

Exploring the Equilibrium of Halal Tourism Market : An Importance Performance Analysis (IPA) Study

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EXPLORING THE EQUILIBRIUM OF HALAL TOURISM MARKET: AN IMPORTANCE PERFORMANCE ANALYSIS (IPA) STUDY

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ARTICLE INFO	ABSTRACT
<p>Article history:</p> <p>Received 10 March 2023</p> <p>Accepted 08 June 2023</p> <p>Keywords:</p> <p>Tourism; Halal Tourism; Sustainable; Market Equilibrium; Performance Analysis.</p> <div data-bbox="235 913 479 1102" style="text-align: center;">  </div>	<p>Purpose: This study aims to investigate the equilibrium between demand and supply of halal tourism products in Lombok, Indonesia. This study utilized 34 halal tourism parameters from the Global Muslim Travel Index (2019).</p> <p>Theoretical framework: This study uses two types of analyses: quadrant analysis and gap analysis. The quadrant analysis aims to determine tourists' response to different attributes, which are categorized based on the level of satisfaction and performance.</p> <p>Design/methodology/approach: This research is a descriptive study conducted to analyze the priorities of the development of halal tourism in Lombok Island. The data used in this study are primary data obtained through a survey of 200 tourists in Lombok, selected using simple random sampling technique.</p> <p>Findings: The results showed that there is an imbalance in the equilibrium of the halal tourism market, where the demand for some halal tourism indicators is higher than the existing supply. Thus, there is a need to improve some halal facilities to meet the demand.</p> <p>Research, Practical & Social implications: This study adapted the Importance Performance Analysis (IPA) to explain the equilibrium of halal tourism demand and supply in the halal tourism industry in Lombok, Indonesia.</p> <p>Originality/value: the study's analysis indicated the need for tourism businesses and related stakeholders in Lombok to focus on improving and offering halal tourism indicators that are important to tourists, such as worship amenities, gender separation in public facilities, and the availability of halal cuisine.</p> <p>Doi: https://doi.org/10.26668/businessreview/2023.v8i6.2563</p>

EXPLORANDO O EQUILÍBRIO DO MERCADO DE TURISMO HALAL: UM ESTUDO DE ANÁLISE DE IMPORTÂNCIA E DESEMPENHO (IPA)

RESUMO

Objetivo: Este estudo tem como objetivo investigar o equilíbrio entre a demanda e a oferta de produtos de turismo halal em Lombok, Indonésia. Este estudo utilizou 34 parâmetros de turismo halal do Global Muslim Travel Index (2019).

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Estrutura teórica: Este estudo usa dois tipos de análise: análise de quadrante e análise de lacuna. A análise de quadrante visa a determinar a resposta dos turistas a diferentes atributos, que são categorizados com base no nível de satisfação e desempenho.

Projeto/metodologia/abordagem: Esta pesquisa é um estudo descritivo realizado para analisar as prioridades do desenvolvimento do turismo halal na Ilha de Lombok. Os dados usados neste estudo são primários e foram obtidos por meio de uma pesquisa com 200 turistas em Lombok, selecionados pela técnica de amostragem aleatória simples.

Conclusões: Os resultados mostraram que há um desequilíbrio no equilíbrio do mercado de turismo halal, onde a demanda por alguns indicadores de turismo halal é maior do que a oferta existente. Portanto, há necessidade de melhorar algumas instalações halal para atender à demanda.

Implicações sociais, práticas e de pesquisa: Este estudo adaptou a Análise de Desempenho de Importância (IPA) para explicar o equilíbrio da demanda e da oferta do turismo halal no setor de turismo halal em Lombok, Indonésia.

Originalidade/valor: a análise do estudo indicou a necessidade de as empresas de turismo e as partes interessadas relacionadas em Lombok se concentrarem em melhorar e oferecer indicadores de turismo halal que sejam importantes para os turistas, como comodidades de culto, separação de gênero em instalações públicas e disponibilidade de culinária halal.

Palavras-chave: Turismo, Turismo Halal, Sustentável, Equilíbrio de Mercado, Análise de Desempenho.

