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April 10-12, 2023 / Ankara-TÜRKİYE

THE PROCEEDINGS BOOK

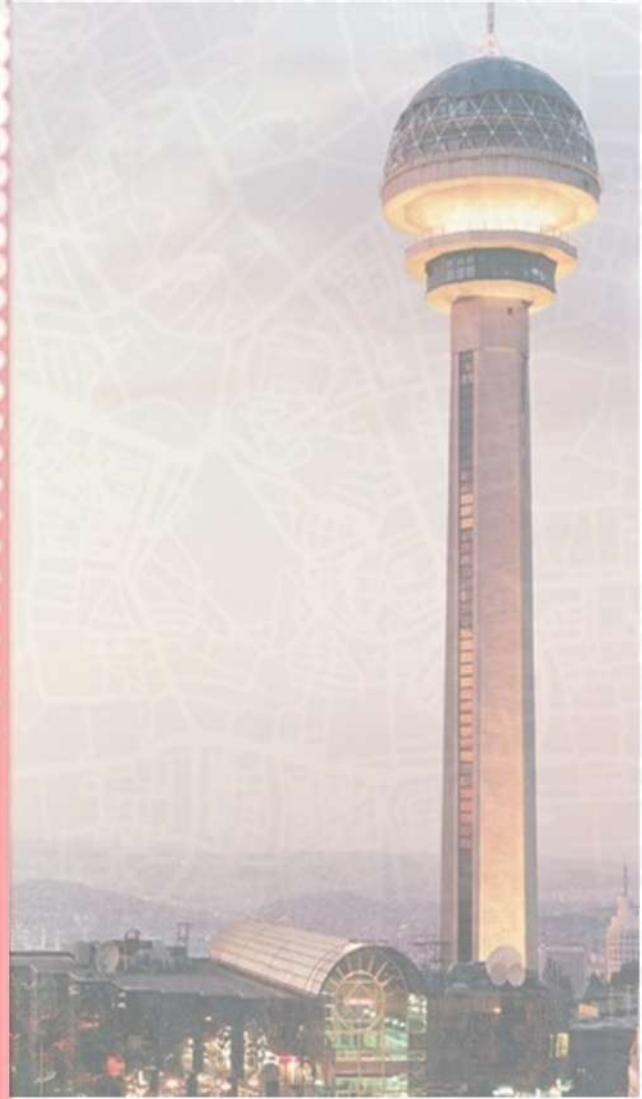
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A SYSTEMATIC LITERATURE REVIEW ON HALAL TOURISM DEVELOPMENT IN INDONESIA

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Abstract

This study intends to analyze halal tourism development in Indonesia by means of a systematic literature review. This qualitative research method uses a research library approach with a systematic literature review (SLR). SLR analysis was performed using the VOS Viewer. The results of the analysis of the systematic literature review of this study found that in a literal way, halal tourism is a promising market in Indonesia. Seeing the significant growth in halal tourism has made the Indonesian government start to seriously develop halal tourism. Halal tourism refers to additional amenity services, attractions and accessibility that are intended and provided to meet the experiences, needs and desires of Muslim tourists. Indonesia already has tourist destinations that provide halal food, supporting facilities for worship (mushola and ablution places), to other Muslim-friendly services. Indonesia's prospects in developing halal tourism have been recognized worldwide. Indonesia has won many awards in the realm of world halal tourist destinations. In 2019, Indonesia was ranked first as the Best Halal Tourism in the World according to the Global Muslim Travel Index (GMTI) outperforming 130 other participating countries. Indonesia has potential tourist destinations in the development of halal tourism which are spread across various provinces or regions.

Keywords: Halal tourism, systematic literature review, and Indonesia.

INTRODUCTION

Indonesia has again made achievements at the international level by being ranked first as a world halal tourist destination according to the GMTI (Global Muslim Travel Index) 2019, which was announced by CrescentRating – Mastercard (Adinugraha & Sartika, 2022). After five years of focusing on developing halal tourism, Indonesia has finally been able to show its potential as the world's best halal tourist destination (Perguna, 2021).

