of strengths, weaknesses, opportunities and challenges, then weighting and rating of these strategic (internal and external) factors is carried out to obtain positioning and strategic choices can be taken.

Table 5. Analysis of the Strengths and Weaknesses of the Indonesian Halal Tourism Industry

No	Strategic Factors	Weight	Rating	Score
Strengths (S)				
1	Indonesia has a variety of natural beauty including stunning beaches, mountains, and underwater tourism.	0,03	5	0,14
2	Indonesia is rich in culture and cultural heritage.	0,03	5	0,14
3	The friendliness of the local community towards foreign tourists creates a special attraction.	0,03	5	0,14
4	Indonesia is ranked 2nd as the most visited place by Muslim tourists in the world based on the MasterCard & Crescent Rating Report on the 2018 Global Muslim Travel Index.	0,02	4	0,09
5	Several regions in Indonesia, such as the Sembalun Valley Region, Padang, Aceh, and others as the world's best halal destinations at the 2016 World Halal Tourism Awards event.	0,02	4	0,09
6	There are many self-claimed halal foods around tourist destinations.	0,02	4	0,09
7	Garuda Indonesia was recognized as the world's best airline for halal travelers at the 2016 World Halal Tourism Awards.	0,02	4	0,09
8	Sultan Iskandar Muda International Airport, Aceh was recognized as the world's best airport for halal travelers at the 2016 World Halal Tourism Awards.	0,02	4	0,09
9	Almost all airports in Indonesia have Muslim prayer rooms/places of worship.	0,02	4	0,09

10	The availability of halal-certified restaurants around the airport.	0,02	5	0,11
11	The number of packaged halal food and beverage products sold in shops providing daily necessities.	0,02	5	0,11
12	Indonesia is ranked 2nd as the most visited place by Muslim tourists in the world based on the MasterCard & Crescent Rating Report on the 2018 Global Muslim Travel Index.	0,02	4	0,09
13	Hotel Sofyan Betawi as the world's best family friendly hotel at The World Halal Travel Awards 2015 in the United Arab Emirates.	0,02	4	0,09
14	The Rhadana Kuta, Bali was recognized as the world's best family friendly hotel at the 2016 World Halal Tourism Awards.	0,02	4	0,09
15	Padang, West Sumatra was recognized as the world's best halal culinary at the 2016 World Halal Tourism Awards.	0,02	4	0,09
16	There are many self-claimed halal foods around tourist destinations.	0,02	5	0,11
17	ERO Tours, West Sumatra was recognized as the world's best halal tour operator at the 2016 World Halal Tourism Awards.	0,02	4	0,09
18	www.wonderfullomboksumbawa.com was recognized as the world's best halal travel website at the 2016 World Halal Tourism Awards.	0,02	4	0,07
19	ESQ Tours and Travel is recognized as the world's best Hajj & Umrah operator. at the 2016 World Halal Tourism Awards	0,02	4	0,09
Total of Score (S)				1,95
Weaknesses (W)				
1	Lack of supporting sector connectivity (access to tourist destinations).	0,02	2	0,05
2	The quality of human resources is still low, especially regarding halal tourism.	0,03	1	0,03
3	It does not yet have a massive halal certification, especially the food and beverage industry in tourist destinations.	0,03	2	0,06
4	There are still poor facilities such as toilets and prayer rooms at several points of halal tourist locations.	0,03	1	0,03
5	Language is also an obstacle, especially when foreign tourists visit tourist destinations (except Bali and Lombok).	0,02	1	0,02
6	Lack of use of technology in making information easy for Muslim tourists.	0,03	2	0,06
7	There is no regulation that regulates halal tourism guidelines.	0,02	2	0,05
8	The prayer room infrastructure at airports is still inadequate	0,03	1	0,03
9	Poor facilities such as toilets and prayer rooms at bus terminals, train stations and ship ports.	0,03	2	0,06

