

PESTEL Analysis of Indonesia's Halal Tourism: Regulatory Framework vs Implementation Challenges in Facing Global Competition

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Abstract

As a country with the largest Muslim population in the world, Indonesia has great potential in the development of halal tourism. This segment continues to grow globally by offering services and facilities that comply with Islamic values, thereby meeting the needs of Muslim travelers. This study aims to analyse policies, regulations and legal aspects, economic impacts such as investment and infrastructure, social factors such as perceptions and local culture, the role of technology, and environmental effects on the development and sustainability of halal tourism, through a qualitative approach with exploratory and descriptive designs to identify the current state of halal tourism in Indonesia. The collected data were analysed using the PESTEL approach. The study's results revealed that Indonesia is politically ready and has established basic regulations. Still, not yet prepared economically, socially, technologically, environmentally, and legally to develop halal tourism to a comprehensive and international standard. The results of this study can serve as a reference for policymakers and tourism industry players in formulating more effective strategies to promote and develop halal tourism in Indonesia.

Keywords

PESTEL Analysis - Indonesia's Halal Tourism - Halal industry

Introduction

Indonesia is uniquely positioned as a country with the largest Muslim population, thus presenting significant opportunities for the development of halal tourism. As a growing segment of the global tourism market, halal tourism focuses on providing services and facilities that align with Islamic principles, ultimately meeting the preferences and needs of Muslim travellers. Aceh province, in particular, exemplifies a proactive approach to promoting halal tourism. The region has successfully blended tourism with Islamic religious obligations, ensuring that all forms of tourism, including creative and heritage tourism, adhere to halal standards. This model not only improves the travel experience for Muslim travellers but also contributes to local economic growth by attracting visitors to Islamic heritage sites.¹ A study highlights that the Indonesian Ulema Council (MUI) has issued regulations and fatwas on halal tourism, including comprehensive guidelines on contractual provisions for tourism activities.²

This regulatory framework is crucial in ensuring traveller confidence in halal certification and offerings, which in turn enhances the marketability of halal tourism destinations in Indonesia.³ Moreover, with the rise of Muslim travellers globally, destinations that offer halal-friendly amenities such as prayer facilities, halal cuisine, and accommodation are likely to see higher visitation rates from an increasingly discerning Muslim traveller base.^{4,5} Additionally, tourism management and perceived destination attributes significantly influence Muslim tourists' intentions to visit halal tourist sites. Elements such as perceived behavioural control and destination trust

¹ Muhammad Yusuf and others, 'Halal Tourism to Promote Community's Economic Growth: A Model for Aceh, Indonesia', *Pertanika Journal of Social Sciences and Humanities*, 29.4 (2021), 2869–91 <<https://doi.org/10.47836/pjssh.29.4.42>>; Dina Hariani and Mohd H Hanafiah, 'The Competitiveness, Challenges and Opportunities to Accommodate the Halal Tourism Market: A Sharia-Law Tourism Destination Perspectives', *Journal of Islamic Marketing*, 15.3 (2023), 919–42 <<https://doi.org/10.1108/jima-05-2023-0147>>.

² Hariani and Hanafiah.

³ Budiman M Musthofa and others, 'Institutional Dynamics of Halal Tourism Development in Indonesia and Malaysia', *Jas (Journal of Asean Studies)*, 11.1 (2023), 21–41 <<https://doi.org/10.21512/jas.v11i1.9431>>.

⁴ Musthofa and others.

⁵ Iddrisu Mohammed and others, 'The Impact of Halal Tourism on Muslim Diaspora Intention to Recommend: An Application of the Theory of Planned Behaviour', *Journal of Hospitality and Tourism Insights*, 6.5 (2022), 1688–1708 <<https://doi.org/10.1108/jhti-10-2021-0297>>; Amarn Sodawan and Liwei Hsu, 'Halal-Friendly Attributes and Muslims' Visit Intention: Exploring the Roles of Perceived Value and Destination Trust', *Sustainability*, 14.19 (2022), 12002 <<https://doi.org/10.3390/su141912002>>.

emerged as important factors that enhance tourists' overall experience and intention to revisit.⁶

The ability to provide an enabling environment for halal tourism includes not only meeting the dietary needs of Muslim travellers through halal food but also their spiritual needs through accessibility⁷, which contributes to economic growth. Halal tourism presents economic opportunities for local businesses in Indonesia. The rise of Muslim consumerism, together with the growth of the halal tourism market, shows strong potential to increase local incomes and create jobs in the tourism sector⁸. Growing global interest in halal tourism extends beyond Muslim-majority countries, attracting destinations worldwide that seek to cater to Muslim travellers through customised services.⁹

On the other hand, there is a significant opportunity to strengthen Indonesia's position as a halal tourism destination by capitalising on growing global awareness of the market. As more countries recognise the needs of Muslim travellers, Indonesia's tourism industry can adapt by offering more services and facilities that comply with Islamic law.¹⁰ In addition, government support in regulating and promoting halal tourism is also significant. Evidence suggests that consistent government policies, such as halal certification and tourism promotion

⁶ Yuliani D Lestari, Faridatus Saidah, and Aghnia N A Putri, 'Effect of Destination Competitiveness Attributes on Tourists' Intention to Visit Halal Tourism Destination in Indonesia', *Journal of Islamic Marketing*, 14.4 (2022), 937–65 <<https://doi.org/10.1108/jima-12-2020-0368>>.

⁷ Norliza Katuk and others, 'Halal Certification for Tourism Marketing: The Attributes and Attitudes of Food Operators in Indonesia', *Journal of Islamic Marketing*, 12.5 (2020), 1043–62 <<https://doi.org/10.1108/jima-03-2020-0068>>.

