**Halalin Journal**
*Halalin Journal* Vol. 3 No. 2 (2026) 155-167
Available online at
https://halalin.walisongo.ac.id/index.php/halalin

# The Role and Dynamics of Halal Tourism in the Global Halal Industry: An Analysis Based on the ACES and RIDA Frameworks within the Global Muslim Travel Indeks

**Tria Safira[1], Wasyith[1], Mashilal[1], Istikomah[1*]**
[1] Faculty of Islamic Economics and Business, Universitas Islam Negeri Walisongo Semarang, Indonesia.
[2] Faculty of Science and Technology, Universitas Islam Negeri Walisongo Semarang, Indonesia.

* Corresponding author's e-mail: istikomah@walisongo.ac.id

**ABSTRACT**
The halal tourism sector demonstrates rapid growth within the global halal industry and holds a strategic position in the global economy. Halal tourism has become a vital component of the international tourism industry's dynamics, transcending the mere fulfillment of Muslim travelers' needs. The Global Muslim Travel Index (GMTI) serves as the benchmark for evaluating competitiveness and readiness in providing services and meeting the requirements of Muslim travelers. This study aims to integrate the ACES (Access, Communications, Environment, Services) and RIDA (Responsible, Immersive, Digital, Assured) frameworks to examine the role and evolution of halal tourism in supporting the global halal industry. A qualitative research method with a descriptive approach was employed, utilizing secondary data from GMTI reports, scholarly publications, and other relevant literature. The study sample comprised 12 countries, consisting of six OIC (Organization of Islamic Cooperation) nations and six non-OIC nations. Analysis using the ACES and RIDA frameworks within the GMTI context reveals that the global halal industry's growth is driven by halal tourism's role in linking various sectors such as halal culinary services, accommodation, transportation, and Sharia-compliant services. Competition among countries, both within and outside the OIC is intensifying. Halal tourism addresses traveler needs through principles encompassing accessibility, information and communication, environmental factors, and service availability, as outlined in the ACES framework. Meanwhile, the RIDA framework broadens this perspective by emphasizing responsible tourism, the creation of meaningful travel experiences, the utilization of digital technology, and the provision of service assurances for Muslim travelers. Application of both frameworks demonstrates that halal tourism development extends beyond meeting religious requirements to encompass innovation, sustainability, digital transformation, and service quality enhancement. Consequently, strengthening these aspects can boost the competitiveness of tourism destinations while reinforcing halal tourism's contribution to the growth of the halal industry on a global scale.

**Keywords:**
ACES Framework; RIDA Framework; GMTI; Global Halal Industry; Halal Tourism.

## Introduction

Over the past two decades, the global halal industry has expanded rapidly, becoming a strategic sector within the global economy. This growth is driven not only by the rising Muslim population but also by a growing global awareness of values such as ethics, hygiene, safety, and sustainability. The global halal economy was valued at approximately $2.43 trillion in 2023, spanning diverse sectors including food, Islamic finance, pharmaceuticals, cosmetics, fashion, media, and halal tourism (Standard, 2025). The concept of "halal" has broadened in scope; it is no longer viewed merely as a religious matter but as a quality standard that appeals to both Muslim and non-Muslim consumers (Mubarok & Imam, 2020). While halal food remains the primary contributor, sectors such as cosmetics, pharmaceuticals, and halal tourism are

experiencing rapid growth, fueled by digital transformation, e-commerce, and the evolution of halal lifestyles(Nugraha, 2025). These trends demonstrate that the halal industry has evolved into an increasingly diverse and integrated global economic ecosystem.

Beyond its economic contribution, the global halal industry plays a role in strengthening national identities and cross-border cultural diplomacy; this is evident in the increasing number of non-Muslim nations developing halal ecosystems to attract Muslim markets and expand trade (Kalimah, 2023). One rapidly growing sector is halal tourism, a concept that from an Islamic perspective, transcends mere recreation by encompassing spiritual dimensions, as reflected in Surah Al-Mulk (67:15): "It is He who has made the earth manageable for you, so traverse its tracts and enjoy the sustenance which He furnishes: but unto Him is the Resurrection" (Ali, 1946). With the number of Muslim travelers reaching over 145 million in 2023 and projected to hit 230 million by 2028 (Mastercard & CrescentRating, 2024), halal tourism has become increasingly strategic in supporting global economic growth. This sector encompasses not only the provision of halal food and prayer facilities but also travel experiences aligned with the values, ethics, and needs of Muslim tourists; simultaneously, it expands the halal industry value chain through culinary offerings, accommodation, Muslim-friendly transportation, and a creative economy rooted in Islamic culture(Mashilal & Ramadhan, 2023).

Halal tourism possesses a "soft power" dimension, enabling inclusive and civilized Islamic values to serve as a vehicle for cultural diplomacy while strengthening the image of Muslim-friendly destinations. Countries such as Malaysia, Indonesia, and Saudi Arabia are developing this sector through destination promotion, the hosting of international events, and collaboration with halal certification bodies; meanwhile, non-Muslim nations like Japan, South Korea, and Thailand are also developing halal services to attract Muslim tourists without compromising their own cultural identities (Mohsin et al., 2016). These developments demonstrate that halal tourism has become a cross-border collaborative platform and a link connecting various sub-sectors within the halal value chain. Rising Muslim tourist activity drives demand for a wide range of halal products and services—such as food, accommodation, transportation, and local goods—thereby generating broader economic impacts (Standard, 2025). In Indonesia and Malaysia, for instance, the development of Muslim-friendly destinations fosters the growth of halal MSMEs and the creative economy through culinary, handicraft, and Muslim fashion sectors, illustrating that halal tourism holds economic and social dimensions that extend beyond the spiritual aspect.(Fadhlan & Subakti, 2022).

