

COMPETITIVENESS ANALYSIS OF HALAL TOURISM: EVIDENCE FROM NUSA TENGGARA BARAT

(ANALISIS DAYA SAING PARIWISATA HALAL: BUKTI DARI NUSA TENGGARA BARAT)

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Abstract

Market Appeal Robusticity Matrix is an effective assessment of cultural heritage assets to evaluate the potential market appeal and management of cultural heritage tourism (robusticity). It is important to determine appropriate policies and frameworks for better planning decisions in the future. This study aims to describe the preservation of cultural heritage at the Puppet Museum and analyze the valuation of cultural heritage assets at the Puppet Museum, Jakarta Old Town using Market Appeal-Robusticity Matrix. The research design used is qualitative analysis of Market Appeal-Robusticity Matrix. The results of this study have described the preservation of cultural heritage in the Museum, protection is done through maintenance and restoration, development is done by adding value to cultural heritage buildings by making it a Puppet Museum and the use of cultural heritage buildings is done by considering the interests of religion, social, culture and society. Preservation has been well implemented and adapted to the regulations of Law number 11 of 2010 concerning Cultural Heritage. Whereas the valuation of cultural heritage assets yields the value of the market attractiveness of the High Puppet Museum with a score of 51 and the resilience value of the building of the Medium Puppet Museum with a score of 40. In this assessment the Puppet Museum is in the "A1" category which means high market attractiveness and moderate resilience.

Keywords: Market Appeal Robusticity Matrix, valuation of cultural heritage assets, preservation.

Abstrak

Tujuan penelitian ini adalah menganalisis peningkatan sektor pariwisata dan untuk mengetahui posisi daya saing destinasi wisata Provinsi Nusa Tenggara Barat. Metodologi penelitian ini adalah penelitian kuantitatif dan menggunakan teknik analisis berupa Indeks Competitiveness Monitor (CM), yaitu metode yang dapat digunakan untuk mengukur daya saing industri pariwisata. Hasil penelitian ini menemukan bahwa indeks daya saing industri pariwisata Nusa Tenggara Barat (NTB) tahun 2019 lebih tinggi dibandingkan hasil penghitungan indeks daya saing tahun 2018. Daya saing industri wisata di NTB terus meningkat yang mana bermanfaat bagi PAD (Pendapatan Asli Daerah) Provinsi NTB. Temuan dalam penelitian ini diharapkan dapat memberikan masukan bagi pemerintah daerah untuk dapat mengembangkan destinasi wisata halal yang berdaya saing dan mampu menjadikan sektor pariwisata sebagai salah satu andalan dalam menyumbang Pendapatan Asli Daerah (PAD) yang dapat meningkatkan kesejahteraan masyarakat.

Kata Kunci: wisata halal, daya saing, ekonomi daerah., NTB

INTRODUCTION

Indonesia is a developing country that has natural beauty, cultural heritage, and abundance in the world. The population who adhere to Islam in Indonesia is also very large, which is around 12.7 percent of the world's total Muslims. In 2010, there were around 205 million Muslims in Indonesia or 88.1% of the population. (The Pew Forum on Religion & Public Life, 2010). According to (Khoiriati, Suharko, & Dinarto, 2018) as the country with the largest Muslim population in the world, Indonesia is also interested in following trends and taking part in the global halal tourism market by introducing halal ideas for several tourist destinations. Indonesia depends on tourism for foreign income by relying on its beautiful nature and rich cultural heritage. Many foreign tourists were choosing Indonesia as favorite destination for global tourists such as Bali, Toraja, Yogyakarta, and others. These various potentials can boost the competitiveness of Indonesian tourism globally. However, with the increasing competition in the world of tourism business, it is no longer enough to rely solely on nature and culture as tourist attractions. Creative strategies are needed to attract global tourists, and halal tourism offers opportunities for that purpose.