⁸ Siti Mujiatun and others, 'The Impact of Marketing Communication and Islamic Financial Literacy on Islamic Financial Inclusion and MSMEs Performance: Evidence From Halal Tourism in Indonesia', *Sustainability*, 15.13 (2023), 9868 <<https://doi.org/10.3390/su15139868>>; Shintya D Nur'aini and Sucipto Sucipto, 'Comparison Halal Food Regulation and Practices to Support Halal Tourism in Asia: A Review', *Iop Conference Series Earth and Environmental Science*, 733.1 (2021), 012044 <<https://doi.org/10.1088/1755-1315/733/1/012044>>.

⁹ Lukman Santoso, Agus Triyanta, and Jawahir Thontowi, 'Halal Tourism Regulations in Indonesia: Trends and Dynamics in the Digital Era', *Ijtihad Jurnal Wacana Hukum Islam Dan Kemanusiaan*, 22.1 (2022), 73–94 <<https://doi.org/10.18326/ijtihad.v22i1.73-94>>; Paolo Biancone and others, 'Halal Tourism: An Opportunity for the Global Tourism Industry', *Tourism Analysis*, 24.3 (2019), 395–404 <<https://doi.org/10.3727/108354219x15511865533112>>.

¹⁰ Punit M Ekka, 'Halal Tourism Beyond 2020: Concepts, Opportunities and Future Research Directions', *Journal of Islamic Marketing*, 15.1 (2023), 42–58 <<https://doi.org/10.1108/jima-09-2022-0260>>.

geared toward Muslim tourism, can strengthen tourist attractions and confidence.¹¹

However, despite its significant potential, the development of Indonesia's halal tourism sector faces various challenges and opportunities influenced by external factors. One key challenge is the need to improve understanding of halal at various levels of the community and industry. Misunderstandings about halal principles can hinder strategic efforts to promote halal tourism destinations.¹² Research shows that a lack of clarity about halal certification and related standards can confuse consumers.¹³ Therefore, halal tourism destinations need to develop a comprehensive recovery strategy to address these uncertainties, while also creating a safe and enjoyable experience for travellers.¹⁴

In addition, the importance of understanding and exploring the desires and motivations of Muslim travellers cannot be overlooked. Research indicates that the desire to visit destinations offering authentic halal experiences can be a decisive factor in travel decisions¹⁵. In general, to optimise the growth of halal tourism in Indonesia, all stakeholders need to collaborate, share knowledge, and establish clear standards for this sector.

There has been much research on halal tourism in Indonesia, but it can be classified into five main categories: consumer behaviour, which highlights the factors that influence Muslim consumers' decision to choose a halal tourist destination, such as the research of ^{16,17,18} destination development that emphasises the importance of developing

¹¹ Abror Abror and others, 'Perceived Risk and Tourist's Trust: The Roles of Perceived Value and Religiosity', *Journal of Islamic Marketing*, 13.12 (2021), 2742–58 <<https://doi.org/10.1108/jima-03-2021-0094>>.

¹² Uud Wahyudin and others, 'The Misunderstanding of Halal Tourism in Bandung City - Indonesia: Muslim Tourist Arrivals Are Increasing in the Obscurity of Concepts', *Journal of Islamic Marketing*, 13.12 (2021), 2611–29 <<https://doi.org/10.1108/jima-07-2020-0204>>.

¹³ Ahmed Adel and others, 'Muslims' Travel Decision-Making to Non-Islamic Destinations: Perspectives From Information-Seeking Models and Theory of Planned Behavior', *Journal of Islamic Marketing*, 12.4 (2020), 918–40 <<https://doi.org/10.1108/jima-04-2020-0095>>.

¹⁴ Mohammed and others.

¹⁵ Nasrin Akter and Shahedul Hasan, 'The Moderating Role of Perceived Behavioral Control in Predicting Muslim Tourists' Halal Tourism Intention: A Developing Country Perspective', *Journal of Islamic Marketing*, 14.7 (2022), 1744–67 <<https://doi.org/10.1108/jima-10-2021-0336>>.

¹⁶ Citra Kusuma Dewi and others, 'Developing Halal Consumer Behavior and Tourism Studies: Recommendations for Indonesia and Spain', *Frontiers in Psychology*, 13 (2022), 863130.

¹⁷ Ririn Tri Ratnasari and others, 'Emotional Experience on Behavioral Intention for Halal Tourism', *Journal of Islamic Marketing*, 12.4 (2021), 864–81.

¹⁸ Muhammad Bilal Zafar and Mohd Fauzi Abu-Hussin, 'Halal Purchasing Decisions and Consumer Behavior: A Multi Method Review', *Journal of Islamic Marketing*, 2025.

attractions, hotels, and marketing under halal principles to position Indonesia as the world's halal tourism centre, such as research^{19,20} marketing, evaluating the effectiveness of halal tourism promotion in Indonesia and how such strategies improve the country's competitiveness in the global market, such as the study of^{21 2223} policy, examining the development of halal tourism policies in Indonesia, such as research.^{24,25,26} and sustainability. Highlighting aspects of sustainability in halal tourism development.^{27,28,29}

Research analysing the external factors influencing halal tourism development in Indonesia has not employed a PESTEL framework. Filling this gap seeks to support the development of halal tourism that is more inclusive, sustainable, and competitive in Indonesia. This study aims to analyse the influence of government policies, political regulations, and legal aspects on the development of halal tourism; identify the impact of economic factors such as investment and infrastructure; explore the influence of social factors, including

¹⁹ Abdul K Jaelani and others, 'Halal Tourism Sector and Tax Allowance Policy: A Case Study Observed From Normative Problems to Effective Implementation', *Ijtihad Jurnal Wacana Hukum Islam Dan Kemanusiaan*, 23.2 (2023), 185–210 <<https://doi.org/10.18326/ijtihad.v23i2.185-210>>.

²⁰ Lila Bismala and Gustina Siregar, 'Development Model Of Halal Destination: A Literature Review', in *Proceeding International Seminar of Islamic Studies*, 2020, 1, 624–32.