The development of Indonesian halal tourism is one of the priority programs of the Ministry of Tourism which has been carried out since five years ago. GMTI 2019 data shows that by 2030, the number of Muslim tourists is projected to exceed 230 million worldwide. Referring to the target of achieving 20 million foreign tourist visits in 2019, the Ministry of Tourism is targeting 25% or the equivalent of 5 million out of 20 million foreign tourists to be Muslim tourists from the concept of developing halal tourism in Indonesia (GMTI, 2021).

The concept of developing Indonesian halal tourism itself is a tourism concept that aims to meet the needs and experiences of Muslim tourism.

These concepts include: halal food and beverage services, quality prayer facilities, clean toilets with adequate water, free from Islamophobia, providing social benefit values, Ramadan programs, unique experiences for Muslim tourists, free from non-halal activities, providing recreation areas with privacy (Husni Pasarela et al., 2022).

Based on State of the Global Islamic Economy data, during 2020 the total number of trips by world Muslim tourists was valued at 194 billion US Dollars. In 2023 it is predicted to increase to 274 billion US Dollars (Dinar Standard, 2021). Seeing this opportunity, Indonesia began to develop the concept of halal tourism by providing halal food and beverage services, quality prayer facilities, and a unique experience for Muslim tourists visiting Indonesia (Fathan et al., 2022).

Opportunities and challenges that will be faced by Indonesia to develop the concept of halal tourism. With the growing Muslim population in Indonesia and public awareness to consume halal products, this is an opportunity for us to improve the concept of halal tourism (Eyisi et al., 2021). Therefore, the Indonesian government needs to align policies between the central and regional governments. Furthermore, to improve the development of halal tourism programs, it is necessary to carry out halal certification for all products, be it food, drinks, or souvenirs that are traded in halal tourism areas (Fadholi et al., 2020).

Regarding halal tourism in Indonesia, it is necessary to coordinate and synergize between relevant stakeholders to develop guidelines and regulations so that the halal tourism ecosystem can be maintained and continues to improve (Adinugraha et al., 2020). All institutions in Indonesia have provided their support for the halal tourism program. They have carried out outreach and synchronization with local governments to develop halal tourism areas in their respective regions (Bilim, 2017).

Indonesia is considered to be still slow in developing halal tourism (Khairawati, 2021). Therefore, don't be surprised if the halal tourism market is taken up by neighboring countries where Muslims are minorities (Adinugraha, 2021). In fact, halal tourism is a demand for Muslim segmentation. This is because there are billions of Muslims around the world, and it is very important to broaden understanding of halal, namely clean and healthy (Adinugraha et al., 2018).

The Indonesian government must be more serious about developing halal tourism. When it is not supported by MSMEs, Indonesia will be left behind. Halal certification is a demand of the community because halal tourism is increasingly widespread, including food/beverages and accommodation which must have a halal label. Because without a halal label, it is not guaranteed to be halal. Halal certification is becoming big business. Because, with halal certification can increase turnover (Jailani & Adinugraha, 2022). For example, Japanese restaurants that are certified halal always have long queues. In this era of openness, many foreign products enter Indonesia and have halal certificates. Therefore, MSMEs that do not have or manage halal certificates are injured, especially since there is already a Halal Product Guarantee Law which requires all businesses in Indonesia to be halal certified, certification has become the main focus. Therefore, regarding halal certification, the Indonesian government has provided subsidies for obtaining halal certification for MSMEs (Izzudin & Adinugraha, 2021). Based on the background of the problems above, this study aims to analyze halal tourism development in Indonesia by means of a bibliometric literature review.

METHOD

This qualitative research method uses a research library approach with a systematic literature review (SLR). SLR analysis was performed using the VOS Viewer.

RESULTS AND DISCUSSION

Halal Tourism Destinations in Indonesia

In Indonesia itself, in general the development of halal tourism has actually been going on for a long time considering that the majority of the population is Muslim so that almost most destinations or the tourism sector in Indonesia can be said to have implemented the principle of being friendly to Muslim tourists (Purwanto et al., 2020). This can be seen from the various facilities for Muslims to find prayer facilities, halal culinary, to polite manners that are in accordance with Islamic values.