Despite its potential, halal tourism faces various challenges, primarily the lack of standardized definitions for halal destinations and the diverse interpretations of the halal tourism concept across different countries (Juliana et al., 2025). Other challenges include a shortage of personnel who understand the needs of Muslim tourists, suboptimal halal certification processes, low awareness among industry players, and the fragmentation of halal-related information on digital platforms, which can make it difficult for tourists to distinguish between strictly halal services and those that are merely Muslim-friendly (Sumarjiyanto, 2020). However, this situation has simultaneously driven the processes of adaptation and standardization within the halal tourism sector at a global level. In this context, the Global Muslim Travel Index (GMTI)—developed by CrescentRating and Mastercard since 2015—serves as a benchmark for measuring the readiness, performance, and competitiveness of destinations in meeting the needs of Muslim travelers (Mastercard & CrescentRating, 2025). The GMTI also acts as a strategic reference for governments and industry stakeholders, while the ACES and RIDA frameworks employed within it offer instruments for understanding the development, competition, and adaptation of halal tourism amidst the diversity of global destinations.

The GMTI employs two complementary frameworks: ACES (Access, Communication, Environment, and Service) and RIDA (Responsible, Immersive, Digital, and Assured). ACES focuses on a destination's structural readiness to provide access, communication, environmental conditions, and services for Muslim travelers(T. S. Putri, 2023), while RIDA broadens this perspective by incorporating aspects of social and environmental responsibility, immersive travel experiences, digital technology utilization, and service assurance (Anggita et

al., 2025) . Integrating these frameworks allows halal tourism competitiveness to be assessed not only based on facilities and infrastructure but also on the quality of experiences, innovation, sustainability, and traveler trust. Disparities in destination readiness are evident in the "Transport Infrastructure" and "Airport Services" indicators within the GMTI 2024. Indonesia, Malaysia, and Turkey each achieved an "Airport Services" score of 100, whereas Japan, South Korea, and Thailand scored 67, 43, and 80, respectively. Conversely, regarding the "Transport Infrastructure" indicator, Japan and South Korea demonstrated higher scores—97 and 93, respectively—compared to Indonesia (78), Malaysia (74), and Turkey (75). These differences indicate that a destination's competitive edge in halal tourism does not necessarily lie in the same areas. Muslim-majority nations tend to excel in providing services that cater to the specific needs of Muslim travelers, while certain non-Muslim countries demonstrate strengths in accessibility and infrastructure. Thus, halal tourism competitiveness is determined not merely by a country's status or Muslim population size, but also by its capacity to provide access, infrastructure, services, and travel experiences that align with the needs of Muslim travelers.

In terms of development, halal tourism continues to face challenges regarding inter-agency coordination, synergy between the government and industry stakeholders, and the lack of globally standardized halal criteria (Kalimah, 2023). Several studies have utilized ACES to analyze the concepts and potential of halal tourism destinations (Aisy et al., 2025; T. S. Putri, 2023), while others have employed RIDA to examine the development and characteristics of Muslim-friendly destinations (Anggita et al., 2025; Noor & Bahardeen, 2025). Research concerning the GMTI has also addressed the index's role in halal tourism development (Nisthar & Mustafa, 2019; Pranika et al., 2023), and the evolution of Muslim-friendly tourism (Som et al., 2016; Yunadi, 2024). However, studies that integratively use ACES and RIDA to analyze the role and dynamics of halal tourism within the global halal industry ecosystem remain limited. Therefore, this study focuses on analyzing the strategic role of halal tourism in strengthening the global halal industry ecosystem, as well as the dynamics, challenges, and development opportunities associated with it, based on the ACES and RIDA frameworks within the GMTI. The study employs a qualitative-descriptive approach utilizing secondary data from Mastercard-CrescentRating reports and relevant academic literature, emphasizing a conceptual, strategic, and comparative analysis of the competitiveness of halal tourism destinations on a global scale.

## Methods

*Research Type and Approach*

This study employs a descriptive qualitative method using a library research approach. This approach is utilized to conduct an in-depth examination of the role and dynamics of halal tourism within the global halal industry, based on the ACES (Access, Communication, Environment, Service) and RIDA (Responsible, Immersive, Digital, Assured) frameworks used in the Global Muslim Travel Index (GMTI). Data were obtained through the search, selection, and analysis of various relevant literature sources, particularly GMTI reports, scholarly publications, books, and reports from institutions associated with the halal industry and halal tourism.

*Data Sources*

The study utilizes secondary data obtained from existing documents and publications. The primary source is the annual Global Muslim Travel Index (GMTI) report published by Mastercard and CrescentRating. Supporting sources include journal articles, books, reports, and publications from international organizations such as CrescentRating, Mastercard, UNWTO, and DinarStandard, as well as credible online sources relevant to the development of the halal industry and halal tourism. The collected data focus on information regarding the development of halal tourism, ACES and RIDA indicators, destination positioning, and the dynamics and development strategies of Muslim-friendly destinations.

