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Alfonso Vargas-Sanchez
University of Huelva, vargas@uhu.es

Dina Hariani
Sekolah Tinggi Pariwisata Bogor, bhi.dinahariani@gmail.com

Ani Wijayanti
Universitas Bina Sarana Informatika, ani.awi@bsi.ac.id

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Perceptions of Halal Tourism in Indonesia: Mental Constructs and Level of Support

Alfonso Vargas-Sanchez

University of Huelva, Spain
vargas@uhu.es

Dina Hariani

Sekolah Tinggi Pariwisata Bogor, Indonesia
bhi.dinahariani@gmail.com

Ani Wijayanti

Universitas Bina Sarana Informatika, Indonesia
ani.awi@bsi.ac.id

Tourism is one of the leading sectors for the Indonesian government to increase foreign exchange. Indonesia has many tourist destinations that attract domestic and foreign tourists. In line with the development of Halal tourism trends, the Indonesian government has begun to develop several enclaves such as Lombok and Aceh as Halal destinations. Indonesia has the largest Muslim population of all countries in the world, and it is estimated that around 13 percent of the global Muslims live in the country. As a Muslim-majority country, it should be easier to implement Halal tourism than in other non-Muslim countries, but this is still a relatively new concept for Indonesians. In this vein, the main purpose of this research is to examine and contribute to understanding the Indonesian population's perception of Halal tourism. A structured questionnaire was employed to elicit responses from local people linked to tourism (namely tourism professionals, academics and students), concluding that extra training efforts are needed. The collective mental constructs about Halal tourism has been characterised (built around four axes: benefits, barriers, religiosity and attractiveness) and the main factors to be emphasised in order to gain people's support have been identified (benefits and attractiveness, together with awareness about the spiritual dimensions of Halal tourism). Currently, support is clear, but moderate for the development of this type of tourism in Indonesia. With regard to appreciation of its spiritual dimension (that is, its focus on people's inner wellbeing) compared with other dimensions (healthy and ecological), the spiritual imprint can be considered as the most necessary condition in gaining support for the positioning of Indonesia as a Halal tourism destination, while the others appear as optional. In addition to the above-mentioned conclusions, some recommendations have arisen, for instance, those related to the need for extra effort for the socialisation and promotion of Halalness in tourism. Finally, limitations of this research are recognised and some future research avenues are proposed.

Key Words: Halal tourism, Halal destination, Indonesia, perception

Introduction

Tourism is the second-largest sector and contributor to foreign exchange in Indonesia, after Palm Oil, according to the Ministry of Tourism (2016). In spite of its current importance, it is broadly recognised that one of the tourism potentials that can be further developed in Indonesia is Halal tourism, which is one of the fastest developing market segments in the world. The number of Muslim travellers continues to increase each year, pushing the need for Halal products and services in tourist destinations.

As a country with a clear Muslim majority and the largest Muslim population in the world, Halal tourism has enormous potential in Indonesia. Even in non-OIC

countries, the Halal tourism industry needs to be prepared to meet Muslims' tourist needs when travelling, such as Halal food (Vargas-Sánchez & Moral-Moral, 2019a) and places of worship. But OIC countries (Malaysia, Indonesia and others) already provide a lot of Halal food, places of worship, etc., because these are normal habits and daily needs of Muslims in their countries.

The Indonesian government has begun to develop the country as a Halal tourist destination. Thus, based on the Global Muslim Travel Index (elaborated by MasterCard and CrescentRating) in 2016, 2017 and 2018, Indonesia's ranking within the top 10 Halal destinations has continued to improve. Finally, in 2019 Indonesia reached the same score as Malaysia and

Table 1: Top 10 OIC Destinations

2016	Country	Score	2017	Country	Score	2018	Country	Score	2018	Country	Score
1	Malaysia	81.9	1	Malaysia	82.5	1	Malaysia	80.6	1	Malaysia	78
2	UAE	74.7	2	UAE	76.9	2	Indonesia	72.8	2	Indonesia	78
3	Turkey	73.9	3	Indonesia	72.6	3	UAE	72.8	3	Turkey	75
4	Indonesia	70.6	4	Turkey	72.4	4	Turkey	69.1	4	Saudi Ar.	72
5	Qatar	70.5	5	Saudi Ar.	71.4	5	Saudi Ar.	68.7	5	UAE	71
6	Saudi Ar.	70.4	6	Qatar	70.5	6	Qatar	66.2	6	Qatar	68
7	Oman	70.3	7	Morocco	68.1	7	Bahrain	65.9	7	Morocco	67
8	Morocco	68.3	8	Oman	67.9	8	Oman	65.1	8	Bahrain	66
9	Jordan	65.4	9	Bahrain	67.9	9	Morocco	61.7	9	Oman	66
10	Bahrain	63.3	10	Iran	66.8	10	Kuwait	60.5	10	Brunei	65

Source: Global Muslim Travel Index. Mastercard-CrescentRating (2016, 2017, 2018, 2019). Available at: <https://www.crescentrating.com/Halal-muslim-travel-market-reports.html>

ranked number 1 together with that country (Table 1). For the first time since this index was launched, Malaysia is sharing the top position with Indonesia. The improvements in this ranking reflect successes in efforts to educate the industry on the opportunities presented by the Muslim travel market.