10	Lack of condition of public transportation such as buses, trains and boats.	0,02	2	0,05
11	Low level of security around transportation hubs.	0,03	2	0,06
12	Foreign languages are still an obstacle when foreign tourists visit, especially in public transportation facilities other than airports.	0,02	2	0,05
13	The number of sharia hotels and SPAs is still limited and not properly recorded.	0,02	2	0,03
14	There is an assumption that sharia hotels have a low market share and do not even produce optimal turnover.	0,02	2	0,05
15	The minimal role of Islamic Financial Institutions in providing sharia financing is mainly due to the strict requirements of the sharia screening list.	0,02	2	0,05
16	The Trans Luxury Bandung was recognized as the world's most luxurious family friendly hotel at the 2016 World Halal Tourism Awards.	0,02	2	0,05
17	Novotel Lombok Resort and Villas was recognized as the world's best halal beach resort at the 2016 World Halal Tourism Awards.	0,02	2	0,05
18	Halal-certified restaurants and cafes are still low, from 2,916 restaurants, but only 303 are halal-certified. A total of 1,800 are preparing themselves as halal restaurants.	0,03	1	0,03
19	The quality of human resources is still low, especially regarding Halal Tourism.	0,03	2	0,06
20	Language is also an obstacle, especially when foreign tourists visit tourist destinations (except Bali and Lombok).	0,02	2	0,05
21	The lack of travel & tours companies in providing halal tourism packages.	0,02	2	0,05
22	Travel & tours company travel packages are still dominated by conventional (non-halal) tourism packages.	0,02	2	0,05
Total of Score (W)				0,97
Total		1		2,91

Source: Author's Analysis (2025)

Table 6. Analysis of the Opportunities and Threats of the Indonesian Halal Tourism Industry

No	Strategic Factors	Weight	Rating	Score
Opportunities (O)				
1	Availability of DSN MUI fatwa No: 108/ DSN-MUI/X/2016 concerning Guidelines for Tourism Implementation Based on Sharia Principles.	0,05	5	0,23
2	Making Padang, West Sumatra, a reference for other destinations in Indonesia in developing Halal Tourism destinations.	0,04	4	0,15

3	The Decree of the Minister of Tourism No. KM.40/UM.001/MP/2018 regarding the Indonesian Halal Tourism Logo and the Indonesian Halal Tourism Logo	0,05	5	0,23
4	Making airline companies in Indonesia become Muslim friendly by making Garuda Indonesia a benchmark for development.	0,04	4	0,15
5	Increasing the number of airports in Indonesia to become Muslim friendly with reference to the Sultan Iskandar Muda International Airport, Aceh which has been recognized as the world's best airport for halal travelers at the 2016 World Halal Tourism Awards.	0,04	4	0,15
6	The population of Indonesia, which is predominantly Muslim, is very compatible with the application of the halal concept, especially in hotels.	0,04	5	0,19
7	There is a basis for the MUI Fatwa No:108/DSNMUI/X/2016 concerning Guidelines for the Implementation of Tourism Based on Sharia Principles which regulates hotels, spas, saunas, massages, tourist attractions and travel agencies.	0,05	5	0,23
8	The Ministry of Tourism is developing 10 provinces of halal tourism destinations, namely West Sumatra, Aceh, Riau and Riau Islands, Jakarta, West Java, Central Java, D.I Yogyakarta, East Java, Lombok NTB and South Sulawesi.	0,04	5	0,19
9	Increasing the number of hotels with Muslim Friendly concepts will increase the satisfaction of Muslim tourists by referring to Hotel Sofyan Betawi which won the world's best family friendly hotel at The World Halal Travel Awards 2015 in the United Arab Emirates and Hotel The Rhadana Kuta, Bali which won the World's Best Family Friendly. Hotels at the 2016 World Halal Tourism Awards.	0,04	4	0,15
10	Increasing the number of resorts with Muslim Friendly concepts referring to Novotel Lombok Resort and Villas which has won the World's Best Halal Beach Resort at the 2016 World Halal Tourism Awards.	0,05	4	0,19
11	With the majority of the Indonesian population being Muslim, the understanding of halal food ingredients and the process of making halal food has been qualified. This is expected to be a great potential to increase the number of halal-certified restaurants and cafes in Indonesia.	0,04	5	0,19