EXPLORING HALAL TOURISM MARKET EQUILIBRIUM: AN IMPORTANCE AND PERFORMANCE ANALYSIS (IPA) STUDY

RESUMEN

Objetivo: Este estudio tiene como objetivo investigar el equilibrio entre la demanda y la oferta de productos turísticos halal en Lombok, Indonesia. Este estudio utilizó 34 parámetros de turismo halal de Global Muslim Travel Index (2019).

Marco teórico: Este estudio utiliza dos tipos de análisis: análisis de cuadrantes y análisis de brechas. El análisis de cuadrantes tiene como objetivo determinar la respuesta de los turistas a los diferentes atributos, que se categorizan en función del nivel de satisfacción y rendimiento.

Diseño/metodología/enfoque: Esta investigación es un estudio descriptivo realizado para analizar las prioridades del desarrollo del turismo halal en la isla de Lombok. Los datos utilizados en este estudio son primarios y se obtuvieron a través de una encuesta realizada a 200 turistas en Lombok, seleccionados mediante la técnica de muestreo aleatorio simple.

Conclusiones: Los resultados mostraron que existe un desequilibrio en el balance del mercado del turismo halal, donde la demanda de algunos indicadores del turismo halal es superior a la oferta existente. Por lo tanto, es necesario mejorar algunas instalaciones halal para satisfacer la demanda.

Implicaciones sociales, prácticas y de investigación: este estudio adaptó el Análisis de Importancia y Rendimiento (IPA) para explicar el equilibrio de la oferta y la demanda de turismo halal en el sector del turismo halal en Lombok, Indonesia.

Originalidad/valor: El análisis del estudio indicó la necesidad de que las empresas turísticas y las partes interesadas relacionadas en Lombok se centren en mejorar y ofrecer indicadores de turismo halal que sean importantes para los turistas, como servicios de culto, separación por sexos en las instalaciones públicas y disponibilidad de cocina halal.

Palabras clave: Turismo, Turismo Halal, Sostenible, Equilibrio de Mercado, Análisis de Resultados.

INTRODUCTION

The development of the halal industry continues to show an increase as more and more people Muslim communities who make the hijrah to halal lifestyle. Halal awareness is no longer awareness is no longer only on food and beverage products, but has evolved to the finance sector, pharmaceuticals, fashion, media and recreation as well as tourism.

The tourism sector has become a featured sector for most countries in the world, including Indonesia. World Tourism Organization (WTO) reports that 13,396 international tourists came to this country in 2018 with US\$14.110 million revenue generated (World Tourism Organization, 2019).

Various types of tourism have been offered by various tourist destinations. A type of tourism that is currently developing is religious tourism. Countries such as Indonesia and Malaysia that have Muslim residents develop the concept of halal tourism in order to accommodate the interests of Muslim travelers (Suherlan, 2023).

Halal Tourism as a new phenomenon in traveling continues to increase along with increasing number of travelers tourists around the world (Samori et al., 2016). (Battour & Ismail, 2016) found that Muslim tourists in determining travel destination and accommodation they will often consider halal element (something that is permitted or allowed according to Islamic teachings). This is because in their actions, Muslim tourists based on the Al-Quran and Hadith, including in traveling.

As a tourist destination with the largest Muslim population, Indonesia has also developed halal tourism as one of the mainstay types of tourism (Sutono et al., 2019). Based on the 2018 Global Muslim Travel Index (GMTI), Indonesia was listed as the best country in the halal tourism industry, along with Malaysia (Mastercard & Crescentrating, 2018). The achievement refers to the record, 20% or around 14.92 million foreign tourists who come to Indonesia are Muslim tourists. Indonesia's achievement is also assessed in terms of access, communication, environment, and services while in halal tourist destinations. Not only that, Indonesia also managed to sweep 12 out of 16 awards in the World Halal Tourism Award 2016 in Abu Dhabi. Lombok Island which is famous as a mainstay tourist destination in Eastern Indonesia, obtained a predicate of The Best Halal Tourism destination based on the Indonesia Muslim Travel Index (IMTII) in 2019 (Sofyan et al., 2020). After receiving the predicate, various relevant stakeholders ranging from local governments, tourism businesses, and other related parties began to prepare for providing various infrastructure facilities that support the concept of halal tourism. From the supply side, Lombok is nearly ready to become the leading of halal tourist destination in Indonesia (Sofyan et al., 2020). However, the demand side of halal tourism remains a question. As a market system (Muna et al., 2023; Wanof & Gani, 2023), in the tourism industry there must be a balance between the supply and demand sides.