Considering the weight of Indonesia in the Muslim world, the main purpose of this research is to examine the perception of Halal tourism by Indonesian people linked to tourism as professionals, academics and students, particularly about its dimensions and characteristics, trying to understand the collective opinion on whether this country should seek to position itself as a halal tourism destination and how it has been formed. Our findings could help to focus private and, especially, public authorities' efforts in this regard.

After this introduction, a number of sections follow: firstly, the theoretical framework of this research; secondly, the methodology utilised in our empirical work; thirdly, the results obtained; and fourthly, the conclusions reached, including recommendations, limitations and suggestions for future research avenues.

Theoretical Framework

Halal tourism

As recognised by Haddad *et al.* (2019), a variety of terms have been used to express the linkage between Islamic law and tourism. In fact, the term 'Halal tourism' has been used in the literature as interchangeable (inaccurately to some extent) with others such as 'Shariah tourism', 'Islamic tourism', or 'Muslim-friendly tourism', which has led to a certain degree of confusion. Nevertheless, the most preferable use is the term 'Halal Tourism', according to the definitions of El-Gohary (2016).

Bearing in mind that, in all aspects of life, a Muslim is expected to benefit from what is considered Halal (permitted) and abstain from Haram (forbidden), Duman (2011:6) makes clear that:

From this point of view, categorization of tourism-related goods and services that are designed, produced and presented to the markets according to Islamic rules (Shariah) can be considered under Halal tourism. Such use of the terminology about touristic goods and services is already common in daily usage.

More specifically, for Akyol and Kilinc (2014), in their characterisation of this market niche, Halal tourism includes Halal hotels, Halal transport (Halal airlines), Halal food / restaurants, Halal tour packages, and Halal finance. Therefore, under this perspective, Halal tourism is formed by different subsectors which are related to each other. Similarly, Battour and Ismail (2016:151) defined Halal tourism as

any tourism object or action which is permissible according to Islamic teachings to use or engage by Muslims in the tourism industry.

In a nutshell,

Halal tourism can be understood as offering tourist services designed to meet the needs of Muslim tourists in accordance with their religious obligations and practices. Thus, the Muslim tourist wants to be able to travel and to visit other places of the world maintaining their usual forms of daily life and behaviours according to Islamic law (Vargas-Sánchez & Perano, 2018).

Nevertheless, considering the critical review of Halal tourism carried out by Moufakkir *et al.* (2019), it has to be recognised, as a starting point to fairly understand this market segment, that the Muslim tourist cannot be stereotyped and reduced to one single mould: the travel motivation is multifaceted, and religion is just one of the factors, among many others, to be taken into account when trying to know more about Muslim tourist preferences and behaviours. The heterogeneous character of this market segment is an intrinsic part of its complexity, even in Muslim people's approach to religion and religiosity, in general in their lives and in particular when travelling.

A recent in-depth literature review - a 'state of the art' review published by Vargas-Sánchez and Moral-Moral (2019b) - has allowed us to identify three key dimensions in Halal tourism: spiritual, ecological and health aspects, which reflect its complex nature as a construct. In addition, to develop the profile of this segment, a number of factors (fifteen in total) have been identified, that can be organised in three theoretical blocks:

- * Factors of **economic** character, influencing level of attractiveness directly: size and growth; the level of expenditure; adaptations of offer and certifications; level of knowledge; seasonality mitigation; impact of global geopolitics.
- * Factors of **social** character derived from religious

background: religious and cultural peculiarities; diversity of origin and need; Muslims as target population; religious motivations; food and catering services.

- * Factors of **social** character that can promote cultural integration to some extent: suitability of experience for any type of public; the welcoming character of the resident population; capacity for integration in the host community; potential for promoting mutual understanding.

The corresponding theoretical foundations, which have served in the design of our questionnaire for primary data collection, are detailed in table 2.

Halal tourism in Indonesia

The implementation of Halal tourism in Indonesia is not universally interpreted by stakeholders. The Halal concept is seen as a motivator to increase the number of tourists, but is typically mixed with a variety of factors that include value-added products and the existence of non-Halal products, such as alcoholic beverages. This has become a tough challenge for businesses in their attempt to implement Halal tourism without losing existing market segments (Laras & Gunawijaya, 2017).

Nevertheless, the idea that Halal tourism does not limit the market, but expands it, is gaining momentum, if the concept of extended facilities and services is put into practice. Under this approach, with no need to make anything new, the requirements of Muslim tourists could be met. Following Laras and Gunawijaya (2017), Halal markets are grouped into three categories, namely; conventional tourists, moderate Muslim tourists, and conservative Muslim tourists. Conventional markets that have been established must be maintained, while the Muslim market segments begin to be worked on.