12	The large number of potential halal tourism destinations makes this industry lucrative for travel & tours businesses in developing halal tourism programs.	0,05	4	0,19
Total of Score (O)				2,21
Threats (T)				
1	The unavailability of the Ministry of Tourism's regulations regarding guidelines for the implementation of Halal Tourism, thus hampering the Regional Government and business actors in developing Halal Tourism destinations	0,05	1	0,05
2	The lack of quality human resources will have an impact on the quality of service in Halal Tourism destinations which will ultimately have an impact on the level of tourist satisfaction.	0,05	2	0,09
3	The lack of quality of infrastructure in the center of public transportation	0,04	1	0,04
4	Supporting facilities in public transportation centers are not adequate so that it has an impact on the level of tourist satisfaction.	0,04	1	0,04
5	The issuance of the Minister of Tourism Regulation No. 11 of 2016 concerning the abolition of the Regulation of the Minister of Tourism and Creative Economy of the Republic of Indonesia Number 2 of 2014 concerning Guidelines for the Implementation of Sharia Hotel Businesses.	0,05	1	0,05
6	The absence of laws or ministerial regulations related to the implementation of sharia-based tourism.	0,05	1	0,05
7	Lack of quality human resources who understand sharia.	0,05	1	0,05
8	Lack of MUI Sharia Supervisory Board (DPS) who are experts on sharia hotels.	0,04	2	0,07
9	The cost of halal certification is relatively high.	0,04	2	0,07
10	The process of halal certification is relatively complicated, thus preventing halal food and beverage business actors from obtaining halal certification.	0,04	1	0,04
11	There is no clear law on halal tourism from the Ministry of Tourism	0,05	1	0,05
12	There are no complete and clear technical regulations and regulations related to halal tourism, thus hampering the travel & tours industry in summarizing halal tourism programs.	0,05	1	0,05
Total of Score (T)				0,63
Total		1,00	2,84	

Source: Author's Analysis (2025)

Based on the table of analysis of internal (strengths and weaknesses) and external (opportunities and threats) factors above, the position coordinates of the SWOT Model Quadrant can be made as follows:

	HIGH (3-4)	MEDIUM (2-3)	LOW (1-2)
HIGH (3-4)	I Growth: Concentration through Vertical Integration	II Growth: Concentration through Horizontal Integration	III Retrechment: Turn-round Strategy
MEDIUM (2-3)	IV Stability	V Growth: Concentration through Horizontal Integration or Stability Profit Strategy	VI Retrechment: Divestment Strategy
LOW (1-2)	VII Growth Concentric Diversification	VIII Growth: Conglomerate Diversification	IX Liquidation

Graphic 2. Coordinate Position of Indonesian Halal Tourism Industry
 Source: Author's Analysis (2025)

The position of the Indonesian Halal Tourism Industry is at Medium–Medium (2.91:2.84) coordinates, namely in cell V. With this position, it is recommended that the Indonesian Halal Tourism Industry implement a growth strategy through horizontal integration. In this position, the Indonesian tourism industry has a great opportunity to grow, for example by the availability of DSN-MUI Fatwa No. 108/DSN-MUI/X/2016 concerning Guidelines for Tourism Implementation Based on Sharia Principles which regulates hotels, spas, saunas, massages, tourist attractions, and travel agencies, as well as the Decree of the Minister of Tourism No. KM.40/UM.001/MP/2018 regarding the Indonesian Halal Tourism Logo. In addition, the population of Indonesia, which is predominantly Muslim, is very compatible with the application of the halal concept, especially in hotels. The large number of potential halal tourism destinations also makes this industry lucrative for travel & tours businesses in developing halal tourism programs.