*Data Collection Techniques*

Data collection was conducted through documentation and a literature review. Documentation involved examining GMTI reports, journal articles, academic publications, and official documents relevant to the research subject (Sugiyono, 2021). Subsequently, a literature review was used to identify concepts, findings from previous studies, and developments in research concerning the halal industry, halal tourism, ACES, RIDA, and the GMTI. The obtained sources were then selected based on their relevance to the research focus and used as the basis for analysis.

*Data Analysis Techniques*

Data were analyzed using descriptive qualitative analysis through the stages of data reduction, data presentation, and conclusion drawing and verification following the interactive analysis model of Miles & Huberman (1994) as cited in Sugiyono (2021). During the reduction stage, information from GMTI reports and various literature sources was selected and categorized according to the ACES and RIDA aspects. The categorized data are presented narratively and comparatively to identify patterns, differences, dynamics, and challenges associated with the development of halal tourism. Subsequently, conclusions are drawn based on the identified patterns and findings, and these are compared with relevant literature.

The selection of OIC member states is based on top rankings in the GMTI 2025, namely Malaysia (first place), Turkey, Saudi Arabia, and the United Arab Emirates (sharing second place), Indonesia (highly ranked with strong cultural appeal), and Qatar (part of the Gulf destination cluster continuously strengthening its competitiveness) while also representing diverse geographic regions and halal tourism development strategy models. These range from culture- and large-Muslim-population-based approaches in Southeast Asia (Indonesia, Malaysia) to post-oil economic diversification and investment in the Middle East (Saudi Arabia, UAE, Qatar) and a transcontinental position linking Asia and Europe (Turkey). Meanwhile, non-OIC countries were selected to represent geographic diversity and varying stages of halal tourism strategy development. These include established destinations (Singapore), rapidly emerging ones (Thailand), and countries demonstrating public-private strategic initiatives to tap into the halal market despite not yet reaching the top GMTI rankings—specifically Japan (Thamrin, 2021) and South Korea (T. H. Putri, 2025)—as well as the UK and Taiwan, representing non-OIC destinations that are steadily strengthening their positions within their respective regions (Mastercard & CrescentRating, 2025; Sutikno et al., 2023). Comparing these two groups of countries serves to identify variations in strategies, destination readiness, and halal tourism development dynamics between Muslim-majority and non-Muslim countries.

## Results and Discussions

*The Strategic Position and Role of Halal Tourism within the Global Halal Industry*

The Muslim-friendly travel sector has demonstrated fluctuating growth yet possesses strong resilience. According to the State of the Global Islamic Economy (SGIE) 2024/25 report, Muslim consumer spending rose from approximately US$189 billion in 2018 to US$194 billion in 2019, before dropping to around US$102 billion in 2021 due to the COVID-19 pandemic. Following the pandemic, the sector rebounded, reaching approximately US$217 billion in 2023—surpassing pre-pandemic levels(Fauzi & Ramandini, 2026). This indicates that demand for Muslim-friendly travel is relatively sustainable in nature.

Within the global halal industry ecosystem, Muslim-friendly travel is a key sector alongside halal food, modest fashion, media and recreation, pharmaceuticals, and cosmetics. In 2023, the sector recorded a consumption value of approximately US$217 billion and is projected to reach US$384 billion by 2028, with a Compound Annual Growth Rate (CAGR) of around 12.1%—one of the highest growth rates among halal economy sectors (Standard, 2025). These figures demonstrate that halal tourism is no longer merely a niche market but has become a vital component of the global halal industry ecosystem.

Halal tourism also generates a multiplier effect, as tourism activities drive demand for various halal products and services—such as food, accommodation, transportation, modest

fashion, MSME offerings, and the creative economy. Thus, this sector acts as a link between various sub-sectors within the halal value chain while simultaneously creating opportunities for local economic growth (Fadilah, 2026). Beyond economic considerations, the provision of Muslim-friendly services can enhance a destination's image, boost tourist confidence, and serve as a component of nation-branding strategies (Pranata, 2025). However, the immense market potential has not yet been matched by uniform destination readiness. Disparities in infrastructure, accessibility, services, digitalization, policies, and halal assurance result in varying levels of competitiveness among destinations (Muthoharoh, 2025). Therefore, the development of halal tourism cannot rely solely on a large Muslim population; it also requires governance, innovation, and service quality capable of meeting the needs of Muslim tourists.

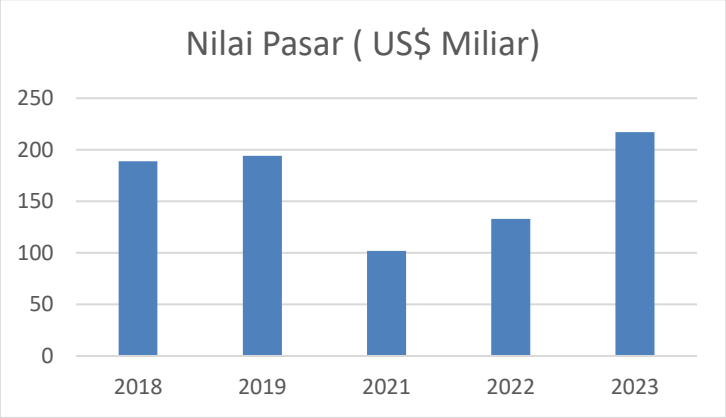



Figure 1. Global Muslim-Friendly Travel Consumer Spending Trends (2018–2023)
Source: Processed from State of the Global Islamic Economy reports (2019/20, 2020/21, 2022, 2023/24, and 2024/25), DinarStandard.