The Halal tourism concept in Indonesia still has not found stability, since stakeholders are still experiencing confusion on the implementation of the Halal concept. However, Yogyakarta has been able to fulfil the criteria of the Halal tourism concept, as can be seen from the results of a survey carried out in 2016 with tourists in that city: more than 80% of respondents recognised the facilities adhering to the Halal concept (including accommodation, restaurants, and places of worship) and more than 90% stated that there were services that fit the Halal concept (Pratiwi, 2016).

One way to develop Halal tourism in Indonesia is the Penta helix strategy involving academics, businesses, local communities, government, and the media. The government is the facilitator and policyholder, together with other institutions managing the preparation and development of Halal tourism. But in addition, there are three important aspects in Halal tourism development, namely the availability of Halal tourism supporting industries, the willingness of districts or cities to develop this type of tourism, and the existence of business associations able to handle it (Pratiwi *et al.*, 2018).

Empirical Work: Methodology

Population and sample

Concerning the sample, from a total of 305 observations, only 249 were considered valid (81.6%), that is, participants with a declared level of familiarity with Halal tourism of at least 4 in a Likert-scale of 7 points. The breakdown follows: 59 professionals (23.7%), 68 academics (27.3%) and 122 students (49.0%). It has to be noted that this is a convenience sample since the implementation of a random sampling process was unworkable in this case, because of the inexistence of well-defined populations.

Table 2: Theoretical Foundations of Items in the Questionnaire

Items	Theoretical Foundations
Q5.01 - Spiritual dimension.	Battour <i>et al.</i> , 2010; Carboni & Janati, 2016; El-Gohary, 2016; Jafari & Scott, 2014; Oktadiana <i>et al.</i> , 2016; Samori <i>et al.</i> , 2016; Zamani-Farahani & Henderson, 2010.
Q5.02 - Ecological dimension.	Jafari & Scott, 2014; Oktadiana <i>et al.</i> , 2016; Stephenson, 2014.
Q5.03 - Health dimension.	Henderson, 2010; Jafari & Scott, 2014; Oktadiana <i>et al.</i> , 2016; Stephenson, 2014; Zamani-Farahani & Henderson, 2010.
Q5.04 - Size and growth.	Battour <i>et al.</i> , 2011; Carboni & Janati, 2016; El-Gohary, 2016; Hamza <i>et al.</i> , 2012; Henderson, 2010; Jafari & Scott, 2014; Mohsin <i>et al.</i> , 2016; Oktadiana <i>et al.</i> , 2016; Samori <i>et al.</i> , 2016; Stephenson, 2014; WTM, 2007; Zamani-Farahani & Henderson, 2010.
Q5.05 - Level of expenditure.	Battour & Ismail, 2016; El-Gohary, 2016; Stephenson, 2014; WTM, 2007.
Q5.06 - Religious and cultural similarities.	Henderson, 2010; Oktadiana <i>et al.</i> , 2016; Sandikci, 2011; Stephenson, 2014; Zamani-Farahani & Henderson, 2010.
Q5.07 - Diversity of origins and needs.	Henderson, 2010; Jafari & Scott, 2014; Mukhtar & Butt, 2012; Sandikci, 2011; Stephenson, 2014; Zamani-Farahani & Henderson, 2010; Zamani-Farahani & Musa, 2012.
Q5.08 - Adaptations of the offer and certifications.	Battour <i>et al.</i> , 2010; Battour & Ismail, 2016; El-Gohary, 2016; Henderson, 2010; Henderson, 2016; Moshin <i>et al.</i> , 2016; Oktadiana <i>et al.</i> , 2016.
Q5.09 - Level of information.	Battour <i>et al.</i> , 2011; Battour & Ismail, 2016; El-Gohary, 2016; Henderson, 2010; Henderson, 2016; Jafari & Scott, 2014; Razzaq <i>et al.</i> , 2016; Stephenson, 2014.
Q5.10 - Suitability of the experience for any type of public.	Jafari & Scott, 2014; Stephenson, 2014.
Q5.11 - Muslims as the target population.	Henderson, 2010; Scott & Jafari, 2010.
Q5.12 - Religious motivations.	Battour <i>et al.</i> , 2011; El-Gohary, 2016; Jafari & Scott, 2014.
Q5.13 - Particular food and catering services.	Battour <i>et al.</i> , 2011; Battour & Ismail, 2016; Carboni & Janati, 2016; El-Gohary, 2016; Henderson, 2010; Razzaq <i>et al.</i> , 2016; Stephenson, 2014.
Q5.14 - Welcoming character of the resident population.	Carboni <i>et al.</i> , 2014; Jafari & Scott, 2014; Oktadiana <i>et al.</i> , 2016; Shakona <i>et al.</i> , 2015; Stephenson, 2014.
Q5.15 - Seasonality mitigation.	Stephenson, 2014; Zamani-Farahani & Henderson, 2010.
Q5.16 - Impact of the global geopolitical situation.	Battour & Ismail, 2016; Jafari & Scott, 2014; Oktadiana <i>et al.</i> , 2016; Stephenson, 2014; Zamani-Farahani & Henderson, 2010.
Q5.17 - Capacity of integration in the host community.	Carboni <i>et al.</i> , 2014; Carboni & Janati, 2016; Hamza <i>et al.</i> , 2012; Jafari & Scott, 2014; Oktadiana <i>et al.</i> , 2016; Zamani-Farahani & Henderson, 2010.
Q5.18 - Potential for promoting mutual understanding.	Battour <i>et al.</i> , 2010; Carboni & Janati, 2016; Moshin <i>et al.</i> , 2016; Oktadiana <i>et al.</i> , 2016; Stephenson, 2014.

