

THE ROLE OF INDONESIAN HALAL TOURISM IN SUPPORTING THE COMMUNITY'S ECONOMIC GROWTH AND ITS RELEVANCE TO THE ASEAN HALAL INDUSTRY

¹Akhmad Ridho, ²Rohana Faridah, ³Muhammad Yulian Ma'mun

^{1,2,3}UIN Antasari Banjarmasin, Indonesia

Email: ¹230105050210@mhs.uin-antasari.ac.id, ²rohanafaridah@uin-antasari.ac.id, ³yulianmamun@uin-antasari.ac.id

Abstract

This study explores the development of halal tourism in Indonesia, its contribution to local economic growth, and its position within the ASEAN halal industry. Employing a literature review of scientific journals, official reports, and relevant publications, the research finds that Indonesia's halal tourism ecosystem comprehensively integrates products, services, facilities, and Sharia values. While Indonesia's vast Muslim population offers a significant market share that drives economic growth, the sector faces competitiveness challenges at the ASEAN level. These include non-standardized cross-border certifications and Indonesia's tendency to be a consumer rather than a producer in the global market. Recommended government strategies include streamlining certification and regulation, leveraging digital promotion, strengthening human resources, and enhancing ASEAN regional cooperation. Ultimately, this research highlights the critical role of halal tourism in supporting economic development amidst growing global demand.

Keywords: halal tourism; economic growth; concepts; potentials and challenges; strategy

A. INTRODUCTION

Entrepreneurial growth is a pivotal driver of economic development in both developed and developing nations. Within the global economy, the halal industry has emerged as one of the fastest-growing sectors, encompassing diverse fields from food and cosmetics to tourism. This expansion offers entrepreneurs vast opportunities to innovate and compete internationally. Consequently, entrepreneurs play a critical role in this industry by bridging consumer demands with expanding market potential. (Abdulah Azam, 2020).

The main contributors to this global halal industry are halal lifestyle and halal products which have become a trend for the world's needs without exception halal tourism. The term halal tourism has only begun to be known since 2015 when a World Halal Tourism Summit (WHTS) event was held in Abu Dhabi, UAE. In the event, WHTS tried to raise awareness that the potential of halal tourism is very large

and needs to be developed (Veni Reza, 2020). This refers to the high public awareness of the importance of using products that have been proven to be safe (halal). In addition, comfort and privacy security when traveling/tourism have also become the main needs, so service providers try to meet consumer demand (Imam & Ainul, 2022). Therefore, tourist destinations that are able to provide a good halal experience will have higher competitiveness in the global market.

Almost every Muslim country today hopes to conquer the Muslim tourism market because the halal market has advanced the tourism sector by offering a wide range of tourism goods, services, and infrastructure to meet their needs (Kusumaningtyas et al., 2021). Halal tourism has become an arena of international competition, where the quality of facilities, halal certification, and branding strategies are the determining factors for the success of a destination. The following is a ranking of the top 5 OIC (Organisation of Islamic Cooperation) countries as Muslim-friendly tourist destinations in the world.

Ranking	2023	Score	Ranking	2024	Score	Ranking	2025	Score
1	Indonesia	73	1	Indonesia	76	1	Malaysia	79
1	Malaysia	73	1	Malaysia	76	2	Turkey	78
3	Saudi Arabia	72	3	Saudi Arabia	74	2	Saudi Arabia	78
4	United Arab Emirates	71	4	Turkey	73	2	United Arab Emirates	78
5	Turkey	70	5	United Arab Emirates	72	5	Indonesia	76

Source: Global Muslim Travel Index 2023 - 2025

Since 2023, Indonesia and Malaysia have both occupied the top positions in the *Global Muslim Travel Index* (GMTI) ranking as the most Muslim-friendly OIC (Organisation of Islamic Cooperation) countries, both of which received high scores and are considered the leading global halal tourism destinations at GMTI 2023 (MasterCard-CrescentRating, 2023). In 2024, Indonesia and Malaysia will again maintain the top position together as the best OIC destinations in GMTI, each with a score of 76 (Mastercard-CrescentRating, 2024). However, in 2025, Malaysia managed to occupy the first place with a score of 79, while Indonesia dropped to fifth place with a score of 76, after two consecutive years of being in first place with Malaysia (Mastercard-CrescentRating, 2025).

