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# Analysis Of Visitors' Perceptions Of Muslim-Friendly Tourism At The Super Priority Destination Of Lake Toba

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## Abstract

The purpose of study This for now Perception and Preference Visitors to Lake Toba Against Muslim-Friendly Tourist Service at the Super Priority Destination of Lake Toba development halal tourism on Lake Toba. Method used in study is method study descriptive through approach quantitative At stage beginning done testing validity and reliability This matter done because of the data obtained in study This is primary data through interview and filling questionnaire The purpose of study This For now Perception Visitors to Lake Toba Against Muslim-Friendly Tourist Service at the Super Priority Destination of Lake Toba development halal tourism on Lake Toba. Method used in study is method study descriptive through approach quantitative Research result show that level suitability between level perceptions and preferences visitors to Lake Toba towards tour friendly Muslim, shows the average level suitability of 92.68% Results from the gap shows level quality performance tour friendly Muslim according to perception visitors to Lake Toba are worth it negative (-). Where deep matter This is the result of the gap test between perception society and hope public to tour friendly Muslim in a way whole value - 0.8030.

**Keywords:** Perceptions; Preferences; Muslim Friendly Tourism.

## 1. Introduction

Muslim-friendly tourism is one of the global tourism phenomena. This is due to the large and highly potential market and spending of Muslim tourists. [1] Muslim tourists are estimated to continue to increase by 30% in 2022 and also increase spending to 200 billion USD. the number of tourists visiting North Sumatra in 2017 was 270,792, an increase of 15.90% compared to 2016, which had 233,643 tourists [2]. The majority of tourists visiting North Sumatra were from Malaysia, with a total of 128,761 in 2017, accounting for 47.55% of all international tourists visiting North Sumatra. It is hoped that North Sumatra will experience inclusive growth and enhance local businesses in the tourism sector and certified workforce. A leading tourist destination in Indonesia, both at the provincial and national levels, is Lake Toba, located in North Sumatra Province. Lake Toba is included in the Ministry of Tourism's '10 New Balis' programme, which aims to attract 20 million foreign tourists in 2019 [3]. Given the huge market potential and spending power of Muslim tourists, Lake Toba must position itself to remain attractive to tourists.

Muslim-friendly tourism is defined as all objects or actions that are permitted according to Islamic teachings to be used or engaged in by Muslims in the tourism industry. Meanwhile, Euromonitor states that Muslim-friendly tourism is a form of religious tourism defined as activities that are permitted according to Islam [5]. Both definitions share the commonality that Muslim-Friendly Tourism adheres to Islamic principles, specifically the Quran (the holy book of Islam) and the Sunnah (the teachings and guidelines recommended by Prophet Muhammad SAW) [6]. From an Islamic perspective, Muslim-friendly tourism places greater emphasis on tourism products and activities that are in line with Islamic teachings. In fact, Muslim-friendly tourism is not only implemented in tourist destinations with a Muslim majority population, but also in destinations dominated by non-Muslims. Japan, Russia, the United Kingdom, and even Europe have already implemented Muslim-friendly tourism [7]. The implementation of Muslim-friendly tourism by countries adopts the approach of a 'Muslim-friendly destination' or Muslim-friendly tourist destination Experts argue that a Muslim-friendly destination and halal tourism are essentially the same (in terms of concept and implementation). The difference between the two terms lies solely in branding to target specific markets.

From the research, it can be seen that Muslim-friendly destinations are the most appropriate approach to use as branding for

destinations whose populations are dominated by non-Muslims. According to them, this is related to the religious philosophy embraced by the majority of the local population and appears exclusive to certain groups [8]. Therefore, the implementation at Lake Toba focuses on branding as a Muslim-friendly tourist destination, where adjustments to products and other tourist activities are based on the Muslim-friendly tourism approach. If activities, facilities, or other tourism elements do not consider the needs of Muslim tourists, this can lead to a poor quality of experience for Muslim tourists during their trip. Worse still, it can result in a decrease in the number of Muslim tourists visiting. This is because there is a tendency for Muslim tourists to choose tourist destinations that can meet their religious needs during their travels [9]. Therefore, this study is interested in conducting research with the title “Analysis of Lake Toba Visitors' Perceptions of Muslim-Friendly Tourism at the Lake Toba Super Priority Destination”.

