SEISENSE Journal of Management
Vol 9 No 1 (2026): DOI: https://doi.org/10.33215/xfqa3403 , 112-132
Research Article

Strategic Management of Muslim-Friendly Tourism Ecosystems: Destination Readiness, Stakeholder Collaboration and Market Value Creation

Abdul Rahman Rahim[1], Ismail Rasulong[2*], Wahyuddin[3]

[1] Department of Management, Universitas Terbuka, Tangerang, Indonesia
[2] Department of Management, Universitas Muhammadiyah Makassar, Indonesia
[3] Department of Education, Universitas Muhammadiyah Makassar, Indonesia
* Corresponding author: ismail.rasulong@unismuh.ac.id

Article History
Received 2026-07-09
Reviewed 2026-08-23
Reviewed 2026-08-30
Accepted 2026-08-30
Published 2026-09-03

Keywords
Muslim-friendly tourism
Strategic management
Destination readiness
Stakeholder collaboration
Market value creation

Copyright © 2026 The Author(s)
CC BY

Abstract

Purpose: This study examines how destination-level strategic capabilities shape Muslim-friendly tourism in Indonesia through analytical comparison with Singapore and the United Kingdom.

Design/Methodology: A qualitative multiple-case design draws on 32 semi-structured interviews, three focus group discussions involving 20 participants, and a secondary documentary review conducted between May and August 2024. Interview and FGD data were coded by the second and third authors and interpreted through reflexive thematic and cross-case analysis.

Findings: Indonesia possesses substantial Muslim-friendly tourism resources, but resource abundance does not consistently translate into destination capability. The main constraints concern uneven halal assurance, inconsistent service readiness, fragmented practical digital information, limited operational coordination, and gaps between general investment promotion and project-specific investment requirements. Singapore illustrates an integrated service-reliability pathway, while the United Kingdom demonstrates a decentralized pathway mediated by community networks, market mechanisms, and digital platforms.

Practical Implications: Destination managers should focus on minimum service reliability, visible assurance, searchable information, operational stakeholder routines, and credible investment preparation while preserving destination diversity.

Originality: The study reframes Muslim-friendly tourism as a destination-level strategic capability and specifies a resource-conversion mechanism linking governance, readiness, assurance, digital usability, visitor confidence, and market value.

Introduction

Many destinations now recognize Muslim travel as an important and expanding market. Recent halal tourism and hospitality research has moved beyond definitional debates toward destination attributes, visitor experience, trust, satisfaction, loyalty, digital support, and service outcomes (Battour et al., 2024; Qureshi et al., 2025). Recognition alone, however, does not make a destination Muslim-friendly. Visitors encounter a destination through practical service conditions: how easily they move between attractions, whether halal food can be identified with confidence, whether prayer spaces are accessible and adequately signposted, how clean public facilities are, whether guides understand Muslim visitor needs, and whether relevant information can be trusted before and during the trip. These conditions influence comfort, satisfaction, trust, destination image, revisit intention, and recommendation behaviour (Al-Ansi et al., 2021; Çıkı & Tanrıverdi, 2025; Said et al., 2022; Suhartanto et al., 2025).

Indonesia provides an important setting in which to examine this managerial problem. As a Muslim-majority country with substantial Islamic heritage, culinary diversity, tourism resources, and domestic Muslim travel demand, it possesses many of the attributes commonly associated with Muslim-friendly tourism. Yet resource availability does not necessarily ensure that these attributes are delivered consistently across the visitor journey. Previous research has identified challenges related to destination competitiveness, institutional arrangements, policy interpretation, halal assurance, and service delivery (Hennida et al., 2024; Jaelani et al., 2025; Lestari et al., 2023; Musthofa et al., 2023). The strategic issue therefore lies not only in what resources exist, but in how destination-level services are coordinated, made visible, and communicated to visitors.

Singapore and the United Kingdom provide analytically useful contrasts because they illustrate different ways in which Muslim-friendly services operate in Muslim-minority environments. Singapore represents a compact setting in which food certification, transport, safety, cleanliness, and destination information are relatively integrated. The United Kingdom represents a more decentralized setting in which Muslim-friendly services are embedded in multicultural cities, halal food clusters, mosques, community networks, local businesses, and digital discovery. These cases are not treated as models to be copied or as statistically equivalent national samples. Their analytical value lies in revealing alternative institutional arrangements through which service assurance, accessibility, information, and visitor usability can be produced.

Digital information is central to this transition from destination potential to visitor confidence. Smart and Muslim-friendly tourism research suggests that digital tools reduce uncertainty by helping visitors identify services, evaluate options, and navigate destinations (Cuesta-Valiño et al., 2020). More recent studies show that digital halal literacy, social media content, user-generated information, and AI-enabled assistance influence trust, destination image, satisfaction, and behavioural intention (Abror et al., 2025; Hoang & Nguyen, 2025; Wijaya et al., 2025). For Muslim-friendly tourism, digital visibility is therefore not merely promotional. It is part of the service infrastructure through which physical resources and assurance mechanisms become searchable and usable.

The gap addressed in this study is not the absence of research on halal or Muslim-friendly tourism. Existing studies have established the relevance of halal-friendly attributes, religious accessibility, service quality, destination image, trust, satisfaction, loyalty, and digital information (Al-Ansi & Han, 2019; Al-Ansi et al., 2021; Battour et al., 2024; Han et al., 2019; Qureshi et al., 2025). What remains less clearly explained is how these dispersed attributes are organized and coordinated at destination level so that they become reliable, visible, searchable, and economically meaningful. Put differently, the literature explains what Muslim travellers need more clearly than the managerial process through which destination actors convert those needs and existing resources into a coherent strategic service capability.

Accordingly, this study addresses three research questions. First, how do stakeholders construct the potentials and constraints of Muslim-friendly tourism in Indonesia compared with Singapore and the United Kingdom? Second, how do halal assurance, destination readiness, digital information, stakeholder coordination, and market orientation differ across the three institutional contexts? Third, what strategic mechanisms are required to convert Muslim-friendly tourism resources into visitor confidence and market value?

The study makes three contributions. First, conceptually, it reframes Muslim-friendly tourism as a destination-level strategic capability rather than merely a collection of halal-related attributes or a destination label. Second, empirically, it uses Indonesia, Singapore, and the United Kingdom as analytically contrasting cases to identify different institutional pathways through which Muslim-friendly services become usable: a resource-rich but coordination-constrained pathway in Indonesia, an integrated service-reliability pathway in Singapore, and a decentralized community- and digitally mediated pathway in the United Kingdom. Third, managerially, the study develops a strategic Muslim-friendly tourism ecosystem framework explaining how governance, assurance, destination readiness, human and community capability, digital service information, and investment enablement can work together to convert destination resources into service reliability, visitor confidence, and credible market opportunities. The framework is deliberately bounded to the actors, service arrangements, assurance mechanisms, information channels, and investment conditions that shape Muslim-friendly service usability within mainstream tourism destinations.

Literature Review

Muslim-Friendly Tourism as Inclusive Destination Positioning

Halal tourism, Islamic tourism, and Muslim-friendly tourism are related but not identical. Halal tourism is commonly associated with products and services that comply with Islamic principles, including halal food, prayer facilities, hygiene, modesty, family orientation, and ethical service delivery (Battour & Ismail, 2016; Mohsin et al., 2016). Islamic tourism may additionally include travel motivated by Islamic heritage, worship, learning, or religious culture. Muslim-friendly tourism is broader and more market-facing because it does not require the entire destination to be defined through a religious identity.

