

GOVERNANCE OF MUSLIM FRIENDLY TOURISM
AND HOSPITALITY IN AUSTRALIA: CHALLENGES,
OPPORTUNITIES AND FRAMEWORK FOR
IMPLEMENTATION

BY

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INTERNATIONAL ISLAMIC UNIVERSITY MALAYSIA

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ABSTRACT

The Muslim travel sector has recently gained recognition worldwide as a growing and largely untapped market, attracting the attention of both OIC and non-OIC countries. Many destinations have begun adjusting their offerings by creating Muslim Friendly environments and tailoring services to suit the preferences of Muslim visitors. With global demand rising, Australia has shown interest in this niche, but limited research has left many tourism stakeholders unaware of its potential. As a result, no comprehensive framework or clear guidelines have been established to systematically support the development of Muslim-friendly tourism, leaving Australia's potential positioning in this market underdeveloped. Consequently, Muslim tourists visiting Australia may encounter challenges in fulfilling their religious requirements. Therefore, the objectives of this study are to analyse the challenges and opportunities of implementing Muslim Friendly Tourism and Hospitality (MFTH) in Australia and to determine the factors that support the implementation of MFTH in overall tourism and economic development in Australia. This study also proposes the MFTH governance framework for Australia. This study adopted a qualitative research design. Data analysis followed a triangulation strategy, integrating insights from literature and document reviews, observational data, and expert interviews to enhance analytical depth and validity. Semi-structured interviews were conducted with 15 tourism industry stakeholders, including policymakers, tourism operators, hospitality industry representatives, academics, and representatives of Muslim community organisations. The data were analysed using both content and thematic analysis, with thematic analysis undertaken manually and further supported by ATLAS.ti to ensure systematic coding and rigorous interpretation. The findings of this study provide a comprehensive analysis of the governance of Muslim Friendly Tourism and Hospitality (MFTH) in Australia, highlighting the structural, economic, cultural, and regulatory challenges associated with its development. Moreover, the study also found governance challenges, including policy and regulatory gaps, visa restrictions, and weak stakeholder coordination, which hinder the structured development of MFTH in Australia. Economic potential remains largely untapped, as Australia has not capitalised on the growing demand for Muslim Friendly tourism. Finally, the development of the MFTH governance framework is based on this study's findings and has been confirmed by expert interviews. Therefore, this study may assist tourism stakeholders in Australia in formulating policies and effective strategies for the development and implementation of Muslim-Friendly Tourism and Hospitality (MFTH). Such strategic progress is expected to contribute significantly to the growth of the overall tourism economy of Australia. Hopefully, the development of MFTH framework by this research is a significant breakthrough and represents a potentially valuable contribution, aimed at enhancing the travel experience of both local and international Muslim tourists, while positioning Australia as an inclusive and Muslim Friendly destination on the global stage.