Indonesia's tourism sector is able to be a contributor to the Gross Domestic Product (GDP) and labor. This is one proof that tourism in Indonesia is progressing rapidly both at home and abroad. Tourism is ranked the fourth largest contributor to national foreign exchange, at 9.3%, and this is highest nominal in ASEAN. Tourism GDP growth is above the industry average by spending USD 1 million or GDP 170%, the highest in the industry.

Broadly speaking, there are 10 countries that have the best tourism competitiveness. These countries have long been tourist destinations, most of which are developed countries whose carrying capacity and tourism infrastructure are very advanced. The first rank is Spain, which managed to maintain its position like last year and followed by France, Germany, Japan, United Kingdom, United States, Australia,

Italy, Canada, and Switzerland. In Asia, tourism is increasingly excited because of a developing economy. There are five Asian countries that are the most developed countries in the field of travel and tourism, namely Japan, South Korea, India, Vietnam, and Bhutan (Wibisono, 2017). Countries in Southeast Asia are the most competitive tourist destinations. In addition, Indonesia's openness to international tourists is also better and this is the impact of visa-free policies for some new nations. Indonesia is very superior in the pillar of Price Competitiveness (PC) as well, due to the cost of living in Indonesia is considered cheap worldwide. In this eighth pillar, we are ranked 5th worldwide, only defeated by Iran, Egypt, Malaysia, and Algeria. This means that, with living costs and tourism costs considered cheap, Indonesia will become a tourist destination. Because price competitiveness is a very important component in the tourism competitiveness index of a country. In this case, the cost of living in Indonesia is much cheaper than in Singapore. Comparisons like this are very important, especially for young travelers or backpackers who are usually priced sensitive.

Furthermore, the Travel and Tourism Competitiveness Index (TTCI) has measured the factors and government policies that can develop the tourism and travel sectors of a country. The tourism and travel sector then contributes to the development and competitiveness of a country's tourism. This competitiveness index consists of 4 sub-indices, namely Enabling Environment (supporting climate), Travel and Tourism Policy and Enabling Conditions (policies and conditions that support tourism), Infrastructure, Natural and Cultural Resources. Indonesia's tourism competitiveness index shot up 2 places, from the world's top 42 to 40. This reputation was captured by TTCI in 2019, which was officially issued by the World Economic Forum (WEF).

In 2016, at the World Halal Travel Awards in the United Arab Emirates. Lombok received the most awards. Lombok received three awards, namely the World's Best Halal Beach Resort, World's Best Halal Honeymoon Destination,

and World's Best Halal Travel Site. This achievement has become a spur to turn on the potential for halal tourism in various provinces or regions in Indonesia. In appreciating Indonesia's international achievements, the ministry of tourism has taken strategic steps by determining 13 provinces that will be developed into Indonesian halal tourism icons including Nusa Tenggara Barat, Nanggroe Aceh Darussalam, West Sumatra, Riau, Lampung, Banten, DKI Jakarta, West Java, Central Java, DI Yogyakarta, East Java, South Sulawesi, and Bali.

NTB has many other potential tourism objects and in addition, it is expected that each area that is capable of being an attraction is included in the real part. The stimulant from tourism drives many other sectors such as accommodation, transportation, food supply, to the handicraft industry. The big impact of tourism should be able to provide added value not only economically but also socially and environmentally. Economic development due to tourism must go hand in hand with the preservation of the environment and cultural heritage. With the increasing echo of sustainable development, tourism development must also accommodate each of the Sustainable Development Goals, also known as SDGs.

Various studies discussing the halal tourism industry are mostly carried out outside Indonesia, such as Malaysia (Abdullah, 2018); (Isa, 2018); Turkey (Battour, 2018); (Boğan, 2019); across countries (Muhamad, 2019); (Harahsheh, 2019).

However, there have not been many studies that analyze the competitiveness of the tourism industry; this research specifically discusses the analysis of the competitiveness of the halal tourism industry using indicators in the Competitiveness Monitor (CM) considering that in 2019 NTB was awarded the World's Best Halal Tourism Destination. The 2019 version of the GMTI (Global Muslim Travel Index) makes NTB more potential and has greater opportunities to develop its tourism. After the earthquake that hit, Nusa Tenggara Barat continues to clean up and beautify itself so that it will attract more tourists. Thus, this is the first study using the Competitiveness Monitor (CM) analysis method with the object of research in Nusa Tenggara Barat Province.