Muslim visitors are not a homogeneous market. Expectations vary by nationality, religiosity, age, income, travel purpose, family composition, and prior travel experience. Some travellers prioritize certified halal food and prayer access, while others pay greater attention to safety, cleanliness, family comfort, shopping, digital information, and overall destination image. Studies on halal-friendly destination attributes show that Muslim travellers evaluate both faith-related and mainstream destination attributes when forming trust, satisfaction, revisit intention, and recommendation behaviour (Al-Ansi & Han, 2019; Han et al., 2019; Qureshi et al., 2025).

The more useful question is therefore not whether a destination should simply be labelled halal, but whether Muslim visitors can use it comfortably without being separated from mainstream tourism. This is particularly important in plural societies and Muslim-minority destinations, where an explicitly halal-tourism label may be politically sensitive, commercially narrow, or unnecessary. Research on Muslim travel in non-Muslim destinations shows that visitors often rely on a practical combination of halal food availability, mosques, service sensitivity, local community presence, safety, and accessible information rather than destination branding alone (Çıkı & Tanrıverdi, 2025; Said et al., 2022; Soonsan & Jumani, 2024).

In this study, Muslim-friendly tourism is therefore understood as the provision and coordination of additional destination services that enable Muslim visitors to participate confidently in mainstream tourism while meeting relevant faith-related and general travel needs. This framing links Muslim visitor requirements with wider

managerial concerns such as service reliability, visitor confidence, market responsiveness, and destination competitiveness.

Destination Readiness, Halal Assurance, and Visitor Confidence

Destination competitiveness research has long argued that destinations compete as integrated systems rather than isolated attractions. Buhalis (2000) conceptualizes destinations as combinations of attractions, accessibility, amenities, available packages, activities, and ancillary services. Dwyer and Kim (2003) similarly emphasize that competitiveness depends not only on endowed resources, but also on created resources, supporting factors, destination management, demand conditions, and situational conditions. These frameworks are useful for Muslim-friendly tourism because they distinguish resource abundance from actual visitor readiness.

Destination readiness refers here to the extent to which attractions, amenities, mobility, human resources, service information, and Muslim-relevant facilities are sufficiently available, connected, and operationally consistent to support a usable visitor journey. For Muslim visitors, readiness is experienced across the whole trip. Access includes airports and public transport, but also wayfinding, route information, multilingual guidance, and the ability to locate halal food and prayer spaces. Amenities include accommodation, restaurants, prayer rooms, toilets with water facilities, family-friendly spaces, clean public areas, and responsive front-line staff. Attractions become more usable when they can be combined with prayer time, halal food access, family convenience, and reliable information.

Halal assurance is analytically distinct from halal availability. Visitors in Muslim-majority settings may reasonably assume that halal food is widespread, but assumption is not the same as visible assurance. International visitors, first-time visitors, and more observant travellers may seek certification, clear labelling, trusted kitchen practices, staff knowledge, or reliable information channels. In Muslim-minority destinations, assurance may also be provided through Muslim-owned reputation, community recommendations, digital reviews, halal apps, or combinations of these mechanisms (Jia & Chaozhi, 2021; Said et al., 2022).

Accordingly, halal assurance is defined in this study as the formal and informal mechanisms through which halal-related service claims become visible, verifiable, and credible to visitors. This makes assurance more than a religious or legal procedure. It becomes part of destination service infrastructure. Prior research shows that halal-friendly destination performance influences value, satisfaction, trust, destination image, and loyalty (Al-Ansi & Han, 2019), while tourist experience, perceived value, satisfaction, and loyalty are closely connected in halal tourism contexts (Suhartanto et al., 2021a, 2021b).

Research on Indonesia reinforces the need to connect assurance with destination management. Destination competitiveness attributes, halal destination image, environmental and non-environmental factors, and governance practices have been linked to satisfaction, trust, intention to visit, loyalty, and electronic word of mouth (Haryanto et al., 2024; Lestari et al., 2023; Zulvianti et al., 2022). Institutional and policy research also identifies governance challenges and contested interpretations of halal tourism (Hennida et al., 2024; Musthofa et al., 2023). The strategic challenge is therefore not simply whether halal tourism is desirable, but how assurance and readiness are translated into consistent destination-level services.

Digital Information and the Searchability of Muslim-Friendly Services

Digital information has become integral to the tourist experience. Visitors search, compare, book, navigate, review, and recommend destinations through digital channels. In Muslim-friendly tourism, the digital layer has an additional function because it helps visitors manage religious-service uncertainty. Before travelling, visitors may want to know whether halal food is available near attractions, whether hotels provide prayer facilities, whether family-friendly services are accessible, and whether transport routes support efficient movement.

During travel, they may depend on maps, reviews, QR guides, halal apps, social media content, and user-generated information.

Smart tourism research has established that information and communication technologies shape tourist behaviour before, during, and after travel (Gretzel et al., 2015). In Muslim-friendly destination development, digital tools can support more inclusive experiences (Cuesta-Valiño et al., 2020), while social-media and online-data studies show that digital content reveals traveller concerns and perceptions (Ainin et al., 2020; Feizollah et al., 2021). More recent studies demonstrate that digital halal literacy, user-generated and firm-generated content, and AI-enabled assistance can influence trust, destination image, attitude, and intention (Abror et al., 2025; Hoang & Nguyen, 2025; Wijaya et al., 2025).

The analytical implication is that digital promotion and digital service information should be distinguished. Promotion seeks attention and communicates destination image. Digital service information reduces uncertainty by making practical services searchable and usable. A destination may have halal restaurants, prayer facilities, family services, or suitable accommodation, but these resources create limited visitor value when they cannot be located or verified. Digital service information therefore acts as the informational layer through which physical readiness becomes visible readiness.

Stakeholder Governance and Strategic Destination Capability

Tourism destinations are rarely controlled by a single organization. Visitor experience is produced by government agencies, destination managers, certification bodies, accommodation and food businesses, transport providers, guides, communities, digital platforms, media actors, investors, and local enterprises. Stakeholder theory explains why destination outcomes depend on the alignment of actors whose interests and responsibilities differ (Freeman, 1984). Collaboration theory similarly emphasizes interorganizational coordination where community interests, business goals, and public policy overlap (Jamal & Getz, 1995).

Muslim-friendly tourism makes this coordination problem particularly visible. Halal certification may be managed by one institution, destination promotion by another, infrastructure by local government, hospitality by private firms, and digital information by platforms or media actors. Communities may support or resist particular tourism narratives, while investors require clear rules, infrastructure, demand information, and credible project definition. Without coordination, these elements may exist but fail to become an integrated visitor experience.

Strategic capability is therefore defined here as the destination-level ability of multiple actors to coordinate services, standardize quality, make assurance visible, provide reliable information, respond to visitor and market needs, and translate destination potential into visitor confidence and economic value. This shifts attention away from whether individual halal attributes exist toward whether destination actors can organize those attributes into a coherent service proposition. Recent studies highlighting governance, institutional dynamics, regulation, and system-level government support reinforce this perspective (Adham et al., 2025; Haryanto et al., 2024; Jaelani et al., 2025; Musthofa et al., 2023).

Conceptual Boundaries and Strategic Ecosystem Framework

The proposed framework does not replace existing perspectives on halal tourism, destination competitiveness, smart tourism, stakeholder governance, or service systems. Instead, it connects their insights around a specific strategic problem: how dispersed Muslim-friendly resources are converted into reliable, verifiable, searchable, and usable destination services. The analytical advance lies in treating this as a destination-level conversion process rather than merely an inventory of attributes.