One of the typical Indonesian halal tourism practices that is also implemented in an effort to fulfill spiritual needs is the pilgrimage of saints which is part of the tourism aspect as well as a tradition that has lasted a long time and is in line with the history and development of Islam in Indonesian society (Sholehuddin et al., 2021). Until now, Indonesia has won various achievements in the realm of world halal tourist destinations. As in 2019, Indonesia was ranked first as the Best Halal Tourism in the World according to the GMTI which outperformed 130 other participating countries. This achievement refers to data, 20% or around 14.92 million foreign tourists who come to Indonesia are Muslim tourists. Meanwhile, for 2022, Indonesia is ranked second (GMTI standard) and beat Saudi Arabia in third, Turkey in fourth, and the United Arab Emirates in fifth. Indonesia's achievements were also assessed in terms of access, communication, environment, and services while in halal tourist destinations. It didn't stop there, Indonesia also managed to get 12 out of 16 awards at the 2016 World Halal Tourism Award in Abu Dhabi. These things make many parties optimistic that Indonesia has enormous potential in terms of developing halal tourism (Rizqi Toyibah et al., 2021).

Indonesia also has various halal tourist destinations spread across various islands from Sabang to Merauke. One of the islands with the most potential in developing halal tourism is the island of Lombok, where in 2015 Lombok was named The World Best Halal Tourism Destination at the World Halal Travel Awards in Abu Dhabi, even GMTI gave a score of 76 on the quality of communication services in Lombok in year 2019 (Adinugraha et al., 2023). Citing data from the 2019-2020 Regional Muslim Friendly Tourism Development Report, Halal Tourism in Indonesia needs to consider the potential for accessibility, communication, environment, and services. To have good accessibility, provinces in Indonesia must increase and increase international flight routes and improve other transportation infrastructure (Adinugraha et al., 2021).

Provinces must also have a strong Muslim-friendly tourism brand image, and be more involved in market expansion activities so as to attract Muslim tourists to visit the area. When tourists visit, the environment will have a significant influence in increasing tourism visits. A friendly environment for Muslim tourists includes tourist destinations that must have a conducive business climate, as well as increasing Wi-Fi connectivity in public areas, such as airports, malls and hotels (Suci et al., 2021). Apart from these three things, the main factor that must be developed is Muslim-friendly services (Azam et al., 2019).

Muslim-friendly services are the key to attracting Muslim tourists. These services include Muslim-friendly tourism supporting businesses that are halal-certified such as sharia restaurants and hotels, as well as enhancements and repairs for mosques and prayer rooms in public spaces, product innovation, and tourism attractions that are cultural, cultural and halal culinary to attract tourists, visit these tourist destinations (Mansouri, 2014).

Regarding halal tourism, in the midst of the large number of Indonesian tourism at this time, there are still many other areas where halal potential can be explored, not only limited to religious tourism, but also extends to all forms of tourism without exception.

Local governments and related policy makers need to develop regional tourism in accordance with halal principles, one of which is by providing tourism products, services or attributes that meet the needs of Muslim tourists to facilitate worship, accommodation and other elements of tourism in accordance with Islamic law (DinarStandard, 2020).

Halal Tourism Potential and Opportunities in Indonesia

Indonesia has a lot of potential in the form of beautiful natural scenery with 17,100 islands and 742 languages (Nur Iman et al., 2021). In addition, Indonesia, which has a population of 250 million people, is the largest archipelago with a length of 5,120 km from west to east and 1,760 km from north to south. Indonesia itself is a population with the largest Muslim population (88% of the population) and 12.7% of Muslims in the world are in Indonesia (Hendriarto, 2021). Based on this, the development of halal tourism in the future is considered promising and potential. Meanwhile, based on the results of research conducted by Mubarak & Imam (2020), it is known that tourism potential is considered good and tourists agree with the concept of halal tourism.

In terms of concept, 48% of respondents agree with the concept of halal tourism. In terms of needs, 68% of respondents emphasized that halal tourism has a high urgency in its implementation. In terms of suitability, 60% of respondents agree that halal tourism is in accordance with the conditions of Indonesian society. That way, the value according to the needs of tourists is the hope of comfort and tranquility on the way without forgetting Islamic values. This value is supported by the increasing middle-class Muslim community who have high awareness of halal products (Juliana et al., 2022). This makes halal tourism have great potential to be developed following existing market demand. Indonesia synergizes with many parties to develop halal tourism, for example the Ministry of Tourism is working with the National Sharia Council, the Indonesian Ulema Council and the Business Certification Institute.

