

Halal Tourism Policy in the Southeast Asian Countries

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ABSTRACT

Economic growth and global population expansion have created significant opportunities for the halal tourism industry. As home to the world's largest Muslim population, Southeast Asia is positioning itself as a key destination for halal tourism. This study examines the strategies employed by Indonesia, Malaysia, Singapore, and Thailand to enhance their competitiveness in the regional and global halal tourism market. Using a comparative qualitative approach and secondary data analysis, the research finds that Indonesia leverages its cultural diversity and rich tourist attractions, while Malaysia focuses on attracting Middle Eastern tourists through targeted marketing. Despite having a smaller Muslim population, Singapore capitalizes on its strategic location, and Thailand adapts through strong government support. The findings underscore the importance of internal and institutional factors in strengthening each country's appeal as a halal tourism destination.

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INTRODUCTION

Halal tourism encompasses tourist attractions or activities in the tourism industry that are permissible according to Islamic teachings or law. This refers to Islamic law used as a basis for selling goods/services to Muslim tourists, such as halal resorts, halal restaurants, and halal travel (Battour & Ismail, 2015). The Global Muslim Travel Index describes that halal tourism refers to all tourism activities that meet Islamic standards (Mastercard CrescentRating, 2023). The criteria for halal tourism defined by the Global Muslim Travel Index include good access, a supportive environment, effective communication, and friendly service for Muslim tourists.

Therefore, halal tourism can be understood as an effort to create a tourism experience with an Islamic nuance and adhere to Islamic law, thus providing comfort for Muslim tourists. This includes the provision of halal accommodation and food, supporting facilities, and tourist destinations that cater for the needs of Muslim tourists. The halal industry is expected to continue to grow and become an important part of economic development within countries as it has shown positive growth (Fauzi & Battour, 2024). Thus, the concept of halal is not only a rule in Islam but can also become a lifestyle that contributes to the economy at the national and global levels.

Geographically, the halal tourism industry in Southeast Asia has grown rapidly in the last 10 years, in line with the growth of the global Muslim population. By 2030, the estimated Muslim population worldwide is 2.2 billion, or about 26.4% of the total world population. The growth of halal tourism in Southeast Asia is the result of a long process that has continued for decades, starting from infrastructure development, institutionalization, supervision, and the involvement of various stakeholders (Wahab et al., 2016). These development efforts require not only political commitment but also strong leadership (Samudin, 2022). Indonesia and Malaysia are two pioneering countries in the development of halal tourism in Southeast Asia. Both countries have the largest Muslim populations in Southeast Asia. The institutionalization of halal food in both countries has always been a reference for other countries that want to develop halal tourism, especially halal food (Musthofa et al., 2023)

Singapore's geographical location as a transportation and trade hub, and its position between the two largest Muslim countries in Southeast Asia, Indonesia and Malaysia, makes it a key stopover and a modern halal tourist destination. Singapore is also the highest-ranking non-OIC country for Muslim tourist destinations. Singapore's ranking is placed above the UK and Taiwan. Meanwhile, Thailand, the country with the largest number of tourists in Southeast Asia, maintain a stable position as one of the top five most attractive and "potential leaders" in halal tourism (Mastercard CrescentRating, 2023; SRD, 2024)

Numerous studies on tourism in Southeast Asia have been conducted. These studies often focus on single-case studies or comparative analyses of two cases. These studies are characterized by strong empirical field data (Adinugraha et al., 2023; Ahmad Azmi M. Ariffin & Mohd Safar Hasim, 2009; Henderson, 2016; Musthofa et al., 2023; Wahab et al., 2016). Malaysia and Singapore have significantly played a positive role in the ASEAN region's halal industry development. The halal industry in both countries -including certification processes, halal logos, and product legislation- is internationally recognized, leading some to refer to Malaysia and Singapore as a "global halal hub" (Wahab et al., 2016).