Professionals in this research are those who work in hotels or restaurants, academics are those who teach on campus, and students are those who study hospitality. The sample comes from the cities of Jakarta, Yogyakarta and Bogor, in Java Island. Specifically, students and academics come from Gadjah Mada University and Universitas Bina Sarana Informatika (located in Yogyakarta), and Sekolah Tinggi Pariwisata Bogor (the biggest school of tourism in Bogor). It is relevant to note that respondents are originally from all over Indonesia.

Instrument of measurement

Data were collected via questionnaire, which was structured in six sections:

- * The first section investigates the level of familiarity with the concept of Halal tourism (Q1). This is important because only the answers coming from informants who have been rated by themselves with a level of at least 4 (out of 7) have been considered.
- * The second informs on whether (yes or no) some specific training (course, seminar, workshop or similar) has been attended by the respondents (Q2 item).
- * The third asks for a personal definition of Halal tourism (Q3 item).
- * The fourth ascertains the informant's opinions on whether Indonesia should decisively position itself

as a halal tourism destination, in a 7-points Likert scale (Q4 item).

- * Section 5 is the most complex, with eighteen items (anticipated above in the 'Haal tourism' subsection) to be assessed in Likert scales from 1 to 7. Their corresponding theoretical foundations are summarised in the Table 2.
- * The last section (6) describes the socio-demographic profile of the sample, with three items - gender (Q6.1), age (Q6.2) and nationality (Q6.3)-, which could also be useful to identify potential significant statistical differences in the responses collected.

Techniques applied

Univariate, bivariate and multivariate techniques were applied for data processing, as detailed in the next section. SPSS 20.0, WarpPLS 6.0 and fsQCA 2.0 were used.

Results

Univariate analysis: descriptive statistics

These analytical processes have been calculated on the above-mentioned 249 observations. Table 3 (divided into two parts, 3a and 3b) summarises the descriptive statistics of variables in the questionnaire.

Table 3a: Descriptive statistics (sections 2, 4 and 6 of the questionnaire)

Sample	Variable	Values
Total (n=249)	Q6.1: Gender	49.4% male; 50.6% female
	Q6.2: Age (years)	Mode 21; Median 23; Mean 28.9, Standard Deviation 11.6
	Q6.3: Nationality	100% Indonesian
	Q2: Specific training on Halal tourism	29.3% yes; 70.7% no
Professionals (n=59)	Q4: Indonesia as a Halal destination (1-7)	Mode 7; Median 6; Mean 5.7, Standard Deviation 1.4
	Q6.1: Gender	49.2% male; 50.8% female
	Q6.2: Age (years)	Mode 28; Median 28; Mean 32.0, Standard Deviation 10.9
	Q2: Specific training on Halal tourism	18,6% yes; 81,4% no
Academics (n=68)	Q4: Indonesia as a Halal destination (1-7)	Mode 7; Median 6; Mean 5.6, Standard Deviation 1.4
	Q6.1: Gender	51.5% male; 48.5% female
	Q6.2: Age (years)	Mode 39; Median 39; Mean 40.8, Standard Deviation 10.2
	Q2: Specific training on Halal tourism	41,2% yes; 58,8% no
Students (n=122)	Q4: Indonesia as a Halal destination (1-7)	Mode 7; Median 6; Mean 5.8, Standard Deviation 1.5
	Q6.1: Gender	48.4% male; 51.6% female
	Q6.2: Age (years)	Mode 21; Median 20; Mean 20.8, Standard Deviation 3.2
	Q2: Specific training on Halal tourism	27,9% yes; 72,1% no
	Q4: Indonesia as a Halal destination (1-7)	Mode 7; Median 6; Mean 5.8, Standard Deviation 1.2

Table 3b: Descriptive statistics (section 5 of the questionnaire)