²¹ Ike Janita Dewi, 'In the Name of the Residents' Wellbeing: Development of Halal Tourism in Indonesia Using the "Place Attachment" Approach and "Value-Belief-Norm Theory"', *Frontiers in Sustainable Tourism*, 2 (2023) <<https://doi.org/10.3389/frsut.2023.1183347>>.

²² Mevlüt Akyol and Özgür Kiliç, 'INTERNET AND HALAL TOURISM MARKETING', *Electronic Turkish Studies*, 9.8 (2014).

²³ Salman Yousaf and Fan Xiucheng, 'Halal Culinary and Tourism Marketing Strategies on Government Websites: A Preliminary Analysis', *Tourism Management*, 68 (2018), 423–43.

²⁴ Wisber Wiryanto and others, 'Development of Halal Tourism Policies in Indonesia after DSN-MUI Fatwa Number 108/DSNMUI/X/2016: Preliminary Insights', ed. by A. Ma'arif and others, *BIO Web of Conferences*, 146 (2024), 01097 <<https://doi.org/10.1051/bioconf/202414601097>>.

²⁵ M Syamsurrijal and others, 'From Decision Making to Practice: Economic Growth on Halal Tourism Policies Based on Sharia Regulation in Lombok, Indonesia', *Journal of Environmental Management & Tourism*, 14.4 (2023), 2127–39.

²⁶ Intan Purwandani and Mohamad Yusuf, 'Localizing Indonesian Halal Tourism Policy within Local Customs, Qanun, and Marketing', *Journal of Policy Research in Tourism, Leisure and Events*, 16.2 (2024), 246–64.

²⁷ Muhammet Fatih Elaziz and Abdurrahman Kurt, 'Religiosity, Consumerism and Halal Tourism: A Study of Seaside Tourism Organizations in Turkey', *Tourism: An International Interdisciplinary Journal*, 65.1 (2017), 115–28.

²⁸ (Keliat & Sentanu., 2022)

²⁹ Mohamed Battour and others, 'Halal Tourism: What Is next for Sustainability', *Journal of Islamic Tourism*, 1 (2021), 80–91.

community perceptions and local culture; assess the role of technology in the promotion and facilitation of halal tourism; and evaluate the environmental impact on the sustainability and attractiveness of halal tourism destinations.

Methods

This research employs a qualitative approach with an exploratory, descriptive design to identify the current state of halal tourism in Indonesia. The exploratory approach was chosen because it enables the collection of in-depth, direct initial input from informants. The primary method for data collection is semi-structured interviews, with open-ended questions designed to explore stakeholders' perceptions, awareness, and predictions regarding the development of the halal tourism industry. The questions were developed from a literature review and relevant prior research, serving as the theoretical basis.

This study involved 13 purposively selected informants. The informants came from diverse backgrounds, including government representatives, halal tourism experts, business professionals (such as restaurant owners, tour guides, and hotel employees), and the general public (see Table 1). Their selection was based on their competence and ability to provide information relevant to the issues under study. Interviews were conducted individually, with each informant asked to provide their opinion on the development of Indonesian halal tourism using the PESTEL classification.

Table 1. Informant demographic

Code	Initial	Gender	Type of stakeholders	Occupation
01	AD	Male	Government	Staff of the West Java Tourism and Culture Office
02	MI	Male	Government	Staff of the Indonesian Ministry of Law and Human Rights
03	STM	Female	Government	West Java Environmental Office
04	AA	Male	Business actor	Tour Guide
05	DR	Male	Business actor	Owner of Sharia Hotel
06	LS	Female	Business actor	Manager of Halal Tourism Village
07	NSI	Female	Business actor	Owner of Travel Tour
08	CS	Male	Expert	KNEKS
09	SA	Male	Expert	MUI West Java
10	MIF	Male	Expert	Researcher of Sharia Economics UIN SGD

11	MDR	Male	Society	MES Management of Islamic Economic Society
12	IS	Female	Society	Environmental Activist
13	DA	Male	Society	Cultural Activist

Source: Researchers’ tabulation

In addition to interviews, supporting data were obtained through literature reviews and surveys of Muslim tourists to provide a more comprehensive picture of the phenomenon under study. To enhance Indonesia's halal tourism on a global scale, it is crucial to analyse the external environment of halal tourism using a PESTEL framework, focusing on the political, economic, socio-cultural, technological, environmental, and legal aspects. According to³⁰, these factors cannot be controlled by halal tourism businesses and become an external influence on business performance. Table 2 presents a comprehensive overview of the various aspects included in each element. Following the methodological approach outlined by³¹, to deepen this analysis, a thematic approach is used, utilising data obtained from informants.

Table 2: Elements assessed in PESTEL

Aspects	Assessed Elements	Key Questions
Political	Government Policy	Has the government issued policies and regulations that support halal tourism?
	Political Stability	Does Indonesia have sufficient political stability to support tourist comfort?
	Diplomatic Relations	Do Indonesia's diplomatic relations support the flow of international Muslim tourists?
Economic	Economic Growth	Does Indonesia's economic growth support tourist purchasing power and investment in the halal tourism sector?
	Infrastructure Investment	Does tourism infrastructure investment include halal facilities evenly?
	Currency Exchange Rates	Do exchange rate fluctuations support cost convenience for foreign tourists?
Social	Public Perception	Is public perception of halal tourism positive and inclusive?
	Culture & Tradition	Do local cultures and traditions support the acceptance of the halal tourism concept?
	Traveler Demographics	Does Indonesia have demographic data on Muslim tourists as a target market?

³⁰ G Friend and S Zehle, ‘Guide to Business Planning (Pp. 31–35)’, *London: The Economist Newspaper Ltd*, 2009.

³¹ Zaid Bin Mat Yusop, ‘PESTEL Analysis’, *Paper Persented at COMRAP*, 2018, 34–39.