ملخص البحث

حظي قطاع السياحة الإسلامية مؤخراً باعتراف عالمي متزايد بوصفه سوقاً واعدة لم تستغل بعد استغلالاً كاملاً، مما استقطب اهتمام دول منظمة التعاون الإسلامي (OIC) وغيرها على حدٍ سواء. وقد شرعت كثير من الجهات السياحية في تكييف عروضها من خلال تهيئة بيانات صديقة للمسلمين وتخصيص خدماتها لتلائم تفضيلات الزوار المسلمين. وفي ظل تصاعد الطلب العالمي، أبدت أستراليا اهتمامها بهذا القطاع المتخصص، غير أن محدودية الأبحاث المتاحة تركت كثيراً من أصحاب المصلحة في قطاع السياحة غير مدركين لإمكاناته الحقيقية. ونتيجةً لذلك، لم يرسَ حتى الآن أي إطار شامل أو مبادئ توجيهية واضحة تدعم بصورة منهجية تطوير السياحة الصديقة للمسلمين، مما أعاق تموضع أستراليا الفعلي في هذا السوق. وعلى هذا الأساس، قد يواجه السياح المسلمون القادمون إلى أستراليا تحديات في الوفاء بمتطلباتهم الدينية. وعليه، تسعى هذه الدراسة إلى تحقيق هدفين رئيسيين: أولهما تحليل التحديات والفرص المرتبطة بتطبيق السياحة والضيافة الصديقة للمسلمين (MFTH) في أستراليا، وثانيهما تحديد العوامل الداعمة لتطبيق هذا النوع من السياحة (MFTH) في إطار التنمية السياحية والاقتصادية الشاملة في أستراليا. كما تقترح الدراسة إطاراً حوكمياً للسياحة والضيافة الصديقة للمسلمين (MFTH) مصمماً خصيصاً للسياق الأسترالي. واعتمدت الدراسة تصميماً بحثياً نوعياً، وسارت في تحليل البيانات وفق استراتيجية التثليث (Triangulation)، إذ دمجت رؤية مستخلصة من مراجعة الأدبيات والوثائق، والبيانات الرصدية، ومقابلات الخبراء، بهدف تعزيز العمق التحليلي والصدق المنهجي. وأُجريت مقابلات شبه منظمة مع خمسة عشر صاحب مصلحة في قطاع السياحة، يمثلون صانعي السياسات، والمشغلين السياحيين، وممثلي قطاع الضيافة، والأكاديميين، وممثلي منظمات المجتمع المسلم. وخضعت البيانات للتحليل بأسلوب تحليل المحتوى والتحليل الموضوعي، حيث أُجري التحليل الموضوعي يدوياً ثم دُعم ببرنامج ATLAS.ti لضمان الترميز المنهجي والتفسير الدقيق. وتقدم نتائج هذه الدراسة تحليلاً شاملاً لحوكمة MFTH في أستراليا، مسلطة الضوء على التحديات الهيكلية والاقتصادية والثقافية والتنظيمية المرتبطة بتطويرها. وعلاوةً على ذلك، كشفت الدراسة عن تحديات حوكمية تشمل الفجوات في السياسات والأطر التنظيمية، وقيود التأشيرات، وضعف التنسيق بين أصحاب المصلحة، وهي عوامل تُعيق التطوير المنظم للسياحة والضيافة الصديقة للمسلمين في أستراليا. كما يبقى الإمكان الاقتصادي لهذا القطاع غير مُستثمر إلى حدٍ بعيد، إذ لم تستفد أستراليا بصورة كافية من الطلب المتنامي على السياحة الصديقة للمسلمين. وقد استند في بناء إطار حوكمة السياحة والضيافة الصديقة للمسلمين إلى نتائج هذه الدراسة، وجرى التحقق منه عبر مقابلات الخبراء. وتأمل هذه الدراسة في إسهامها الفعال في دعم أصحاب المصلحة في القطاع السياحي الأسترالي في صياغة سياسات واستراتيجيات فاعلة لتطوير السياحة والضيافة الصديقة للمسلمين وتطبيقها. ومن المتوقع أن يسهم هذا التقدم الاستراتيجي إسهاماً ملموساً في تنمية الاقتصاد السياحي الأسترالي برمته. ويؤمل أن يمثل الإطار الذي أسفرت عنه هذه الدراسة نقلة نوعية وإسهاماً علمياً ذا قيمة، يستهدف الارتقاء بتجربة السفر للسياح المسلمين المحليين والدوليين، وتعزيز مكانة أستراليا بوصفها وجهةً شاملة وصديقة للمسلمين على الساحة العالمية.

APPROVAL PAGE

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DECLARATION

I hereby declare that this dissertation is the result of my own investigations, except where otherwise stated. I also declare that it has not been previously or concurrently submitted as a whole for any other degrees at IIUM or other institutions.

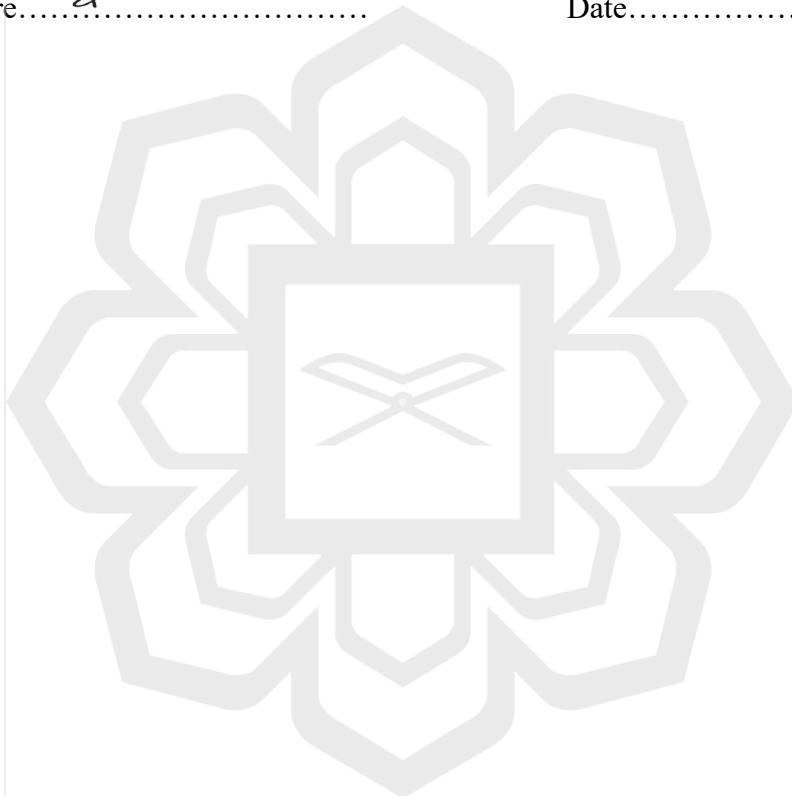
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This thesis is dedicated with love and gratitude to my beloved parents. To my father, Ahamed Abdul Cader, whose unwavering support, boundless love, and constant prayers have always guided me, and to my mother, Mufeeda Cader, who has been my greatest teacher in patience, perseverance, and unconditional love.