To avoid conceptual overlap, seven concepts are distinguished. Muslim-friendly tourism refers to coordinated additional services that enable Muslim visitors to use mainstream tourism confidently. Destination readiness concerns the availability, connectivity, and operational consistency of destination services. Halal assurance concerns mechanisms that make halal claims visible, verifiable, and credible. Strategic capability concerns the destination-level ability to coordinate actors and convert resources into usable services. A Muslim-friendly tourism service ecosystem refers to the bounded configuration of actors, facilities, assurance mechanisms, information channels, and investment arrangements whose interaction determines service usability. Investment enablement refers to the institutional and managerial capacity to translate demonstrated readiness and market demand into credible investment opportunities through regulatory clarity, infrastructure, market information, project definition, partnership mechanisms, and investment packaging. Market value creation refers to the process through which reliable, visible, and usable Muslim-friendly services strengthen visitor confidence, destination attractiveness, commercial opportunities, and the credibility of the destination as a tourism and investment proposition. In this qualitative study, market value creation is treated as an interpretive destination-level outcome rather than a directly measured financial variable.

Table 1. Conceptual boundaries of key constructs

Concept	Working definition	Analytical role
Muslim-friendly tourism	Additional destination services enabling Muslim visitors to use mainstream tourism confidently while meeting relevant faith-related and general travel needs.	Overall phenomenon
Destination readiness	Availability, connectivity, and operational consistency of facilities, mobility, human resources, and service information across the visitor journey.	Service condition
Halal assurance	Formal and informal mechanisms that make halal-related service claims visible, verifiable, and credible.	Trust mechanism
Strategic capability	Destination-level ability to coordinate actors and convert dispersed resources into reliable and usable services.	Managerial capability
Service ecosystem	Bounded configuration of actors, facilities, assurance mechanisms, information channels, and investment arrangements.	System context
Investment enablement	Institutional and managerial capacity to turn readiness and market demand into credible investment opportunities.	Conversion process
Market value creation	Strengthening of visitor confidence, destination attractiveness, commercial opportunities, and investment credibility through usable service systems.	Interpretive outcome

Methodology

Research Design and Comparative Case Logic

This study employed a qualitative multiple-case comparative design to examine how Muslim-friendly tourism services are developed, coordinated, and interpreted across Indonesia, Singapore, and the United Kingdom. A qualitative design was appropriate because the study sought to understand institutional processes, stakeholder interpretations, and destination-level mechanisms rather than estimate population-level causal effects.

Indonesia was treated as the focal case because it combines a large Muslim population, substantial tourism and halal-economy resources, Islamic heritage, culinary diversity, and strong domestic Muslim travel demand. Singapore and the United Kingdom were selected as analytically contrasting cases rather than statistically equivalent national units. Singapore represents a compact Muslim-minority setting in which halal assurance, mobility, service reliability, and destination information are relatively integrated. The United Kingdom

represents a more decentralized Muslim-minority setting in which Muslim-friendly services are embedded in multicultural cities, community infrastructure, halal business clusters, and digitally mediated information.

The purpose of the comparison was not to rank the countries or claim national representativeness. Instead, the cases were selected to examine how different institutional configurations shape the visibility, reliability, and usability of Muslim-friendly destination services. This design supports analytical rather than statistical generalization.

Participant Selection and Sampling

Participants were selected purposively on the basis of their knowledge of, or professional involvement in, tourism policy, destination management, halal assurance, hospitality operations, travel services, community-based tourism, digital tourism, media communication, tourism research, or investment-related activities. The purposive strategy was intended to ensure that participants could provide informed accounts of the institutional and operational conditions shaping Muslim-friendly tourism.

Snowball sampling was used selectively after the initial interviews to identify additional participants with specialized expertise or cross-sector knowledge that was not readily accessible through formal organizational networks. The combination of purposive and snowball sampling was intended to maximize the relevance and diversity of stakeholder perspectives rather than achieve statistical representativeness. Indonesia had a larger number of participants because it served as the focal case, while Singapore and the United Kingdom were used principally as comparative learning cases.

Table 2. Participant profile and data sources.

Case or group	Sample size	Stakeholder composition
Indonesia	12 interviews	National tourism policy actor, halal certification actor, destination manager, hotel manager, restaurant entrepreneur, travel agent, community leader, academic, investment promotion officer, digital platform representative, guide association representative, media or halal travel influencer
Singapore	8 interviews	Destination marketing practitioner, halal food ecosystem actor, hotel operations manager, travel agent, Muslim community representative, retail and culinary business owner, tourism scholar, digital travel marketer
United Kingdom	8 interviews	Destination marketing observer, halal travel consultant, restaurant owner, hotel manager, Muslim community leader, tour operator, tourism academic, local government tourism actor
Cross-country experts	4 interviews	Halal tourism scholar, Islamic economy analyst, international destination consultant, sustainable tourism expert
FGDs	3 FGDs, 20 participants	Indonesia stakeholder validation FGD, Singapore learning FGD, and United Kingdom learning FGD involving government, business, community, academic, media, halal assurance, travel, and tourism observers

Interview and FGD Procedure

Data were collected between May and August 2024 through 32 semi-structured individual interviews and three focus group discussions involving 20 participants. The interview protocol covered participant background, understandings of Muslim-friendly or halal tourism, policy and regulation, destination readiness, halal certification and assurance, stakeholder collaboration, investment and business conditions, technology and

promotion, and comparative learning. The protocol remained flexible enough for participants to introduce issues specific to their institutional or professional context.

Interviews were conducted face-to-face or online. Online interviews, including those with Singaporean and United Kingdom participants, were conducted through Zoom and recorded with participant consent. Interviews with Singaporean and United Kingdom participants were conducted in English, while Indonesian interviews were conducted in Indonesian or a mixture of Indonesian and English depending on participant preference. Interviews lasted approximately 42 to 70 minutes. Participants were anonymized using case-based codes such as ID03, SG04, UK02, and EX02.

The three FGDs were conducted after the interview stage to refine emerging interpretations. The Indonesia FGD focused on destination readiness, coordination challenges, and strategic priorities. The Singapore FGD explored service reliability, halal assurance visibility, transport integration, and destination communication. The United Kingdom FGD examined inclusive urban tourism, community infrastructure, digital discovery, and Muslim-friendly market development. Each FGD lasted approximately 110 to 130 minutes. FGD evidence was used to assess whether themes identified in individual interviews were supported, challenged, or qualified when considered collectively by stakeholders.

Secondary Documentary Review

Secondary documentary materials were reviewed to contextualize and triangulate interview and FGD findings. These materials included tourism statistics and market reports, policy and regulatory materials, halal-related institutional information, and official tourism information relevant to Indonesia, Singapore, and the United Kingdom. The research report, for example, drew on sources such as tourism statistics and market reports, Indonesian tourism regulation and long-term policy materials, Singapore tourism and halal-assurance information, and United Kingdom tourism institutional information.

The documentary component was not treated as a standalone dataset and was not subjected to a separate formal coding procedure. Instead, secondary sources were used as contextual and corroborative evidence. Where participant accounts referred to service assurance, destination information, policy arrangements, or tourism-market conditions, relevant secondary material was considered to assess whether the interpretation was consistent with publicly available institutional and market context.

Data Analysis and Coding

Data analysis followed a reflexive thematic approach combined with cross-case comparison (Braun & Clarke, 2006; Miles et al., 2014). Analysis began with repeated reading of interview transcripts and FGD materials. An initial coding framework was informed by the literature on halal tourism, destination competitiveness, service quality, digital tourism, stakeholder governance, and strategic management. These deductive categories were then refined inductively as additional patterns emerged from the empirical material.