However, comparative studies involving more than two cases remain limited. By analyzing four Southeast Asian countries, this study seeks to explore the unique strategies and policies of each nation that contribute to the growth of the halal tourism industry. Despite differences in geographical location, political institutions, and socio-cultural aspects, all four countries share a common emphasis on halal tourism as a key sector driving economic development.

METHODS

This research employs a qualitative method to analyze halal tourism policies in four Southeast Asian countries, focusing on the distinction between Muslim-majority countries (OIC member states) and non-Muslim-majority countries (non-OIC members). The qualitative approach is selected to explore phenomena within societal groups or individuals, enabling a deeper understanding of social dynamics. According to (Creswell & Creswell, 2018), qualitative research follows a systematic process that includes formulating research questions, adhering to structured procedures, collecting specific data, analyzing it through themes that progress from general to specific, and interpreting its meaning. This study gathers data exclusively from secondary sources, such as books, journals, government documents, and online materials concerning halal tourism policies in ASEAN countries, particularly in Indonesia, Malaysia, Singapore, and Thailand, which provide insights relevant to the research objectives. The data analysis process follows a structured framework, beginning with the collection of data, followed by its organization and presentation, and culminating in the formulation of conclusions. By employing this comprehensive qualitative approach, the study offers a nuanced understanding of halal tourism policies in the Southeast Asian context, with careful consideration of the social, cultural, and political environments in each country examined.

RESULTS AND DISCUSSION

Indonesia: Richness of Culture and Halal Tourism Destinations

Tourism, particularly foreign tourist arrivals, is an important sector in the Indonesian economy. The number of foreign tourists visiting Indonesia has fluctuated significantly in recent years. According to data from the Central Statistics Agency (BPS) of Indonesia, foreign tourist visits to Indonesia in 2019 reached 16.11 million but dropped sharply to only 4.02 million in 2020, approximately 75.03 per cent (BPS, 2021). This decline continued in 2021, with the number of foreign tourist visits dropping to 1.56 million visits, representing a further drop of 61.57 per cent compared to the previous year (BPS, 2022). The decline in the number of foreign tourists was a direct impact of the COVID-19 pandemic, which led to travel restrictions and border closures to control the spread of the virus.

Along with the development of the tourism industry, new tourism models have emerged in many countries, aiming to market their products effectively. Among the emergence of many tourism models, one that has become a priority and a key driver of the national economy is halal tourism (Putri & Wakhid, 2023). Halal tourism in Indonesia has become an important segment of the country's tourism industry, reflecting the growing demand for tourism experiences that meet the needs of Muslim tourists. Indonesia has experienced an increase in global Muslim tourist arrivals, with the number

estimated to reach 140 million in 2023. Meanwhile, in 2026, the number of global Muslim tourist arrivals is projected to rise to 230 million, with an estimated total expenditure of US\$225 billion (Bisnis.com, 2022). With the world's largest Muslim population, Indonesia offers a rich diversity of Islamic culture, heritage sites, and halal-friendly facilities. This makes the country one of the main destinations for halal tourism in Southeast Asia. According to the Global Muslim Travel Index, in 2023 Indonesia consistently ranked among the top as a globally halal-friendly destination, with advantages in various halal-certified accommodations, culinary choices, and cultural attractions (Mastercard Crescent Rating, 2023).

Indonesia is a country with the largest Muslim population in the world. According to data from the Ministry of Home Affairs in 2022, the Muslim population in Indonesia is around 241.7 million people or 87.02% (DataIndonesia, 2023). This data shows the great potential for Indonesia to continue to advance halal tourism. Moreover, Indonesia is blessed with a strategic geographical location. Indonesia's tropical climate produces a diverse wealth of flora and fauna. This high biodiversity makes Indonesia a very promising tourist destination (Waluyo & Guritno, 2023).