With all my heart, I also dedicate this work to my soulmate and beloved wife, Sithy Nadia Hibatullah, whose love, patience, and encouragement have been my strength, and to my precious children my daughter, Salma Irshad, and my sons, Tariq Irshad and Omar Irshad for their trust, support, and the joy they bring into my life.

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LIST OF ABBREVIATION

ABS	Australian Bureau of Statistics
ACES	Access Communication Environment Service Framework
ATEC	Australian Tourism Export Council
CAGR	Compound Annual Growth Rate
DMO	Destination Marketing Organizations
GDP	Gross Domestic Product
GMTI	Global Muslim Travel Index
HDC	Halal Development Corporation
HKC	Halal Knowledge Centre
HKTb	Hong Kong Tourism Board
IIUM	International Islamic University Malaysia
ITC	Islamic Tourism Centre
JNTO	Japan National Tourism Organization
MFH	Muslim-Friendly Hospitality
MFT	Muslim Friendly Tourism
MFTH	Muslim-Friendly Tourism and Hospitality
MUIS	Majlis Ulama Islam Singapura
NSP	New Southland Policy
NSTF	National Sustainable Tourism Framework
NSW	New South Wales
OIC	Organization of Islamic Cooperation
QLD	Queensland
RO	Research Objectives
RQ	Research questions
TA	Tourism Australia
UAE	United Arab Emirates
UK	United Kingdom
UNWTO	United Nations World Tourism Organization
UTS	University of Technology

CHAPTER ONE

INTRODUCTION

1.1 BACKGROUND OF THE STUDY

The global tourism and hospitality sector refers to the combined industries that encompass travel, tourism, and hospitality services worldwide. This includes various sectors such as transportation, accommodation, food and beverages, attractions, events, travel agencies, tour operators, and other related services. The word ‘tourism’ derives from the word ‘tour’ in English, which means time, round trip, and touring (Llic & Stefanovic, 2019). Tourism refers to the journey for leisure of the travellers to another destination for less than one year (Battour, 2018). The tourism and hospitality sectors are substantial global economic drivers, generating employment, revenue, and growth in many countries around the world. Tourism is becoming a global leisure activity which is a popular and very important source of income for many countries (Liu et al., 2018). In 2023, the total contributions of travel and tourism to global gross domestic product (GDP) was roughly four percent lower compared to 2019, the year before the COVID-19 pandemic, but nevertheless amounted to approximately 9.9 trillion U.S. dollars in 2023. This figure was forecasted at an estimated 11.1 trillion U.S. dollars in 2024, notably above pre-pandemic levels (Statista Research Department, 2024).

In recent years, the market for Muslim travel has been seen as an untapped potential market by tourism destinations worldwide by both OIC (Organisation of Islamic Cooperation) countries and non-OIC countries alike. Countries around the world have accordingly begun developing Muslim Friendly environments for travellers and, to varying degrees, tailor-made their offerings to cater to the interests and needs of Muslim travellers. At present, Muslim Friendly tourism has been increasing in demand, in line with an increase in Muslim tourists on an annual basis. Many non-Muslim countries, such as the United Kingdom, Germany, France, and, recently, Japan, Australia, and South Korea, have all begun providing specialized accommodations for Muslim tourists (Eddahar, 2018).

‘Halal tourism’ and ‘Muslim Friendly tourism’ concepts are often used interchangeably by academicians and practitioners as though the concepts are similar. Muslim Friendly tourism refers to a form of tourism that caters to the specific needs and requirements of Muslim travellers who adhere to Islamic principles and practices. The central concept of the term ‘Muslim Friendly tourism’ represents an effort to make the tourism experience pleasant to attentive Muslims. As such it is almost akin to the concept of ‘Halal tourism’ but in a wider context to include allowing Muslims to perform religious duties (Battour, 2018). Therefore, Muslim Friendly tourism offers halal services in their simplest form, such as halal food and drinks or separate pools, and offers comfortable places for Muslims to perform their daily prayers. For a clear understanding of the meaning behind the term ‘Muslim Friendly Tourism,’ several definitions of the concept widely used in the halal travel industry proposed by previous researchers are presented in Chapter 2 - Table 2.1.