The positioning of Indonesia's halal tourism industry in Cell V (Medium–Medium) of the SWOT–IE Matrix indicates a moderate internal capacity combined with moderate external attractiveness, leading to a strategic recommendation of growth through horizontal integration. This finding is consistent with several previous empirical studies on halal tourism in Indonesia, which similarly report strong market potential supported by demographic and cultural factors, yet constrained by structural, institutional, and governance-related weaknesses³⁰. Earlier studies have emphasized that Indonesia's competitive advantage in halal tourism is largely driven by its large Muslim population, cultural diversity, and growing policy support for the halal economy, while simultaneously identifying persistent challenges related to human resource quality, infrastructure readiness,

³⁰ Alfonso Vargas-Sanchez, Dina Hariani, and Ani Wijayanti, "Perceptions of Halal Tourism in Indonesia: Mental Constructs and Level of Support," *International Journal of Religious Tourism and Pilgrimage* 8, no. 4 (2020): 5.

uneven halal certification, and limited technological adoption³¹. These patterns align closely with the internal and external factors identified in this study, suggesting that Indonesia's Medium–Medium strategic position reflects a recurring structural condition rather than a short-term or cyclical issue.

Comparatively, empirical research from other Muslim-majority countries such as Malaysia, Saudi Arabia, and the United Arab Emirates demonstrates a relatively stronger strategic positioning in halal tourism development. Studies on Malaysia, for example, frequently highlight the role of integrated halal governance, comprehensive certification systems, standardized Muslim-friendly infrastructure, and consistent global branding strategies³². The contrast with Indonesia's findings underscores that Indonesia's primary constraints are not demand-side limitations, but rather supply-side readiness and institutional coordination, particularly in human capital development, infrastructure standardization, and regulatory clarity.

Every entry point for the halal tourism industry in Indonesia generally has good strengths and opportunities. This is evidenced by the awards obtained at the 2016 World Halal Tourism Awards in all categories of entry point for the halal tourism industry. Nevertheless, Indonesia needs to improve existing weaknesses and address the challenges it faces. The Halal Tourism Industry in Indonesia is still weak in terms of human resources, particularly concerning halal tourism knowledge, inadequate facilities such as toilets and prayer rooms at several tourist sites, language barriers especially when foreign tourists visit destinations (except Bali and Lombok), lack of comprehensive regulations, low technology adoption, limited halal certification coverage, and restricted infrastructure development. In addition, the industry also faces challenges in the form of poor infrastructure quality in public transportation centers and a complicated halal certification process, which prevents many food and beverage business actors from obtaining halal certification.

Therefore, the strategy that can be taken is to brand halal tourism through social media and exhibitions. The superior products of halal tourism must be introduced to the global community. In the current era of the Industrial Revolution 4.0, social media can be an effective and fast means of strengthening halal tourism branding. A special work unit is needed at the central and regional levels to promote halal tourism through social media to achieve awareness that competes with other global destinations. Halal tourism exhibitions are programs that must be conducted continuously and sustainably. In the short term, exhibitions are expected to serve as promotional platforms for leading halal tourism products. In the long term, exhibitions will strengthen Indonesia's tourism branding on a global scale. The Ministry of Tourism can lead the coordination of these exhibitions, in collaboration with regional tourism offices, supporting industries, and halal tourism operators across Indonesia. This program is part of the main quick wins master plan for the Islamic economy, particularly the national campaign "Halal Lifestyle Literacy."

³¹ Dina Hariani and Mohd Hafiz Hanafiah, "The Competitiveness, Challenges and Opportunities to Accommodate the Halal Tourism Market: A Sharia -Law Tourism Destination Perspectives," *Journal of Islamic Marketing* 15, no. 3 (February 19, 2024): 919–42, <https://doi.org/10.1108/JIMA-05-2023-0147>.