The second and third authors conducted the coding of interview and FGD data. Coding proceeded in four stages. First, transcripts were coded into preliminary categories including halal assurance, destination amenities, access and mobility, stakeholder coordination, digital information, market orientation, and investment enablement. Second, coded excerpts were compared across participant groups and country cases to identify convergent, divergent, and context-specific patterns. Third, related codes were consolidated into higher-order themes on the basis of empirical recurrence and analytical relevance. Fourth, a cross-case matrix was developed to compare the configuration of Muslim-friendly services across Indonesia, Singapore, and the United Kingdom.

Differences in coding or interpretation were resolved through discussion among the research team. Where interpretations differed, the team returned to the relevant transcript or FGD material, compared the contextual meaning of excerpts, and discussed alternative interpretations until a shared interpretation was reached. The purpose was not to calculate statistical intercoder agreement, but to strengthen interpretive transparency and ensure that final themes remained grounded in the underlying qualitative evidence.

Table 3. Codebook for thematic and cross-case analysis.

Code	Analytical domain	Illustrative indicators
C1	Policy and governance architecture	Policy direction, regulation, institutional responsibility, destination priorities
C2	Halal assurance	Certification, visibility, monitoring, trusted claims, reputation
C3	Destination readiness	Amenities, prayer facilities, toilets, accommodation, service consistency
C4	Access and mobility	Transport, connectivity, route guidance, wayfinding
C5	Visitor experience	Attractions, family convenience, cultural and culinary experience
C6	Stakeholder coordination	Government-business-community interaction, operational alignment
C7	Market orientation	Visitor needs, positioning, segment responsiveness, demand narratives
C8	Digital service information	Maps, apps, reviews, QR guidance, service searchability
C9	Investment enablement	Infrastructure, regulatory clarity, market information, project preparation
C10	Comparative transferability	Adaptable lessons, contextual limits, destination diversity

Data Sufficiency and Trustworthiness

Data sufficiency was assessed using the principle of information power rather than a predetermined numerical saturation threshold. The research team considered the dataset sufficient when subsequent interviews and FGD discussions no longer produced substantively different insights in relation to the main analytical domains, particularly halal assurance, destination readiness, digital information, stakeholder coordination, and investment-related conditions. The focused research questions, diversity of stakeholder roles, and comparative case structure were also considered in assessing adequacy.

Several procedures were used to strengthen trustworthiness. Credibility was supported through comparison across individual interviews, FGDs, stakeholder groups, country cases, and relevant secondary contextual materials. Dependability was supported through a common interview protocol, an explicit coding framework, team discussions, analytical notes, and cross-case matrices. Confirmability was strengthened by linking theme development to underlying interview and FGD materials and by resolving interpretive differences through collective review of relevant excerpts. Transferability was addressed through detailed description of the three institutional settings and explicit recognition that the comparison supports analytical rather than statistical generalization.

Results

Inclusive Positioning and Terminology

The first pattern concerned the language used to position Muslim-friendly tourism. Participants did not reject halal tourism as a concept, but repeatedly distinguished between halal as a service-assurance requirement and Muslim-friendly tourism as a broader destination positioning. This distinction was particularly visible in Indonesia, where several stakeholders regarded halal tourism as meaningful for food, certification, and religious compliance but potentially sensitive when used as an umbrella label for plural destinations.

An Indonesian academic captured the tension: "In Indonesia, the term halal tourism is powerful but also sensitive. A more acceptable framing is Muslim-friendly tourism because it emphasizes additional services rather than religious exclusivity" (ID08). Similar concerns appeared in the Indonesia FGD, where participants agreed that Muslim-friendly language made it easier to discuss prayer spaces, halal food, cleanliness, family convenience, and respectful service without implying that destinations should become religiously exclusive.

Singapore and the United Kingdom displayed different patterns. In Singapore, participants emphasized usability rather than religious branding. A destination marketing practitioner explained that the city did not need to overstate halal tourism because food certification, mosque access, reliable transport, and visitor information already made the destination usable for Muslim visitors (SG01). In the United Kingdom, a tourism academic noted that inclusive tourism was the more common public language, while Muslim visitor needs were served through multicultural urban services, halal food visibility, community infrastructure, and digital discovery (UK07).

Halal Assurance and Practical Trust

Halal assurance emerged as a central theme in all three cases, although its mechanisms differed. In Indonesia, participants recognized a strong institutional basis for halal assurance but described uneven implementation and visibility across SMEs, restaurants, hotels, and tourism areas.

One halal certification actor stated: "Certification is not only a legal matter. For tourists, it is a signal of trust. The problem is that many SMEs see certification as costly and bureaucratic, so the visible halal ecosystem is still uneven" (ID02). Indonesian participants generally agreed that halal food itself is widely available. The more specific issue was visibility and verification. Interview and FGD data pointed to uneven certification display, limited development of clearly identifiable halal culinary clusters, and inconsistent destination-level information about trusted services.

Singapore showed a more formalized assurance pattern. A halal food ecosystem actor explained that visitors tended to trust halal labels because they were recognizable, monitored, and supported by public information and consumer familiarity (SG02). Secondary institutional materials were consistent with this account, including references to visible certification and monitoring arrangements. In the United Kingdom, formal certification coexisted with Muslim-owned reputation, community recommendations, online reviews, halal apps, and local Muslim networks. A UK restaurant owner noted that digital visibility was crucial because many visitors decided where to eat through maps, halal reviews, and community recommendations (UK03).

Destination Readiness

Indonesia displayed the clearest gap between resources and readiness. Participants consistently referred to the country's Muslim-majority population, Islamic heritage, natural attractions, culinary diversity, community hospitality, and expanding halal-product ecosystem. Yet this resource strength did not always translate into a seamless visitor journey.

A destination manager explained: "Our destination has natural beauty, local culture, and Muslim-majority communities. The challenge is not the concept but the consistency of service standards across restaurants, toilets, prayer rooms, guides, and transport points" (ID03). A travel agent similarly noted that Muslim travellers often asked not only about attractions, but also where to pray, where to eat, whether accommodation was family-friendly, and whether the itinerary respected prayer time (ID06).

The Indonesia FGD identified five recurring readiness gaps: inconsistent prayer facilities, limited certified culinary clusters, weak signage, insufficient guide literacy, and uneven toilet or water-friendly facilities.

Participants therefore did not question Indonesia's Muslim-friendly tourism potential; they questioned whether destinations could deliver consistent service conditions across the full itinerary.

Singapore presented a contrasting pattern of compact readiness. Participants associated the city with efficient movement, clean public spaces, food assurance, safety, and easy access to attractions. A Singapore tourism scholar emphasized that the transferable lesson was not physical imitation, but discipline in information quality, service reliability, and destination packaging (SG07). The United Kingdom presented another form of readiness, particularly in large cities where halal food clusters, mosques, family activities, shopping districts, universities, and community-based information were embedded within wider urban tourism.

Digital Information and Service Searchability

Digital information was one of the clearest areas in which participants distinguished tourism promotion from practical service guidance. Indonesia was repeatedly described as strong in visual promotion of landscapes, culture, culinary experiences, and hospitality. Participants, however, described practical Muslim-friendly information as less consistently organized.

A digital platform representative explained that tourists could readily find attractive destination images online, while verified information on halal food, prayer spaces, and family facilities remained scattered (ID10). The Indonesia FGD reinforced the need for verified maps, clearer halal restaurant references, prayer-room information, route guidance, and family-facility indicators. The problem identified by participants was therefore not digital absence, but the gap between promotional visibility and service searchability.