The term halal - Arabic for “permissible” - is not just applicable to food, however; it also includes any products or services which meet the requirements of Islamic jurisprudence from banking to pharmaceuticals, cosmetics, fashion and also, as highlighted, tourism. In the case of tourism, this includes offering packages and destinations that are particularly designed to cater to and address Muslim considerations and needs and, therefore, the terms halal tourism, Islamic tourism, and Muslim Friendly tourism are all used as reflections of these wishes and desires within the tourism industry (Boğan & Sarıışık, 2019). The encouragement of travel in Islam exists in various chapters of the Quran, for example:

“Travel through the land and observe how He began creation. Then Allah will produce the final creation. Indeed Allah, over all things, is competent”.

(Qur’an, 29:20)

Muslim Friendly tourism is spreading its wings by offering cultural, historical, culinary, religious and beach tourism. Muslims across the world want to spend their vacation in environments that respect their beliefs and cater to their requirements. Such concerns range from providing halal food at restaurants and hotels to more diverse offerings, such as accommodation which includes prayer rooms, or prayer directional

signs in rooms, and resorts that have segregated as well as family-friendly facilities at swimming pools and beaches. Muslim Friendly beach resorts are becoming particularly popular. These resorts offer separate swimming pools and beach areas exclusively for women, separate spa facilities, and family-friendly entertainment, along with facilities to meet all the basic needs of Muslim guests. The recent development in the tourism industry has witnessed the trend of attracting Muslim tourists by providing services that fulfil their needs (Rahman et al., 2020). Muslim consumer spending on travel in 2022 reached US\$133 billion, a 17% increase from US\$114 billion in 2021. By 2027, Muslim consumer spending on travel is forecasted to reach US\$174 billion at a CAGR (Compound Annual Growth Rate) of 5.5% (Dinar standards, 2023).

According to a Mastercard-Crescent Rating Global Muslim Travel Index (2025) report, the strong performance that was observed in 2024 is establishing a foundation for sustained positive growth in the Muslim travel market. Projections for 2025 indicate an increase in international Muslim tourist arrivals to approximately 186 million. This upward trend is anticipated to continue over the long term, with forecasts suggesting that arrivals will reach 245 million by 2030. Correspondingly, traveller expenditure is expected to grow significantly, reaching an estimated USD 235 billion by the same year. These figures underscore the expanding economic impact and strategic importance of the Muslim travel sector within the global tourism industry. Muslims across the world want to spend their vacation in environments that respect their beliefs and cater to their requirements. Their concerns range from the availability halal food at restaurants and hotels to amenities such as accommodations which include prayer rooms or directional signs (Qibla) in their rooms, and in the case of resorts, segregated and/or family-friendly facilities at swimming pools and beaches. Muslim Friendly beach resorts have become particularly popular, offering separated swimming pools and beach areas exclusively for women as well as separate spa facilities and family-friendly entertainment, along with the aforementioned amenities meant to meet all the basic needs of their guests. Recent developments in the tourism industry have witnessed the trend of attracting Muslim tourists by providing services that fulfil their needs (Rahman et al., 2020), and this has paid off as Muslim consumer spending worldwide on travel had reached US\$133 billion in 2022, up 17% from the US\$114 billion spent in 2021. By 2027, Muslim consumer spending on travel is forecasted to reach US\$174 billion at a CAGR (Compound Annual Growth Rate) of 5.5% (Dinar standards, 2023).

According to a report by the Mastercard-Crescent Rating Global Muslim Travel Index (2025), the strong performance in spending that was observed in 2024 is establishing a foundation for sustained positive growth in the Muslim travel market. Projections for 2025 indicate an increase in international Muslim tourist arrivals to approximately 186 million. This upward trend is expected to continue long term, with forecasts suggesting that arrivals will reach 245 million by 2030 and correspondingly, traveller expenditures are expected to have significant growth, reaching an estimated US\$235 billion by 2030. These figures underscore the impact and subsequent strategic imperative of supporting the Muslim travel sector within the global tourism industry.