In this context, the Global Muslim Travel Index (GMTI) serves as a crucial instrument for understanding the readiness and competitiveness of Muslim-friendly destinations. The GMTI employs the ACES framework (Access, Communication, Environment, and Service) to assess a destination's structural readiness and the RIDA framework (Responsible, Immersive, Digital, and Assured) to evaluate aspects of responsibility, the tourism experience, digitalization, and service assurance. Integrating these two frameworks provides a foundation for analyzing how destinations transform Muslim market potential into halal tourism competitiveness while simultaneously strengthening the global halal industry ecosystem.

*Dynamics of Halal Tourism Development Based on the ACES and RIDA Frameworks*

The dynamics of global halal tourism development can be understood not only through the growth in the number of Muslim tourists and the resulting economic value but also through shifts in destination competitiveness(Croes & Semrad, 2018). This study employs the ACES framework (Access, Communication, Environment, and Services) to analyze destination readiness in meeting the needs of Muslim tourists. Meanwhile, the RIDA framework (Responsible, Immersive, Digital, and Assured) serves as a complementary perspective for understanding halal tourism development in the context of evolving tourist needs and industry advancements.

Given the year-to-year adjustments to indicators in the GMTI reports, the comparative analysis in this study focuses on the GMTI 2025 data shown in Table 1 to maintain consistency in the assessment structure. The analysis compares six OIC member countries—Indonesia, Malaysia, Turkey, the United Arab Emirates, Saudi Arabia, and Qatar—with six non-OIC countries: Japan, South Korea, Thailand, Singapore, the United Kingdom, and Taiwan. These countries were selected based on their destination characteristics, the development of Muslim-

friendly tourism, and their relevance for comparing halal tourism competitiveness between OIC and non-OIC nations Source: Processed data from GMTI 2025, Mastercard-CrescentRating).

Based on the processed GMTI 2025 data, Each country exhibits a distinct performance pattern across the ACES dimensions. Within the OIC group, Malaysia achieved the highest total score at 298.53, followed by the United Arab Emirates (296.20), Saudi Arabia (295.43), Turkey (289.50), Qatar (282.60), and Indonesia (274.67). Meanwhile, in the non-OIC group, Singapore secured the highest score at 262.43, followed by the United Kingdom (239.57), Taiwan (216.97), Thailand (216.37), Japan (195.60), and South Korea (190.27).

Table 1. ACES Scores of Selected OIC and Non-OIC Countries in GMTI 2025

| Negara | Group | Access | Communication | Environment | Services | Total |
|---|---|---|---|---|---|---|
| Indonesia | OIC | 58.33 | 64.67 | 68.67 | 83 | 274.67 |
| Malaysia | OIC | 73 | 71 | 76.33 | 78.2 | 298.53 |
| Turkey | OIC | 79.67 | 41.67 | 81.17 | 87 | 289.5 |
| United Arab Emirates | OIC | 85.67 | 54 | 78.33 | 78.2 | 296.2 |
| Saudi Arabia | OIC | 78.33 | 53.33 | 80.17 | 83.6 | 295.43 |
| Qatar | OIC | 82.67 | 47.33 | 74 | 78.6 | 282.6 |
| Jepan | non-OIC | 59.67 | 24.67 | 73.67 | 37.6 | 195.6 |
| South Korea | non-OIC | 58.33 | 24.33 | 71 | 36.6 | 190.27 |
| Thailand | non-OIC | 64.33 | 35 | 66.83 | 50.2 | 216.37 |
| Singapura | non-OIC | 68 | 54 | 77.83 | 62.6 | 262.43 |
| United Kingdom | non-OIC | 57.33 | 49 | 71.83 | 61.4 | 239.57 |
| Taiwan | non-OIC | 56.33 | 41.33 | 70.5 | 48.8 | 216.97 |

(Source: Processed GMTI 2025 Data, Mastercard-CrescentRating)

These differences indicate that destination readiness for developing halal tourism varies in character and is not determined solely by a country's status as Muslim or non-Muslim. Variations in strengths across countries are also evident within each ACES dimension. Some OIC countries demonstrate relatively strong performance in the "Services" aspect, whereas a number of non-OIC countries show relatively good performance in the "Access" and "Environment" aspects. This situation suggests that halal tourism competitiveness is shaped by a combination of accessibility, communication, environment, and services that cater to the needs of Muslim tourists.

Subsequently, the average scores for each ACES dimension were calculated for both groups of countries. These calculations served to identify patterns of strengths and disparities between OIC and non-OIC countries regarding the Access, Communication, Environment, and Services dimensions. The results of this comparative analysis formed the basis for discussing the characteristics and dynamics of halal tourism competitiveness across each ACES dimension.

*Comparative Analysis Based on the ACES Framework (2025)*

A comparative analysis was conducted by comparing the average scores of OIC and non-OIC countries across the four dimensions of the ACES framework: Access, Communication, Environment, and Services. These averages were derived from six OIC countries and six non-OIC countries included in the study, based on GMTI 2025 data shown in Table 2..