Although Indonesia's index score remains the same, this decline occurs due to competition from countries such as Saudi Arabia, Turkey, and the United Arab Emirates which strengthen its position through improved aspects of services, facilities, and promotions. In the calculation of GMTI 2025, the main aspects assessed are access (10%), communication (20%), environment (30%), and services (40%). Services are the biggest assessment weight, so other countries have significant service improvements that make them outperform Indonesia in the service category (Mastercard-CrescentRating, 2025).

Indonesia, which has a majority Muslim population and has abundant cultural wealth and natural resources, has the potential to develop into a leading halal tourist destination. With a large Muslim population, Indonesia has a strong foundation to develop halal tourism as a pillar of economic growth (Hasibuan, 2024).

According to the "Investing in Indonesia's Halal Economy" report in 2023, the market value of Indonesia's halal industry is around USD 279 billion, indicating the country's large role in the global halal industry. This market is projected to grow at an incredible CAGR (Compound Annual Growth Rate) of 14.2 percent, reaching around USD 807 billion by 2030. As the largest consumer market for halal products, Indonesia offers many opportunities across sectors such as food and beverages, Muslim fashion, and halal tourism (Halal Focus, 2025).

A number of previous studies have highlighted Indonesia's halal tourism development strategy and its impact on national economic growth. For example, the research of Laili Savitri Noor et al. 2024; Hasibuan et al., 2024; Hasibuan et al., 2023, show that halal tourism plays a role in increasing GDP, opening up job opportunities, and improving community welfare. However, these studies mostly focus only on the domestic sphere without looking at Indonesia's position in the ASEAN regional context. In fact, the Global Muslim Travel Index (GMTI) 2025 shows a significant decline in Indonesia's ranking, from first position in 2023–2024 to fifth position in 2025, which indicates a new challenge in maintaining international competitiveness. Thus, there is still a research gap related to the relevance of Indonesian halal tourism in the framework of the ASEAN halal industry and how it contributes to the integration of the ASEAN Region.

Consequently, this research analyzes the framework of Indonesian halal tourism, its regional competitiveness, and strategic solutions for growth.

B. LITERATURE REVIEW

Halal Tourism in Indonesia

According to the Halal Tourism Implementation Guidebook published by the Ministry of Tourism, halal tourism is understood as the provision of additional services in terms of amenities, attractions, and accessibility that are specifically designed to meet the experiences, needs, and preferences of Muslim tourists (Ministry of Tourism, 2019).

The main characteristics of halal tourism include accessibility to halal worship and food facilities, high privacy and security standards, and clear halal regulatory and certification certainty so that the level of tourist trust increases (Soleha, 2023).

In contrast to conventional tourism, halal tourism does not only focus on the entertainment aspect or the beauty of the destination, but also emphasizes that all elements of the tourist experience ranging from accommodation, food, tourist activities, to social interaction must be in harmony with Islamic values, so as to offer a more holistic and specific experience for Muslim tourists (Siregar et al., 2024)

According to the Global Muslim Travel Index (GMTI) issued by Mastercard-CrescentRating, halal tourism is measured through four main aspects, namely Access (ease of access), Communication (Muslim-friendly information and

promotion), Environment (safe and comfortable environment for Muslim tourists), and Services (availability of halal services such as food and worship facilities) (Mastercars-CrescentRating, 2025)

In Indonesia, the main reference in the implementation of halal tourism is DSN-MUI Fatwa No. 108/DSN-MUI/X/2016 concerning Guidelines for Tourism Implementation Based on Sharia Principles. This fatwa explains that halal tourism is not only about providing halal food, but also includes policies related to sharia hotels, tourists, tourist destinations, spas, saunas, and massages, sharia travel agencies, and sharia tour guides that are in accordance with Islamic values.

In the 2023–2024 edition of the Global Muslim Travel Index (GMTI), Indonesia managed to be ranked first along with Malaysia as the world's leading halal tourism destination (Mastercard-CrescentRating, 2024). However, a new challenge arose when in the 2025 edition Indonesia dropped to 5th position, although its score remained 76, reflecting the acceleration of the progress of competing countries and the need for an evaluation of national halal tourism development strategies (CrescentRating, 2025).

Economic Growth Theory

The Neo-Classical economic growth theory developed by Robert Solow and Trevor Swan explains that the economic growth rate of a country is highly determined by three main factors, namely capital growth, labor growth, and technological development (Sukirno, 1999).