Singapore showed a stronger connection between destination communication and visitor usability. Participants described transport, attractions, halal food access, safety, and public information as relatively easy to combine within a short itinerary. In the United Kingdom, digital discovery played a more decentralized role. Maps, halal applications, user-generated reviews, community websites, and social-media recommendations were important to planning eating, prayer, shopping, and family activities. Secondary material from the underlying research report was consistent with this account, including references to Google Maps profiles and public reviews as mechanisms through which halal businesses become discoverable.

Stakeholder Coordination and Investment Enablement

The fifth pattern concerned coordination among destination actors. Indonesian participants frequently referred to pentahelix collaboration, but they also indicated that collaboration did not always operate as an integrated destination-level routine. Government, businesses, communities, certification actors, media, digital platforms, and investors may all support Muslim-friendly tourism while operating through separate channels.

Participants identified three recurring consequences. First, service standards were not always translated into practical destination indicators. Second, halal assurance was sometimes treated primarily as a compliance matter rather than as part of visitor-experience management. Third, participants identified a gap between general tourism investment promotion and the more specific information required for investment decisions. An investment-related informant emphasized that investors require clear rules, stable demand, reliable infrastructure, and bankable destination models rather than broad promotional narratives (ID09).

Singapore differed because coordination was supported by compact geography, strong urban management, clear service standards, and predictable infrastructure. The United Kingdom differed because coordination was more decentralized, with community infrastructure, local businesses, diaspora networks, retail clusters, and digital platforms supporting Muslim-friendly service provision. Across the cases, the evidence suggests that investment credibility depends on more than destination attractiveness; it also depends on the ability to demonstrate service readiness, market demand, institutional support, and credible project definition.

Cross-Case Patterns

The cross-case comparison revealed three broad patterns. First, Muslim-friendly tourism can be positioned through different public languages: Indonesia continues to negotiate between halal-tourism and Muslim-friendly terminology, Singapore embeds Muslim needs within general visitor convenience, and the United Kingdom places Muslim visitor needs within inclusive urban tourism and multicultural service life. Second, assurance mechanisms differ: Indonesia has a strong formal basis but uneven visibility, Singapore relies on recognizable and monitored certification within a compact service environment, and the United Kingdom combines certification with reputation, community trust, digital reviews, and local networks. Third, service usability emerges through different institutional pathways: integration in Singapore, community-market-digital connectivity in the United Kingdom, and a resource-rich but coordination-constrained configuration in Indonesia.

Table 4. Cross-case comparative matrix.

Dimension	Indonesia	Singapore	United Kingdom	Cross-case implication
Positioning	Halal and Muslim-friendly terminology coexist; sensitivity remains in plural destinations.	Muslim needs embedded in general visitor convenience.	Inclusive tourism and multicultural urban framing.	Service usability may matter more than explicit halal branding.
Halal assurance	Strong institutional basis but uneven visibility across SMEs and destinations.	Recognizable, monitored, highly visible certification.	Mixed assurance through certification, reputation, community trust, and digital reviews.	Assurance can emerge through different institutional pathways.
Destination readiness	Strong resource base but uneven service consistency.	Compact, integrated, predictable service environment.	Decentralized but strong urban/community service clusters.	Resource abundance alone does not create readiness.
Digital information	Strong promotion but fragmented practical service guidance.	Destination and service information more integrated.	Platform-, review-, and community-mediated discovery.	Searchability converts physical resources into usable services.
Stakeholder coordination	Broad participation but fragmented operational routines.	Compact and infrastructure-supported coordination.	Decentralized community- and market-mediated coordination.	Participation must be converted into operational coordination.
Investment enablement	General potential exceeds project-specific readiness.	Stable infrastructure and predictable service conditions.	Market-led opportunities in urban clusters.	Investability depends on credible service systems and project definition.

Table 5. FGD refinement of interview-based themes

FGD	Main focus	Themes reinforced / refined	Analytical contribution
Indonesia	Readiness, assurance, coordination	Service inconsistency, halal visibility, digital gaps, operational fragmentation	Clarified the gap between resource potential and destination capability.
Singapore	Service integration and assurance	Certification visibility, information quality, mobility, predictable services	Supported an integrated service-reliability pathway.
United Kingdom	Inclusive urban services	Community infrastructure, digital discovery, halal business clusters	Supported a decentralized community-market-digital pathway.

Discussion

From Resource Endowment to Destination Capability

The first theoretical implication of the findings is that resource abundance should not be equated with destination capability. This distinction is consistent with destination competitiveness research, which has long argued that endowed resources generate advantage only when they are combined with supporting factors, destination management, accessibility, and created resources (Buhalis, 2000; Dwyer & Kim, 2003). The present study extends that logic to Muslim-friendly tourism. Existing halal-tourism research has shown that destination attributes shape intention, value, trust, image, and loyalty (Al-Ansi & Han, 2019; Lestari et al., 2023; Qureshi et al., 2025), but the comparative evidence here suggests that the strategic question lies one step earlier: whether dispersed attributes are organized into a service system that visitors can actually use.

The Indonesian case makes this conversion problem particularly visible. Participants did not describe a shortage of Muslim-friendly assets; they described uneven connections among those assets across restaurants, prayer facilities, toilets, guides, transport points, and destination information. This finding qualifies attribute-centred interpretations of competitiveness. Attributes remain necessary, but their value is contingent on coordination and service consistency. In this sense, the study complements Lestari et al. (2023), who link destination competitiveness attributes to visit intention, and Haryanto et al. (2024), who emphasize governance and branding, by showing how coordination operates as the mechanism through which resource endowments become visitor-facing capability.

The comparison with Singapore and the United Kingdom further indicates that capability can emerge through different institutional configurations. Singapore combines recognizable assurance, mobility, public information, safety, and predictable service conditions, whereas the United Kingdom relies more heavily on multicultural urban services, community infrastructure, halal business clusters, and platform-mediated discovery. This finding is consistent with research showing that Muslim travellers in non-Muslim destinations evaluate both faith-related and mainstream service conditions (Çıkı & Tanrıverdi, 2025; Said et al., 2022; Soonsan & Jumani, 2024). The contribution, however, is to recast these conditions as alternative resource-conversion pathways rather than as a universal checklist of Muslim-friendly attributes.

From Halal Availability to Credible Assurance

The second distinction concerns halal availability and halal assurance. Prior research has established the importance of halal-friendly destination performance, certification, religious accessibility, trust, and perceived value (Al-Ansi & Han, 2019; Jia & Chaozhi, 2021; Said et al., 2022). The present findings refine this literature by separating the existence of halal products from the visitor's ability to identify, verify, and trust them. A

product or service may be halal in practice while remaining strategically invisible if assurance signals are weak, difficult to locate, or disconnected from the visitor journey.

This distinction is especially important in Indonesia, where participants considered halal food widely available but described uneven certification visibility and implementation across SMEs and tourism areas. The result resonates with studies that identify institutional and policy complexity in Indonesian halal-tourism development (Hennida et al., 2024; Musthofa et al., 2023). It also adds a managerial dimension: assurance mechanisms can impose perceived administrative and cost burdens on smaller enterprises even when certification strengthens trust. The strategic challenge is therefore not to choose between certification and SME participation, but to design assurance arrangements that preserve credibility while lowering practical barriers to visible participation.

The comparative cases show that credible assurance can be institutionally layered. Singapore represents a more formalized pathway in which recognizable certification, monitoring, public information, and consumer familiarity reinforce trust. The United Kingdom demonstrates a more plural pathway in which formal certification coexists with Muslim-owned reputation, community recommendations, online reviews, halal applications, and local networks. This supports supplier- and traveller-oriented research showing that trust in halal provision may be constructed through combinations of formal and informal signals (Jia & Chaozhi, 2021; Said et al., 2022). The theoretical implication is that halal assurance is better conceived as a layered trust architecture than as certification alone.