Indonesia's tourism sector has responded actively to the growing demand for halal tourism, with numerous hotels, resorts, and restaurants obtaining halal certification to accommodate Muslim tourists. According to the Ministry of Tourism and Creative Economy (2015), thirteen provinces have been designated as halal tourism destinations. These provinces include Aceh, Banten, West Sumatra, Riau, Lampung, Jakarta, West Java, East Java, Central Java, Yogyakarta, West Nusa Tenggara (NTB), Bali, and South Sulawesi. Cities like Jakarta, Yogyakarta, and Bandung offer a variety of halal restaurants serving Indonesian cuisine following Islamic law. In addition, Indonesia has many mosques and Islamic landmarks where Muslim tourists can perform religious obligations while enjoying the beauty of Islam (Utami et al., 2023)

Outside of urban centres, Indonesia's diverse regions offer various Muslim-friendly destinations, ranging from pristine beaches to lush mountains and cultural villages. Popular tourist destinations like Bali, Lombok, and Aceh have embraced halal tourism by providing halal food and accommodation, recreational activities, and cultural experiences for Muslim tourists. In Bali, visitors can find halal-friendly beach resorts, halal restaurants, and tour operators offering guided tours to explore the island's cultural and natural wonders (Darmawan et al., 2023). Among the 249,585 micro and small businesses in Bali's trade sector, only 312 products have been certified as halal (Republika, 2023).

The Indonesian government has recognized the potential of halal tourism in driving economic growth and has implemented various initiatives to support its development. The Ministry of Tourism and Creative Economy has launched a campaign to promote Indonesia as a halal-friendly destination and has partnered with industry stakeholders to improve halal tourism infrastructure and services throughout the archipelago. Additionally, The Ministry of Tourism and Creative Economy works alongside local governments and businesses to develop halal tourist destinations and enhance halal certification standards (Kemenparekraf, 2024).

Halal tourism in Indonesia continues to grow, driven by the country's rich cultural heritage and halal tourist destinations, as well as the government's commitment to providing inclusive tourism experiences for Muslim tourists. With ongoing efforts to expand halal-friendly facilities and services, Indonesia is poised to further capitalize on the booming halal tourism market, contributing to the overall tourism sector and economic development. As the industry evolves, maintaining authenticity, sustainability, and cultural sensitivity will be key to ensuring the long-term success of halal tourism in Indonesia.

Malaysia: Intensive Marketing for Middle Eastern Tourists

Malaysia's ranking in the Global Muslim Travel Index (GMTI) has consistently remained at the top year after year, with GMTI 2023 even describing it as "Malaysia's dominance". The Halal Malaysia Directory indicates that over 1,500 companies have received halal certification, and more than 9,700 food establishments, including restaurants and food trucks, are also certified as halal (Azam et al., 2024) This dominance in halal tourism is not the result of a quick and short effort but rather a continuous endeavour for decades. Malaysia is the only country that receives full government support in halal food certification. It is also considered successful in marketing itself and portraying itself as an urban

destination with the most impressive experiences (Battour et al., 2010; Henderson, 2016; Mosbah & Salleh, 2014). To form this image, Malaysia has invested in infrastructure development and provided incentives for tourism sector growth (Mosbah & Salleh, 2014)

Since 2021, the number of Muslim tourists visiting Malaysia has increased year annually. The number of Muslim tourist arrivals in Malaysia reached 10.07 million in 2022 and 20.14 million in 2023. Several researchers say that one of the main factors contributing to the increase in the number of foreign tourists is the large-scale and intensive promotional activities carried out by the Malaysian government, mainly to attract Muslim tourists from the Middle East (Henderson, 2016; Samori et al., 2016). These Middle Eastern tourists are from Saudi Arabia, Oman, the United Arab Emirates, Jordan, Kuwait, Iran, and Iraq. This targeted promotion is because tourists from the Middle East represent a niche market for Malaysia.

In addition to the large market potential, Middle Eastern tourists tend to have high spending (lavish) when travelling. Data from the United Nations Tourism shows that Middle Eastern tourists spend an average of 7,000 RM, while tourists from other countries spend only 2,300 RM per visit. Middle Eastern tourists also tend to come in groups/large families (up to 30 people). They have high preferences for quality experiences and services, such as 5-star hotels with connecting rooms and hotel locations in the city centre (Ahmad Azmi M. Ariffin & Mohd Safar Hasim, 2009).