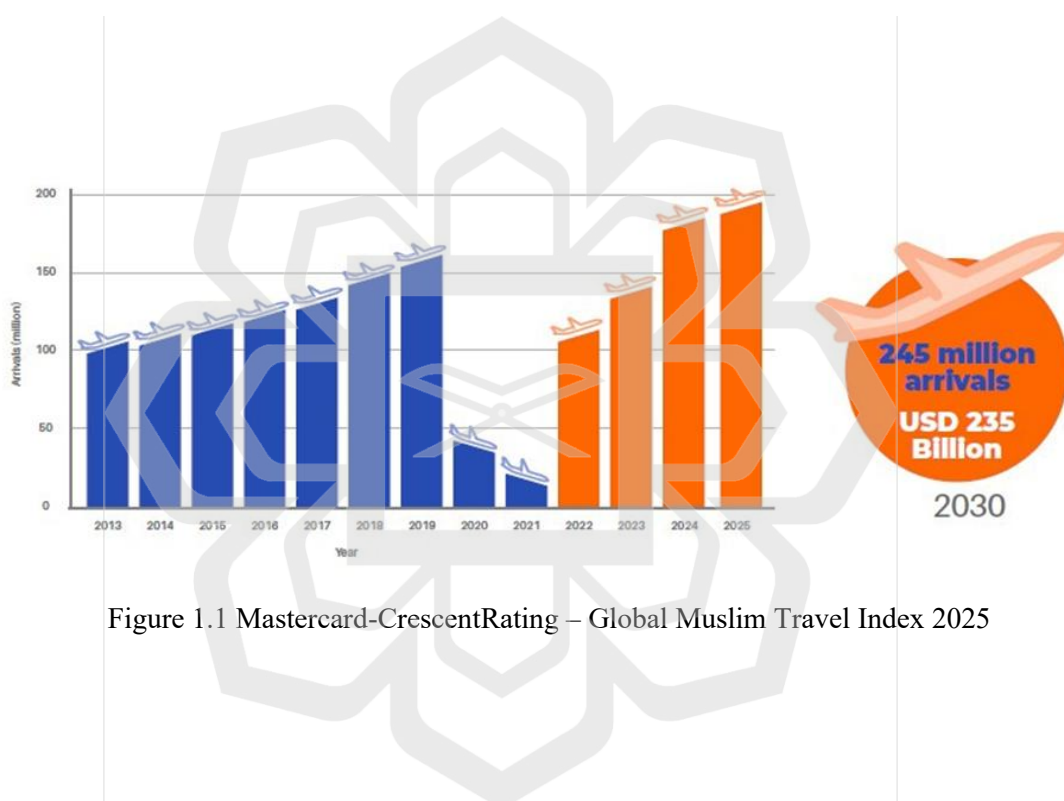


Figure 1.1 Mastercard-CrescentRating – Global Muslim Travel Index 2025

Muslim minority countries are currently showing a great interest in the Muslim Friendly tourism sector. Singapore has been ranked as the top Muslim Friendly destination amongst non-OIC (Organisation of Islamic Cooperation) countries for eight consecutive years. The United Kingdom has climbed up to the 2nd position. Hong Kong, Taiwan, Thailand, Ireland, Australia, and Philippines continue to be featured within the top 10 destinations according to the Mastercard-Crescent Rating Global Muslim Travel Index 2025.

Table 1.1 Mastercard-CrescentRating – Global Muslim Travel Index 2025

Non-OIC Rank	Change VS 2024	MTI 2025 Rank	Destination	GMTI 2025 Score	Change VS 2024
1	0	11	Singapore	71	+5
2	0	22	United Kingdom (UK)	63	+5
3	+1	23	Hong Kong	62	+10
4	-1	27	Taiwan	58	+3
5	0	29	Thailand	57	+6
6	+2	34	Ireland	54	+6
6	+2	34	Australia	54	+6
8	+4	36	Philippines	53	+7
9	-3	38	Spain	52	+3
9	-1	38	Germany	52	+4
9	+3	38	South Africa	52	+5

Singapore, as the leading destination for Muslim Friendly tourism for eight consecutive years, earned a score of 71, a five-point increase from the previous year, on the Global Muslim Travel Index (GMTI) 2025. Several factors have contributed to this success. One important aspect is Singapore's stringent halal certification process, which is strictly managed by the Islamic Religious Council of Singapore (Majlis Ulama Islam Singapura or MUIS). This process involves the certification of various entities, including suppliers, hotels, restaurants, and manufacturing establishments, as halal following thorough inspections. Additionally, MUIS, being a statutory body, not only oversees the halal certification process but also plays a pivotal role in advising the President of Singapore on Islamic matters (Majlis Ulama Islam Singapura, n.d.). This dual responsibility significantly enhances the governance of the Muslim Friendly tourism sector in Singapore, fostering trust and confidence among Muslim tourists.