Table 2. Average ACES Scores for OIC and Non-OIC Countries (2025)

| ACES Dimension | OIC Countries | Non-OIC Countries | Difference |
|---|---|---|---|
| Access | 76.28 | 60.67 | 15.61 |
| Communication | 55.33 | 38.06 | 17.27 |
| Environment | 76.45 | 71.94 | 4.51 |

| | | | |
|---|---|---|---|
| Services | 81.43 | 49.53 | 31.90 |

a. Access: The Access dimension reflects the ease with which Muslim tourists can reach a destination, particularly regarding connectivity and transport infrastructure. According to Table 2, the average Access score for OIC countries reached 76.28, while non-OIC countries scored 60.67, representing a difference of 15.61 points. This indicates that OIC countries hold an advantage in terms of accessibility. Good access is a crucial factor in destination competitiveness, as it facilitates tourists' ability to reach and enjoy the destination (Croes & Semrad, 2018). Nevertheless, improving connectivity and enhancing Muslim-friendly access in non-OIC countries presents an opportunity to narrow this gap (Mastercard & CrescentRating, 2025)
b. Communication: The Communication dimension reflects a destination's ability to communicate and promote Muslim-friendly services to tourists. The average score for OIC countries was 55.33, compared to 38.06 for non-OIC countries, a difference of 17.27 points. These results indicate that OIC countries are relatively ahead in establishing communication and raising awareness regarding halal tourism. Effective communication can strengthen a destination's image, boost trust, and influence tourist interest in visiting(Croes & Semrad, 2018).
c. Environment: The Environment dimension describes destination conditions that support the comfort of Muslim tourists, including aspects of safety, social conditions, and an inclusive environment. OIC countries achieved an average score of 76.45, while non-OIC countries scored 71.94, a difference of only 4.51 points. This relatively small gap suggests that both groups possess comparable levels of readiness in this dimension. Such conditions indicate a trend toward convergence, as non-OIC countries are increasingly adapting to create environments that are welcoming to Muslim tourists (Mastercard & CrescentRating, 2025)
d. Services: The Services dimension encompasses the availability of services that directly support the needs of Muslim tourists, such as halal food, prayer facilities, airport amenities, and Muslim-friendly accommodation (Sembiring & Riadi, 2025). The average score for OIC countries reached 81.43, compared to 49.53 for non-OIC countries—a difference of 31.90 points. This gap is the largest across all ACES dimensions and highlights the strong advantage OIC countries hold in providing services for Muslim tourists. Consequently, Services stands out as a key competitive advantage for OIC countries in the development of global halal tourism (Adinugraha et al., 2023).

*Synthesis of ACES Framework Findings*

Based on the ACES 2025 analysis, OIC countries scored higher than non-OIC countries across all dimensions. The most significant advantage lies in the "Services" dimension, with a margin of 31.90 points, followed by "Communication" (17.27 points) and "Access" (15.61 points). Conversely, the "Environment" dimension showed the smallest gap—4.51 points—indicating a trend of convergence between the two groups. Overall, the findings suggest that OIC countries retain an advantage in providing services, access, and communication for Muslim tourists, whereas non-OIC countries demonstrate increasingly strong adaptability regarding the environmental aspect. Thus, the competitiveness of halal tourism is not determined solely by a country's status as a Muslim nation, but rather by the destination's readiness to provide access, communication, an environment, and services that meet the specific needs of Muslim tourists.

*Analysis Based on the RIDA Framework*

The RIDA framework (Responsible, Immersive, Digital, and Assured) expands upon the ACES perspective by emphasizing sustainability, the tourism experience, digitalization, and service assurance. Consequently, RIDA illustrates the evolution of halal tourism from merely meeting basic needs to developing destinations that are more sustainable, innovative, and trust-based.

a. Responsible: Based on Table 3, the "Responsible" dimension emphasizes social, economic, and environmental sustainability in halal tourism development. The advantage held by OIC countries in "Access" and "Services" does not automatically translate to an advantage in sustainability. Conversely, non-OIC countries that have already implemented sustainable tourism have the opportunity to excel in this dimension(Noor & Bahardeen, 2025; UNWTO, 2018; Wibowo et al., 2025).

b. Immersive: The Immersive dimension emphasizes authentic tourism experiences, cultural interaction, and educational value. Thus, destination competitiveness is determined not only by halal facilities but also by the ability to provide meaningful experiences that align with the destination's character(CrescentRating, 2025; El-Gohary, 2016).

Table 3. Comparison of RIDA Dimension Trends between OIC and Non-OIC Countries

| RIDA Dimension | OIC Countries | Non-OIC Countries |
|---|---|---|
| Responsible | Beginning to integrate sustainability into halal tourism | Relatively more experienced in sustainable tourism |
| Immersive | Experiences based on Islamic culture and heritage | Thematic, cultural, and lifestyle experiences |
| Digital | Digital transformation is steadily evolving | Smart tourism investments are relatively more advanced |
| Assured | Stronger halal certification and service assurance | More adaptive Muslim-friendly approaches |

c. The Digital dimension highlights the growing importance of technology in halal tourism, including online booking, information on halal services, navigation, and the provision of certification details. Digitalization offers an opportunity for non-OIC countries to narrow structural gaps through smart tourism innovation (Anggita. A. et al., 2025; Buhalis & Amaranggana, n.d.; Sekretariat Desa Wisata Nglanggeran, 2023).

