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Muslim-Friendly or Market-Exclusive? Managing the Paradox of Religious Assurance, Market Openness, and Destination Competitiveness in Halal Tourism

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ABSTRACT
Muslim-friendly tourism has become a strategic field in Islamic business management, yet its managerial problem is often reduced to the availability of halal facilities and destination branding. Such a view leaves a more difficult tension underexamined. Faith-sensitive services can widen access for Muslim travellers, while the same services may narrow destination appeal once they are framed as a closed market identity. Using qualitative secondary-data research and conceptual-comparative document analysis, this study examines Muslim-friendly tourism across Muslim-majority and non-OIC destinations, with attention to policy materials, industry reports, destination-facing texts, and academic literature. The analysis identifies two contrasting sources of managerial credibility. Malaysia and Indonesia draw on institutional halal legitimacy, while Singapore and Thailand rely more heavily on designed service credibility within plural tourism settings. The findings suggest that Muslim-friendly tourism works best as service architecture rather than religious labelling. Halal food verification, prayer access, staff literacy, digital information, and mobility planning need to connect across the visitor journey. A market-exclusivity trap emerges when halal branding turns these services into a total destination identity and makes wider hospitality less visible. The proposed concept of inclusive Muslim-friendly destination management connects faith-based service assurance, plural market openness, and destination competitiveness. Within Islamic business management, maqāṣid al-sharīʻah gains operational value when protection of faith is linked to trust, fair access, consumer clarity, and non-exclusionary hospitality.

INTRODUCTION

Global tourism has begun to treat Muslim travel as a strategic market rather than a narrow religious niche. The 2025 Mastercard-CrescentRating Global Muslim Travel Index reports 176 million international Muslim arrivals in 2024 and projects 245 million by 2030, with travel spending expected to reach USD 230 billion in the same horizon (Mastercard and CrescentRating, 2025). These figures explain why destinations now provide halal food information, prayer facilities, accommodation, and digital guides for Muslim travellers. The managerial question sits behind the growth narrative. A destination can offer faith-sensitive services to widen access, yet lose part of its wider appeal if halal branding is framed as a closed market identity.

The vocabulary around halal tourism already carries a conceptual tension. Halal tourism is often associated with Sharia-compliant products, verified food supply, certified accommodation, and religious propriety during travel. Muslim-friendly tourism sounds less total, because the emphasis falls on practical service readiness rather than full transformation of the destination. A hotel in Singapore that provides qibla direction and nearby halal restaurant information can be Muslim-friendly without presenting itself as an Islamic hotel. A beach destination in Thailand can welcome Muslim families through food assurance and modest recreation options without redesigning the whole destination around religious identity. Such cases matter because Muslim travellers do not form a single behavioural bloc.

Some seek robust halal assurance, others only need basic certainty about food and prayer (Fajriyati et al., 2022; Said et al., 2022).

Earlier studies have linked halal attributes with destination image, satisfaction, trust, revisit intention, and Muslim consumer behaviour (Chrismardani & Arief, 2022; Wibawa et al., 2025). That line of work helped move halal tourism from a descriptive category into a serious field of service and marketing research. A remaining weakness lies in the way the problem is usually framed. Halal facilities are treated as positive attributes, while market expansion is treated as an expected outcome. Less attention goes to the point where the same attributes produce different readings among different audiences. For Muslim travellers, a visible halal ecosystem may reduce anxiety and increase confidence. For non-Muslim travellers, the same branding may raise doubts about whether the destination remains culturally open, socially relaxed, or relevant to their own expectations.

Destination managers face this paradox in concrete decisions that rarely appear in abstract models. A tourism board must decide whether to use halal tourism as a headline brand or place Muslim-friendly services within a broader hospitality narrative. Hotel operators may seek halal certification for restaurants while still retaining the ambience expected by mixed international guests. Each decision has commercial value, but each can also shift the symbolic meaning of the destination. The issue is not the presence of prayer rooms, halal restaurants, or family facilities. The deeper issue concerns the way service design, public communication, and governance arrangements turn religious accommodation into either inclusive hospitality or market separation.