Item (in a 7-points Likert scale)	Mode	Median	Mean (St. Dev.)
Q5.01 - Spiritual dimension.	6	6	5.48 (1.32)
Q5.02 - Ecological dimension.	7	6	5.61 (1.32)
Q5.03 - Healthy dimension.	7	6	6.00 (1.21)
Q5.04 - Size and growth.	7	6	5.64 (1.37)
Q5.05 - Level of expenditure.	6	5	5.08 (1.49)
Q5.06 - Religious and cultural similarities.	6	6	5.36 (1.35)
Q5.07 - Diversity of origins and needs.	5	5	4.63 (1.67)
Q5.08 - Adaptations of the offer and certifications.	6	5	4.83 (1.59)
Q5.09 - Level of information.	5	5	5.17 (1.40)
Q5.10 - Suitability of the experience for any type of public.	6	6	5.38 (1.38)
Q5.11 - Muslims as target population.	6	5	4.98 (1.88)
Q5.12 - Religious motivations.	6	6	5.36 (1.51)
Q5.13 - Particular food and catering services.	6	6	5.63 (1.32)
Q5.14 - Welcoming character of the resident population.	6	6	5.63 (1.22)
Q5.15 - Seasonality mitigation.	5	5	5.05 (1.48)
Q5.16 - Impact of the global geopolitical situation.	6	5	5.06 (1.39)
Q5.17 - Capacity of integration in the host community.	5	5	4.61 (1.58)
Q5.18 - Potential for promoting mutual understanding.	6	6	5.75 (1.13)

Bivariate analysis: statistically significant differences

The aim of this section is to find out if there are statistically significant differences between the three types of respondents (as outlined in Table 3a). The Kruskal-Wallis H test was used for this purpose, considering a p-value of 0.05.

About receiving specific training on Halal tourism, the above-mentioned test showed the existence of significant differences, clearly visible in the corresponding contingency table: academics are, by far, the group with the higher percentage of trained people; at the opposite end of the scale are professionals, where lack of training is more acute.

With regard to the question of whether Indonesia should decisively position itself as a halal tourism destination, no significant differences were found; neither were differences identified concerning the level of familiarity with this concept.

Once the test was administered to the 18 items in section 5, significant differences were found in the behaviour of the following items: Q5.04, Q5.07, and

Q5.11, that is:

- * Academics appreciate more the size and growth expectations of this market segment as a source of attractiveness. Professionals, however, are more cautious in this respect. Students are in between, although closer to academics' perception.
- * Students value the diversity of tourists' origins and needs as a difficulty in managing this market segment more than professionals and, particularly, academics. The latter group appreciates this potential barrier with less intensity.
- * The group of students associate Halal tourism with the Muslim population much more strongly than professionals and, above all, academics. Academics are not decisively inclined to make that association of exclusivity between Halal tourism and Muslims.

Multivariate analysis: factor and cluster analysis

An exploratory factor analysis was carried out on the data matrix composed of the 15 items in section 5 to draw the profile of this market segment (Q5.04 to Q5.18). Once checked its suitability was identified with tests such as correlation matrix determinant,

Bartlett's test of sphericity and the KMO (Kaiser-Mayer-Olkin) index. Their outputs follow: Correlation matrix determinant = 0.010; Bartlett's test of sphericity, Sig 0.000; KMO index = 0.802

As a data reduction technique, a Principal Component Analysis was performed, using the Kaiser method for component extraction and Varimax method for their rotation. The 'rotated components matrix' which was obtained as a result (with a proportion of variance explained of 60.276%) is displayed in Table 4.

According to this output, the collective Mental Construct of Halal tourism can be built around four factors, which we have termed as follows:

Benefits (F1) - cultural similarities; suitable experience for any type of public; tourists welcome by resident population; seasonality mitigation; and promotion of mutual understanding;

Barriers (F2) - diversity of origins and needs; adaptations of the offer and certifications; lack of information; the global geopolitical situation; and potential difficulties of integration in host communities;

Religiosity (F3) - Muslims population as exclusive target; religious motivations; and diet requirements;

Attractiveness (F4) - size and growth; together with level of expenditure.

This exploratory factor analysis was complemented by confirmatory factor analysis, reaffirming our results. The latter was performed using WarpPLS 6.0 (Kock, 2017).

The rationale has been associated with various clusters of informants. To do so, a hierarchical cluster analysis has also been completed, using the Ward method and the squared Euclidean distance. As a result, and based on the dendrogram, seven clusters were identified, with the following characteristics (a common feature is that the healthy dimension of Halal tourism always scores above the other two, ecological and spiritual):

* **Cluster 1**, the most numerous cluster by far (composed of 106 observations, 42.6%), represents moderate supporters of Indonesia as a Halal tourism destination, with a balanced profile with regard to the four factors under consideration, slightly in favour of the appreciation of the religious character and attractiveness of this market segment.