In 2015, Taiwan was ranked tenth in the GMTI non-OIC rank and, over the past decade, has risen to fourth place in the GMTI 2025. Part of what allowed this was when the Government of Taiwan enacted the New Southland Policy (NSP) in 2016, where Muslim Friendly tourism was included as one of the platforms of the policy and has subsequently seen more intensive development in the years that followed. Among the

four strategic policies in the NSP, developing the halal tourism industry is included in the foremost policy of resource sharing (Setyaningsih, 2021), resulting in the rapid growth of the Muslim Friendly tourism sector in Taiwan. Setyaningsih (2021) further states that the Ministry of Transportation and Communication coordinates the implementation of halal tourism industry support nationwide while the Tourism Bureaus of each of their respective cities coordinates the development of halal tourism in their jurisdictions. This coordinated approach signifies a comprehensive effort by the government to promote Muslim Friendly tourism, with proper policies, procedures, and proper governance in fostering the sector's growth in Taiwan. This remarkable achievement makes Taiwan a great case study for Australia to follow in developing Muslim Friendly tourism.

Japan's government and tourism industry have collaborated to attract more Muslim visitors. Beyond developing infrastructure, Japan also offers affordable airfares and visa-free entry for several countries, including Muslim-majority nations such as Indonesia and Malaysia, which has resulted in a significant increase in Muslim tourist arrivals (Damhuri, 2020). To further enhance services, the Japan National Tourism Organisation (JNTO) has launched a dedicated website to help Muslim travellers easily find halal food, suitable accommodation, and nearby places of worship (JNTO, 2023). Such initiatives have supported Japan in securing its position among the top 10 destinations in the Global Muslim Travel Index.

1.2 WHY CHOOSE AUSTRALIA FOR THIS STUDY?

Australia has recently positioned itself as a Muslim Friendly tourism destination and has earned recognition in the Muslim travel sector, achieving 6th place among non-OIC destinations in the Global Muslim Travel Index 2025 within a relatively short timeframe. Figure 1.2 illustrates the trend of Muslim tourist arrivals to Australia between 2014 and 2024.

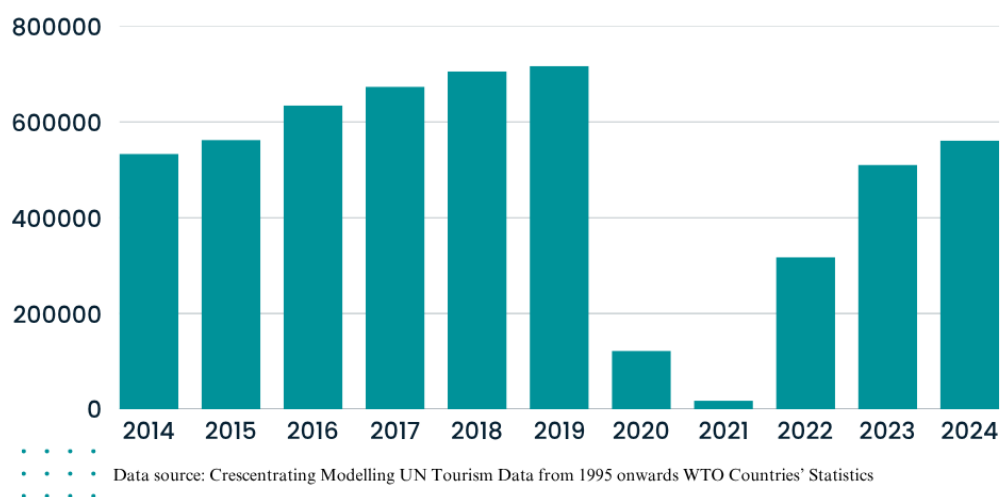


Figure 1.2 Muslim Tourist Arrivals in Australia (2014-2024)

As a tourism destination, Australia has been competitive for many decades on the global stage in attracting inbound tourists from a variety of countries and cultures (Moyle et al., 2014). Nevertheless, there is significant potential for Australia to enhance its standing further among non-OIC member countries by concentrating on the introduction and development of tourism policies, procedures, and governance specifically tailored for Muslim Friendly tourism.

Australia's tourism industry generates \$152 billion for the national economy, supports more than 300,000 businesses, and provides jobs for over 660,000 Australians. It is also ranked among the world's highest-yielding destinations, with international tourists spending \$44.6 billion in 2018–19 (Department of Foreign Affairs and Trade, 2021). In addition to attracting Muslim travellers from the Middle East, Africa, the Americas, and Europe, Australia also appeals strongly to the predominantly Muslim tourist market from Southeast Asia, making this demographic an equally significant source of arrivals.