Therefore, this study tries to answer several important questions due to how the position of the competitiveness of the tourist destinations and how to increase the contribution of the tourism sector in Nusa Tenggara Barat Province to the achievement of the nation's economic competitiveness.

METHODS

This research uses competitiveness variables and the competitiveness of the tourism industry in Nusa Tenggara Barat Province is measured through the availability of the potentials of the region, natural, cultural, and religious. Adapting to research conducted by (Qomaruzzaman & Rachmawati, 2017) and (Pamungkas, 2018), the Competitiveness Monitor (CM) analysis was first introduced by the World Travel and Tourism Council (WTTC) in 2001 as a measure of tourism competitiveness.

CM is a method that can be used to see the competitiveness of the tourism industry. Tourism competitiveness and the variables used are the tourism competitiveness index which is formed from eight indicators set by the World Tourism Organization (Organization, 2008). The eight indicators are as follows:

1. Human Tourism Indicator (HTI). This indicator measures the achievement of regional economic development due to tourist arrivals in an area. This indicator is measured using the Tourism Impact Index (TII) which is calculated by the following formula: $TII = \text{Tourism PAD} / \text{Total GRDP}$. Another measure is the Tourism Participation Index, which is the ratio between the number of tourist activities (coming and going) and the population of the destination area.
2. Price Competitiveness Indicator (PCI)/Indicator of Price Competitiveness (IDTH). This indicator shows the price of commodities consumed by tourists during their trip (for example accommodation, travel, vehicle rental, and other costs). Calculating PCI is using Purchasing Power Parity (PPP) as a proxy for the average minimum rate for star-rated hotels, namely the average minimum rate for hotels which are hotels worldwide, such as the Hermes Palace Hotel. PPP is calculated from the number of tourists in area x the average minimum rate for star hotels x the average length of stay.

3. Infrastructure Development Indicator (IDI). This indicator shows the development of infrastructure in tourist destinations. Measurements used for this indicator are the length of asphalt roads and road quality, improvement of sanitation facilities, and an increase in people's access to clean water facilities. The formula for this indicator is as follows: $IPI = f(\text{length of asphalt road, road quality})$.
4. Environment Indicator (EI), Environmental Indicator, shows the quality of the environment and the awareness of the population in maintaining the environment. The measurements used for this indicator are the population density index and the air quality index. The air quality index uses temperature, because it is difficult to find accurate data, it is calculated by the population density index (the ratio between total population and area). Measurement of CO2 emission index data on air pollution levels on major roads. You can also use a population density index. The large population can help the government to be aware of the surrounding environment. $EI = \text{total population/area}$.
5. Technology Advancement Indicator (TAI), this indicator shows the development of modern infrastructure and technology as indicated by the widespread use of the internet, cellular phones, and the export of high-tech products. The measurements used are the telephone index (the ratio of telephone line used to the total population) and the export index (the ratio of exports of high-tech products: computers, pharmaceutical products, industrial machinery and electronics to the total number of exports)
6. Human Resources Indicator (HRI). This indicator shows the quality of the area's human resources in terms of quality, which can provide better services to tourists. The measurement of HRI uses an education index consisting of the ratio of the population who is illiterate and the ratio of the population educated at Elementary School (SD), Junior High School (SMP), Public Middle School (SMU), Diploma and Bachelor Degree. $HRI = \text{illiterate-free residents/residents with elementary, junior high, high school, diploma, and bachelor degrees}$.
7. Openness Indicator (OI). The Openness indicator shows the level of openness of tourism to international trade and international tourists. Can use the openness of destinations to international trade, and local revenue derived from tourism which is abbreviated as Tourism Regional Original Income (PAD). The measurement uses the ratio of the number of foreign tourists to the total tourism PAD and the ratio of export-import tax revenue to the total revenue.
8. Social Development Indicator (SDI), this indicator shows the comfort and safety of tourists traveling in destination areas. SDI measure is the average length of stay of tourists in tourist destination areas.