There are a lot of research related to the tourism sector, but research on halal tourism that examines the balance of demand and supply has never been conducted, especially in

Indonesia. Previous studies on tourism demand in Indonesia mainly use contingent valuation methods (for example: Nuva et al., 2009; Iasha et al., 2015; Dhaniswara & Kirana, 2014). Several other studies employ the choice experiment method (Crouch, 2011; Chaisemartin & Mahé, 2009) and the travel cost method (Salma & Susilowati, 2004; Aryanto & Mardjuka, 2005). The development of facilities and infrastructure in supporting tourism is expected to increase tourist visits, increase community income, absorb labor and open various business opportunities in the area. Therefore, it is significant to conduct research related to the potential of tourism in Lombok and its impact on regional economic development. This research is expected to fill the literature gap through accommodating important performance analysis (IPA), so that it can contribute to the development of tourism economics in particular. It is also related to halal tourism which is being excellent in the development of tourism in Indonesia. This study also contributes to literature on IPA especially in tourism field of study.

METHOD

This research is a descriptive study conducted to analyze the priorities of the development of halal tourism in Lombok Island. The data used in this study are primary data obtained through a survey of 200 tourists in Lombok, selected using simple random sampling technique.

To analyze the balance of the tourism market, this study uses Importance Performance Analysis (IPA). Through this study, the priorities of the development of halal tourism in Lombok Island will be analyzed through mapping the relationship between tourist expectations (demand) and the performance (supply) of each attribute offered.

This study utilizes two types of analyses: quadrant analysis and gap analysis. The quadrant analysis aims to determine tourists' response to different attributes, which are categorized based on the level of satisfaction and performance. Gap analysis identifies inconsistencies between an attribute's performance and consumers' expectations. Quadrant analysis and gap analysis are used together to assess customer satisfaction and find opportunities for improvement. Quadrant analysis helps to identify the strengths and weaknesses of different attributes based on tourists' level of satisfaction and their perception of how well these attributes are performing. Gap analysis, on the other hand, identifies any gaps between the actual performance of an attribute and consumers' expectations of that attribute. By combining these two analyses, researchers can obtain a comprehensive understanding of the overall satisfaction of tourists and pinpoint the specific areas where improvements can be made

to enhance their experience.

Quadrant analysis can be done through several stages. The first step is to calculate the average importance and performance ratings for each attribute using the formula:

$$\bar{X}_i = \frac{\sum_{i=1}^k x X_i}{n} \quad (1)$$

$$\bar{Y}_i = \frac{\sum_{i=1}^k x Y_i}{n} \quad (2)$$

Where:

\bar{X}_i = the average weighting of the i-attribute level

\bar{Y}_i = the weighting of the average level of importance rating of the i attribute

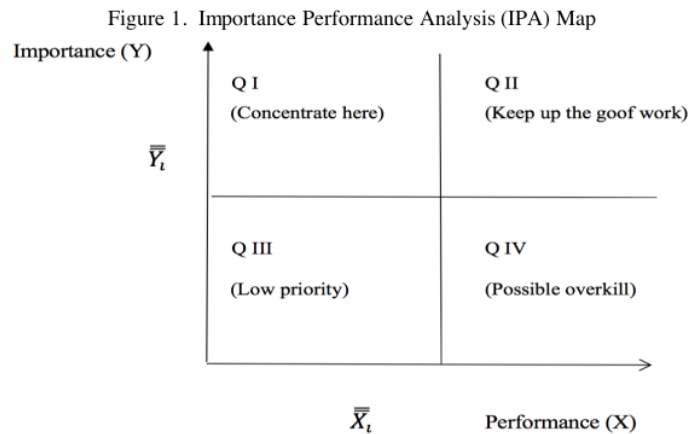
n = number of respondents

The next step is to calculate the average level of importance and performance for all attributes using the following formula:

$$\bar{X}_i^{\bar{}} = \frac{\sum_{i=1}^k x \bar{X}_i}{n} \quad (3)$$

$$\bar{Y}_i^{\bar{}} = \frac{\sum_{i=1}^k x \bar{Y}_i}{n} \quad (4)$$

After obtaining the performance weights and the importance of the attributes as well as the average value of the performance and importance of the attributes, these values are plotted into the Cartesian diagram (Figure 1).



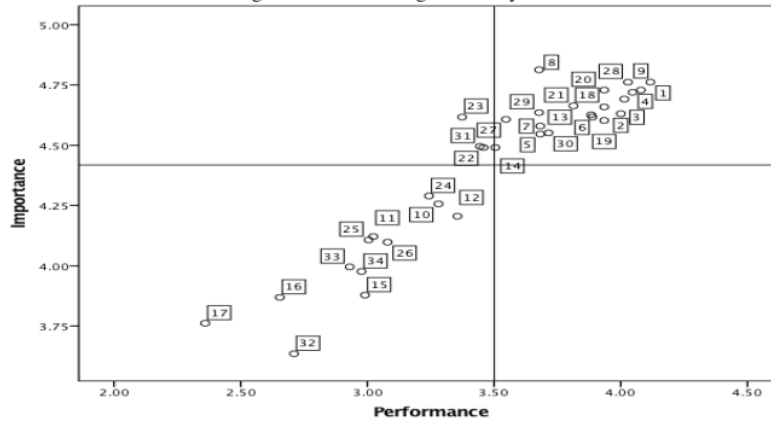
Source: prepared by author (2023)

The diagram presented is divided into four quadrants, as indicated by (Supranto, 2001). Quadrant I, deemed as the Top Priority quadrant, includes halal tourism attributes that are considered significant by tourists, yet their performance fails to meet expectations. Thus, enhancing these attributes is crucial to satisfy tourists. Quadrant II, categorized as Maintain Performance, comprises important attributes that are already performing well and must be preserved. Quadrant III, Low Priority, consists of less significant attributes that have unsatisfactory performance. Improvements in this quadrant can be reevaluated since the impact on tourists' benefits is negligible. Quadrant IV, Excessive, contains less important attributes that are excessively used. Enhancing these attributes will lead to wastage of resources.

RESULT AND DISCUSSION

As mentioned in the previous section, 34 indicators of halal tourism issued by the Global Muslim Travel Index (2019) were used in this Importance Performance Analysis (IPA). Using of Excel and SPSS software, index numbers for the 34 indicators are then mapped in the following scatter diagram.

Figure 2. Scatter Diagram Analysis.



Source: prepared by author (2023)

The details of these indicators based on quadrant position, are presented in the following table:

Table 1. Indicators of halal tourism on Lombok Island are based on quadrant position

QUADRANT	INDICATORS	
	Number	Remarks
I Top Priority	10	Prayer mat (sajadah), sarong, and mukena in the bedroom.
	11	Bedroom Quran
	12	Hotel meeting and event prayer rooms
	22	Mall prayer room with wudhu.
	23	Water-friendly mall toilets
	24	Wellness center has gender-specific facilities.
	31	Healthcare center water-friendly toilets
II Maintain performance	1	Halal cuisine. Terminals have Halal restaurants.
	2	Transportation terminals have separate male and female prayer and wudhu facilities.
	3	Transportation terminals' water-friendly restrooms
	4	Halal meals
	5	Prayer room aboard
	6	Onboard wudhu.
	7	Train and cruise water-friendly toilets
	8	Hotel halal food
	9	Qiblah-marked rooms
	13	Water-saving toilets
	14	Ramadan services
	18	Shopping district Halal restaurants
	19	Mall prayer room with wudhu.
	20	Shopping district water-friendly toilets
	21	Attraction park Halal restaurants
	27	Attraction park halal products
	28	Hospital halal food
	29	Hospital Qiblah rooms
	30	Healthcare visitor prayer chambers