Technological	Digital Innovation	Has Indonesia utilized digital technology to promote halal tourism?
	Technological Infrastructure	Is technological infrastructure such as the internet available in all tourist destinations?
	Cyber Security	Is cybersecurity for digital tourists guaranteed?
Environmental	Environmental Sustainability	Do tourist destinations implement environmental conservation and sustainability practices?
	Climate Change	Has Indonesia mitigated the impact of climate change on the tourism sector?
	Natural Resources Management	Is the management of natural resources for tourism carried out sustainably?
Legal	Halal Regulations	Does Indonesia have halal regulations that are recognized nationally and internationally?
	Tourism Regulations	Do tourism actors comply with national and global tourism regulations?
	Tourist Rights and Protection	Do tourists have clear legal protection and rights while traveling?

Source: Author's Framework

This research is expected to provide a deeper insight into the external challenges in the development of halal tourism in Indonesia. In addition, the results of this study can be a reference for policymakers and tourism industry players in formulating more effective strategies to promote and develop halal tourism in Indonesia. This study makes a significant contribution to the fields of tourism and the creative economy in Indonesia and offers new perspectives that have not been widely discussed in the current literature.

PESTEL study (political, economic, socio-cultural, technological, environmental, and legal) of Indonesian Halal Tourism

Politik

Government policies and regulations play an important role in the development of Indonesia's halal tourism sector. These policies aim to create an enabling environment for the growth of halal tourism, including tax incentives that encourage investment in the sector and support for the infrastructure necessary to enhance the traveller

experience.³² One of the government initiatives in regulating halal tourism is implementing regulations requiring halal certification for tourism service providers, including accommodations and restaurants, to ensure that all services adhere to Islamic principles.³³

Additionally, political stability is a crucial factor that affects the safety and comfort of tourists, particularly Muslim tourists. In this context, stable and transparent government policies will increase travellers' confidence in Indonesian tourism destinations.³⁴ In a broader political analysis, stable political conditions not only encourage the growth of local tourism but also strengthen diplomatic relations and collaboration with other countries, which is crucial for attracting Muslim tourists from abroad.³⁵ For example, partnerships between Indonesia and countries with large Muslim populations, such as Malaysia and Saudi Arabia, can increase tourist interest and visits to Indonesia.³⁶

Furthermore, good diplomatic relations help promote halal tourism. Effective negotiations between countries with Muslim populations enable the adoption of similar standards in the delivery of halal tourism services and facilitate the exchange of tourism-related information.³⁷ This cooperation can strengthen Indonesia's branding as a premier halal tourism destination, while also attracting more Muslim travellers who seek experiences that align with their faith.

"We have, but it is not yet optimal: The Indonesian government, through the Ministry of Tourism and Creative Economy, already has a halal tourism development program. Indonesia even won an award as the world's best halal tourism destination according to the Global Muslim Travel Index (GMTI). However, implementation in the field, such as halal certification, worship facilities, and tax incentives, remains uneven and inconsistent across regions. Many business actors have not been touched by this program in real terms." (MI. government)

"I have: Indonesia is generally politically stable, especially when compared to many other countries in the region. Democracy works, albeit with dynamics typical of developing countries. Key tourist destinations such as Bali, Lombok and Yogyakarta are relatively safe.

³² Jaelani and others.

³³ Santoso, Triyanta, and Thontowi.

³⁴ Abror and others.

³⁵ Katuk and others.

³⁶ Mujiatun and others.

³⁷ Akter and Hasan.

However, sporadic socio-political issues in the media sometimes affect the global perception of stability." (CS. Expert)

"Not completely: *Indonesia has good relations with many Muslim countries and OIC members. However, the promotion of halal tourism abroad is still less aggressive. Compared with Malaysia or Turkey, Indonesia's diplomatic approach to attracting Muslim tourists through international exhibitions, visa facilitation, and airline cooperation remains suboptimal. There is great potential, but a more focused tourism diplomacy strategy is needed" (AD. Government)*

In general, the informants agreed that the development of halal tourism in Indonesia has been undertaken, but its implementation remains suboptimal. The first respondent highlighted that, although the government has had a halal tourism programme and achieved international recognition, its implementation on the ground remains uneven, both in terms of worship facilities and tax incentives.

Economic

A country's economic growth rate is directly related to tourists' purchasing power and their ability to invest in tourism services, including halal tourism.³⁸ As the economy grows, more individuals can plan and execute trips, which in turn increases the demand for halal tourism services that comply with Islamic religious requirements. Furthermore, research indicates that an increase in per capita income can encourage travel to halal destinations outside one's home country, thereby increasing the market share of halal tourism.³⁹

Infrastructure investment is also an important element in supporting halal tourism areas. Good infrastructure, including transportation, accommodation, and facilities for Muslim travellers, greatly supports the comfort and safety of their journey.⁴⁰ Therefore, the government's infrastructure investment programme to improve the accessibility of halal tourism destinations is crucial for attracting more Muslim tourists; high-quality infrastructure creates a positive experience, encouraging tourists to recommend the destination to others and increasing their desire to return.⁴¹ Furthermore,

³⁸ Ekka.

³⁹ Ekka.

⁴⁰ Abror and others.