In addition, this theory places organization and entrepreneurship as an important part of the economic growth process. Organizations are considered to function to coordinate the use of factors of production such as labor, capital, and natural resources so that they can be used efficiently in economic activities. In the modern economy, the role of entrepreneurs is very important because they act as risk takers and drivers of innovation that are able to create updates in production systems and services (Ningsih, 2020).

In the context of Indonesian halal tourism, the Solow-Swan theory illustrates that the economic growth of the halal sector will be sustainable if supported by increased capital, labor, and technological innovation. Organizational and entrepreneurial elements are also important determinants because halal business people play a role in increasing productivity and creating added value.

ASEAN Halal Industry

According to the State of the Global Islamic Economy (SGIE) Report 2024/2025 published by DinarStandard, there are seven main sectors that make up the global halal economy, namely Halal Food, Modest Fashion, Halal Pharmaceuticals, Halal Cosmetics, Halal Tourism, Media & Recreation, and Islamic Finance. The report estimates the value of the world's halal industry to reach more than USD 2.8 trillion by 2025, with Southeast Asia as one of the most potential regions in the development of the global halal ecosystem. Indonesia, Malaysia, and Thailand are the three ASEAN countries that are most active in developing the halal

sector, both in the form of policies, investments, and international promotions (SGIE Report, 2025).

One of the strategic aspects in the development of the ASEAN halal industry is the harmonization of cross-border halal standards to strengthen regional economic integration. The document *"Development of the ASEAN Certification and Accreditation Schemes for Halal Food"* shows that ASEAN, together with the Australian Government through the Aus4ASEAN program, has developed an integrated halal certification and accreditation scheme for food products aimed at addressing differences in standards between member countries. The main focus of this document is the establishment of an integrated halal certification and accreditation scheme for food and beverage products, covering the entire supply chain from raw materials, slaughter processes, processing, testing laboratories, storage facilities, to the distribution of final products to comply with sharia law (ASEAN Secretariat, 2023).

This document confirms that the harmonization of food halal certification is believed to be able to increase Muslim consumer confidence, strengthen intra-ASEAN trade, and be a strategic step towards mutual recognition of halal certification between member countries. Thus, although the halal industry has a wide scope, this document explicitly contributes to strengthening the dimension of halal food as a key entry point in building a regional halal industry ecosystem (ASEAN Secretariat, 2023).

C. RESEARCH METHODS

This study employs a qualitative approach using secondary data collected through a literature review. Sources include previous research, academic journals, official reports, and policy documents. The analysis follows a structured process of data reduction, categorization, interpretation, and conclusion drawing.

D. RESULTS AND DISCUSSION

The Concept of Indonesian Halal Tourism as Part of the ASEAN Halal Industry

Based on the findings of various studies, the concept of Indonesian halal tourism is not interpreted as religious tourism, but as tourism that is equipped with services in accordance with sharia principles to provide comfort for Muslim tourists. Azizuddin (2022) and Hasibuan (2023) stated that the core of halal tourism is the provision of halal food and beverages, worship facilities, and a tourist environment that is free from non-halal activities. This is strengthened by Masrurah (2025) who emphasized that halal tourism is not only about providing sharia facilities but also providing spiritual value for Muslim tourists, and Hasan (2023) who positions halal tourism within the framework of sharia maqasid, namely to protect religion, soul, intellect, descendants, and property.

The similarity of findings in various previous studies shows that there is a consistency of concept, which is not only normative, but has become the operational standard for halal tourism services in Indonesia. Thus, Indonesian halal tourism has

comprehensive characteristics, including sharia products, services, facilities, and values that form the halal tourism service ecosystem.

Then the results of the comparative study show that the concept of halal tourism applied in Indonesia is in harmony with halal industry standards in the ASEAN region. Research by Musthofa (2023) and Irewati (2024) shows that the components of Indonesia's halal tourism are in line with Malaysia's halal tourism sector, which also emphasizes aspects of halal certification, worship facilities, and Muslim-friendly service policies.

Indonesia has integrated halal tourism development through the IMT-GT (Indonesia–Malaysia–Thailand Growth Triangle) framework, which establishes halal tourism as a strategic sector in the ASEAN halal industry (Irewati, 2024). Indonesia's involvement in regional cooperation such as the IMT-GT (Indonesia–Malaysia–Thailand Growth Triangle) makes halal tourism not only seen as a domestic activity, but as part of ASEAN's halal industry integration strategy.