RESULTS AND DISCUSSION

Based on the characteristics of the problem to be studied, this research is classified into quantitative analysis research. This study applies the calculation of the tourism competitiveness index by adapting the Competitiveness Monitor analysis as a measure of tourism competitiveness, in which this analysis uses eight indicators used to see competitiveness.

From the calculation of the index regarding the position of the competitiveness of the tourism industry in Nusa Tenggara Barat (NTB), the following results are obtained:

Table 1: Tourism Industry Competitiveness Index Nusa Tenggara Barat Province 2018-2019

Indicators	2018	2019
Human Tourism Indicator		
- Tourism Participant Index	0,56	0,73
Price Competitiveness Indicator		
- Purchasing Power Parity	1.353.877.579.984	2.711.527.047.680
Infrastructure Development Indicator	120	114,65
Environment Indicator	2,49	2,52

Indicators	2018	2019
Technology Advancement Indicator	0,495	0,507
Human Resources Indicator	0,082	0,674
Openness Indicator	0,0000000716	0,0000000907
Social Development Indicator	2,3	3,2

Based on table 1 above, it can be stated that the average competitiveness index of the tourism industry in Nusa Tenggara Barat Province in 2019 is higher than the results of the 2018 power index calculation. Several factors in this matter can be described in each of the indicators that make up the calculation. The tourism sector competitiveness index below:

1. Human Tourism Indicator (HTI)

This indicator shows the economic development of tourist arrivals in the area. The measurement used is the Tourism Participation Index (TPI), which is the ratio between the number of tourist activities (coming and going) and the population of the destination area. In this study, the measure used was TPI.

Based on the calculation of this indicator, it was found that in 2019 the index of the number of tourists, who came and went both domestic and foreign tourists, was 0.73, slightly increased compared to 2018 which was recorded at 0.56.

The tourism development in Nusa Tenggara Barat Province has given increasing results. This can be seen from the number of tourists who come. The number of foreign and domestic guests staying at star hotels in 2019 reached 712,783 people.

In line with visiting visits, Nusa Tenggara Barat Province is required to increase the number of accommodations, including hotel rooms and beds. Data shows that the number of accommodations in Nusa Tenggara Barat Province in 2019 was 983, with hotel rooms totaling 10,664 rooms.

2. Price Competitiveness Indicator (PCI)

This indicator shows the price of commodities consumed by tourists during their trip, such as the cost of accommodation, travel, car rental, and so on. The measurement used to calculate PCI is Purchasing Power Parity (PPP). The proxy used to measure PPP is the minimum average rate of hotels representing hotels around the world. So that the formula used to calculate PPP.

In 2018 the PPP results index showed a figure of 1,353,877,579,984. This figure increased again in 2019 to 2,711,527,047,680. The increase in the PPP index in 2019 was due to the length of stay of tourists in NTB. This also makes the average hotel rate in NTB also increase compared to the previous year. When detailed, the number of guests staying at star hotels during 2019 was 712,783 people. Most of the guests staying at the star hotel are domestic guests. The percentage of domestic guests reached 74.27%, while the remaining 26.73% were foreign guests.

Based on the classification of star hotels, the most staying guests chose 4 and 3-star hotels. The percentages reached 43.99% and 39.57% respectively. The number of guests staying at least at 1-star hotels, which is only 0.95% (Badan Pusat Statistik, 2020).

3. Infrastructure Development Indicator (IDI)

This indicator shows the development of infrastructure caused by the arrival of tourists to tourist destinations. Infrastructure is an important variable for the tourism industry because good infrastructure can attract tourists to come. Vice versa, tourist arrivals can increase local government revenue so as to increase the infrastructure owned. The length of asphalt roads and road quality are proxies for this indicator.

In 2018 the IDI index was higher than in 2019, which was 120, while the year after that fell to 114.65. These results indicate that the number of good quality roads and the number of paved roads in NTB has increased in terms of the number of roads paved and the number of good quality roads in NTB.