Table 1.2 Short-term Visitor Arrivals, Australia - Top 10 Source Countries - 2022-23
(Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, Australia
(September 2023)).

Rank	Country of Residence	2012-13 (‘000)	2018-19 (‘000)	2021-22 (‘000)	2022-23 (‘000)
1	New Zealand	1,182.54	1,407.24	191.64	1,082.42
2	UK, CIs & IOM	637.98	718.58	133.85	573.56
3	USA	509.8	811.98	100.1	557.29
4	India	171.9	372.04	134.47	383.38
5	Singapore	306.92	464.85	121.06	357.43
6	China(b)	689.62	1,432.89	35.56	241.73
7	Japan	339.11	484.3	15.55	173.15
8	Korea, South	201.45	280.71	19.31	169.72
9	Indonesia	141.59	214.84	26.89	164.9
10	Malaysia	252.11	389.35	20.98	143.96
	All countries	6,293.41	9,343.99	1,191.83	5,856.44

a. Top 10 source countries based on year ending June 2023.

b. Excludes SARs and Taiwan.

It is interesting to note that two Muslim-majority countries have secured places in the top 10 for visitor arrivals into Australia: Indonesia was Australia’s ninth largest inbound market for visitor arrivals in 2023, and Indonesian tourists generated \$800 million in total expenditure in 2018 and became the 15th largest market overall for total visitor spending and visitor nights. Malaysia was Australia’s 10th largest market demographic for visitor arrivals in 2023, and visitors from Malaysia generated \$1.3 billion in total expenditure in 2018 and became the 9th largest market for total visitor spending and 10th for visitor nights (Australia Marketplace Southeast Asia, 2019). However, in addition to the above two Muslim countries, there are a vast sum of Muslim tourists who arrive both from other Muslim-majority and Muslim-minority countries in Australia regularly. Overall, the level of spending by Arabs is relatively high (Alganam, 2011), and they are generally viewed as a high-yield and coveted tourism market. This

confirms the opportunities and the need prevailing for Australia to further develop its Muslim Friendly tourism sector.

Table 1.3 illustrates the short-term arrivals of Muslim travellers to Australia in 2023 and 2024 along with their countries of origin. Among the top ten source countries, 67% of Muslim travellers arrived from Southeast Asia, 13% from South Asia, and 10% from the Middle East.

Table 1.3 Short-term Muslim Visitor Arrivals, Australia - Top 10 Source Countries – 2023-2024 (Source: CrescentRating CR MAPS platform (2025)).

Rank	Country of Residence	Muslim Inbound 2023	Muslim Inbound 2024
1	Malaysia	143,635	165,756
2	Indonesia	106,697	122,695
3	Singapore	43,451	50,519
4	United Arab Emirates	29,778	34,210
5	United Kingdom	28,486	33,571
6	India	25,484	29,499
7	Pakistan	16,125	18,548
8	New Zealand	13,844	16,300
9	Saudi Arabia	13,234	15,223
10	Bangladesh	12,257	14,104

Despite the emerging inbound Arab market, little is known about how Australia is promoted to, or viewed by the “Arab world”. This is especially true of the Gold Coast in Queensland, which, because of its renowned beaches, shopping, and family-friendly apartment-style accommodation, is becoming a destination of choice for many Arab visitors, (Michael et al., 2011; Mick, 2007).

In this research, existing literature has been examined regarding Muslim Friendly tourism & hospitality in Australia, however, the scope of research conducted

in this area has been sparse. It can be presumed that, due to a lack of research on the subject, there is a lack of awareness amongst stakeholders in the tourism industry of Australia about the potential returns from supporting Muslim Friendly tourism. It can therefore be presumed that the true potential in developing, managing and placing Australia as a premier destination for Muslim Friendly Tourism and Hospitality has not yet been fully explored.

This study makes an original academic contribution by developing a theoretically grounded governance framework for Muslim-Friendly Tourism and Hospitality (MFTH) within the Australian context, a non-Muslim-majority setting that remains comparatively underexplored in halal tourism literature. Moreover, this study integrates governance theory and stakeholder theory to establish a robust theoretical foundation for examining how regulatory structures, institutional norms, and multi-actor coordination mechanisms shape the development, implementation, and sustainability of MFTH in Australia.

1.3 PROBLEM STATEMENT

Australia is one of the leading tourist destinations worldwide, with many attractive features for tourists: beautiful landscapes, diverse wildlife and vibrant cities. The country's commitment to sustainability and accessibility further contributes to its appeal as a top-tier travel destination. However, there are several shortcomings in play that could affect its appeal as a Muslim Friendly tourist destination that are worth addressing.