³² Nur Syairah Jalilah Johan and Wan Farahiyah Izni W Abd Rahman, "Halal Tourism: Legal Factor Attracting Tourists To Malaysia," *Akademika* 95, no. 1 (2025): 496–512; Fatimah Norazami Abdullah et al., "Halal Tourism: An Integrative Review of Concepts, Challenges, and Future Directions," *Journal of Emerging Economies and Islamic Research* 13, no. 2 (June 1, 2025): 4486, <https://doi.org/10.24191/jeeir.v13i2.4486>.

The strategic recommendation to strengthen halal tourism branding through digital media and exhibitions is in line with previous studies that emphasize the growing importance of social media engagement, digital storytelling, and experiential marketing in attracting Muslim travelers, especially among millennials and Generation Z³³. Prior empirical findings suggest that destinations with strong and credible digital halal branding enjoy higher visibility, trust, and destination loyalty. This study extends the existing literature by positioning digital branding not merely as a promotional tool, but as part of a broader horizontal integration strategy that requires coordinated action among national institutions, regional governments, and tourism industry stakeholders³⁴.

Furthermore, the absence of a comprehensive national halal tourism law identified in this study has also been widely noted in previous Indonesian research as a major institutional barrier to sustainable halal tourism development. While some provinces have adopted local regulations, empirical evidence indicates that regulatory fragmentation weakens policy consistency, reduces investor confidence, and limits inter-regional integration. By linking this regulatory gap directly to Indonesia's position in the SWOT–IE Matrix, the present study contributes a strategic explanation of how legal uncertainty constrains upward movement toward a stronger growth or stability position. The government must immediately formulate and ratify a law on halal tourism. The implementation of halal tourism will gain greater attention if it receives a mandate from the central government. However, this is not yet the case. There is no supreme parent law that regulates the implementation of halal tourism in Indonesia, although several regions already have local regulations related to halal tourism. A new breakthrough is needed in the process of formulating and ratifying a national halal tourism law to realize Indonesia's aspiration of becoming the world's leading halal tourism hub. As a short-term or quick-win strategy, local governments can formulate regional regulations on halal tourism and ratify them with local representatives. Regional leaders can then spearhead the formulation of implementation mechanisms to enhance competitiveness in regional tourism. This initiative aligns with one of the main quick wins of the Islamic economics master plan, namely strengthening the legal aspects and institutional coordination.

The findings of this study can be further interpreted through the theoretical lens of Islamic economics and Sharia business ethics, both of which emphasize that economic activity, including tourism, must serve not only material welfare but also spiritual and moral objectives. In the Islamic economic paradigm, the purpose of development is not merely profit maximization but the attainment of *falah*—comprehensive well-being in both worlds—achieved through balance (*wasatīyyah*) between economic efficiency, social justice, and moral integrity.

Accordingly, the strategic direction recommended for Indonesia's halal tourism industry—growth through horizontal integration—must be guided by the

³³ Md Siddique E Azam, Betania Kartika Muflih, and M Ashraf Al Haq, "Intersection between Modern Technologies and Halal Tourism: Exploring the Role of Digital Innovation in Enhancing Muslim Travellers' Experience," *The Journal of Muamalat and Islamic Finance Research*, 2024, 16–31.

³⁴ Laima Gerlitz, Christopher Meyer, and Gunnar Prause, "Marketing and Branding Strategy for the South Baltic Sea Region: Reinforcing Regional Innovation in SMEs through Cross-Border Collaboration Models in the Age of Transformation," *Entrepreneurship and Sustainability Issues*, no. 4 (2021): 467.

principles of *Maqāṣid al-Syarī'ah*, especially *ḥifzu al-dīn* (protection of religion), *ḥifzu al-naḥs* (protection of life), and *ḥifzu al-māl* (protection of wealth)³⁵. These principles justify efforts to expand the halal tourism market as a means of strengthening public faith expression, promoting ethical consumption, and ensuring that economic gains circulate within a just and halal ecosystem.