This interpretation does not diminish formal certification. Rather, it distinguishes regulatory assurance from experiential assurance. Regulatory assurance establishes standards and accountability; experiential assurance concerns whether visitors can recognize, locate, interpret, and use those trust signals during travel. This extends research linking halal-friendly destination performance to trust, image, and loyalty (Al-Ansi & Han, 2019) by identifying visibility and usability as mechanisms through which assurance enters the tourist experience. For destination managers, the task is therefore to connect certification and other credible trust signals with maps, service directories, itineraries, staff knowledge, and digital platforms.

From Promotion to Digital Service Infrastructure

A third contribution concerns the distinction between digital promotion and digital service infrastructure. Smart-tourism research has established that digital technologies shape how tourists search, evaluate, consume, and review destination experiences (Gretzel et al., 2015), while Muslim-friendly tourism studies increasingly show that digital tools can support inclusive travel, trust, destination image, and behavioural intention (Abror et al., 2025; Cuesta-Valiño et al., 2020; Wijaya et al., 2025). The present study extends this literature by distinguishing communication designed to attract attention from information designed to make services usable.

The Indonesian evidence illustrates this distinction. Participants considered the country highly visible in terms of landscapes, culture, culinary experiences, and general destination promotion, but described practical Muslim-friendly information as less consistently organized. Information about verified halal food, prayer facilities, family amenities, route guidance, and related services may exist across multiple channels without forming an easily searchable visitor system. The resulting problem is not digital absence but informational fragmentation. In strategic terms, promotion creates destination awareness, whereas digital service infrastructure converts awareness into navigability and reduces service uncertainty during the trip.

The United Kingdom demonstrates how digital platforms can also operate as informal trust infrastructure. Maps, halal reviews, community recommendations, user-generated information, and business profiles help visitors evaluate services in a setting where Muslim-friendly provision is not coordinated through a single national destination system. Singapore represents a more integrated configuration in which destination information interacts with predictable mobility and visible assurance. These patterns are consistent with

research on user-generated content and AI-enabled assistance in Muslim travel (Hoang & Nguyen, 2025; Wijaya et al., 2025), but they add a service-system interpretation: digital information mediates the relationship between physical readiness and perceived usability. A facility that cannot be found or verified has less strategic value than a comparable facility embedded in a searchable information environment.

From Stakeholder Participation to Operational Coordination

The findings also qualify conventional assumptions about stakeholder collaboration. Stakeholder and collaborative-planning theories emphasize the interdependence of public agencies, businesses, communities, and other actors in destination development (Freeman, 1984; Jamal & Getz, 1995). Yet participation by multiple actors does not necessarily create operational coordination. The present study therefore shifts the analytical focus from stakeholder presence to the routines through which stakeholders jointly produce a coherent visitor service system.

This distinction is particularly relevant to the Indonesian pentahelix context. Government agencies, destination managers, certification bodies, hospitality businesses, SMEs, transport providers, communities, media, digital platforms, and investors may all contribute while operating through separate institutional channels. The resulting fragmentation is consistent with research highlighting institutional dynamics, policy interpretation, and governance challenges in halal tourism (Haryanto et al., 2024; Hennida et al., 2024; Musthofa et al., 2023). The present evidence specifies where that fragmentation becomes visible to visitors: certified restaurants may be absent from destination information, prayer facilities may lack signage or itinerary integration, and investment promotion may remain disconnected from clearly defined projects.

Collaboration therefore creates strategic capability only when it is translated into shared operational routines. These may include common service standards, facility audits, interoperable destination information, visible assurance, staff training, verified maps, integrated itineraries, and investment-project preparation. This mechanism-based interpretation extends earlier collaboration theory by emphasizing operational outputs rather than collaboration as an end in itself (Jamal & Getz, 1995). It also aligns with system-oriented work showing that government support for halal tourism must be understood through interacting institutional functions rather than isolated interventions (Adham et al., 2025). Singapore and the United Kingdom reinforce this conclusion in different ways: compact institutional coordination can support consistency, but decentralized coordination can also function when community networks, local businesses, urban services, and digital platforms provide effective connective mechanisms.

Standardization without Erasing Destination Diversity

A final tension concerns standardization and destination diversity. Research on halal-tourism policy in Indonesia shows that terminology, belief systems, and local contexts can shape stakeholder acceptance (Hennida et al., 2024), while work on sustainable halal-tourism regulation emphasizes the importance of accommodating local wisdom rather than imposing decontextualized models (Jaelani et al., 2025). The present findings suggest that greater consistency in service assurance, information, facilities, and operational coordination is necessary, but that consistency should not be confused with uniformity. Indonesia's natural, cultural, culinary, urban, coastal, heritage, and community-based destinations derive competitive value precisely from their differences.

The relevant distinction is between standardizing minimum service reliability and standardizing the tourism experience itself. Minimum assurance can be made more consistent through clear halal information, usable prayer facilities, basic cleanliness, accessible service information, staff awareness, and reliable wayfinding. The content of the destination experience can remain locally differentiated. This interpretation is compatible with evidence that Muslim travellers evaluate both faith-related provisions and broader destination attributes

(Soonsan & Jumani, 2024; Suhartanto et al., 2025). Standardization should therefore operate at the level of minimum reliability and information quality, not at the level of cultural identity, culinary expression, or destination narrative.

This distinction is especially important in plural destinations, where explicitly religious branding may be sensitive or commercially restrictive. Indonesian participants indicated that Muslim-friendly terminology can be more inclusive because it emphasizes additional visitor services rather than religious exclusivity, a finding that resonates with policy research on contested interpretations of halal tourism in Indonesia (Hennida et al., 2024). The resulting strategy is one of modular standardization: destinations share a reliable minimum service layer while adapting how that layer is embedded in local tourism. This approach also explains why Singapore and the United Kingdom are useful as analytical contrasts rather than templates for replication: what travels across contexts is the principle of reliable usability, not a single institutional or branding model.

Table 6. Strategic Muslim-Friendly Tourism Ecosystem: capabilities, mechanisms, and outcomes

Strategic element	Working definition	Mechanism	Proximate outcome
Governance alignment	Coordination of public, private, community, certification, knowledge, media, and investment actors.	Clarifies roles, standards, responsibilities, and shared priorities.	Operational coordination
Destination readiness	Availability and consistency of facilities, mobility, amenities, HR, and supporting services.	Reduces service gaps across the visitor journey.	Service reliability
Halal assurance	Formal and informal mechanisms making halal claims visible and credible.	Reduces religious-service uncertainty.	Visitor trust
Human and community capability	Knowledge and service competence of staff, businesses, guides, and communities.	Improves service encounters and contextual responsiveness.	Service confidence
Digital service information	Searchable and usable information about Muslim-friendly services.	Makes physical readiness visible and navigable.	Planning confidence and service usability
Investment enablement	Capacity to translate readiness and demand into credible investment opportunities.	Connects rules, market information, infrastructure, partnerships, and project definition.	Investment credibility
Market value creation	Destination-level value emerging from reliable and usable service systems.	Strengthens confidence, attractiveness, and commercial credibility.	Stronger market proposition

Taken together, these findings support a resource-conversion view of Muslim-friendly tourism. The framework should be read as a set of proposed strategic relationships rather than a tested causal model. Governance and operational coordination provide direction; destination readiness, halal assurance, and human/community capability support service reliability; digital service information makes that reliability visible and searchable; and visitor confidence becomes more likely when services are both available and credible. This synthesis integrates destination competitiveness, halal-tourism, smart-tourism, and stakeholder perspectives (Al-Ansi & Han, 2019; Dwyer & Kim, 2003; Gretzel et al., 2015; Jamal & Getz, 1995) while adding a specific managerial mechanism: resources create market value only when destination actors convert them into a dependable service proposition. Market attractiveness and investment credibility are therefore treated as downstream strategic outcomes, not as automatically produced consequences of resource abundance.