d. Assured: The Assured dimension emphasizes quality assurance, compliance with halal standards, transparency, and tourist trust. While ACES highlights the strengths of OIC countries regarding the "Services" aspect, RIDA expands upon this by underscoring the importance of certification, standards, and service credibility(Gretzel et al., 2015; Nugraha, 2025)

*Synthesis of RIDA Framework Findings*

Overall, the RIDA framework indicates that global halal tourism is evolving from an approach focused on facilities and infrastructure toward one that emphasizes sustainability, visitor experience, digitalization, and trust. OIC nations demonstrate relative strength in halal service assurance, whereas non-OIC nations present development opportunities through sustainability, tourism experiences, and digital innovation. Thus, while ACES illustrates a destination's structural readiness, RIDA outlines the direction of its strategic transformation. Integrating the two reveals that halal tourism competitiveness is increasingly defined by a destination's ability to combine adequate facilities with innovation, sustainability, enriching tourism experiences, and reliable service assurance.

*Halal Tourism Development Trajectory and Implications*

Analysis using the ACES and RIDA frameworks indicates that global halal tourism is shifting from an approach based on identity and facility provision toward a more strategic, innovative, and sustainable model. ACES highlights the importance of structural readiness—particularly regarding access and services—while RIDA expands this scope to include sustainability, tourism experiences, digitalization, and halal service assurance (Battour & Ismail, n.d.).

The growth of the Muslim travel market is driving an increasing number of countries—including non-Muslim nations—to develop Muslim-friendly destinations. Providing halal dining options, prayer facilities, tourism information, and accessible services is crucial for enhancing destination competitiveness (Mastercard & CrescentRating, 2025; Sumardi et al., 2025; Universitas Terbuka TV, 2025). Countries such as Malaysia, the United Arab Emirates, and Qatar are advancing halal tourism through policy support, infrastructure, and halal services, while Japan and South Korea demonstrate that non-Muslim nations can also successfully adapt to the needs of Muslim travelers (Hafiz M. Ahmed, 2025; Pranata, 2025; T. H. Putri, 2025; Thamrin, 2021).

For Indonesia, these developments indicate that its advantage as a nation with a large Muslim market must be supported by improvements in service quality, halal certification, connectivity, digitalization, global promotion, and destination sustainability (CrescentRating, 2025; Nadira et al., 2025; Vina Elvira, 2025) . Consequently, the development of halal tourism cannot rely solely on Muslim identity; it requires an integrated and competitive destination ecosystem. Based on research findings and existing literature, the direction for halal tourism development can be formulated through five key aspects, as shown in Table 4..

Table 4. Direction of Halal Tourism Development

| Aspect | Development Strategy |
|---|---|
| Halal infrastructure | Halal restaurants, Muslim-friendly hotels, and prayer facilities |
| Tourism experience | Cultural tourism, halal culinary experiences, and Islamic heritage |
| Digital tourism | Applications, information platforms, and digital promotion |
| Halal service assurance | Certification, standardization, and service transparency |
| Destination sustainability | Environmental preservation and local community empowerment |

The integration of these five aspects aims to create Muslim-friendly tourism destinations that are competitive, innovative, and sustainable. Thus, the future development of halal tourism focuses not only on providing halal facilities but also on the quality of the experience, the use of technology, service assurance, and the sustainability of the destinations themselves (Chantarungsri & Alam, 2024; Mardiana, 2022; Singgalen, 2025).

## Conclusion

Based on an analysis of the ACES and RIDA frameworks within the GMTI, it can be concluded that halal tourism holds a strategic position in the global halal industry, acting as a link between various sectors—such as halal cuisine, accommodation, transportation, and Sharia-compliant services. Trends in the GMTI also indicate intensifying competition between OIC and non-OIC member countries; while ACES assesses accommodation readiness through the dimensions of Access, Communication, Environment, and Services, RIDA expands this scope by incorporating aspects of desire, travel experience, digitalization, and halal service assurance. Quantitative findings reinforce this pattern: for instance, there is a 31.90-point score gap in the Services dimension between OIC and non-OIC countries, highlighting that structural disparities remain significant, even though both groups of countries demonstrate year-on-year improvements in competitiveness. Consequently, the trajectory of global halal tourism development is shifting from a primary focus on providing halal facilities toward the creation of sustainable, experience-oriented, and digitized destinations that offer trusted halal services.

This study has several limitations that should be considered when interpreting the findings. First, the data used is secondary—sourced from GMTI reports and academic literature without direct field verification of actual conditions at each destination. Second, the research is limited to a sample of 12 countries (six OIC and six non-OIC); therefore, generalizing the findings to all global halal tourism destinations requires caution. Third, the analysis is descriptive-qualitative in nature, meaning it cannot yet statistically measure the strength of the relationships between the ACES and RIDA dimensions and destination competitiveness. For future research, it is recommended to conduct quantitative or mixed-methods studies that can

statistically test the relationship between ACES-RIDA dimensions and destination competitiveness indicators in a more measurable way. Additionally, the scope of the sample countries should be expanded beyond the 12 destinations analyzed in this study to include emerging, under-researched non-OIC destinations (e.g., Hong Kong, the Philippines). Future research could also consider interview-based approaches or direct surveys with Muslim tourists and destination managers to validate the findings derived from this secondary data.