The concrete form of cooperation is to develop tourism and promote cultural and religious values which will then be outlined in the Regulation of the Minister of Tourism and Creative Economy (Jaelani, 2020). In addition, human resource training, outreach, and capacity building are also conducted. The government is also working with the Indonesian Hotel and Restaurant Association to provide halal lodging and places to eat that can serve halal food menus, and working with the Indonesian Tourism and Travel Association to make halal tour packages to tourist attractions. religious. Although halal tourism is not only limited to religious tourism, the Ministry of Tourism in its report notes that there are 13 provinces that are ready to become halal tourist destinations, namely Aceh, Banten, West Sumatra, Riau, Lampung, DKI Jakarta, West Java, Yogyakarta, Java. East, South Sulawesi, Central Java, West Nusa Tenggara and Bali. The Indonesian Ministry of Tourism has so far developed and promoted service businesses in hospitality, restaurants, travel agents and spas in 12 Islamic tourist destinations. The development was carried out in a number of cities, namely Aceh, West Sumatra, Riau, Lampung, Banten, Jakarta, West Java, Central Java, Semarang, East Java, NTB and South Sulawesi (Rusli et al., 2018).

The halal tourism market is one of the fastest growing contributors to the tourism segment. It is projected that in 2020 the contribution of halal tourism is targeted to contribute 35% or \$300 million to the global economic sector (Fathan et al., 2022). Indonesia has also won the GMTI 2019 “World’s Best Halal Travel Destination” award. Meanwhile, Indonesia’s regional destination that won the “Best Halal Travel Destination” award from the 2019 Indonesia Muslim Travel Index is Lombok (Multazam & Saniyah, 2020).

Data on sharia tourism in Indonesia starts from 2013, namely there are 37 new certified sharia hotels and as many as 150 hotels towards sharia operations. Likewise with restaurants, out of 2,916 restaurants, only 303 are halal-certified. As many as 1,800 prepare themselves as halal restaurants. While for relaxation, SPA is now only three units. A total of 29 are in the process of obtaining certificates (Andriani, 2015). In the national program, the Indonesian Ministry of Tourism has also set a target of 20 million foreign tourists, of which 5 million are Muslim tourists. In line with the seriousness of the government and related tourism supporters, as well as the potential of various tourist destinations in every region in Indonesia, it is not impossible for Indonesia to become the main and foremost tourist destination in Indonesia.

The market opportunity for the halal tourism industry in Indonesia is quite large. In addition to the majority of Indonesia's population being Muslim, Indonesian halal tourism is also ranked first in the world's halal tourism. In the global arena, halal tourism is a promising market. This can be seen from the Mastercard Crescentrating GMTI 2019 report, which predicts there will be 230 million Muslim tourists globally by 2026. This has increased from 2018 which was only around 140 million. In line with these predictions, the Global Islamic Economy Report also states that the velocity of money from world halal tourism is predicted to increase from US\$177 billion in 2017 to US\$274 billion in 2023. Seeing these tantalizing growth figures, according to Sandiaga, many countries have started to seriously develop halal tourism. In fact, this potential for halal tourism is developing in countries that are not members of the Islamic Working Organization, such as Japan, Taiwan and South Korea.

Indonesia itself has won an award in the world halal tourism. In 2019 Indonesia was ranked first as the best halal tourism in the world according to the GMTI, outperforming 130 other participating countries (GMTI, 2021). This good opportunity offers great opportunities for the development of halal tourism for many stakeholders in Indonesia.

Apart from that, another big bonus for Indonesia in the development of halal tourism, is that the majority of Indonesia's population is Muslim. This means that Indonesian residents who become archipelago tourists will become the driving force for halal tourism that is spread across the archipelago. This is an opportunity that can be utilized as best as possible for collaboration, including universities that can analyze the positive impact of developing halal tourism, awakening the national economy, creating jobs, and empowering MSMEs (Hakim, 2018).

With these opportunities, the crisis due to the Covid-19 pandemic can be used as a momentum for the tourism and creative economy sectors to prepare for the recovery process by growing faster and being competitive. In 2023, Indonesia is facing it with optimism. Indonesia takes advantage of this momentum by appreciating creativity, innovation and collaboration to achieve the goal of developing sustainable halal tourism in 2030.