## 2. Literature Review

### 2.1 Theory of Tourism Development

Tourism development is a change in conditions that can influence a destination, leading to better conditions for the destination. The development of these destination conditions can take the form of human, social, physical, or other aspects that can influence each other, and are supported by elements of society, government, and business units. In Swarbrooke, it is known that there are three implementers of tourism development in a destination, namely the Public Sector, the Private Sector, and the Volunteer Sector [10].

1. The Public Sector, comprising the Central Government, Local Government, State-Owned Enterprises (SOEs), Local Government-Owned Enterprises (LGOs), and Village Governments.
2. The Private Sector, which includes large, medium, small, or micro-sized companies involved in tourism.
3. The Volunteer Sector, which typically involves communities or organisations whose purpose is to participate in tourism development. These organisations can be local, national, or multinational.

There are several components required in tourism development: [11]

1. Tourist attractions and activities, including natural, cultural, and man-made attractions, along with all activities within an attraction that can attract tourists.
2. Accommodation, including hotels or any form of lodging services provided for tourists.
3. Tourism facilities and services. Facilities and services are crucial and essential for tourists during their travels. This component may include ATMs/banks, currency exchange offices, petrol stations, Tourist Information Centres, and so on.
4. Transportation. Transportation is the means by which tourists can access attractions. Good transportation is transportation that can provide good transportation facilities and services.
5. Other infrastructure, including the availability of clean water, electricity, waste management and disposal facilities, drainage, telephone signals, and so on, is also important in infrastructure considerations.

Institutional, institutions are required to develop and regulate tourism, including human resource development, planning, training, programmes, policy-making related to tourism, investment policy-making, and so on.

### 2.2 Muslim-Friendly Tourism

Muslim-friendly tourism is defined as an activity supported by various facilities and services provided by the community, entrepreneurs, the government, and local governments that comply with Sharia law [12]. Meanwhile, according to the Indonesian Ulema Council in 108/DSN-MUI/X/2016 regarding Guidelines for Organising Tourism Based on Sharia Principles. Muslim-friendly tourism is considered an alternative form of tourism for Muslim travellers, where tourism products and services are tailored to the context of Islamic teachings. Thus, Muslim travellers can enjoy their trips without worrying about violating religious regulations and guidelines [13]. The principles of implementing Muslim-friendly tourism (products and services) are based on the Quran (the holy book of Islam) and the Sunnah (the teachings of Prophet Muhammad SAW). In this context, tourism products and services must not contain any haram elements. Haram is the opposite of halal, meaning forbidden, unacceptable, not permitted, and/or not allowed.

### 2.3 Muslim-Friendly Tourism Destination Ecosystem

Law No. 10 of 2009 states that there are five aspects to a destination, including tourist attractions, public facilities, tourism facilities, accessibility, and community [14]. All aspects of a tourism destination are elaborated into one and linked to a Muslim-friendly tourism approach. This creates a tourism destination ecosystem that meets or applies halal principles (halalness). The importance of a tourism destination that can provide products and services lies in its ability to support the implementation of high-quality activities for Muslim tourists [15]. The Muslim-friendly tourism destination ecosystem formulated by Rahtomo and Sumaryadi is as follows:

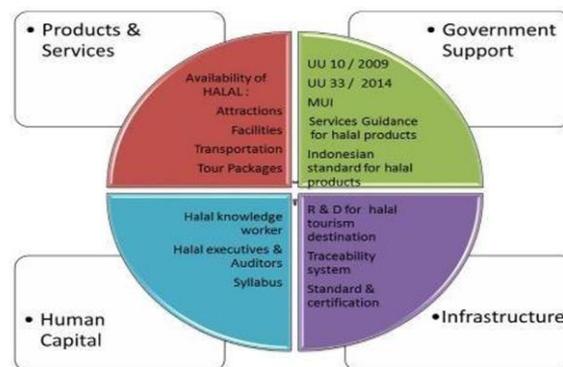


Figure 1  
Muslim-Friendly Tourism Destination Ecosystem

#### 2.4 Perception

In general, there are several factors that can influence a person's perception, namely:

1. The person concerned  
In this case, this refers to the attitudes, interests, expectations, experiences and motivations of the individual themselves.
2. The target of perception  
The target of perception refers to the perception of a person, an object, or an event.
3. The situation  
The situation refers to the environmental conditions where the environment influences an individual's perception [16].  
There are two factors that can determine an individual's perception:

1. Functional factors  
Functional factors are those derived from past experiences, needs, and other personal characteristics, where it is not the type or form of the stimulus that influences perception but rather the individual's response to the stimulus.
2. Structural Factors

Structural factors are those derived from the inherent properties of physical stimuli and their effects on an individual's nervous system. In this context, it means that when understanding an event, one cannot view it in isolation but must consider it as a whole, taking into account its context within the environment and the challenges faced [17].

#### 2.5 Preference

Tourist preferences arise from the diversity of facilities and tourist activities that meet the needs of tourists when travelling. Tourist preferences form the basis for calculating the desires and needs for tourist facilities and services that will be received. Preferences and perceptions are closely related to a person's decision to choose one product alternative over another. In the case of tourism, a person's decision to travel, for example, requires careful consideration, including deciding on accommodation options [18]. Tourists visiting tourist destinations are faced with available accommodation options such as hotels, villas, homestays, resorts, bungalows, guesthouses, and cottages. The greater the number of accommodation options, the more varied the prices and facilities available. The abundance of choices creates a desire or preference for a particular item, product, or service, which is referred to as preference. A person's preference is related to consumer or buyer behaviour in the process of selecting products to purchase, which occurs during the purchasing process [19]. This purchasing process needs to be studied to understand why someone chooses and purchases a particular product and prefers a specific brand. Tourists' choices or preferences for a product or service differ from one tourist to another.

#### 2.6 IPA Concept (Importance and Performance Analysis)

Importance Performance Analysis (IPA) is a method that maps customer perceptions of the importance of service aspects with customer perceptions of the performance of service aspects to identify services that need to be improved [20]. IPA is a method used to analyse the relationship between importance and performance and the theory that the target performance level of a particular product attribute must be proportional to the importance of that attribute. In other words, as stated by Slack, importance is seen as a reaction to the relative value of various consumer attributes. Data using a Likert scale as an indicator of the importance scale according to the perceptions of Muslim visitors to Lake Toba. The Likert scale data was scored quantitatively for use in calculations [21]. The level of perception (Importance) is measured in relation to what should be available in Muslim-Friendly Tourism to produce high-quality Muslim-Friendly Tourism.

### 3. Research Method

This type of research is classified as descriptive quantitative research. According to this method can be defined as a research method based on the philosophy of positivism, which is used to examine a specific population or sample, collect data using research instruments, and analyse quantitative or statistical data, with the aim of testing pre-determined hypotheses [22]. This research was conducted using data collection techniques in the form of surveys or questionnaires. The survey method was used to obtain data from a specific natural (not artificial) location, but this research involved treatment in data collection. The population in this study was tourists who visited Lake Toba as a tourist destination in 2022. The total number of tourists, both local and foreign, who visited Samosir Island reached 820,000 tourists, with the sampling technique used in this study being Purposive Sampling [23]. Purposive Sampling is a sampling technique based on specific selection criteria to determine who will be used as informants. Based on the established criteria, it can be seen that the sample size taken using the Slovin formula is 100. The data analysis method used in this study is the Importance Performance Analysis (IPA) method and GAP Analysis [24].

#### 4. Results and Discussion

The gap analysis was conducted by finding the gap value that emerged from the difference between Lake Toba visitors' perceptions of Muslim-friendly tourism and Lake Toba visitors' preferences for Muslim-friendly tourism. This gap value is referred to as the SERVQUAL score, which can be calculated using the following formula: [25]

$$\text{SERVQUAL Score} = \text{Perception Score} - \text{Preference Score}$$

Based on the three aspects outlined in the SERVQUAL analysis, this study will conduct a gap analysis per attribute, a gap analysis per dimension, and an overall gap analysis. The results of the calculation of the gap in the perception of Lake Toba visitors towards Muslim-friendly tourism and the level of preference of Lake Toba visitors towards Muslim-friendly tourism show that there is not much difference between the performance of Muslim-friendly tourism and the expectations of the community regarding Muslim-friendly tourism. In this case, the gap in each standard plays a role in providing information about the level of importance of Muslim-friendly tourism, and the results can be seen in the table below:

Table 1. Results of Gap Analysis per Attribute

Indikator	Persepsi	Preferensi	Gap	Peringkat
P1	4.190	4.420	-0.230	23
P2	4.230	4.550	-0.320	11
P3	4.270	4.550	-0.280	14
P4	4.230	4.630	-0.400	7
P5	4.450	4.270	-0.270	15
P6	4.410	4.660	-0.250	18
P7	4.500	4.850	-0.350	9
P8	4.270	4.740	-0.470	3
P9	4.480	4.700	-0.220	24
P10	4.190	4.750	-0.560	1
P11	3.950	4.420	-0.470	4
P12	4.220	4.660	-0.440	6
P13	3.990	4.480	-0.490	2
P14	4.210	4.670	-0.460	5
P15	4.170	4.520	-0.350	9
P16	4.240	4.640	-0.400	7
P17	4.030	4.330	-0.300	12
P18	4.020	4.260	-0.240	20
P19	4.110	4.400	-0.290	13
P20	4.190	4.440	-0.250	18
P21	4.350	4.580	-0.230	21
P22	4.290	4.560	-0.270	15
P23	4.250	4.480	-0.230	21
P24	4.090	4.350	-0.260	17

Source: Data Processed by Researchers.

The results of the calculation of the gap in the perception of Lake Toba visitors towards Muslim-friendly tourism and the level of preference of Lake Toba visitors towards Muslim-friendly tourism in each dimension show that there is not much difference between the performance of Muslim-friendly tourism and the community's expectations regarding Muslim-friendly tourism. In this case, the gap in each dimension will play a role in providing information about the level of importance of Muslim-friendly tourism, and the results can be seen in the table below:

Table 2. Gap Analysis Results per Dimension

Indikator	Persepsi	Preferensi	Gap	Peringkat
<b>Dimensi A</b>				
P1	4.190	4.420	-0.230	3
P2	4.230	4.550	-0.320	
P3	4.270	4.550	-0.280	
P4	4.230	4.630	-0.400	
<b>Jumlah</b>	16.920	18.150	-1.230	
<b>Dimensi B</b>				
P5	4.450	4.270	-0.270	1
P6	4.410	4.660	-0.250	
P7	4.500	4.850	-0.350	
P8	4.270	4.740	-0.470	
P9	4.480	4.700	-0.220	
P10	4.190	4.750	-0.560	
P11	3.950	4.420	-0.470	
P12	4.220	4.660	-0.440	
P13	3.990	4.480	-0.490	
P14	4.210	4.670	-0.460	
P15	4.170	4.520	-0.350	
<b>Jumlah</b>	46.840	51.170	-4.330	
<b>Dimensi C</b>				
P16	4.240	4.640	-0.400	2
P17	4.030	4.330	-0.300	
P18	4.020	4.260	-0.240	
P19	4.110	4.400	-0.290	
P20	4.190	4.440	-0.250	
P21	4.350	4.580	-0.230	
P22	4.290	4.560	-0.270	
P23	4.250	4.480	-0.230	
P24	4.090	4.350	-0.260	
<b>Jumlah</b>	37.570	40.040	-2.470	

Source: Data Processed by Researchers.

The gap value in the overall gap analysis is calculated based on the level of perception of Lake Toba visitors towards Muslim-friendly tourism and the level of preference of Lake Toba visitors towards Muslim-friendly tourism, showing that the performance of Muslim-friendly tourism is not too different from the community's expectations regarding Muslim-friendly tourism. The overall gap role provides information on the level of importance of Muslim-friendly tourism and the overall roles in providing information on the level of quality of Muslim-friendly tourism performance, with the results shown in the following table:

Table 3. Overall Gap Analysis Results

No.	Dimensi	Persepsi	Preferensi	Gap	Peringkat
1	Destinasi Ramah Keluarga	16.920	18.150	-1.230	3
2	Fasilitas dan Pelayanan Ramah Bagi Muslim	46.840	51.170	-4.330	1
3	Kesadaran terhadap Halal dan Pemasaran Destinasi	37.570	40.040	-2.470	2
<b>Jumlah</b>		101.330	109.360	-8.030	

Source: Data Processed by Researchers

If the perception score is greater than the preference score, a positive gap value (+) will be obtained, and vice versa, if the preference score is greater than the perception score, a negative gap value (-) will be obtained. A positive gap value (+) indicates that the performance of Muslim-friendly tourism is very good and in line with visitors' expectations. A negative gap value indicates that the performance of Muslim-friendly tourism is still not good or does not yet meet visitors' expectations. Based on Table 4.3, it can be seen that the overall gap value indicates a negative gap value of -8.030, meaning that the performance of Muslim-friendly tourism still does not meet visitors' expectations [26].

The level of conformity is the result of a comparison between the value of perception and the value of preference. The level of consistency determines the order of priority for improving the factors that influence tourist satisfaction. The application level of each attribute can be classified from the highest level 1 (one) to the lowest level 24 (twenty-four). Priority indicates that the quality of the tourist destination aligns more closely with tourists' expectations and interests. The lower the priority, the lower the quality, indicating to tourists that their perceptions and preferences regarding the quality of the tourist destination do not meet their expectations and interests [27].

Table 4.4 Satisfaction Level Based on Percentage

No.	Persentase Kepuasan	Tingkat Kepuasan
1	20-40	Kepuasan Rendah
2	41-79	Kepuasan Sedang
3	80-100	Kepuasan Tinggi

Source: Data Processed by Researchers

Through calculations of the level of conformity between the level of perception and the level of preference, an average level of conformity of 92.68% was obtained, which means that the quality of Muslim-friendly tourism is felt by visitors to Lake Toba [28].

Table 4.5 Results of Reliability Testing of Criteria for Muslim-Friendly Facilities and Services

No.	Dimensi	Atribut	Persepsi	Preferensi	Tingkat Kesesuaian
1	Destinasi Ramah Keluarga	A1	419	442	94.80
		A2	423	455	92.97
		A3	427	455	93.85
		A4	423	463	91.36
2	Fasilitas dan Pelayanan Ramah bagi Muslim	B1	445	472	94.28
		B2	441	466	94.64
		B3	450	485	92.78
		B4	427	474	90.08
		B5	448	470	95.32
2	Fasilitas dan Pelayanan Ramah bagi Muslim	B6	419	475	88.21
		B7	395	442	89.37
		B8	422	466	90.56
		B9	399	448	89.06
		B10	421	467	90.15
		B11	417	452	92.26
3	Kesadaran Terhadap Halal dan Pemasaran Destinasi	C1	424	464	91.38
		C2	403	433	93.07
		C3	402	426	94.37
		C4	411	440	93.41
		C5	419	444	94.37
		C6	435	458	94.98
		C7	429	456	94.08
		C8	425	448	94.87
		C9	409	435	94.02

Source: Data Processed by Researchers

If the value is close to 100 or above average, then the value can be considered good [29].

## 5. Conclusions

Based on the data analysis and discussion presented in the previous chapter, the following conclusions can be drawn: The results of the analysis of the level of conformity between the level of perception and preferences of Lake Toba visitors towards Muslim-friendly tourism show an average level of conformity of 92.68%, which means that the level of satisfaction with the quality of Muslim-friendly tourism experienced by Lake Toba visitors is quite high or can be said to be good. The results of the gap analysis indicate that the quality of performance of Muslim-friendly tourism according to the perceptions of Lake Toba visitors has a negative value (-). In this case, the gap test results between the public's perception and expectations of Muslim-friendly tourism as a whole are -0.8030, which indicates that the performance of Muslim-friendly tourism is currently not fully meeting or aligning with public expectations, or in other words, there is a gap between Lake Toba visitors' perceptions and preferences for Muslim-friendly tourism. Based on the analysis using a Cartesian diagram, several indicators were found to fall into Quadrant A, where these indicators have a low performance level.

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