Islamic business management provides a useful entry point because the field is concerned with more than formal compliance. The relevant question is how religiously grounded value can be translated into fair service, consumer protection, trust, transparency, and balanced stakeholder treatment. Maqāṣid al-sharī'ah is helpful here, provided that the concept is not reduced to decorative vocabulary attached to tourism promotion. Protection of faith may support halal assurance, but protection of welfare, dignity, and social order also pushes destination managers to avoid exclusionary design. An Islamic management view should be able to defend the needs of Muslim travellers without turning their needs into a rigid market boundary. That tension places halal tourism close to paradox management, where two valid demands must be governed together rather than resolved by choosing one side (Schrage & Rasche, 2022).

A sharper research problem appears at this intersection. Muslim-friendly tourism can be an inclusive service strategy because food verification, prayer access, privacy-sensitive facilities, and reliable digital information make travel less risky and more comfortable. The same strategy can become market-exclusive once branding begins to imply that the destination belongs primarily to one religious segment. The difference between these two outcomes is managerial, not theological. Service architecture, communication style, institutional coordination, and destination identity shape whether Muslim-friendly tourism broadens the market or narrows it. A destination that treats halal as a service layer can remain plural and competitive, while a destination that treats halal as a total identity may invite avoidable resistance.

Three questions guide the inquiry. How is Muslim-friendly tourism constructed as a destination management strategy in contemporary halal tourism. Under what managerial conditions does Muslim-friendly tourism shift from inclusive service provision to market-exclusive destination branding. How can Islamic business management support a model of halal tourism that protects Muslim traveller needs while maintaining openness for plural tourism markets. These questions move the analysis beyond the common claim that halal tourism is economically promising. The more urgent issue is whether the industry can manage growth without flattening Muslim travellers into one imagined consumer type or reducing destinations to religious market labels. The expected contribution lies in shifting halal tourism analysis from an attribute-based approach toward a paradox-management approach. Rather than asking whether a destination provides enough halal facilities, the inquiry examines how faith-sensitive services are designed, communicated, and governed within plural tourism systems. Inclusive Muslim-friendly destination management connects faith-based service assurance, plural market openness, and destination competitiveness.

RESEARCH METHODS

The research uses a qualitative secondary-data design with conceptual-comparative document analysis. Such a design suits an inquiry that is concerned with how Muslim-friendly tourism is constructed, communicated, and governed across different destination settings. Survey data would be useful for measuring tourist perception, yet the central problem here sits earlier in the managerial chain. Destination managers, public agencies, and industry actors first define the service promise through policy documents, destination campaigns, certification schemes, and industry reports. Those documents carry assumptions about religion, market segmentation, hospitality, and competitiveness. Close analysis of those materials allows the inquiry to examine the managerial logic behind Muslim-friendly tourism before testing how visitors respond to it (Morgan, 2022; Nicmanis, 2024).

Four destination cases are selected through purposive comparison. Malaysia and Indonesia represent Muslim-majority destinations with relatively strong halal ecosystems, formal policy interest, and a visible ambition to compete in the Muslim travel market. Singapore and Thailand represent non-OIC destinations where Muslim-friendly services are developed within plural and commercially diverse tourism environments. The comparison is not intended to rank performance or measure national success. A more useful purpose is to observe how different institutional settings shape the same managerial tension. Muslim-majority destinations may possess stronger religious infrastructure, but that advantage can be weakened by fragmented service delivery or overconfident branding. Non-OIC destinations may lack a Muslim-majority environment, yet their service design can be more precise because Muslim-friendly hospitality must be deliberately planned.

The data are drawn from academic literature, industry reports, public policy documents, destination marketing materials, halal certification information, and official tourism websites. Academic sources are used to build the conceptual base around halal tourism, Muslim-friendly tourism, Islamic business management, destination branding, inclusive tourism, and paradox management. Industry reports are used to identify how the Muslim travel market is classified and narrated by tourism actors. Policy and destination documents are examined to trace how governments and tourism boards translate Muslim-friendly tourism into standards, campaigns, and service priorities. Digital destination materials are included because many travel decisions are now shaped before arrival through search results, mobile guides, restaurant listings, hotel descriptions, and short promotional texts.