III Low priority	15	No alcohol, discotheques, or casinos in hotels.
	16	Swimming pools and gyms with gender-specific hours
	17	Private zones for men and women in beach resorts
	25	In wellness centers, men serve men and women serve women.
	26	Wellness personnel dress Muslim-friendly.
	32	Same-sex doctors and nurses
	33	Halal drugs (if possible)
	34	Muslim hospital chaplains
IV Excess service	NA	NA

Source: Prepared by the authors, (2023).

Demand for halal tourism in Lombok is reflected in tourist ratings for the above indicators. It can be seen in quadrant 1 that imbalances exist between demand and supply of halal tourism. Attention from tourism stakeholders in Lombok is required, and need to be improved continuously to meet the tourist needs. These indicators are: Provision of prayer clothes in the hotel bedroom, the provision of the holy book of the Qur'an also in the bedroom, the availability of prayer rooms that support meeting facilities in the hotel, prayer rooms that equipped with ablution facilities in shopping locations, toilets with water-friendly facilities in shopping locations, separate rooms and facilities for men and women in fitness facilities, and water-friendly toilets in health care facilities. These things should be a concern of tourism businesses and related stakeholders to achieve a balance between demand and supply in the halal tourism market.

Meanwhile, some indicators of halal tourism fall into low priority where demand for these aspects is not the main priority. These indicators are the absence of non-halal activities in accommodation, separation of men and women in swimming pools and beaches, services in fitness centres by servants with the same sex with the customer, wearing the Muslim-friendly clothing by waiters in fitness centres, doctors and nurses by the same sex as the patient, the use of halal drugs, and the availability of preaching services in health facilities such as hospitals. These things can be ignored by tourism businesses because the demand for this indicator is low.

In addition to the indicators described in the two paragraphs above, indicators of halal tourism offered by tourism businesses in Lombok are in accordance with the needs and demands of tourists. These include the availability of halal food, the separation of places of ablution for men and women, bedrooms that are equipped with Qibla direction, and water-friendly toilets. In this analysis, there is no excessive offer of halal tourism indicator conducted by tourism businesses in Lombok.

This study aims to investigate the equilibrium between demand and supply of halal tourism products in Lombok, Indonesia. This study utilized 34 halal tourism parameters from the Global Muslim Travel Index (2019). The indicators include the provision of prayer clothes in the hotel room and the provision of the Qur'an in the room as well, the availability of prayer rooms that support meeting facilities in the hotel, prayer rooms equipped with ablution facilities in shopping areas, toilets with water-friendly facilities in shopping areas, separate rooms and facilities for men and women in fitness facilities, and water-friendly toilets in health care facilities. The study highlighted that attention from tourism stakeholders in Lombok is required to meet tourists' needs and achieve a balance between demand and supply in the halal tourism market.

We discovered a disparity between the demand and supply of halal tourism products in Lombok. This research supports (Sari et al., 2019) examination of popular attitudes of halal tourism. People have a belief that halal tourism entails worship amenities, such as a clean prayer room and a constant call to prayer (*adzan*), as well as ablution facilities and separate restrooms for men and women.

The results are also consistent with (Hariani, 2019) in terms of the fundamental demands of Indonesian Muslim visitors. (Hariani, 2019) claimed that the availability of worship facilities and their qualities, as well as the availability of halal cuisine, are the two primary needs of Indonesian Muslim tourists when traveling.

Tang and Tan (2016) suggested that in Malaysia, tourism demand is determined by income, tourism prices, costs of alternative tourist locations, pollution levels, and crime rates. Our findings contradict these claims. In addition to economic concerns, travellers' decisions are also influenced by environmental quality, safety, and health (Tang & Tan, 2016), which are comparable to halal indicators.