4. Environment Indicator (EI)

This indicator shows the quality of the environment and the awareness of the population in maintaining the environment. The measurements used are CO₂ emission index and population density index (ratio between total population and area). While there is no data on the CO₂ emission index measurement, what is used to calculate the EI is the population density index. The large population can help the government to be aware of the surrounding environment.

Nusa Tenggara Barat has natural wealth that is an attraction for domestic and foreign tourists. It is detailed that 76.64% of the 20,124 km² area of NTB Province is the area on the island of Sumbawa, covering one-third of the total area of the Province of NTB while the rest is in Lombok Island. NTB Province itself has 421 islands, but only 40 islands are inhabited.

In 2018, the EI index showed a figure of 2.49 and slightly increased to 2.52 in 2019. This result shows that environmental improvements in Nusa Tenggara Barat Province are being strived for. The Regional Disaster Management Agency (BPBD) of Nusa Tenggara Barat Province said that during 2019 there were around 95 disasters that occurred in NTB. Hydro meteorological disasters dominate, such as floods and whirlwinds, earthquake disasters are recorded as disasters that cause the greatest damage and cause casualties. However, after the earthquake that struck, NTB continued to clean up and beautify itself so that it would be more attractive to tourists. This effort is proven by the success of the Province of NTB in obtaining an award as the World's Best Halal Tourism Destination 2019 version of the GMTI (Global Muslim Travel Index). This achievement certainly makes NTB more potential and has a greater opportunity to develop its tourism.

The presence of tourism must be a booster for environmental preservation because in general tourism sells the beauty and wealth of nature and the beauty of the environment. A tourist object that is damaged, unkempt, and full of pollution will not have any selling value and will be shunned.

5. Technology Advancement Indicator (TAI)

This indicator shows the development of modern infrastructure and technology, as indicated by the widespread use of the internet, mobile telephones, and the export of high-tech products. The measurement used is the Internet Network (the ratio of Internet Network usage to the population).

In the era of the Industrial Revolution 4.0, all aspects have been digitized and made use of the internet. The concept of the digital economy has begun to spread and infiltrate global economic activities. In this digital world, infrastructure is not only basic physical facilities but also social. What must be available is of course all internet-based facilities. If the facilities are available, their use must be maximized to be able to explore and get benefits from them.

Skills in Information Technology and Telecommunications (ICT) are now a necessity. In the era of the Industrial Revolution 4.0, there has been a shift both in the pattern of people's lives and in the world economy in general. Tourism is the beneficiary, with everything being digital, all sectors engaged by tourism are utilizing ICT to simplify their business processes (Badan Pusat Statistik, 2020). Various e-commerce-based applications, travel applications, shopping applications, to transportation applications. Being one of the favorite tourist destinations, if the human resources owned by the Province of NTB have not been able to master and understand ICT, it will be an obstacle.

The results of the TAI index calculation show that in 2018 this indicator was calculated at 0.495 and increased to 0.507 in 2019. When compared to DKI Jakarta, the use of the internet network in Nusa Tenggara Barat is still low when compared to the total population of the area. Based on the West Nusa Tenggara Regional Statistics Report (2020), in 2019, only 57.10% of the population aged 5 years and over in Nusa Tenggara Barat controlled cell phones for the last 3 months. This means that there are still many NTB residents who do not have access to long-distance communication. Although the internet era has long existed in

Indonesia, unfortunately only 39.16% of the population aged 5 years and over in NTB have access to the internet. This shows that internet literacy is still low in this province. Even though the increased use of technology will be a means of promotion for these tourist areas (Badan Pusat Statistik, 2019).

6. Human Resources Indicator (HRI)

This indicator shows the quality of the area's human resources so that they can provide better services to tourists. The measurement of HRI uses the education index which consists of the ratio of the population who are illiterate and the ratio of the population with elementary, junior high, high school, diploma, and bachelor degrees.