Data selection follows relevance rather than volume. Materials are included if they address Muslim-friendly tourism, halal tourism, Islamic tourism, or destination services for Muslim travellers, and if they contain information about management strategy, branding, standards, governance, or market positioning. Preference is given to materials published between 2020 and 2026, while older conceptual sources are retained where they clarify core ideas. Materials that treat religious travel only as pilgrimage, devotional tourism, or theological guidance without a connection to destination management are excluded. Pure promotional content is used cautiously. A glossy tourism slogan may still reveal a destination's market logic, but it cannot carry the same analytical weight as a policy document or peer-reviewed article.

The analysis proceeds through interpretive coding. Documents are first read for their explicit service claims, including how they describe halal food access, prayer facilities, family comfort, gender-sensitive needs, certification, and digital information. A second reading examines the language of branding, especially whether Muslim-friendly services are framed as hospitality, market differentiation, religious identity, or destination exclusivity. A third layer compares the cases across two axes. The first axis concerns religious assurance, while the second concerns market openness. Tension between these axes becomes the basis for identifying the market-exclusivity trap. The final step develops a conceptual model of inclusive Muslim-friendly destination management by connecting service assurance, plural market openness, and destination competitiveness.

RESULTS AND DISCUSSION

1. Muslim-Friendly Tourism as Service Architecture, Not Religious Labelling

Across the selected destinations, Muslim-friendly tourism appears less as a fixed religious category than as a layered service arrangement. The reviewed policy materials, industry reports, and destination-facing texts tend to translate Muslim travel needs into practical service cues rather than a single religious label. Malaysia and Indonesia draw on dense halal ecosystems, public halal institutions, and familiar religious infrastructure, while Singapore and Thailand frame similar services through accessibility, urban convenience, and hospitality readiness. The contrast matters because religious assurance becomes managerial only after the service is made searchable, verifiable, and usable across the journey. A halal sign can reduce doubt, yet its value remains limited if travellers cannot locate the restaurant, confirm its credibility, or connect the service with transport, accommodation, and attraction planning (Mahardhani et al., 2024; Syah Putra & Tucunan, 2021).

Muslim-friendly services as cues encountered before arrival, during movement, and within the tourism experience itself. A visitor may first meet the destination through a digital guide that identifies halal dining clusters and prayer spaces, later through an airport or shopping area where worship facilities are visible, and then through hotel staff who can answer ordinary questions about certified restaurants or mosque access. Singapore is useful because Muslim-friendly hospitality is folded into a broader language of accessibility rather than presented as a separate religious corridor. Thailand carries a similar logic in selected tourism materials, where halal food, airport prayer spaces, and hospitality training support Muslim visitors while the wider destination image remains open to mixed visitor groups (Handani & Kim, 2023; Tavitiyaman et al., 2021).

Muslim-majority destinations face a more complicated advantage. Malaysia and Indonesia possess religious infrastructure that non-OIC destinations usually have to construct through deliberate service design, but availability can be mistaken for readiness. Indonesia, for example, has strong culinary and religious resources, yet Muslim visitors still depend on accurate halal information, consistent certification, trained service workers, and coordination among local governments, tourism operators, and halal authorities. A Muslim family arriving in Lombok, Makassar, or another regional destination may not doubt the general presence of halal food, but uncertainty can still emerge around certification status, transport access, prayer-space cleanliness, and staff capacity to respond to specific travel needs. Religious familiarity becomes tourism value only after being organised into dependable service routines (Desky et al., 2022).

Trust clarifies the difference between labelling and architecture. A label announces that a service claims to satisfy Muslim requirements, while architecture makes that claim useful across the destination. Trust grows when travellers can move between service points without repeatedly testing whether their needs will be recognised. Digital information now carries a governance role, because searchable restaurant maps, prayer-time guidance, hotel descriptions, and verified visitor information help convert religious assurance into ordinary itinerary planning. Fragmented provision weakens this conversion. Travellers may find one certified restaurant but struggle to identify suitable nearby attractions, or locate a prayer facility without knowing whether the surrounding itinerary supports family comfort and time-sensitive religious routines. Service assurance becomes fragile when the destination provides facilities but fails to connect them.