Based on a report from the Halal Product Assurance Agency (BPJPH), starting October 18, 2026, all food and beverage products of micro and small enterprises (MSEs) must be halal certified. The implementation of this obligation is in accordance with the mandate of Law number 33 of 2014 concerning Halal Product Assurance (JPH) and Government Regulation Number 42 of 2024 concerning the Implementation of the Halal Product Assurance Sector (BPJPH, 2025). This program is in line with ASEAN's push for the harmonization of halal standards, as seen in the *ASEAN General Guidelines on Halal Food* and *Strategy Framework for Halal Industry Development* documents which state that the success of the halal sector in the ASEAN region is highly dependent on consistency in certification and improving product quality (ASEAN Secretariat, 2023).

Potentials and Challenges in Developing Indonesian Halal Tourism

Nationally, a number of studies say that Indonesia has the largest demographic potential as the country with the largest Muslim population in the world (Hasibuan et al., 2024, Hasibuan et al., 2023 Noor et al., 2024). According to official data from the Ministry of Home Affairs of the Republic of Indonesia (Semester I 2025), the number of Muslim population in Indonesia reached 249,818,873 people (dataloka, 2025). This figure makes Indonesia the country with the largest Muslim population in the world, so demographically Indonesia has the largest market for halal tourism development. So that halal tourism does not only depend on international tourists, but also on the demand of local tourists who are increasingly aware of the need for tourism services in accordance with sharia principles. This is in line with the findings of Hasibuan et al. (2024) and Noor et al. (2024) who show that halal tourism plays a direct role in increasing national GDP, expanding employment, and encouraging the growth of tourism-based halal MSMEs.

This demographic advantage is strengthened by international recognition through the Global Muslim Travel Index (GMTI) 2024, where Indonesia is ranked first along with Malaysia with a score of 76 as the world's best halal tourism destination. Although in 2025 Indonesia's position will shift to fifth place with a fixed

score of 76, this shows that structurally Indonesia still has strong competitiveness in the global halal tourism ecosystem.

In the context of ASEAN, research by Irewati and Nufus (2024) shows that Indonesia has a strategic position in the integration of the region's halal economy through the Indonesia-Malaysia-Thailand Growth Triangle (IMT-GT) cooperation, which makes halal tourism a leading sector. The alignment of Indonesia's halal service standards with Malaysia and Thailand, such as the provision of worship facilities, halal food, and sharia accommodation, shows that Indonesia not only plays a role as a domestic destination but also as a major driver of halal tourism at the regional level.

However, the results of the study also show that the development of Indonesia's halal tourism faces a number of structural challenges. At the national level, the main challenge lies in the limited infrastructure and low level of halal certification. Research by Hasibuan et al. (2024) and Masruroh (2025) found that the complicated certification process and low literacy of business actors towards halal tourism standards are the main obstacles in implementation.

In addition, Rosana's research (2024) shows that Indonesia is still the main consumer of global halal products. Promotional and branding challenges were also found in the study (Safira et al., 2025) where Indonesia does not yet have a single identity of halal tourism at the global level, in contrast to Malaysia which has consistently run the "Muslim-Friendly Malaysia" campaign.

In the context of ASEAN, Indonesia's challenges are strengthened by regional competition. The GMTI 2025 report shows that Malaysia increased its score to 79 due to expanding halal infrastructure and digital promotion of halal tourism globally, while Indonesia is still at the same score as the previous year. In addition, non-OIC countries such as Thailand and Singapore are aggressively entering the halal tourism market by providing international halal-certified restaurants, Muslim travel guides, and digital applications for halal services (Putri, 2024). Research by Irewati and Nufus (2024) also emphasized that differences in halal standards between ASEAN countries have led to the lack of harmonization of cross-border halal certification, which limits the integration of regional halal tourism.

The findings on the potential and challenges of Indonesia's halal tourism have direct relevance to Solow-Swan's theory of economic growth which explains that economic growth is influenced by three main factors, namely capital accumulation, labor growth, and technological advancement.