Theoretical Implications

The study makes three theoretical contributions. First, it moves Muslim-friendly tourism beyond a label- or attribute-based understanding by conceptualizing it as a destination-level strategic capability. The contribution does not lie in proposing new Muslim-friendly attributes, but in explaining how recognized attributes become useful when actors coordinate them into a reliable, visible, and searchable service system.

Second, the study extends destination competitiveness theory by distinguishing resource endowment from conversion capability. Access, attractions, and amenities remain important, but they are insufficient when assurance is invisible, information is fragmented, or coordination is weak. Halal assurance, digital service information, stakeholder governance, and investment enablement therefore operate as strategic layers linking basic destination resources with visitor confidence.

Third, the comparative cases reveal multiple institutional pathways to service usability. Singapore illustrates an integrated formal service-reliability pathway; the United Kingdom illustrates a decentralized community-market-digital pathway; and Indonesia illustrates a resource-rich but coordination-constrained pathway. This shifts comparison away from identifying a single best model and toward understanding how different institutional arrangements convert resources into usable service capability.

Managerial and Policy Implications

For policymakers, Muslim-friendly tourism should be managed through minimum destination-readiness and assurance principles rather than broad promotional claims alone. These principles should cover halal-information visibility, prayer facilities, toilets, signage, guide and staff literacy, family facilities, digital service information, transport nodes, and event management. The objective should be consistent minimum reliability without imposing uniform destination identity.

For destination managers, the priority is to connect services that are currently dispersed. A Muslim-friendly destination is not created by a single certified restaurant, prayer room, or campaign slogan. Managers need an itinerary-level view of whether visitors can move, eat, pray, rest, shop, and obtain information without repeatedly facing uncertainty. Service mapping, facility audits, verified directories, staff development, and practical digital guidance are therefore central management tasks.

For tourism businesses and SMEs, Muslim-friendly services should be treated as service-quality improvements rather than niche add-ons. Hotels, restaurants, attractions, travel agents, shopping centres, and transport providers can strengthen competitiveness by making halal assurance visible, improving cleanliness and prayer access, training staff, and ensuring that services can be found through digital channels. At the same time, certification systems should remain credible while recognizing the administrative constraints faced by smaller enterprises.

For investment actors, the findings suggest that market potential alone is insufficient. Credible investment opportunities require clearer project definition, supporting infrastructure, demand information, service-readiness evidence, and stable institutional arrangements. Investment enablement should therefore connect tourism planning with project preparation rather than remain limited to general destination promotion.

Limitations and Future Research

This study has several limitations. Its qualitative design supports analytical rather than statistical generalization. Although the participant structure was suitable for a comparative exploratory study, it cannot represent the full diversity of destination systems within Indonesia, Singapore, or the United Kingdom. The country-level

comparison also required attention to broad institutional patterns rather than detailed destination-by-destination variation.

The secondary documentary component was used for contextualization and corroboration rather than as a separately coded documentary dataset. Future research could therefore undertake a systematic policy or digital-platform analysis to examine how formal destination communication aligns with visitor service needs. Quantitative studies could test relationships among halal assurance, destination readiness, digital visibility, visitor confidence, destination image, and loyalty. Comparative case studies could also examine urban, coastal, heritage, and community-based Indonesian destinations separately, while intervention-oriented research could evaluate verified Muslim-friendly maps, destination-readiness standards, SME assurance support, and investment-packaging initiatives.

Conclusion

This study examined Muslim-friendly tourism as a destination-level strategic capability rather than solely as a collection of halal-related attributes or a destination label. The comparative evidence from Indonesia, Singapore, and the United Kingdom shows that Muslim-friendly resources create greater visitor value when they are organized into services that are reliable, visible, searchable, and usable across the travel journey.

The study's central contribution is a resource-conversion perspective. Destination competitiveness in Muslim-friendly tourism depends not simply on the availability of halal food, prayer facilities, cultural resources, or tourism attractions, but on governance arrangements that connect assurance, destination readiness, human and community capability, digital service information, and investment conditions. The comparative cases demonstrate that this conversion can occur through different institutional pathways, but each requires mechanisms that reduce visitor uncertainty and improve service usability.

For Indonesia, the strategic challenge is therefore not a lack of Muslim-friendly potential, but the need to translate existing resources into coordinated destination capability. Strengthening minimum service reliability, visible assurance, service-oriented digital information, operational stakeholder coordination, and credible investment preparation can help convert resource advantage into visitor confidence and stronger market propositions. Muslim-friendly tourism, in this sense, becomes less a branding exercise and more a destination-management capability.

Declarations

Ethics Statement:

Ethical approval for this study was obtained from the Institute for Research and Community Service (LPPM), Universitas Terbuka, Indonesia, under approval reference B/133/UN31.LPPM/PT.01.03/2024. All participants participated voluntarily and provided informed consent prior to the interviews and focus group discussions. Consent for online recording was obtained where applicable. Participants were informed about the purpose of the study, the use of anonymized quotations, confidentiality procedures, and their right to withdraw. Identifying information was removed during transcription, coding, and reporting. Research materials were stored securely and used solely for research purposes.

Funding:

This research received no external funding.

Conflicts of Interest:

The authors declare no conflict of interest.

Data Availability Statement:

The qualitative data supporting this study are not publicly available because they contain stakeholder interview materials and context-specific institutional information. Anonymized excerpts may be made available by the corresponding author upon reasonable request, subject to ethical and institutional restrictions.

Author Contributions:

Abdul Rahman Rahim: Conceptualization, Investigation, Methodology, Project administration, Writing – original draft. Ismail Rasulong: Conceptualization, Methodology, Formal analysis, Validation, Writing – review & editing. Wahyuddin: Investigation, Formal analysis, Data curation, Validation, Writing – review & editing. All authors contributed to the interpretation of the findings, reviewed the manuscript, and approved the final version.

References

Abror, A., Patrisia, D., Engriani, Y., Hafizh, M. A., Gaffar, V., Qoriah, Q., Achmad, N., Wusqa, U., & Abdullah, M. S. (2025). Antecedents of tourist citizenship behavior: The role of digital halal literacy and religiosity. *Journal of Islamic Marketing, 16*(1), 65–81. https://doi.org/10.1108/JIMA-11-2023-0376

Adham, K. A., Munawar, A., Shihama, M., & Mahmad Nasir, N. (2025). Government support for halal tourism: A viable system model analysis of the Maldives. *Journal of Islamic Marketing.* Advance online publication. https://doi.org/10.1108/JIMA-10-2024-0455

Ainin, S., Feizollah, A., Anuar, N. B., & Abdullah, N. A. (2020). Sentiment analyses of multilingual tweets on halal tourism. *Tourism Management Perspectives, 34*, 100658. https://doi.org/10.1016/j.tmp.2020.100658

Al-Ansi, A., & Han, H. (2019). Role of halal-friendly destination performances, value, satisfaction, and trust in generating destination image and loyalty. *Journal of Destination Marketing and Management, 13*, 51–60. https://doi.org/10.1016/j.jdmm.2019.05.007

Al-Ansi, A., Han, H., Kim, S., & King, B. (2021). Inconvenient experiences among Muslim travelers: An analysis of the multiple causes. *Journal of Travel Research, 60*(6), 1352–1370. https://doi.org/10.1177/0047287520934870

Battour, M., & Ismail, M. N. (2016). Halal tourism: Concepts, practises, challenges and future. *Tourism Management Perspectives, 19*, 150–154. https://doi.org/10.1016/j.tmp.2015.12.008

Battour, M., Ratnasari, R. T., Ahmi, A., Sukmana, R., & Hendratmi, A. (2024). The current state of published literature on halal tourism and hospitality: A bibliometric review. *Journal of Islamic Marketing, 15*(4), 963–989. https://doi.org/10.1108/JIMA-02-2023-0054

Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology, 3*(2), 77–101.