According to research of Ratnasari et al. (2020) about emotional experiences and behavioral intents for halal tourism, halal certification has a beneficial effect on the behavioral intention to purchase halal tourist products. This research also confirms the findings of Rahman et al. (2019), who discovered that halal brand image and halal brand awareness have a direct positive effect on Muslim tourists' attitudes and their happiness with halal tourism destinations.

According to additional research conducted by Hong et al. (2019) in China regarding the determinants of halal purchasing behavior, loyalty, the reliability of recommendations, product price, product availability, and halal authenticity are the most influential factors influencing Chinese Muslims' purchase of halal products. This researcher also agrees with the

findings of (Ahmed & AKBABA, 2018), who believe that in Ethiopia, infrastructure, the availability of halal items, and services may be essential for Muslim tourists. According to Ahmed and Akbaba (2018), these needs pertain to a wide range of tourism locations in Ethiopia, including MICE, business, research, and education needs, as well as a simple visit to a friend or relative.

This study also validates the findings of (Chanin et al., 2015) concerning the facilities required by Muslim tourists in Thailand. Their findings indicate that Muslim visitors to Thailand require a qibla sign in hotel rooms, accommodations, tour packages, facilities that enable them to worship while traveling, full amenities, safety, and halal certification on food.

Our study is more specific to the needs of tourists traveling to Lombok, such as prayer equipment, Qurans provided in hotel rooms, the availability of ablution-friendly facilities that are in accordance with the recommended standards for performing wudhu, and the need for gender separation in public facilities.

In addition, the findings of this study are consistent with those of (Chandra, 2014), who discovered that the needs of visitors in the development of halal tourism are more likely to be related to the need for worship qualities such as prayer signs (qibla direction) in hotel rooms. Our findings are more particular to facilities with certain additional characteristics that travelers' desire and require while traveling to Lombok for its Halal Tourism branding.

In contrast to (Prayag, 2020), (Sriprasert et al., 2014), (Adinugraha et al., 2021), (Nurdiansyah, 2018) and (Suharko et al., 2018), who discovered that the need for the development of halal tourism is to emphasize the recognition of halal food as demonstrated by halal certification from the authorized institutions (Alim et.al 2023). This must be created in order to persuade tourists to consume halal items while traveling. The research was undertaken in nations where non-Muslims constitute the majority of the population. In the case of Lombok, its halal tourist branding indirectly indicates that the things sold in Lombok, particularly food, are halal products. Nevertheless, given the diversity of tourists visiting Lombok, it is probable that the application of the halal certification regulation in restaurants will also be implemented to encourage tourists to visit this location (Astuti et.al 2023).

Overall, the study's analysis indicated the need for tourism businesses and related stakeholders in Lombok to focus on improving and offering halal tourism indicators that are important to tourists, such as worship amenities, gender separation in public facilities, and the availability of halal cuisine. These improvements may help achieve a balance between demand and supply in the halal tourism market and attract more Muslim tourists to Lombok.

CONCLUSION

The conclusions that can be drawn from this study are: **a)** Demand for halal tourism in Lombok is still at the level of meeting basic needs of Muslim traveller such as halal food and worship facilities. Meanwhile, requests related to the fulfillment of other Islamic Sharia, for example the separation of men and women in swimming pools or beaches, are still not a priority. **b)** The demand for halal tourism in Lombok is still imbalanced with the facilities offered, where there is still a gap between needs for Muslim tourists and its supply. **c)** Some efforts need to be made by tourism stakeholders in Lombok to balance the demand and supply of halal tourism, including the provision of prayer clothes in the hotel bedroom, provision of the Holy Qur'an in the bedroom, availability of prayer rooms that support meeting facilities at the hotel, prayer rooms and equipped with ablution facilities at shopping locations, toilets with water-friendly facilities at shopping locations, separate rooms and facilities for men and women at fitness facilities, and toilets that are water-friendly in a health care facility. These things should be the concern of tourism businesses and related stakeholders so that there is a balance between demand and supply in the halal tourism market.

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