This pattern also complicates the assumption that stronger religious visibility automatically improves competitiveness. Heavy halal language may reassure some visitors, but may leave unresolved the practical problems that shape experience and may narrow how wider audiences imagine the destination. A destination that advertises itself as halal-friendly yet provides vague information, hard-to-access facilities, or poorly trained frontline staff risks producing symbolic assurance without operational reliability. By contrast, a non-OIC destination with modest religious language can build stronger confidence if service points are clear, credible, and easy to navigate. The two analytical axes used in the document reading converge here. Religious assurance has to be strong enough to reduce Muslim travellers' uncertainty, while market openness has to remain visible enough to protect the plural appeal of the destination (Noor, 2025).

Muslim-friendly tourism becomes most persuasive when designed as a service layer within plural destination management. Faith-based needs are recognised as real consumer needs, but they do not absorb the entire identity of the destination. This approach fits Islamic business management because religious assurance is tied to trust, transparency, consumer protection, and balanced stakeholder treatment. Local vendors need attainable standards, hotels need practical training, public agencies need coherent information systems, and travellers need confidence without being pushed into a separate tourism corridor. Service architecture, rather than the intensity of religious labelling, provides the first answer to the paradox. The next difficulty lies in branding, where the same service layer can either widen hospitality or harden into a market boundary.

2. The Market-Exclusivity Trap in Halal Tourism Branding

The first layer of Muslim-friendly tourism concerns service architecture, while the second layer concerns the public meaning attached to that architecture. The reviewed destination campaigns, policy documents, and industry reports rarely present facilities as neutral information alone. They turn services into market signals through the choice of headline, visual emphasis, certification language, and the placement of Muslim-friendly information inside broader tourism narratives. Halal food, prayer access, and family-sensitive facilities can enter a destination narrative as ordinary hospitality features that widen comfort for Muslim travellers. The same features acquire a narrower meaning once promoted as the defining identity of the destination. A service that begins as accommodation may become a marker of separation if the message suggests that the destination is mainly arranged around one religious segment.

For Muslim travellers, halal branding carries a practical function that should not be understated. Travel involves repeated uncertainty, especially in destinations where food supply chains, certification practices, and prayer facilities are unfamiliar. A visible halal claim helps travellers compare hotels, choose restaurants, and plan daily movement without excessive checking. Such confidence has commercial value because tourists rarely purchase a single service in isolation. A family choosing a hotel in Bangkok or Singapore may assess nearby halal dining, room arrangements, airport transfers, and walking distance to prayer facilities as one connected experience. Branding gathers these scattered concerns into a promise of reliability, so halal language can reduce perceived travel risk when supported by credible service information (Kadir, 2026a).

The difficulty appears because trust signals are never interpreted by one audience alone. A label that reassures Muslim travellers may produce hesitation among non-Muslim travellers if the destination message becomes too totalising. The hesitation may have little to do with resistance toward halal services. Many non-Muslim tourists are comfortable eating halal food, visiting mixed destinations, or staying in hotels that serve diverse guests. Doubt grows when branding suggests a narrower leisure environment, reduced cultural spontaneity, or an atmosphere shaped mainly by religious expectations. Public language can turn a service cue into a symbolic boundary. The same prayer facility that expands access in an airport may carry a different meaning if destination campaigns repeatedly frame tourism through a single religious identity (Padrón-Ávila et al., 2022).

The comparison between Muslim-majority and non-OIC destinations clarifies the managerial tension. Malaysia and Indonesia rely on institutional halal legitimacy, since public agencies, certification bodies, food ecosystems, and social familiarity already support Muslim travel. Such legitimacy strengthens credibility, yet the same advantage may invite over-identification when halal becomes the dominant story and local culture, landscape, cuisine, and ordinary leisure experience receive weaker attention. Singapore and Thailand work through designed service credibility. Their Muslim-friendly services need careful assurance because Muslim travellers cannot assume an Islamic environment, but their branding often remains anchored in convenience, accessibility, and plural hospitality. That restraint protects market openness, although weak religious assurance would make the offer too thin for Muslim visitors.