⁴¹ Mohamed Battour, Muhammad K Rahman, and Md. S Rana, 'The Impact of PHTPS on Trip Quality, Trip Value, Satisfaction and Word of Mouth', *Journal of Islamic Marketing*, 11.6 (2019), 1517–38 <<https://doi.org/10.1108/jima-03-2019-0058>>.

implementing government programmes that take these factors into account can create synergies between tourism and local economic development.⁴²

Furthermore, currency exchange rate fluctuations are an external factor that can affect travel costs for international travellers. When local currency exchange rates weaken against major international currencies, travel costs for travellers from those countries increase, which can limit their ability to visit, especially in the halal tourism sector, where special needs sometimes make travel more expensive⁴³. Research indicates that currency stability can contribute to tourists' decisions to visit a country, including in the context of halal tourism.⁴⁴ Competitive prices and labour services can help attract more Muslim tourists, especially during unfavourable exchange rate fluctuations. The combination of these factors supports the creation of a conducive environment for the growth of the tourism sector by providing the value that Muslim travellers expect in terms of both experience and ease of travel⁴⁵

"It has, but it is still not stable: Indonesia's economic growth in recent years has been quite consistent at around 5%, including post-pandemic. This shows the resilience of the national economy; however, inequality in income distribution and public consumption is still a challenge. The lower-middle sector has not fully recovered, so the potential of local tourists is still not optimal." (MDR. Society)

"Not quite yet: The government has indeed built massive infrastructure such as airports, toll roads, and ports in the "10 New Bali" project. However, infrastructure that specifically supports halal tourism (such as halal-certified hotels, scattered halal restaurants, and access to places of worship in tourist areas) is still very limited outside major cities." (LS. Business actor)

"It is not yet stable: The exchange rate of the rupiah against the US dollar and other major currencies tends to fluctuate. While a weak rupiah can make Indonesia cheaper for foreign tourists, exchange-rate instability makes businesses and investors in the

⁴² Abror and others.

⁴³ Yunia Wardi and Okki Trinanda, 'Halal Tourism and Coronavirus: Understanding the Influence of Halal Reputation and Fear of COVID-19 on Tourist's Revisit Intention', *Journal of Islamic Accounting and Business Research*, 13.7 (2022), 1095–1109 <<https://doi.org/10.1108/jiabr-11-2021-0290>>.

⁴⁴ Ekka.

⁴⁵ Abror and others.

tourism sector hesitant to make long-term decisions. In addition, tourists from countries with weak currencies also continue to face purchasing power challenges when visiting Indonesia."
(AA.Business actor)

Informants noted that, despite Indonesia's growing economy and infrastructure, support for halal tourism remains limited. Income inequality and weak purchasing power are domestic constraints, while the lack of halal facilities outside major cities reflects the development gap. Exchange rate fluctuations also create uncertainty for businesses and reduce foreign tourists' purchasing power. Overall, although Indonesia's economic and infrastructure foundations are moving in a positive direction, instability in areas such as economic distribution, halal infrastructure readiness, and exchange rates poses real challenges that must be overcome for halal tourism to develop sustainably and competitively.

Social

Local communities' perceptions of halal tourism and Muslim travellers play a significant role in determining the sector's development success. Positive attitudes among local communities can enhance the experience of Muslim travellers and create an atmosphere conducive to the growth of halal tourism.⁴⁶ Research indicates that community support for halal tourism can encourage local investment and enhance the facilities offered to tourists, including places of worship and halal food options.⁴⁷ However, if the public misunderstands or feels dissatisfied with Muslim travellers, this may reduce interest in engaging with the tourism sector.⁴⁸

Local culture and traditions also influence the acceptance and adaptation of the halal tourism concept. In many contexts, public acceptance of halal tourism depends on how closely local traditions align with Islamic practices.⁴⁹ For example, areas with a history of positive interactions with Muslim communities, or where Islamic values are internalised, tend to be more receptive to, and more successful in implementing, halal tourism products and services.⁵⁰ In

⁴⁶ Wahyudin and others.

⁴⁷ Adel and others.

⁴⁸ Abror and others.

⁴⁹ Ekka.

⁵⁰ Juliana Juliana and others, 'The Determinants of Muslim Millennials' Visiting Intention Towards Halal Tourist Attraction', *Journal of Islamic Accounting and Business Research*, 14.3 (2022), 473–88 <<https://doi.org/10.1108/jiabr-02-2021-0044>>.

contrast, areas with very different cultures or conflicts between local and Islamic values may face challenges in implementing halal tourism.⁵¹

Understanding the demographics of Muslim travellers, the target market, is also important in this context. Demographic profiles, including age, income level, education, and preferences, provide insight into Muslim travellers' needs and expectations.⁵²

This includes choosing a halal destination that not only fulfils spiritual needs but also offers opportunities for social interaction.⁵³ Research shows that tourists' understanding and awareness of the halal concept affect their decisions when choosing a travel destination.⁵⁴

In the face of these challenges, co-operation between the government, businesses, and local communities is essential.⁵⁵ An effective marketing strategy is needed that emphasises the advantages of Indonesian halal tourism, along with clear communication to build awareness and understanding of its benefits among local communities.⁵⁶

This effort will not only support the growth of the halal tourism industry but also strengthen Indonesia's position as an attractive halal tourism destination.⁵⁷

"Already, but not evenly distributed: In general, Muslim-majority Indonesians tend to be positive and open to halal tourism. Many local communities support the presence of Muslim travellers by providing halal food and worship facilities. However, in some non-Muslim or secular-oriented tourist areas such as Bali, halal tourism is still perceived in a limited way or even misunderstood as a form of cultural conservatism. Education is needed so that halal tourism is not seen as

⁵¹ Ahmed E Mohamed, 'Political Budget Cycles in Autocracies: The Role of Religious Seasons and Political Collective Action', *Politics and Religion*, 15.3 (2022), 617–28 <<https://doi.org/10.1017/s1755048322000050>>.

⁵² Santoso, Triyanta, and Thontowi.

⁵³ Mohd F Said and others, 'Exploring *Halal* Tourism in Muslim-Minority Countries: Muslim Travellers' Needs and Concerns', *Journal of Islamic Marketing*, 13.4 (2020), 824–42 <<https://doi.org/10.1108/jima-07-2020-0202>>.