## References

Adinugraha, H. H., Nasarruddin, R. Bin, Andrean, R., & Shulthoni, M. (2023). Halal Tourism in Malaysia: Its Development and Strategy. *Social Sciences and Education Research Review*, *10*(1), 93–98.

Aisy, R., Mulyadi, Y., & Achmad, M. (2025). Strategic Destination Planning for Halal Tourism: An ACES-Based Ranking of Regional Tourism Potentials in Makassar. *Pakistan Journal of Life and Social Sciences*, *23*(1).

Ali, A. Y. (1946). *The Holy Qur'an: Translation by A. Yusuf Ali*. Quranyusufali.Com.

Anggita, W., Yanto, Y., Wahyudin, N., & Afdal S, M. (2025). Persepsi Muslim Traveler Berkunjung Ke Negara Non Muslim Berdasarkan RIDA (Responsible, Immersive, Digital, Assured) Framework. *Jurnal Ilmiah Manajemen, Ekonomi, & Akuntansi (MEA)*, *9*(1).

Battour, M., & Ismail, M. N. (n.d.). *Halal tourism: Concepts, Practises, Challenges and Future*.

Buhalis, D., & Amaranggana, A. (n.d.). *Smart Tourism Destinations Enhancing Tourism Experience Through Personalisation of Services*.

Chantarungsri, C., & Alam, A. (2024). Sustainable Strategies for Halal Tourism Infrastructure in the Digital Age: Integrating Architecture, Urban Planning, and Technology. In *International Summit on Science Technology and Humanity*.

CrescentRating, et. al,. (2025). *Indonesia Muslim Travel Index 2025*.

Croes, R., & Semrad, K. (2018). Destination Competitiveness. In *The SAGE Handbook of Tourism Management*.

El-Gohary, H. (2016). Halal Tourism, Is it Really Halal? *Tourism Management Perspectives*, *19*, 124–130.

Fadhlan, M., & Subakti, G. E. (2022). Perkembangan Industri Wisata Halal di Indonesia dan Dunia. *Indonesian Journal of Halal*, *5*(1).

Fadilah, et. al. (2026). Penguatan Ekosistem Industri Halal Nasional Berbasis Ekonomi Syariah. *Al Mudayanah: Journal of Islamic Economics and Finance*, *2*(1).

Fauzi, A. S. R., & Ramandini, N. (2026). Perbandingan Ekosistem Muslim-Friendly Travel Indonesia, Malaysia, dan Arab Saudi Berdasarkan State Of The Global Islamic Economy Report 2024/25. *Media Riset Bisnis Ekonomi Sains Dan Terapan*, *5*(1), 1–12.

Gretzel, U., Sigala, M., Xiang, Z., & Koo, C. (2015). Smart Tourism: Foundations and Developments. *Electronic Markets*.

Hafiz M. Ahmed. (2025). *Top 10 Best Halal-Friendly Destinations in 2026*. Https://Www.Halaltimes.Com/Best-Halal-Friendly-Travel-Destinations/#:~:Text=Home.

Juliana, Monoarfa, H., & Adirestuty, F. (2025). *Industri Halal Peluang dan Tantangan Global*. PT Rajawali Buana Pusaka.

Kalimah, S. (2023). Management Strategy in Developing the Halal Industry in the Era of Globalization. *Indonesian Journal of Islamic Economics and Finance*, *3*(2).

Mardiana, S. (2022). Peran Teknologi Informasi Dalam Mendukung Wisata Halal. In *Industri & Pariwisata Halal: Peluang dan Tantangan*.

Mashilal, & Ramadhan, D. S. (2023). Atribut Umum Versus Atribut Islami; Manakah Yang Paling Berpengaruh Bagi Wisatawan Muslim? *Jurnal Ilmiah Ekonomi Islam*, *9*(2).

Mastercard, & CrescentRating. (2024). *Global Muslim Travel Index 2024*.

Mastercard, & CrescentRating. (2025). *Global Muslim Travel Index 2025*.

Miles, M. B., & Huberman, A. M. (1994). *Qualitative data analysis: An expanded sourcebook*. Sage.

Mohsin, A., Ramli, N., & Alkhulayfi, B. A. (2016). Halal Tourism: Emerging Opportunities. *Tourism Management Perspectives*, *19*, 137–143.

Mubarok, F. K., & Imam, M. K. (2020). Halal Industry in Indonesia; Challenges and Opportunities. *Journal of Digital Marketing And Halal Industry*, *2*(1).

Muthoharoh, S. (2025). Ekonomi Halal Berbasis Pariwisata Syariah: Peluang dan Tantangan. *Jurnal Ekonomi Islam*, *2*(1), 100–117.

Nadira, Bahrudin, & Iqbal. (n.d.). *Dampak Pariwisata Halal terhadap Perekonomian melaui Pelestarian Kearifan Lokal: Tantangan dan Peluang di Indonesia*.

Nisthar, S., & Mustafa, A. M. M. (2019). An Econometric Analysis of Global Muslim Travel Index: a Study on the Perspectives of Permitted Tourism Industry in the Global Context. *International Journal of Economics and Financial Issues*, *9*(5), 44–49.

Noor, N., & Bahardeen, F. (2025). An Updated Model for Halal Tourism: A Review of RIDA by CrescentRating. *Journal of Hospitality and Tourism Horizons*.

Nugraha, A. L. (2025). The Rise of The Global Halal Industry: Trends and Key Sectors for Future Direction. *Islamic Business Review*.