A market-exclusivity trap emerges from this unstable relationship between assurance and openness. The trap refers to a managerial condition in which faith-sensitive services intended to expand access for Muslim travellers are communicated or governed in ways that narrow the perceived openness of the destination. Three pressures usually drive the trap. Halal becomes too closely identified with total destination identity, Muslim consumers are treated as a uniform segment, and public messaging fails to keep wider hospitality visible. Certification, prayer rooms, modest recreation options, and Muslim-friendly hotel information are not the source of the problem. The problem lies in the branding arrangement that connects those services to a closed image of the market.

Simplified assumptions about Muslim consumers intensify the trap. Stronger halal branding is often assumed to mean stronger appeal to Muslim travellers, yet Muslim demand is uneven. Some travellers want strict assurance, some prefer discreet information, and others combine religious needs with ordinary expectations of leisure, safety, scenery, shopping, and local culture. A destination that treats the Muslim market as one uniform group may overinvest in visible religious symbolism while underinvesting in service usability. Muslim travellers may still face practical gaps, while non-Muslim travellers may sense that the destination message no longer speaks to them. Branding quality depends on calibration, not intensity, because both assurance and openness have to remain legible (Mustikawati et al., 2022).

Inclusive branding requires a more careful grammar of hospitality. Muslim-friendly services need to be visible enough for those who rely on them, while remaining part of a wider destination promise. Food assurance can be presented as trustworthy dining information, and prayer access can be described as visitor convenience without losing religious significance. A maqāṣid-oriented management view supports this balance because faith protection must travel with trust, dignity, fair access, and avoidance of unnecessary exclusion. Religious assurance becomes stronger when visitors can use it without feeling channelled into a separate market corridor. The unresolved task is to design a management model that keeps assurance, openness, and competitiveness connected before branding narrows the field of hospitality.

3. Toward Inclusive Muslim-Friendly Destination Management

The comparative reading points to a more uneven pattern than a simple division between Muslim-majority and non-OIC destinations. Malaysia and Indonesia draw strength from institutional halal legitimacy, yet their weakness appears when religious infrastructure is treated as if it already guarantees destination readiness. Singapore and Thailand move from a different constraint. Their Muslim-friendly offer depends on designed service credibility, because assurance has to be built through information, facility visibility, and hospitality practice rather than assumed through social familiarity (Kadir, 2026b). The two pathways fail in different ways. A Muslim-majority destination may have abundant halal resources but weak integration, while a non-OIC destination may preserve plural branding yet offer assurance that feels too thin for travellers who need verifiable certainty (Hariani et al., 2026).

Inclusive Muslim-friendly destination management emerges from that uneven pattern as a governance approach for managing the tension between assurance and openness. The concept does not ask destinations to choose between religious credibility and plural market appeal. A more difficult managerial task is to keep both pressures active without allowing one to cancel the other. Religious needs must remain visible because Muslim travellers experience travel through practical questions about food, prayer time, family routines, and trust in service claims. Those needs also have to be placed inside a broader destination promise, since tourism spaces cannot be reduced to one segment without losing cultural and commercial breadth. The model is less a fixed framework than a discipline of calibration.

Faith-based service assurance gives the model its ethical base, although assurance has to be understood beyond religious vocabulary. A halal claim carries managerial value only when travellers can verify and use it during the trip. Certification that cannot be found on booking platforms, a prayer facility that is not signposted, or hotel staff who cannot explain nearby halal dining leaves the visitor with formal assurance but practical uncertainty. Maqāṣid al-sharīʻah matters at this point because protection of faith in tourism is not identical with market separation. The same ethical reasoning also involves clarity in transactions, protection from misleading claims, dignity in service encounters, and access that does not make religious needs feel like a problem pushed to the margins.

Plural market openness corrects the opposite risk. A destination may provide strong assurance and still damage its wider appeal if the public narrative turns halal into the total language of place. The issue is not that non-Muslim tourists reject Muslim-friendly facilities. Doubt appears when destination identity seems narrowed before the visitor even arrives. Singapore and Thailand show why inclusive wording matters in non-OIC settings, since Muslim-friendly services are often communicated through convenience and hospitality while the broader urban or leisure brand remains intact. Malaysia and Indonesia face a subtler task. Their halal legitimacy is already credible, so stronger competitiveness may depend on keeping regional culture, landscape, culinary diversity, and ordinary leisure experience visible alongside Muslim-friendly assurance.