⁵⁴ Ending Solehudin, Hisam Ahyani, and Haris M Putra, 'Study on Sharia Compliance Principles in Halal Tourism Business in Bandung Regency: An Implementation of Islamic Business Ethics Principles (Professional Ethics)', *Keuangan Islam Dan Peran Kesejahteraan*, 2024, 39–66 <<https://doi.org/10.20885/millah.vol23.iss1.art2>>.

⁵⁵ Ratih Pratiwi and others, 'The Collaboration of Penta Helix to Develop Halal Tourism Villages in Batang, Cental Java.', *International Journal of Sustainable Development & Planning*, 19.7 (2024).

⁵⁶ Suhana Mohezar, Sedigheh Moghavvemi, and Suhaiza Zailani, 'Malaysian Islamic Medical Tourism Market: A SWOT Analysis', *Journal of Islamic Marketing*, 8.3 (2017), 444–60 <<https://doi.org/10.1108/jima-04-2015-0027>>.

⁵⁷ Mujiatun and others.

a threat to local diversity, but as an inclusive market option." (DA. Society)

"Not fully: *Indonesia is very rich in diverse local cultures and traditions. On the one hand, this is a strength of national tourism, but on the other hand, it can be a challenge to adapt halal tourism standards universally. For example, in some regions, the tradition of alcoholic beverages or certain traditional dances may be considered incompatible with halal tourism standards. This adjustment needs to be done dialogically and contextually, not with a uniform approach that ignores local wisdom." (SA. Expert)*

"It has not been optimised: *Indonesia has great potential to attract Muslim tourists from the Middle East, South Asia, and other Muslim countries. However, local tourism industry players have not studied demographic profiles such as age, lifestyle, travel preferences, and economic class in depth. Many travel service providers still rely on conventional approaches without sharp market segmentation, even though millennial Muslim tourists, for example, have different needs than older generation Muslim tourists." (MIF. Expert)*

Most informants said Indonesia has significant potential to become a leading halal tourist destination. However, saying 'fully fulfilled' requires a transformation in public perception, careful management of local culture, and more accurate, targeted research on tourist demographics.

Technology

Digital innovation, technological infrastructure, and cybersecurity significantly impact the development of halal tourism. Digital technology can be leveraged to promote halal tourism destinations through mobile applications and online platforms specifically designed to meet the needs of Muslim travellers. These platforms provide information on halal accommodations, restaurants, places of worship, and sharia-compliant activities, which are crucial for enhancing the user experience.⁵⁸ A study shows that mobile apps that provide navigation to halal places and related information speed up travellers' decision-making and create a more positive experience, thereby increasing the intention to recommend or return to the destination.⁵⁹

⁵⁸ Wardi and Trinanda.

⁵⁹ Slamet Slamet, Irwan Abdullah, and Nur Q Laila, 'The Contestation of the Meaning of Halal Tourism', *Heliyon*, 8.3 (2022), e09098 <<https://doi.org/10.1016/j.heliyon.2022.e09098>>.

The availability of technological infrastructure, including the internet and digital services, in tourist destinations is also an important factor. Destinations with fast internet access and good digital services tend to be more attractive to modern travellers who rely on technology to plan their trips.⁶⁰ Research shows that travellers prefer destinations that offer easy access to information and services through online platforms. This directly affects their satisfaction and likelihood of returning.⁶¹ With a robust technology infrastructure, halal tourism destinations can enhance their visibility in the global market, attract more travellers, and provide services that meet the market's growing expectations.

As destinations rely more on digital technology, data protection and cybersecurity become crucial. Travellers need assurance that their personal information will be protected when using digital platforms to plan a trip or while on site.⁶²

Data showing increasing demand for data protection reflects the importance of cybersecurity awareness in the tourism industry.⁶³ Research shows that travellers' trust in digital services is directly related to the transparency and data security offered by service providers⁶⁴. Therefore, app developers and service providers in the halal tourism sector must implement appropriate security measures to maintain data integrity and preserve consumer trust.

Furthermore, digital innovation, technology infrastructure, and cybersecurity play a significant role in creating a responsive and secure halal tourism ecosystem. By using innovative digital technology, developing adequate infrastructure, and implementing effective cybersecurity practices, Indonesia's halal tourism destinations can become more attractive to the global market.⁶⁵ Integrating these aspects will not only enhance the Muslim traveller experience but also strengthen Indonesia's position as a leader in the halal tourism industry.⁶⁶

⁶⁰ Ekka.

⁶¹ Heesup Han and others, 'Exploring Halal-Friendly Destination Attributes in South Korea: Perceptions and Behaviors of Muslim Travelers Toward a Non-Muslim Destination', *Tourism Management*, 71 (2019), 151–64 <<https://doi.org/10.1016/j.tourman.2018.10.010>>.

⁶² Juliana and others.

⁶³ Mohammed and others.

⁶⁴ Slamet, Abdullah, and Laila.

⁶⁵ Adang Sonjaya and others, 'How the Integration of Payment Systems Through QRIS Accelerates Economic and Financial Cooperation in the ASEAN Region', *International Journal of Sustainable Development and Planning*, 20.3 (2025) <<https://doi.org/10.18280/ijstdp.200305>>.

⁶⁶ Adel and others.

"Not yet: Despite a number of initiatives, such as tourism apps from the Ministry of Tourism and some local startups, the promotion of halal tourism through digital technology is still not massive and integrated. Few apps specifically curate halal destinations, restaurants, hotels, or services in real time, with attractive and multilingual features. Malaysia and Turkey are far superior in this regard. Indonesia needs a solid halal digital ecosystem that is not only informative, but also transactional and interactive." **(NSI. Business Actor)**

"Already, but uneven: Internet connectivity in big cities and major tourist areas such as Bali, Yogyakarta and Lombok is already relatively good. But in many potential tourist destinations outside Java, such as the interior of Kalimantan or eastern Indonesia, internet access is still limited or unstable. This hampers the digitization of halal tourism services in the area. In addition, digital HR training in the local tourism sector is also still minimal." **(AD. Government)**

"Not yet: Cybersecurity in Indonesia still faces major challenges. Many digital tourism platforms, including those managed by local governments or the private sector, do not yet have strong data security standards, such as encryption, two-factor authentication, or privacy protection in accordance with international regulations (e.g. GDPR). This poses a risk to travelers who make online bookings, digital payments, or identity registration through applications. Cases of data leakage in Indonesia are still common." **(MDR Society)**

The informants agreed that Indonesia has great potential to apply technology in halal tourism but has not yet fully met these three key indicators. Serious investment in digital infrastructure, AI/UX-based platform development, and data security regulations is needed to support the growth of technology-based halal tourism.