Buhalis, D. (2000). Marketing the competitive destination of the future. *Tourism Management, 21*(1), 97–116. https://doi.org/10.1016/S0261-5177(99)00095-3

Çıkı, K. D., & Tanrıverdi, H. (2025). Understanding Muslim tourist behavior in non-Muslim countries through the stimulus-organism-response framework. *Journal of Islamic Marketing, 16*(11), 3394–3412. https://doi.org/10.1108/JIMA-08-2024-0378

Cuesta-Valiño, P., Bolifa, F., & Núñez-Barriopedro, E. (2020). Sustainable, smart and Muslim-friendly tourist destinations. *Sustainability, 12*(5), 1778. https://doi.org/10.3390/su12051778

Dwyer, L., & Kim, C. (2003). Destination competitiveness: Determinants and indicators. *Current Issues in Tourism, 6*(5), 369–414. https://doi.org/10.1080/13683500308667962

Feizollah, A., Mostafa, M. M., Sulaiman, A., Zakaria, Z., & Firdaus, A. (2021). Exploring halal tourism tweets on social media. *Journal of Big Data, 8*, 72. https://doi.org/10.1186/s40537-021-00463-5

Freeman, R. E. (1984). *Strategic management: A stakeholder approach.* Pitman.

Gretzel, U., Sigala, M., Xiang, Z., & Koo, C. (2015). Smart tourism: Foundations and developments. *Electronic Markets, 25*, 179–188. https://doi.org/10.1007/s12525-015-0196-8

Han, H., Al-Ansi, A., Olya, H. G. T., & Kim, W. (2019). Exploring halal-friendly destination attributes in South Korea: Perceptions and behaviors of Muslim travelers toward a non-Muslim destination. *Tourism Management, 71*, 151–164. https://doi.org/10.1016/j.tourman.2018.10.010

Haryanto, R., Anwar, M. M., Harisah, H., & Fadllan, F. (2024). Tourist satisfaction toward halal tourism: The role of tourism governance and branding. *Journal of Islamic Marketing, 15*(9), 2229–2244. https://doi.org/10.1108/JIMA-09-2023-0282

Hennida, C., Nauvarian, D., Saptari, N. O., & Sugianto Putri, R. (2024). The role of belief systems and misperceptions in halal tourism policy: Evidences from Indonesia. *Cogent Social Sciences, 10*(1), 2352915. https://doi.org/10.1080/23311886.2024.2352915

Hoang, D. S., & Nguyen, D. T. A. (2025). The role of AI assistants in promoting sustainable halal tourism in non-Muslim destinations. *Discover Sustainability, 6*, 705. https://doi.org/10.1007/s43621-025-01640-9

Jaelani, A. K., Kusumaningtyas, R. O., Sarjiyanto, & Sobirov, B. (2025). Sustainable halal tourism regulation based on local wisdom in Indonesia and Uzbekistan. *Journal of Human Rights, Culture and Legal System, 5*(1), 351–377. https://doi.org/10.53955/jhcls.v5i1.671

Jamal, T. B., & Getz, D. (1995). Collaboration theory and community tourism planning. *Annals of Tourism Research, 22*(1), 186–204. https://doi.org/10.1016/0160-7383(94)00067-3

Jia, X., & Chaozhi, Z. (2021). Turning impediment into attraction: A supplier perspective on halal food in non-Islamic destinations. *Journal of Destination Marketing and Management, 19*, 100517. https://doi.org/10.1016/j.jdmm.2020.100517

Lestari, Y. D., Saidah, F., & Aliya Putri, A. N. (2023). Effect of destination competitiveness attributes on tourists' intention to visit halal tourism destination in Indonesia. *Journal of Islamic Marketing, 14*(4), 937–965. https://doi.org/10.1108/JIMA-12-2020-0368

Miles, M. B., Huberman, A. M., & Saldana, J. (2014). *Qualitative data analysis: A methods sourcebook* (3rd ed.). Sage.

Mohsin, A., Ramli, N., & Alkhulayfi, B. A. (2016). Halal tourism: Emerging opportunities. *Tourism Management Perspectives, 19*, 137–143. https://doi.org/10.1016/j.tmp.2015.12.010

Musthofa, B. M., Pranita, D., Sattar Rasul, M., & Haidlir, B. M. (2023). Institutional dynamics of halal tourism development in Indonesia and Malaysia. *Journal of ASEAN Studies, 11*(1), 21–41. https://doi.org/10.21512/jas.v11i1.9431

Qureshi, R. A., Dada, Z. A., Bhat, W. A., & Soudager, M. A. (2025). Modelling halal tourism as a reflective-reflective second-order construct: Linking attributes to tourist outcomes using structural model analysis. *Journal of Islamic Marketing*. https://doi.org/10.1108/JIMA-07-2024-0289

Said, M. F., Adham, K. A., Muhamad, N. S., & Sulaiman, S. (2022). Exploring halal tourism in Muslim-minority countries: Muslim travellers' needs and concerns. *Journal of Islamic Marketing, 13*(4), 824–842. https://doi.org/10.1108/JIMA-07-2020-0202

Soonsan, N., & Jumani, Z. A. (2024). Perceptions of halal-friendly attributes: A quantitative study of tourists' intention to travel non-Islamic destination. *Journal of Islamic Marketing, 15*(6), 1441–1460. https://doi.org/10.1108/JIMA-07-2022-0204

Suhartanto, D., Amalia, F. A., Sumarjan, N., Lu, C. Y., & Nova, M. (2025). The art of inclusivity: How sense of community shapes Muslim journeys across Islamic and non-Islamic destinations. *Journal of Islamic Marketing, 16*(8), 2276–2293. https://doi.org/10.1108/JIMA-05-2024-0217

Suhartanto, D., Dean, D., Wibisono, N., Astor, Y., Muflih, M., Kartikasari, A., Sutrisno, R., & Hardiyanto, N. (2021a). Tourist experience in halal tourism: What leads to loyalty? *Current Issues in Tourism, 24*(14), 1976–1990. https://doi.org/10.1080/13683500.2020.1813092

Suhartanto, D., Gan, C., Andrianto, T., Ismail, T. A. T., & Wibisono, N. (2021b). Holistic tourist experience in halal tourism evidence from Indonesian domestic tourists. *Tourism Management Perspectives, 40*, 100884. https://doi.org/10.1016/j.tmp.2021.100884

Wijaya, C. O., Wijaya, S., & Jaolis, F. (2025). The influence of social media content on attitude, destination image and intention of female Muslim travelers to visit halal destinations: Comparison between UGC and FGC. *Journal of Islamic Marketing, 16*(2), 402–427. https://doi.org/10.1108/JIMA-08-2023-0235

Zulvianti, N., Aimon, H., & Abror, A. (2022). The influence of environmental and non-environmental factors on tourist satisfaction in halal tourism destinations in West Sumatra, Indonesia. *Sustainability, 14*(15), 9185. https://doi.org/10.3390/su14159185