Development of Halal Tourism in Indonesia

Indonesia in 2019 has made achievements at the international level by being ranked first as the world's halal tourist destination according to GMTI. After five years of focusing on developing halal tourism, Indonesia has finally been able to show its potential as the world's best halal tourist destination (Afnarius et al., 2020).

As reported by the official website of the Ministry of Communication and Information, the development of Indonesian halal tourism is one of the Ministry of Tourism's priority programs that have been carried out since five years ago. GMTI 2019 data shows that by 2030, the number of Muslim tourists is projected to exceed 230 million worldwide (GMTI, 2021). Referring to the target of achieving 20 million foreign tourist visits in 2019, the Ministry of Tourism is targeting 25% or the equivalent of 5 million out of 20 million foreign tourists to be Muslim tourists from the concept of developing halal tourism in Indonesia.

The concept of developing Indonesian halal tourism itself is a tourism concept that aims to meet the needs and experiences of Muslim tourism. These concepts include: halal food and beverage services, quality prayer facilities, clean toilets with adequate water, free from Islamophobia, providing social benefit values, Ramadan programs, unique experiences for Muslim tourists, free from non-halal activities, provision of recreational areas with privacy.

Indonesia is in fourth place on the list of the 20 best halal tourist destinations in the world for 2021 based on GMTI 2021 with a score of 73. Previously in 2019, Indonesia won first place with Malaysia with a balanced score of 78. Malaysia is still in first place this year, followed by Turkey is in second place, Saudi Arabia is in third position, and the United Arab Emirates is in fifth position. GMTI version Based on the GMTI 2021 report, the ranking is based on several factors, including facilities and services that are friendly to Muslim tourists (GMTI, 2021).

Indonesia won second place in the GMTI 2021 Communication category. In this category, the assessment is based on how tourism businesses promote their services to make it easier for tourists, for example by releasing a guide to halal restaurants or a guide for Muslim tourists. GMTI 2021 also positions Indonesia as the number three destination in the Services category (GMTI, 2021).

Ratings are based on how a destination offers a good experience for Muslim travelers, including at airports, restaurants and hotels. GMTI 2021 is a Muslim travel market research report launched by Mastercard and CrescentRating. 2021 will be the sixth year that they have launched this research report (GMTI, 2021). After the Peak of the Covid-19 Pandemic. In mid-2020 to early 2022 Indonesia was hit by the peak of the Covid-19 pandemic. Indonesia's tourism sector has also been badly affected by social and travel restrictions in order to contain the spread of this dangerous virus. However, recently the rate of transmission of Covid-19 has gradually decreased, so that the tourism sector has begun to be boosted again by the Government of Indonesia.

In this context, the Indonesian government has offered three concepts of expanding halal tourism services that focus on extension of service, namely (1) need to have or must have, (2) good to have, and (3) nice to have. These three concepts have their respective meanings. Need to have means that a destination has proper places of worship, as well as halal food. Good to have has a goal so that tourists get a memorable and different experience. Meanwhile, a nice to have is that halal tourism in Indonesia must be able to compete with other countries (Muthoifin & Purnomo, 2020).

Halal tourism is an additional service or extended services. There are three categories of services that must first be available, namely halal food, places of worship, water friendly washrooms, and no Islamophobia. Then, good to have and nice to have. The concept is translated into five important components of tourism, such as halal hotels, halal transportation, halal food, halal tour packages and halal finance (Maharani, 2021). Moreover, in fact, halal tourism has also optimally attracted foreign exchange from Muslim tourists.

CONCLUSION

The results of the bibliometric analysis of this research found that in a literal way, halal tourism is a promising market in Indonesia. Seeing the significant growth in halal tourism has made the Indonesian government start to seriously develop halal tourism. Halal tourism refers to additional amenity services, attractions and accessibility that are intended and provided to meet the experiences, needs and desires of Muslim tourists. Indonesia already has tourist destinations that provide halal food, supporting facilities for worship (mushola and ablution places), to other Muslim-friendly services. Indonesia's prospects in developing halal tourism have been recognized worldwide.

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