Environmental

Environmental sustainability, climate change impacts, and natural resource management are important factors in the development of the halal tourism sector. Sustainability practices in halal tourism destinations focus on preserving the environment and creating tourism experiences that raise awareness of the importance of maintaining biodiversity and natural beauty. Destinations that implement environmentally friendly practices, such as using renewable energy,

managing waste properly, and preserving local ecosystems, will be more attractive to travellers who care about the environment.⁶⁷

Climate change can significantly impact the attractiveness and accessibility of halal tourism destinations. Changing weather patterns, rising temperatures, and more frequent natural disasters can disrupt tourist facilities, damage natural attractions, and reduce visitor numbers. Research indicates that sea level rise can harm tourist sites in coastal areas, which are a significant draw for many Muslim travellers.⁶⁸

This condition highlights the need to develop climate change mitigation and adaptation strategies to ensure that destinations can continue to provide services that meet tourists' needs.⁶⁹ In the context of natural resource management, the halal tourism sector must manage these resources sustainably. Water, land, and other natural resources must be managed wisely to prevent environmental damage⁷⁰. Implementing organic farming practices can provide environmentally friendly halal food while improving food quality, maintaining soil health, and promoting biodiversity⁷¹. Involving local communities in resource management is also important to ensure the economic benefits of halal tourism are shared equitably without compromising the environment.⁷²

Community-based management efforts are crucial in supporting environmental sustainability and the development of halal tourism. Involving local communities in every stage of development, from planning to monitoring, can create a sense of ownership and responsibility for the destination. It can also help reduce conflicts between travellers and residents, which often arise from the overexploitation of local resources.⁷³ In addition, the growth of the halal market, which includes more than 1.8 billion Muslims worldwide, makes effective resource management even more relevant.⁷⁴

"Not yet: Sustainable tourism practices are still more slogan than systematic. Many halal tourism destinations (such as Lombok or West Sumatra) lack clear environmental sustainability standards, whether

⁶⁷ Abror and others.

⁶⁸ Ekka.

⁶⁹ Ekka.

⁷⁰ ADANG SONJAYA, ZAMRONI SALIM, and OPIK ROZIKIN, 'Integrating Local Wisdom into a Halal Tourism Model: The Case of Indonesia', *International Journal of Economics & Management*, 18.2 (2024).

⁷¹ Said and others.

⁷² Said and others.

⁷³ Mohammed and others.

⁷⁴ Battour, Rahman, and Rana.

in waste management, green energy use, or the protection of local ecosystems. In many cases, tourism growth is not accompanied by environmental impact control. Green infrastructure, tourist education, and local community involvement in protecting the environment are also still minimal." (STM. Government)

"It has been felt, but not adequately responded to:* The impact of climate change is clearly visible in many coastal destinations that are eroded by abrasion, erratic weather, and more frequent natural disasters. Unfortunately, the policy response to climate change in the halal tourism sector has not been systemic. For example, there has been no adaptation of schedules, shifting tourist seasons, or planning climate resilient infrastructure. Awareness of this matter has not yet become an integral part of the management of halal destinations." *(IS. Society)

"Not yet:* Indonesia is rich in natural resources, but its management is still exploitation rather than conservation, including in areas targeted for halal tourism. The utilization of water, energy, and natural space for the tourism sector often does not pay attention to the carrying capacity of the environment. Some areas are experiencing ecosystem damage due to massive, environmentally unfriendly accommodation development. Without conservation-based management, the long-term sustainability of halal tourism will be threatened." *(SA. Expert)

Most informants stated that Indonesia has not met the three environmental indicators in the development of halal tourism. If halal tourism is to become a national flagship, the ecological dimension must be prioritised on a par with the economic and cultural dimensions. Strict regulations, collaboration with indigenous and local communities, and integrating ecotourism principles across the entire tourism value chain are necessary.

Legal

Halal regulations, tourism regulations, and legal protections for tourists strongly influence the development of Indonesia's halal tourism sector. Clear and internationally recognised halal regulations are essential to ensure consumer confidence in the products and services offered. A study shows that credible halal certification bodies and well-defined standards increase public trust in halal products.⁷⁵ This is particularly important in tourism, where Muslim travellers seek

⁷⁵ Wahyudin and others.

assurance that the services they use, including accommodation and food, meet halal criteria⁷⁶.

National and international tourism regulations also influence how halal tourism destinations are managed. Compliance with these regulations ensures the quality and safety standards necessary to attract travellers. Consistent enforcement of these regulations helps create a safe environment for travellers and reduces the potential for conflict or issues related to non-compliant tourism practices.⁷⁷ Research also highlights the importance of compliance, emphasising reputation as a key factor in travellers' decisions to return.⁷⁸

Travellers' rights and protection are another important aspect of halal tourism development. Legal protection encompasses consumer rights, including transparency in product information, protection of personal data, and security when conducting online transactions. In this context, research shows that clear information and personal data protection can increase travellers' trust in digital services that offer halal products.⁷⁹ Cybersecurity has become particularly relevant, given that many Muslim travellers use apps and digital platforms to plan their trips. Therefore, tourism service providers need to implement robust security protocols to protect travellers' personal information.⁸⁰ This will not only increase the attractiveness for Muslim travellers, but also strengthen Indonesia's position as one of the world's leading halal tourism destinations.