Several initiatives undertaken by the Malaysian government to attract tourists from the Middle East include the Feel at Home and Ain Arabia campaigns, billboards on highways depicting Middle Eastern culture and food, road signs using Arabic (see Figure 1), and even employing staff who can speak Arabic in hotels, travel agencies, and tourist destinations (Samori et al., 2016). The main motivation for tourists (especially from the Middle East) to visit Malaysia is the attractive scenery and nature, and ease of travel (Ahmad Azmi M. Ariffin & Mohd Safar Hasim, 2009).

The Malaysia Tourism Promotion Board (MTPB) is a key institution that plays an important role in promoting foreign tourism. MTPB has representative offices in 29 countries. MTPB is also involved in shaping Malaysia's image and tagline. Malaysia's tagline as a tourist destination has continuously evolved, starting from Beautiful Malaysia, Only Malaysia, Fascinating Malaysia, and now Malaysia, Truly Asia (Mosbah & Salleh, 2014). Malaysia conducts very intensive promotional activities. For example, in 2008, Malaysia launched the Malaysia My Second Home program. Malaysia is also active in travel fairs in the Middle East. Wong (2012) in Mosbah & Salleh (2014) explain how such promotional events to maintain Malaysia's image as a tourist destination have a positive impact on the increase in foreign tourists.

Singapore: Strategic Location and Halal Food Ecosystem

Based on the Global Muslim Travel Index (GMTI) 2023, Singapore is the highest-ranking non-Organization of Islamic Cooperation (OIC) country as a Muslim tourist destination. In addition to excelling in the accessibility criteria, which include connectivity, visas, and transportation infrastructure, Singapore also dominates in terms of marketing, and a friendly, safe, and comfortable environment (even for Muslim women). Changi Airport is recognized as one of the best practices in service and facilities for Muslim tourists (Mastercard CrescentRating, 2023)

Until the 1980s, the tourism industry contributed the most to Singapore's economy, but seven years later, the tourism industry in Singapore declined and fell into a slump (SG101, 2024). In line with the increase in Foreign Direct Investment (FDI), various government efforts and interventions, and the increasing involvement of the private sector, the tourism industry in Singapore revived and continued to grow. In 2019, it is estimated that Singapore received 3.65 million Muslim travellers, accounting for about a fifth of our total visitor arrivals that year (Tan, 2022). In 2022, foreign tourist arrivals in Singapore reached 6.3 million, and revenue from the tourism sector is estimated at 13.8-14.3 billion Singapore Dollars. This number is expected to continue to increase, and it is estimated that in 2024, the tourism sector in Singapore will not only have recovered from COVID-19 but will also have better performance (Raguraman, 2024)

The largest Muslim tourists visiting Singapore come from Indonesia, Malaysia, Bangladesh, Pakistan, Turkey, the United Arab Emirates, and Saudi Arabia (Henderson, 2016). These tourists come to Singapore for various reasons and

purposes. McKercher and Koh (2017) found that the motivation for tourists to come to Singapore is to relax, relieve stress, and recharge (McKercher & Koh, 2017). For example, tourists from Indonesia visit Singapore for leisure, vacation, visiting relatives/friends, and some even come to Singapore to prove their achievements. This is different from tourists from Malaysia, whose motivation is more due to the availability of packages and promotions and the presence of certain events.

Singapore boasts a strategic geographic location that has transformed it into a transportation and trade hub. Approximately 40% of maritime trade passes through the Strait of Malacca. Singapore has been a trade centre since the 14th century (Economist.com, 2015). By developing and enhancing the quality of its ports and logistics infrastructure, Singapore has become a global maritime centre. In addition, Changi Airport not only serves as an airport but also as a transit point for Singapore's tourism sector. The term "entrepot for tourism" for Changi Airport solidifies Singapore's geopolitical position in the Asia Pacific (Ward, 2022).