In this context, Indonesia's halal tourism serves as a source of new capital accumulation through investment in the sharia tourism sector which includes the development of halal tourist destinations, sharia hotels, halal restaurants, and supporting industries. Research by Hasibuan et al. (2024) shows that the development of halal tourism encourages the economic activities of local communities and creates jobs. This is in line with the element of *labor growth* in the Solow-Swan model where increasing job opportunities will accelerate long-term economic growth.

In addition, halal certification, digitization of tourism services, and the application of sharia standards in the tourism industry reflect the elements of *technology advancement* in the Solow-Swan theory. According to the GMTI 2024 report, countries that have successfully integrated digital technology in halal tourism services have experienced a significant increase in competitive scores. Thus, halal tourism is not only a consumption activity, but also an instrument to increase national economic productivity.

This research provides an update on the affirmation that Indonesia's halal tourism not only contributes to domestic growth, but also has a strategic role in strengthening the integration of ASEAN's halal economy, which has not been widely discussed in previous research.

Strategies in Developing Indonesian Halal Tourism

The results of various previous studies show that strategies in developing Indonesian halal tourism have a pattern of similarities that appear consistently in a number of sources, both research at the national level (Hasibuan et al., 2024; Noor et al., 2024; Azizuddin & Ainulyaqin, 2022; Rosana, 2024; Masruroh, 2025) and research in the international scope (Irewati & Nufus, 2024; Mahmud Musthofa et al., 2023; Azizurrohman et al., 2024). Based on repeated appearances in the literature, Indonesia's halal tourism development strategy can be grouped into four main categories, namely: halal certification and regulation, digital promotion, strengthening human resources and halal business actors, as well as international cooperation and ASEAN regional cooperation.

First, halal certification and regulation strategies are the most dominant categories because they appear in almost all studies. Research by Hasibuan et al. (2024) and Noor et al. (2024) states that halal certification in hotels, restaurants, and travel agencies is a core strategy to ensure halal services for tourists. Rosana's research (2024) shows that halal certification is positioned as a mandatory element in the national halal industry. At the ASEAN level, research by Irewati (2024) confirms that halal certification is the main instrument for economic integration within the framework of the IMT-GT *Halal Value Chain*. Research by Mahmud Musthofa (2023) states that Malaysia has managed to lead the halal sector because it has a single institution (JAKIM), which shows the importance of clarity of certification authorities. Based on this pattern of consistency, halal certification is the main strategy in the development of halal tourism.

Second, digital promotion strategies were found in the research of Azizuddin & Ainulyaqin (2022) which mentioned the use of digital platforms as the main medium for halal tourism promotion. This strategy also appears in the Global Muslim Travel Index (GMTI) 2024 report which shows that Indonesia obtained a high score in terms of communication and access to technology-based halal information. International research by Azizurrohman et al. (2024) also shows that countries such as Singapore and Thailand are implementing digitalization strategies to attract global Muslim tourists.

Third, strategies to strengthen human resources and halal business actors appear consistently in the research of Noor et al. (2024) and Masruroh (2025). Both explained that halal tourism human resource training and empowerment of halal MSME actors are the main strategies to strengthen service quality in a sustainable manner. This is strengthened by Rosana (2024) who states that halal human resource competence is part of the strategy to strengthen the national halal industry.

Fourth, international cooperation and ASEAN cooperation strategies are dominant in the research of Irewati (2024) which shows the use of IMT-GT cooperation between Indonesia, Malaysia, and Thailand as a strategy for developing subregional halal tourism. Research by Mahmud Musthofa (2023) explains that Indonesia and Malaysia implement halal diplomacy strategies to improve their positions at the global level. Research by Azizurrohman (2024) shows that non-Muslim countries such as Singapore and Thailand are implementing similar strategies as an effort to attract international Muslim tourists.

E. CONCLUSION

This study concludes that Indonesia's halal tourism ecosystem comprehensively integrates products, services, and Sharia values within the ASEAN landscape. Its primary potential lies in Indonesia's vast Muslim population, which offers a significant market share to drive local economic growth. However, the sector faces competitiveness challenges, notably inconsistent cross-border certification standards and Indonesia's status as a global consumer rather than a producer.

To address this, the government should prioritize streamlining regulations, enhancing digital promotion, strengthening human capital, and fostering ASEAN cooperation. Ultimately, this research underscores the vital role of halal tourism in supporting economic development amidst growing global demand.

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