* **Cluster 2** (18 cases, 7.2%) is composed of the most determined supporters of Indonesia positioning itself as a halal tourism destination. They

Table 4: Rotated Components Matrix

Item	Components			
	F1	F2	F3	F4
Q5.04 - Size and growth.	0.515	-0.075	-0.016	0.564
Q5.05 - Level of expenditure.	0.285	-0.027	0.120	0.806
Q5.06 - Religious and cultural similarities.	0.581	-0.012	0.298	0.145
Q5.07 - Diversity of origins and needs.	-0.192	0.512	0.268	0.498
Q5.08 - Adaptations of the offer and certifications.	-0.140	0.532	0.245	0.466
Q5.09 - Level of information.	0.236	0.682	0.026	-0.120
Q5.10 - Suitability of the experience for any type of public.	0.713	0.092	-0.062	0.165
Q5.11 - Muslims as target population.	-0.177	0.218	0.778	0.147
Q5.12 - Religious motivations.	0.196	0.106	0.784	-0.005
Q5.13 - Particular food and catering services.	0.391	0.095	0.594	0.247
Q5.14 - Welcoming character of the resident population.	0.797	0.074	0.144	-0.052
Q5.15 - Seasonality mitigation.	0.497	0.457	0.266	0.021
Q5.16 - Impact of the global geopolitical situation.	0.105	0.737	-0.013	0.065
Q5.17 - Capacity of integration in the host community.	0.021	0.676	0.411	0.025
Q5.18 - Potential for promoting mutual understanding.	0.786	0.175	-0.046	0.026

particularly value the benefits of this market segment and play down its religious profile. This cluster also presents the highest scores of the three considered dimensions of Halal tourism (spiritual, ecological and healthy).

- * **Cluster 3** (19 cases, 7.6%) is composed of the oldest and least trained supporters of Halal tourism. Above all, they play down the barriers to deal with this market segment, at the same time that gives some importance to its attractiveness; as a result, the level of support is moderate.
- * **Cluster 4** is the smallest (16 observations, 6.4%), mostly formed by academics and professionals with strong support for the idea of turning Indonesia into a Halal destination. They mainly value the benefits of this market segment, although their perception of its attractiveness is not so optimistic.
- * **Cluster 5** (35 cases, 14.1%), the second in size, contains the youngest and most trained supporters, mostly students. The support of this group is also strong, rooted in appreciation of the attractiveness of this market, although the perception of barriers to its development is even more remarkable.
- * **Cluster 6** (25 cases, 10.0%) is mainly formed of male academics, trained above average, who offer moderate support for Halal tourism in Indonesia. Firstly, they don't particularly underscore the religious profile of this segment but, secondly, they pay special attention to the barriers to be overcome.

- * **Cluster 7** (30 cases, 12.0%) is formed of the least determined supporters of Halal tourism. The vast majority of them are males, who play down the benefits and attractiveness of this market segment. Consistently, the scores given to the three dimensions of Halal tourism (spiritual, ecological and healthy) are the lowest.

In sum, the three largest clusters (1, 5 & 7, in this order) comprise more than two-thirds of the observations, which represent, respectively, the following profiles: balanced and moderated supporters (Cluster 1), the youngest and most trained supporters (Cluster 5), and the least determined supporters (Cluster 7).

As a summary, Table 5 displays the features of these seven clusters.

After the application of the Kruskal-Wallis H test to the four identified factors, only in the case of F3 (religiosity), were significant differences found between the three types of respondents. Specifically, academics are those who appreciate this factor with less intensity; on the opposite side are students; finally, professionals are in an intermediate position.

As a final methodological step, a discriminant analysis was executed in order to confirm this clustering, resulting in the finding that 87.1% of the original clustered cases were correctly classified.

Table 5: Clusters Characteristics

	Cluster						
	1	2	3	4	5	6	7
Q5.01 (mean)	5.47	6.17	5.32	5.94	6.03	5.04	4.67
Q5.02 (mean)	5.38	6.44	5.47	6.31	6.2	5.76	4.8
Q5.03 (mean)	6	6.82	5.74	6.27	6.31	6.2	5
F1 (mean)	-0.08	1.41	-0.27	0.81	0.38	-0.09	-1.19
F2 (mean)	-0.1	-0.5	-2	0.49	1.02	0.69	-0.12
F3 (mean)	0.4	-0.88	-0.35	0.74	0.44	-1,95	0.06
F4 (mean)	0.28	0.16	0.58	-1,96	0.6	0.17	-1.25
Prof. (%)	23.6	33.3	21.1	37.5	11.4	12	36.7
Acad. (%)	25.5	27.8	36.8	43.8	2.9	60	20
Stud. (%)	50.9	38.9	42.1	18.8	85.7	28	43.3
Males (%)	44.3	44.4	52.6	43.8	42.9	60	70
Age (mean)	28.39	34.28	34.72	31.88	21.2	34	27.5
Training (%)	23.6	38.9	5.3	31.3	48.6	44	23.3
Indon. as H.T.D. (mean)	5.89	6.5	5.11	6.19	6.14	5.6	4.67

Structural Equation Models (SEM) models

As anticipated in the introduction, getting an insight into the influencing factors on the collective opinion about whether Indonesia should position itself as a halal tourism destination is our final aim. With it in mind, several models have been tested, taking this variable (INDON_HD) as the dependent one and using the PLS technique (WarpPLS 6.0).