Compared to other Southeast Asian countries, Singapore also offers high-end shopping and dining experiences. Other supporting facilities include cleanliness, transportation infrastructure, and a sense of internationalism for foreign tourists (Spears et al., 2019). The Strait Times describes Singapore as having an "innate capability" that attracts tourists seeking high-end shopping experiences (Henderson, 2016)

Henderson (2016) further concludes that one of Singapore's advantages over other non-OIC countries in Southeast Asia is its reliable halal certification, supported by a strong food safety system. Singaporean restaurants have a unique appeal as they offer not only modern food variations but also traditional cuisine that combines flavours from various ethnicities. According to Majlis Ugama Islam Singapura (MUIS), in 2019 there were close to 3,000 halal-certified restaurants in Singapore. The number has increased since 2013 (Alatas, 2021). Furthermore, to establish halal tourism on an institutional level, Singapore launched a halal food ecosystem called the 5T (Trade, Taste, Trust, Technology, and Tourism) (Mastercard CrescentRating, 2023).

Building an ecosystem by strengthening interactions among the 5T is expected to create diverse and flavorful halal food products, thus expanding the halal tourism landscape in Singapore. Halal tourism experiences in Singapore are not only intended for Muslim tourists and residents but also target non-Muslim residents and tourists. According to a survey conducted by CrescentRating, 60% of respondents eat at halal restaurants accompanied by non-Muslim friends or relatives (Mastercard CrescentRating, 2023).

Thailand: High Adaptability and Government Support

Tourism has been a key factor in driving economic growth in Thailand. Thailand is the country with the most foreign tourist arrivals in ASEAN, with around 30% of the total 144 million international tourists in 2019 (ADB, 2022b). The contribution of international tourists has a significant impact on this industry, where Thailand attracts almost 51% of the total international visitors in the Greater Mekong Subregion (ADB, 2020). Before the COVID-19 pandemic, international tourism experienced steady growth. In Thailand, for instance, the number of international visitors rose from 15.9 million in 2010 to 39.9 million in 2019, reflecting an average annual increase of 10.7%. As the 8th most visited destination globally and the 4th highest in tourism revenue in 2019, Thailand's travel and tourism sector significantly contributed to the economy, accounting for 19.7% of the national GDP and supporting 21.4% of employment (ADB, 2022a). Overall, the tourism sector in Thailand contributes about 20% to the country's Gross Domestic Product (GDP) in 2019. To anticipate the increasing number of foreign tourists, the Thai government has also announced plans to develop Suvarnabhumi International Airport by 2025 (Nikkei Asia, 2024).

Thailand has also shown positive performance in the halal tourism sector. Halal tourism in Thailand has experienced significant growth in recent years. This is driven by the increasing number of global tourists, especially Muslims, who are looking for tourist destinations that comply with Islamic principles and their culture. Thailand, with its rich tourist attractions, stunning scenery, and high level of hospitality, has become one of the preferred halal tourist destinations in Southeast Asia. Thailand's uniqueness lies in its ability to adapt to attract Muslim tourists even though Muslims make up a minority of the country's population, only about 5% of the total population. The majority of Thailand's Muslim

community is located in the southern part, such as Phuket and Krabi provinces (Ulath & Zulkifli, 2024). According to GMTI, Thailand also consistently maintains a top position as a destination of choice for Muslim tourists, currently ranking fourth in the GMTI index. This ranking is obtained partly due to the availability of various halal-certified facilities and services (Mastercard CrescentRating, 2023).