Pranata, I. A. (2025). Kontribusi Pariwisata Halal terhadap Peningkatan Kunjungan Wisatawan Muslim di Asia Tenggara. *Tourism and Hospitality Research*, *1*(2), 58–64.

Pranika, R., Ghofur, R. A., Madnasir, M., Zaelani, A. Q., & Fasa, M. I. (2023). Analysis of The Global Muslim Travel Index (GMTI) Muslim-Friendly Tourism in Improving Community Economy Reviewed from an Islamic Economic Perspective. *JIMEA: Jurnal Ilmiah MEA*, *7*(3).

Putri, T. H. (2025). Analisis Perkembangan Wisata Halal dan Dampaknya Terhadap Ekonomi Korea Selatan Pada Tahun 2019-2021. *Journal of International and Local Studies*, *9*(1), 78–85.

Putri, T. S. (2023). Comparing The Concept of Halal Tourism in Indonesia and Turkey Using ACES CrescentRating Model. *JUWITA: Jurnal Pariwisata Nusantara*, *2*(3).

Sekretariat Desa Wisata Nglanggeran. (2023). *"Desa Wisata Nglanggeran," desawisatanglanggeran*. Https://Desawisatanglanggeran.Id/#:~:Text=Desa.

Sembiring, S. I. Br., & Riadi, S. (2025). Strategi Komunikasi Wisatawan Gundaling dalam Meningkatkan Minat Berkunjung di Berastagi. *Journal of Education, Humaniora and Social Sciences*, *7*(4).

Singgalen, Y. A. (2025). *Perilaku Wisatawan*. Universitas Katolik Indonesia Atma Jaya.

Som, A. P. M., Masutani, S., & Ahmad, M. F. (2016). The Growth of Muslim Friendly and Halal Tourism in Inbound and Outbound Travel Market. *The Macrotheme Review*, *5*(5), 10–17.

Standard, T. R. dan D. (2025). *State of the Global Islamic Economy Report 2024/25*.

Sugiyono. (2021). *Metode Penelitian Kuantitatif, Kualitatif dan R&D*. Alfabeta.

Sumardi, W. H., Osman, S., & Sumardi, W. A. (2025). Halal Tourism and the Global Muslim Travel Index (GMTI): A Comparative Study of Malaysia and Brunei Darussalam. In *The Halal Industry in Asia* (pp. 157–178).

Sumarjiyanto, N. (2020). Beberapa Masalah dalam Pengembangan Pariwisata di Indonesia. *Pariwisata*, *7*(2).

Sutikno, S., Herdini, F. L., Idialis, A. R., & Hanapi, M. S. (2023). Analysis of the Influence of Muslim-Friendly Tourism Destinations on Inbound in Countries in the Asia Pacific Region. *Falah: Jurnal Ekonomi Syariah*, *8*(1), 1–13.

Thamrin, M. (2021). Strategi Pemerintah dengan Pelaku Bisnis dalam Mengoptimalkan Pasar Halal di Jepang. *Jurnal Bahasa Dan Budaya Jepang*, *4*(1), 172–183.

Universitas Terbuka TV. (2025). *Pengembangan Industri Pariwisata Halal ~ ESTA4320 Pariwisata Halal* [Broadcast].

UNWTO. (2018). *Tourism for Development Volume I: Key Areas for Action*.

Vina Elvira. (2025). *Peluang Indonesia Pimpin Sektor Wisata Ramah Muslim Global*. Https://Industri.Kontan.Co.Id/News/Peluang-Indonesia-Pimpin-Sektor-Wisata-Ramah-Muslim-Global.

Wibowo, F. E., Nadzri, S. binti, & Puad, N. binti M. (2025). Determining Indicators of RIDA Framework for Entrepreneurial Success in Halal Tourism. *ITQAN: Journal of Islamic Economics, Management, and Finance*, *4*(1), 97–109.

Yunadi, et. al. (2024). The Influence of Muslim-Friendly Tourism on Foreign Tourist Visits in ASEAN. *Elqish: Journal of Islamic Economic*, *4*(1), 67–79.

**Acknowledgment**
None.

**Funding Information**
None.

**Publishing Ethical and Originality Statement**
All authors declared that this work is original and has never been published in any form and in any media, nor is it under consideration for publication in any journal, and all sources cited in this work refer to the basic standards of scientific citation.

**Generative AI Statement**
Authors must acknowledge the use of AI in their work to ensure transparency and maintain trust with their audience. As generative AI becomes an integral tool for content creation, it is crucial to disclose its involvement in the process. This helps clarify the role AI played in generating ideas, drafting text, or enhancing creativity. Acknowledging AI usage also supports ethical standards, ensuring that authorship remains clear and that credit is properly attributed. Such transparency fosters responsible AI integration and upholds the integrity of both the creative process and the final work.

**Author Contributions**
Please indicate the specific contribution(s) of each author using the following roles: Conceptualization; Data curation; Formal analysis; Funding acquisition; Investigation; Methodology; Project administration; Resources; Software; Supervision; Validation; Visualization; Writing – original draft; Writing – review & editing. If the article is written by a single author, please type: The author solely contributed to the entire work.
E.g. Author 1: Conceptualization, Methodology, Investigation, Formal analysis, Writing – original draft. Author 2: Supervision, Validation, Resources, Writing – review & editing.

**Conflicts of Interest**
None.