In the first test (Model 1), the four above-mentioned factors have been taken as explanatory variables, producing the following output (Figure 1):

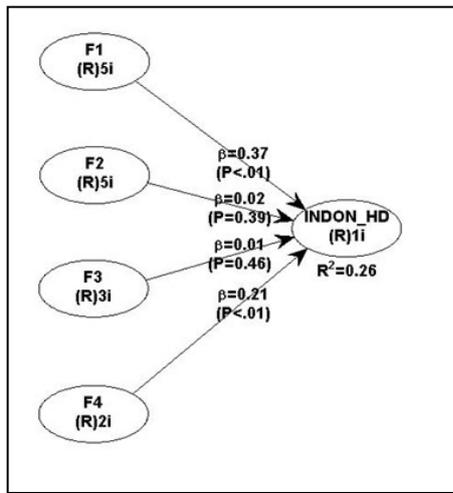


Figure 1: Model 1

Only two factors have a significant effect on the variable to be explained: being F1 ('Benefits') and F4 ('Attractiveness'), with the first one the most influential. Therefore, the more the respondents appreciate the potential benefits of this market segment and its attractiveness, the more they are to favour the positioning of Indonesia as a Halal tourism destination. Nevertheless, the level of R2 is quite low, which indicates that other variables are still needed to explain better the dependent variable.

In an attempt to find out ways to raise the explanatory capacity of the model, we have tested the impact of the three dimensions (spiritual, ecological and healthy) of Halal tourism, leading to Model 2 (Figure 2)

Only the spiritual and ecological dimensions of Halal tourism have significant effects on the dependent variable, the former being the most influential, considering the corresponding path coefficients. Consequently, the more Halal tourism is perceived as related to the search for inner wellbeing and ecological awareness, the more favourable the opinion relative to positioning Indonesia as a Halal destination.

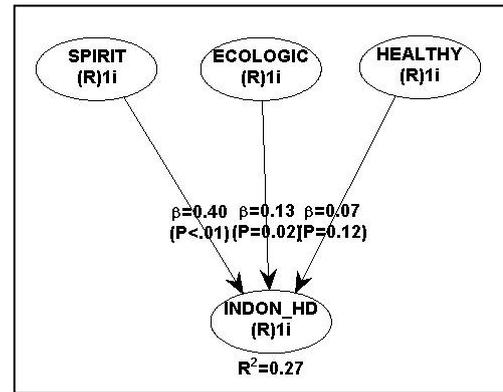


Figure 2: Model 2

The next step integrates the four factors under which attributes describing the profile of Halal tourism have been grouped with the three key dimensions - the result is displayed in Model 3 (Figure 3).

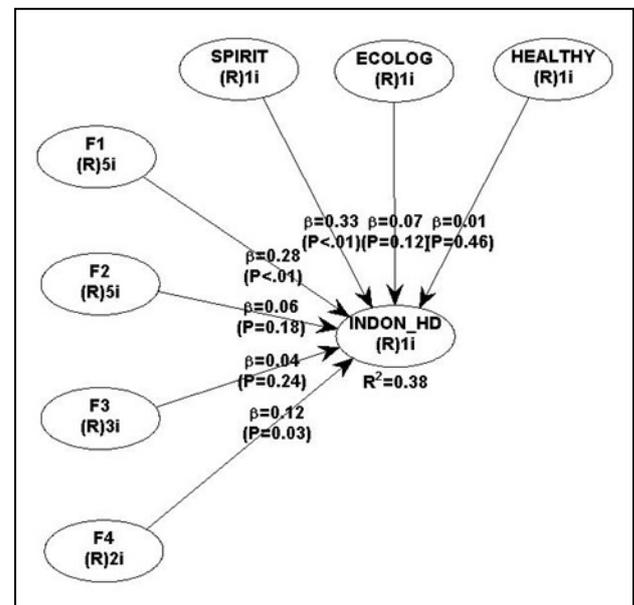


Figure 3: Model 3

As a result of the intersections between the variables in the model, R2 of the dependent variable has risen to 38%, with the same influencing significant factors (F1 and F4) and the same relative importance ('Benefits' and 'Attractiveness', in this order). However, from the dimensions' point of view, the spiritual one becomes the only influential one, while ecological awareness vanishes.

In an attempt to understand this last finding, the fsQCA (fuzzy set qualitative comparative analysis) tool was used, specifically its 2.0 version. This is a software that uses combinatorial logic, fuzzy set theory and Boolean minimisation to work out what combinations of case

Spiritual	Ecological	Healthy	Number	Halal Destination	Raw Consistency
1	1	1	191	1	0.942408
1	0	1	17	1	0.882353
1	1	0	6	1	0.833333

Sufficient Configuration	Raw coverage	Unique Coverage	Consistency
Spiritual * Ecological	0.780591	0.021097	0.939086
Spiritual * Healthy	0.822785	0.063291	0.937500
Solution coverage: 0.843882; Solution consistency: 0.934579			

characteristics may be necessary or sufficient to produce an outcome (Ragin, 2008). In this research, the outcome is our dependent variable (the opinion about Indonesia as a Halal tourism destination) and the characteristics or causal conditions are the three independent variables corresponding to the three dimensions (spiritual, ecological and healthy) of Halal tourism.