From the perspective of Sharia business ethics, the operationalization of halal tourism must embody the five key values of *ṣidq* (truthfulness), *amānah* (trustworthiness), *'adālah* (justice), *iḥsān* (excellence), and *mas'ūliyyah* (accountability)³⁶. The current weaknesses identified—such as inconsistent halal certification, insufficient facilities, and low technological integration—represent gaps not only in operational readiness but also in ethical compliance with the value of *iḥsān* (continuous improvement) and *amānah* (responsibility to Muslim consumers). Therefore, addressing these weaknesses is part of fulfilling the moral obligations inherent in managing a halal-based industry.

Furthermore, the branding and promotion of halal tourism through digital media must also align with ethical communication (*tablīg bi al-ḥikmah*), ensuring that promotional narratives truthfully represent Indonesia's Islamic values without reducing them to mere marketing slogans. Ethical marketing in halal tourism, as emphasized by Khairuldin et al.³⁷, must highlight authenticity, inclusiveness, and the moral benefits of travel in accordance with *Maqāṣid al-Syarī'ah*, rather than exploiting religiosity for commercial gain.

In this way, the SWOT-based strategic recommendations are not only economically viable but also ethically grounded within the Sharia moral economy framework. This integrative perspective ensures that Indonesia's pursuit of global leadership in halal tourism is accompanied by spiritual authenticity, social inclusiveness, and sustainable development, consistent with the Qur'anic injunction:

وَكَذَلِكَ جَعَلْنَاكُمْ أُمَّةً وَسَطًا لِتَكُونُوا شُهَدَاءَ عَلَى النَّاسِ

“And We have made you a just nation (*ummatan wasaṭan*), that you may be witnesses over mankind.” (Q.S. al-Baqarah [2]:143)

This verse underscores the essence of Islamic moderation (*wasatiyyah*) as the foundation for balanced policy and ethical tourism management³⁸. Therefore, implementing halal tourism policies and strategies in Indonesia is not only an economic imperative but also a religious and ethical mission, aligning national

³⁵ Muhammad al-Tāhir Ibn 'Āsyūr, *Maqāṣid Al-Syarī'ah Al-Islāmiyyah* (Urdun: Dār al-Nafāis, 2001); Aḥmad al-Raisūnī, *Nazariyyah Al-Maqāṣid 'Inda Al-Imām Al-Syātibī* (Virginia: Ma'had 'Ālī li al-Fikr al-Islāmī, 1995).

³⁶ Abd.ghafur, “Etika Bisnis Dalam Perpektif Islam,” *Iqtishodiyah: Jurnal Ekonomi Dan Bisnis Islam*, no. 2 (2018): 1–21.

³⁷ WMKFW Khairuldin et al., “Philosophy and Ethics in Halal Tourism: A Conceptual Analysis,” *International Journal of Religion* 5, no. 11 (2024): 486–93, <https://pdfs.semanticscholar.org/2150/01bf0b7e9dee93b76088fd56dac58d49de07.pdf>.

³⁸ Nispul Khoiri and Muhammad Habibi Siregar, “Exploring Halal Tourism: The Role of Islamic Jurisprudence (Usul Fiqh) and Religious Moderation in Enhancing the Tourism Sector of Indonesia,” *Pakistan Journal of Life & Social Sciences* 22, no. 1 (2024).

development objectives with the divine purpose of achieving prosperity (*falāḥ*) through justice (*‘adl*) and harmony (*mīzān*)³⁹.

4. CONCLUSION

The development of halal tourism in Indonesia stands at a strategic crossroads between opportunity and challenge. The results of this study indicate that Indonesia’s halal tourism industry occupies a Medium-Medium (2.91:2.84) position in the SWOT matrix, signifying a potential growth trajectory through horizontal integration strategies. This position reflects an industry that possesses solid internal potential yet still requires structural consolidation and strategic alignment with national and global market demands. The presence of regulatory instruments—such as DSN-MUI Fatwa No.108/DSN-MUI/X/2016 concerning sharia-based tourism implementation and Ministerial Decree No.KM.40/UM.001/MP/2018 on the Indonesian Halal Tourism Logo—illustrates growing institutional support. Combined with Indonesia’s demographic advantage as the world’s largest Muslim-majority nation, these factors form a strong foundation for industry expansion. However, the empirical reality reveals that this potential has not yet translated into optimal performance. The Indonesian halal tourism industry continues to face multidimensional challenges: insufficiently skilled human resources, weak infrastructure in tourist destinations, limited mastery of foreign languages, fragmented regulatory frameworks, and low utilization of digital technology in marketing and certification processes. These obstacles indicate a gap between policy intent and implementation capacity, which weakens Indonesia’s competitiveness relative to other Muslim and non-Muslim countries that have advanced halal tourism ecosystems.