According to (Badan Pusat Statistik, 2020), the low level of education will be an obstacle in advancing sustainable tourism. People with low-quality education will not be able to compete with those with higher quality education. Even in the world of tourism, existing jobs demand good education. With low levels of education, local residents may be increasingly marginalized and become spectators of the advancement of tourism in their own areas while others enjoy.

The results of the calculation of this indicator show a figure of 0.082 for 2018 and increased in 2019 to 0.674. The increase in this index was due to the lower number of illiterate people in Nusa Tenggara Barat and was followed by an increase in the number of educated people in Nusa Tenggara Barat Province. This is a positive result, meaning that the quality of human resources in the province that was awarded as the best halal tourism destination in the world 2019 version of the Global Muslim Travel Index continues to improve so that this condition will directly affect the level of service provided to tourists visiting Nusa West Southeast.

7. Openness Indicator (OI)

This indicator shows the level of openness of destinations to international trade and international tourists. The measurement uses

the ratio of the number of foreign tourists to the total PAD.

The results of this OI index calculation show a result of 0.0000000716 in 2018 and a slight decrease in 2019 to 0.000000907. This increase occurred due to the increase in the number of foreign tourists visiting West Nusa Tenggara and this condition is in line with the increase in the total Regional Original Income (PAD) in NTB Province.

Based on the Temporary Budget Ceiling Priority for the NTB Province 2020 Budget, it is stated that the Regional Revenue of the Province of West Nusa Tenggara is planned to be IDR 5,671 trillion. This amount comes from the original regional income of Rp. 1,844 trillion, the balance fund of Rp. 3,769 trillion and other legitimate regional income of Rp. 57,149 billion. When compared with the Revenue target in the Determination APBD for the 2019 fiscal year, the 2020 fiscal year revenue has increased by Rp. 268,247 billion or 4.96%. Regional Original Income (PAD) consists of Regional Taxes, Regional Levies, Proceeds from the Management of Separated Regional Assets, and Other Legitimate Original Regional Revenues. The PAD target for the 2020 fiscal year has increased by 7.97% when compared to the Determination of the APBD for the 2019 fiscal year, or an increase of Rp. 136,185 billion. It can be said that increased tourism can increase regional income through taxes. Income from taxes incurred as a result of tourist activities can be reinvested in health care programs, improving maternal health, reducing child mortality, and preventing disease outbreaks. Health is a manifestation of a lifestyle and well-being.

8. Social Development Indicator (SDI)

This indicator shows the comfort and safety of tourists to travel in the destination area. The SDI measure is the average length of stay of a tourist in the destination area.

The SDI index results found that during the 2018-2019 period, the average stay period of foreign tourists in Nusa Tenggara Barat Province was 2-3 days on average. In

general, in 2019, the average length of guests staying at star hotels tends to be higher than non-star hotels. The average length of stay for guests at star hotels in 2019 was 2.13 days, while for non-star hotels it was only 1.72 days. When compared to the previous period, RLTM decreased by 0.51 points for star hotels, while the average length of stay for non-star hotels has increased by 0.07 points (Badan Pusat Statistik, 2020).

CONCLUSIONS

It is undeniable that tourism development will have a positive and negative impact on the development of an area. With its various dynamics, tourism development will also have an impact on achieving sustainable development goals, especially for the Province of NTB which is actively developing tourism. Sustainability is also an important aspect for the tourism sector because without sustainability the main tourism products will be increasingly obsolete and not friendly to the audience. Its main tourism products are based on natural wealth and the attractions that accompany it.

The natural wealth that is not preserved, infrastructure that is not maintained for its sustainability, cultural wealth that is not maintained will be destroyed by the future and cannot be enjoyed again in the future. Every aspect of tourism is also an aspect of a sustainable development goal. The successful achievement of sustainable development will have an impact on increasing the tourism sector.

The most important thing is the commitment of the regional leadership, local wisdom that can be picked up and sold as long as the packaging uses a universal language according to the language of the market. Tourism is the fastest and easiest economic driver and developer without having to eliminate Indonesian culture.

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