For the application of this technique, crisp sets were created for the four variables involved, with binary values for each observation. As the original scores were allocated in 7-point Likert scales, the conversion was done as follows: a record of 0 (non-membership) was allocated to those values below 5 (1, 2, 3 and 4) and a record of 1 (membership) to those values over 4 (5, 6 and 7).

From the eight possible configurations, only three of them (with a raw consistency above 0.8) were considered sufficient, as display in Table 6a.

Once the standard analysis of that table was performed, the three solutions provided by the program (complex, parsimonious and intermediate) were coincident. The output obtained is summarised in Table 6b.

As a result, appreciation for the spiritual dimension of Halal tourism, that is, its focus on people's inner wellbeing, can be considered the necessary condition for support of positioning Indonesia as a Halal tourism destination, while the other two dimensions are interchangeable [Spiritual * (Healthy + Ecological)]. This finding helps to explain the previous one.

Parameter	Model 1	Model 2	Model 3
Average path coefficient (APC)	0.153, P=0.003	0.202, P<0.001	0.129, P=0.009
Average R-squared (ARS)	0.260, P<0.001	0.273, P<0.001	0.384, P<0.001
Average adjusted R-squared (AARS)	0.248, P<0.001	0.264, P<0.001	0.366, P<0.001
Average block VIF (AVIF)	1.233	1.563	1.491
Average full collinearity VIF (AFVIF)	1.399	1.532	1.580
Tenenhaus GoF (GoF)	0.416	0.522	0.551
Sympson's paradox ratio (SPR)	1.000	1.000	1.000
R-squared contribution ratio (RSCR)	1.000	1.000	1.000
Statistical suppression ratio (SSR)	1.000	1.000	1.000
Nonlinear bivariate causality direction ratio (NLBCDR)	1.000	1.000	1.000

Concerning constructs' reliability and validity, their Composite Reliabilities (CR) and Average Variances Extracted (AVE) follow.

CR: F1, 0.834; F2, 0.817; F3, 0.820; F4, 0.855.

AVE: F1, 0.506; F2, 0.473 (slightly below the threshold of 0.5, but very close to it); F3, 0.604; F4, 0.747.

In addition, all the correlations among latent variables are lower than the corresponding square root of AVE. As a result, it can be asserted that the requirements for reliability and validity (both convergent and discriminant) are fulfilled.

Finally, model fit and quality indices of our three models (all of them reflective) are summarised above in Table 7.

Conclusions, Recommendations, Limitations and Future Research

In general, training on Halal Tourism needs to be reinforced, particularly among tourism professionals. Perhaps, the more acute lack of training in this group helps to understand participants' more cautious appraisal of the attractiveness of this market segment in terms of size and growth, supported by official figures.

The significant differences found in the perceptions of some attributes of Halal tourism allow an understanding of the existence of certain levels of disparity, or even confusion, in their interpretation. This relative unclarity feeds back the need for an extra training effort on this subject.

The collective mental construct in Indonesia about Halal tourism is currently built around four axes: benefits, barriers, religiosity and attractiveness. To this respect, most of the people show a balanced profile, with relatively moderate support, although clear, for the development of Halal tourism in this country. This finding is consistent with the study on Indonesian Generation Z carried out by Vargas-Sánchez and Perano (2018).

Appreciation for the benefits and attractiveness of this market segment, in this order, are the two factors (among the four mentioned in the previous paragraph) with a significant influence over support for the idea of positioning Indonesia as a Halal destination. In addition, the importance given to spiritual dimensions also influences positively that support, as a necessary

condition (while the other two dimensions appear as interchangeable). Therefore, for gaining people's support, the inner-wellbeing that this type of tourism can offer, together with its benefits (not of economic nature only, but social as well) and its level of attractiveness (because of its size, growth, and level of expenditure) should be emphasised by public authorities.

In line with the above-mentioned conclusions, some recommendations follow, as practical implications of this study:

Intensify the acceptance of Halal tourism with actions (including training) aimed at tourism professionals, academics and students in Indonesia.

Maximise sales promotion through various channels to push Halal tourism, which still sounds foreign to tourists in general

Develop this market segment in potential destinations in Indonesia through the improvement and addition of Halal tourism attributes, particularly those more influential on people's support.

Enhance the role of businesses in marketing Halal tourism packages to spread this distinctive offer.

This study is not without limitations. Specifically, respondents' data are limited to the people who live in Java Island, while Indonesia has other (and large) islands that could be targeted to get more responses. Thus, the size and scope of the sample should be enlarged.

Consequently, in future pieces of research on Halal tourism in Indonesia, primary data should also be collected on islands such as Sumatra, Bali or Lombok, which have many tourist attractions that reinforce the potential of Indonesian Halal destinations. Extra efforts should also be made to understand the role of dimensions and factors that have emerged in this research as influential in the explanation of the dependent variable in our model.

Finally, the generalisation of findings is certainly an issue in case-based pieces of research. To advance this process, the same methodology is being replicated in other countries, and such research has already been partially undertaken in the UAE (Vargas-Sánchez and Fotiadis, 2019).

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