Despite not being a member of the Organization of Islamic Cooperation (OIC), Thailand plays a crucial role in the halal tourism industry. The Thai tourism sector has demonstrated significant engagement in responding proactively to the growing demand for halal services. Numerous hotels, restaurants, and tourism operators in Thailand have obtained halal certification to accommodate the needs of Muslim tourists (Jeaheng et al., 2019). For instance, Thailand's capital, Bangkok, offers a wide range of halal restaurants serving authentic Thai cuisine following Islamic principles. Additionally, Bangkok has several mosques where Muslim tourists can perform religious obligations and interact with fellow Muslim travellers during their stay in Thailand (TAT, 2021). Beyond Bangkok, popular tourist destinations like Chiang Mai have also adapted to support halal tourism. The city offers a variety of Muslim-friendly accommodations and activities. Renowned for its rich cultural heritage and natural beauty, Chiang Mai provides Muslim tourists with access to halal shopping centres, street food, historical mosques, and eco-friendly tours aligned with Islamic principles of conservation and sustainability (Nasution, 2024)

The Tourism Authority of Thailand (TAT), under the Thai government, has played a significant role in developing the tourism sector, including halal tourism in Thailand (TAT, 2021). TAT proactively promotes Muslim-friendly destinations and collaborates with local businesses to enhance the overall tourist experience. Furthermore, Chulalongkorn University houses a Halal Science Center that conducts research and provides certification services to ensure the authenticity and quality of halal products and services across various sectors (Karjaya, 2020). The Thai government has also supported the establishment of the Halal Standard Institute of Thailand (HSIT) under the Central Islamic Committee of Thailand (CICOT). As of 2009, CICOT had issued Halal Management Regulations covering testing, monitoring the quality of halal products, and the use of the halal logo. In the context of national development, the role and support of the state and relevant stakeholders are vital (Nawawi et al., 2020)

The development of halal tourism in Thailand continues to grow thanks to the country's ability to respond well to the increasing number of global Muslim tourists, as well as government support and commitment to creating an inclusive and welcoming experience for Muslim tourists. Through various halal tourism initiatives, including the provision of halal food, facilities and access for Muslim tourists, as well as various types of accommodation and recreational activities, Thailand has become a top destination for Muslim tourists seeking a satisfying experience. With the continued growth of this sector, Thailand's position as a leading halal tourism destination will become stronger and will contribute positively to the tourism and economic sectors of the country.

| Country | Strengths |
|-----------|--|
| Indonesia | Richness of Culture and Halal Tourist Destinations |
| Malaysia | Intensive Marketing with Target Expansion to the Middle East |
| Singapura | - Strategic Location - Institutionalized Halal Food Ecosystem |
| Thailand | High Adaptability and Government Support |

Table 1. Comparison of Relative Strengths of Countries in Increasing Muslim Tourists
 Adapted by researcher [source]

The table above shows a comparison of the strengths of each country in the study. Malaysia and Singapore appear to be more aggressive in developing halal tourism compared to Indonesia and Thailand.

CONCLUSION

Tourism contributes significantly to the economies of Southeast Asian countries. The increasing global Muslim population has opened up opportunities for halal tourism development, not only for Muslim tourists from neighbouring Southeast Asian countries but also for Muslim tourists from the Middle East. As the largest recipients of Muslim tourists in Southeast Asia, Indonesia, Malaysia, Singapore, and Thailand are striving to enhance their respective attractiveness for Muslim tourists.

The development of halal tourism in Southeast Asia reflects both a response to global demand and an internal commitment to enhancing the sector. Indonesia, Malaysia, Singapore, and Thailand have each adopted distinct strategies based on their unique strengths. Indonesia leverages its rich Islamic heritage and diverse attractions, while Malaysia strategically targets Middle Eastern tourists and emphasizes urban-based halal tourism. Singapore capitalizes on its strategic location and strong halal food ecosystem, whereas Thailand adopts an adaptive approach, integrating local culture with government and business support. These efforts highlight the importance of tailored strategies, institutional adaptability, and continuous innovation in strengthening the halal tourism industry. Moving forward, collaboration among stakeholders, investment in infrastructure, and consistent policy support will be crucial in maintaining Southeast Asia's competitiveness as a leading halal tourism destination.

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