Overall, integrating these elements into Indonesia's halal tourism development strategy is a key step towards improving competitiveness in the global market, as well as creating a satisfying and safe travel experience for Muslim travellers.⁸¹

"Already, but not yet optimal in terms of implementation and global recognition: Indonesia already has a strong legal framework related to halal, namely through Law No. 33 of 2014 concerning Halal Product Guarantee, as well as the Halal Product Guarantee Agency (BPJPH) as the certification authority. However, the main challenges are slow technical implementation, complicated bureaucracy, and not

⁷⁶ Ekka.

⁷⁷ Wardi and Trinanda.

⁷⁸ Wardi and Trinanda.

⁷⁹ Abdulla A Hasan, 'Factors Influencing Halal Tourism Destinations Revisit Intentions Among Muslim Travelers of Bangladesh: The Mediating Role of Emotional Attachments', *Journal of Islamic Marketing*, 15.3 (2023), 720–44 <<https://doi.org/10.1108/jima-02-2023-0045>>.

⁸⁰ SONJAYA, SALIM, and ROZIKIN.

⁸¹ Adel and others.

all tourism actors understand or prioritise halal certification. At the international level, recognition of Indonesia's halal standards is also not yet fully equivalent to standards from countries such as Malaysia or the GCC (Gulf Cooperation Council)." **(MI. Government)**

"Not quite yet: Normatively, Indonesia has a fairly comprehensive Tourism Law No. 10/2009. However, in practice, many tourism actors, especially in the MSME sector and remote areas, do not fully comply with regulations, both in terms of licensing, security, and service standards." **(DA. Society)**

"It has not been fulfilled thoroughly: Legal protection for tourists, especially Muslim tourists who are the target of halal tourism, has not been maximised. Indonesia has a Consumer Protection Law (Law No. 8 of 1999), but complaint, mediation, and law enforcement mechanisms for tourists remain weak. Many cases such as travel agency fraud, services not in accordance with promotions, or unclear tourism service contracts are difficult to investigate or take action." **(SA. Expert)**

All informants stated that Indonesia already has a strong legal basis; however, in the context of halal tourism, implementation, supervision, and harmonisation with global standards are still not fully met. More proactive and participatory legal reforms are needed to ensure that travellers, especially Muslim travellers, are guaranteed rights, safety, and legal clarity at every stage of the journey.

Table 3. Status of assessed PESTEL aspects

PESTEL aspects	Elements Assessed	Status	Brief Description
P (Political)	Government Policies	✓ Already	Regulatory support and incentives are in place, although implementation is uneven.
	Political Stability	✓ Already	National politics are relatively stable, ensuring tourist comfort.
	Diplomatic Relations	✓ Already	Cooperation with Muslim countries is increasing but could be expanded further.
E (Economic)	Economic Growth	✓ Already	Growth is stable, but not fully inclusive.
	Infrastructure Investment	✗ Not yet	Not specific enough to support halal facilities, especially outside Java.
	Currency Rates	✗ Not yet	Fluctuating and not yet supporting cost predictability for tourists.

S (Social)	Public Perceptions	⚠️ Already, but not yet evenly distributed	Tend to be positive, but there are still areas with resistance or misconceptions.
	Culture Traditions &	❌ Not yet	Cultural gap not all can accommodate halal values.
	Tourist Demographics	❌ Not yet	Segmentation and demographic data of Muslim tourists have not been managed optimally.
T (Technology)	Digital Innovation	❌ Not yet	Halal tourism applications and platforms are not yet integrated and not optimized.
	Technology Infrastructure	⚠️ Already, but not yet evenly distributed	Internet is available in big cities, but still weak in 3T areas.
	Cyber Security	❌ Not yet	Data protection remains weak and has not been aligned with international standards.
E (Environmental)	Environmental Sustainability	❌ Not yet	Conservation practices and sustainable tourism education are still lacking.
	Climate Change	❌ Not yet	Impacts are being felt, but climate mitigation and adaptation in the tourism sector remain minimal.
	Natural Resource Management	❌ Not yet	Exploitation is still dominant over conservation in tourism development.
L (Legal)	Halal Regulations	✅ Already	There are already laws and BPJPH, although their implementation and global recognition remain limited.
	Tourism Regulations	❌ Not yet	Many tourism actors have not fully complied with national/international regulations.
	Tourist Rights and Protection	❌ Not yet	Consumer and tourist protection mechanisms remain weak and not robust.

Source: Author's Framework

Based on Table 3, Indonesia is politically and on a regulatory basis ready to implement halal tourism comprehensively; however, it is not

yet economically, socially, technologically, environmentally, or legally prepared to meet international standards.

Conclusion

Politically and regulatory-wise, Indonesia already has a strong foundation for developing halal tourism, as evidenced by policy support such as Law No. 33/2014 on Halal Product Guarantee and strategic initiatives from the Ministry of Tourism and Creative Economy. However, this readiness has not been matched by readiness in other crucial aspects, such as economic, social, technological, environmental, and legal implementation. From an economic perspective, financing and investment for developing adequate halal tourism infrastructure remain limited. Meanwhile, the community's social readiness to accept and support halal tourism still needs improvement, including a better understanding of the concept of halal among businesses and domestic tourists. On the technology side, Indonesia is still lagging in implementing digital systems to support halal tourism, such as halal service-booking applications and blockchain-based certification verification. Environmental challenges also arise, such as the lack of tourist destinations that meet hygiene and sustainability standards in accordance with Sharia principles. Additionally, law implementation remains weak, particularly in areas such as the supervision and enforcement of rules governing halal certification and consumer protection. Therefore, although Indonesia has great potential as a leading halal tourism destination, comprehensive efforts are needed to strengthen lagging areas to compete at the international level.

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