From the perspective of Islamic economics and business ethics, these findings emphasize that halal tourism is not merely an economic activity but an embodiment of *Maqāṣid al-Syarī‘ah*—the higher objectives of Islamic law—particularly in realizing *maslahah ‘āmmah* (public welfare), preserving moral values, and promoting equitable prosperity. The principles of *amānah* (trustworthiness), *ṣidq* (honesty), *‘adl* (justice), and *iḥsān* (excellence) should be reflected not only in service delivery but also in policy formulation, governance, and the broader economic ecosystem that supports halal tourism. Strengthening these ethical foundations is essential for developing a tourism model that is not only competitive but also spiritually sustainable.

In practical terms, this study demonstrates that horizontal integration guided by Sharia principles can function as a balanced growth strategy for halal tourism in Indonesia. Such integration requires multi-sector collaboration among government institutions, tourism operators, financial entities, educational institutions, and community organizations, reflecting the Islamic economic values of *tawāzun* (balance) and *ta‘āwun* (mutual cooperation). For policymakers, several key priorities emerge: (1) the urgent enactment of a comprehensive Halal Tourism Law to ensure regulatory clarity, certification standards, incentives, and institutional coordination; (2) strengthened human capital development through the integration of halal tourism competencies into vocational training and national tourism

³⁹ Hafas Furqani and Abdelghani Echchabi, “Who Is Homo Islamicus? A Qur’ānic Perspective on the Economic Agent in Islamic Economics,” *ISRA International Journal of Islamic Finance* 14, no. 2 (2022): 206–20.

education; (3) accelerated digital transformation via a unified platform for halal tourism branding, certification, and promotion; and (4) institutionalized public-private collaboration to enhance investment, infrastructure, and innovation. Theoretically, this study reinforces the relevance of Islamic economic principles in tourism development, emphasizing ethical orientation and spiritual accountability as foundations of sustainable competitiveness. Practically, it offers a strategic roadmap for positioning halal tourism not merely as an economic activity, but as an integrated model of development that harmonizes material progress with moral and spiritual values.

This study acknowledges that the reliance on researcher-based evaluation for weighting and rating SWOT factors constitutes a methodological limitation. The absence of expert elicitation, inter-coder reliability assessment, and sensitivity analysis limits intersubjective validation and may introduce interpretive bias into the strategic positioning results. Consequently, the findings should be interpreted as indicative rather than definitive. Future studies are therefore encouraged to strengthen and validate the proposed strategic framework through field-based qualitative research, expert interviews, and multi-stakeholder engagement. In particular, employing structured expert-driven techniques such as the Delphi method or the Analytic Hierarchy Process (AHP) would enable consensus-based weighting, enhance objectivity, and improve the robustness of comparative factor analysis. Integrating these methods would also allow for methodological triangulation, sensitivity testing, and greater empirical grounding in future SWOT-*Maqāṣid al-Syarī'ah* analyses within the halal tourism and broader halal industry context. Nevertheless, despite these limitations, the present study contributes an exploratory and theoretically informed strategic perspective that bridges Islamic economic principles and strategic management analysis. Ultimately, strengthening halal tourism in Indonesia is not only an economic necessity but also a moral responsibility—an effort to realize a just, ethical, and sustainable tourism ecosystem consistent with the vision of *rahmatan lil-‘ālamīn*.

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