Destination competitiveness should be read through this double requirement. Conventional tourism management often treats competitiveness as attractiveness, arrivals, rankings, or service quality. In Muslim-friendly destination management, competitiveness has a more specific meaning. A competitive destination can translate religious assurance into service quality that Muslim travellers trust while keeping the destination readable for wider markets. That capacity depends on coordination rather than slogans. Halal authorities, tourism boards, hotels, restaurants, transport providers, and digital platforms have to carry compatible information, because the traveller experiences the destination as a connected chain rather than separate institutions. Weak links in that chain can undo even a strong halal brand.

The same logic alters how performance should be assessed. Counting halal-certified restaurants, prayer rooms, Muslim arrivals, or index positions gives useful visibility, yet such numbers often measure presence rather than connection. A destination can accumulate facilities without making them legible to travellers. Another destination can have fewer facilities but guide visitors through them with greater precision. The sharper question is whether religious assurance travels across the itinerary. Food verification, mobility, accommodation, worship access, safety, and destination image have to speak to one another. Broken connections create the familiar gap between policy ambition and visitor experience, especially in regional destinations where certification, digital information, and service training develop at different speeds (Kadir, 2024).

Islamic business ethics gives this model a wider social logic. Muslim-friendly tourism becomes stronger when halal assurance improves the reliability of services for Muslim visitors without displacing other stakeholders from the destination narrative. Local businesses need standards that are credible but attainable. Non-Muslim tourists need to remain addressed by the hospitality promise. Local communities should not see their culture compressed into a promotional halal label. Such concerns are not external to Islamic management. Fair dealing, trust, avoidance of harm, and public benefit require destinations to manage how religious value enters markets. Halal tourism gains durability when religious credibility produces better information, clearer service obligations, and less confusion for different users of the destination.

The model therefore rejects both minimalist and exclusivist routes, although not through a neat compromise between them. Minimalism leaves Muslim travellers to solve uncertainty privately, while exclusivism turns assurance into a boundary around the destination. Inclusive management keeps asking how much visibility is needed for trust and how much openness is needed for plural appeal. That question cannot be settled once through certification or branding. Governance has to adjust as markets change, digital platforms reshape travel planning, and Muslim travellers themselves become more internally diverse. Halal tourism then shifts from a debate over facilities to a harder managerial question about how religion, market access, and destination plurality are held together in everyday service practice.

CONCLUSION

Muslim-friendly tourism becomes analytically useful when separated from the assumption that halal value is secured by visible labels alone. The comparison across Muslim-majority and non-OIC destinations suggests that religious assurance has to be organised as service architecture, where food verification, prayer access, staff literacy, digital information, and mobility planning connect across the visitor journey. Market exclusivity appears once that architecture is absorbed into a total destination identity and wider hospitality becomes less visible. A destination can serve Muslim travellers seriously without narrowing its cultural and commercial address, although that balance depends on how service claims are verified, communicated, and carried through everyday tourism practice.

Inclusive Muslim-friendly destination management reframes halal tourism as a governance problem at the intersection of faith, market access, and plural destination identity. Faith-based assurance protects Muslim travellers from uncertainty, while plural market openness keeps the destination readable for different visitors. Within Islamic business management, this balance gives maqāṣid al-sharī‘ah a more operational role, because protection of faith has to travel with trust, fair access, consumer clarity, and non-exclusionary hospitality. Destination competitiveness emerges from the capacity to hold these pressures together through credible information, coordinated institutions, and service reliability. The market-exclusivity trap gives managers a sharper warning: stronger halal branding does not automatically create stronger Muslim-friendly value. Further empirical work can test how this model is experienced by travellers, local businesses, and destination managers, but the central managerial problem remains clear. Sustainable halal tourism depends on making religious accommodation dependable without allowing hospitality to harden into a boundary.

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