1.3.1 The lack of Muslim Friendly Tourism and Hospitality Service Offerings

Australia's tourism industry is renowned for its diverse landscapes, distinctive wildlife, rich cultural heritage, and vibrant cities. However, several limitations may hinder its attractiveness as a Muslim Friendly destination. One of the key challenges lies in the limited availability of halal food, particularly in certain regions. Broader stressors linked to socioeconomic conditions, housing, and employment, as well as difficulties in accessing halal products, have also been identified as obstacles (Kavian et al., 2020). Expanding the availability of halal food and ensuring its quality is a critical step in meeting the expectations of Muslim travellers and enhancing their overall tourism experience. This applies not only to Australia but also to other non-Muslim majority destinations (Jia & Chaozhi, 2021). Mostafa (2020) further demonstrated that halal food availability, nutritional value, accreditation (e.g., certification and logos), and hygiene and safety standards are essential in assessing halal food performance at international destinations. Although Australia has been exporting halal meat since the 1950s, there is still a need to strengthen the general understanding of halal principles (Zulfakar, 2015).

Similar challenges are observed in other non-Muslim countries such as New Zealand, Japan, Korea, the United Kingdom, various European nations, and the United States, where Muslim tourists often face difficulties in finding halal food and beverages, as well as Shariah-compliant accommodation, hotels, products, and activities (Ramli & Zawawi, 2017). Another pressing issue concerns the limited availability of Muslim Friendly facilities, especially prayer spaces. The presence of mosques or designated prayer rooms in airports and major tourist destinations is a significant factor for Muslim travellers. In some regions of Australia, such facilities are scarce or completely absent, which can negatively affect the confidence of Muslim tourists when choosing destinations (Moshin et al., 2020). Nurdiansyah (2018) also highlights that failure to adequately address the rising global demand for Muslim Friendly travel experiences has prevented many international destinations, particularly those outside Muslim-majority countries, from fully capitalising on this growing market segment.

1.3.2 The Lack of Resources and Bureaucratic Challenges

In Australia, there are no official certification bodies responsible for approving restaurants, hotel kitchens, or food storage facilities, and there is no recognised Muslim Friendly Hotel Rating System. While Muslim Friendly hotels exist in larger cities, their services are generally limited to removing alcohol from mini bars, offering halal food, and providing information on nearby Muslim Friendly restaurants. Although many restaurants in urban centres advertise themselves as halal, they are only self-certified because no official restaurant certification authority currently exists in Australia (Snapkauskaite, 2018).

Another challenge is the shortage of professionals trained in the halal industry. This issue extends beyond the Muslim Friendly Tourism and Hospitality sector and affects the broader halal meat supply chain, including halal slaughtermen, supervisors, auditors, and laboratory technicians. Zulfikar (2015) found that even within existing certification organisations, which are not government-run, there remains a lack of qualified halal auditors and inspectors.

Competition in the Australasian region for Muslim Friendly tourism is also intense. Six destinations, namely Singapore, Taiwan, Thailand, Hong Kong, Japan, and the Philippines, were ranked within the top ten of the Global Muslim Travel Index 2022, all ahead of Australia. While countries such as Singapore, the United Kingdom, Germany, and France have long attracted halal travellers, recent trends indicate that Japan, South Korea, and Australia are becoming emerging players in this growing market (Liberato et al., 2020).

Another significant challenge concerns the issuance of Visitor visas to Australia for applicants from certain Muslim-majority countries. Many applicants, particularly from the Middle East, Turkey, Albania, Iran, Iraq, Egypt, Nigeria, Pakistan, and Bangladesh, have faced high rates of refusal, often due to increased scrutiny under the “Genuine Temporary Entrant” (GTE) requirements and risk assessments (BMS Global, 2025). Such visa-related barriers have the potential to undermine Australia’s competitiveness in attracting visitors from the Muslim world, limiting opportunities for tourism growth and engagement with these markets.

1.3.3 The Lack of Awareness and Support Systems

Research on the opportunities for Muslim Friendly Tourism in Australia remains limited, which has resulted in a lack of awareness among businesses and stakeholders about the potential benefits of developing this sector. This lack of understanding poses a challenge for tourism service providers, restricting their ability to meet the needs and expectations of Muslim travellers. Barriers such as cultural insensitivity, language differences, limited knowledge of Islamic practices, and unfamiliarity with dietary requirements continue to hinder the growth of Muslim Friendly Tourism and Hospitality worldwide, including in Australia. Abodeeb et al. (2015) observe that, despite a rise in the number of Arab tourists travelling globally in the twenty-first century, including to Australia, there is still little academic research on how Western destinations can effectively market to Arab visitors or prepare for an increasingly mobile Arab population. Similarly, Nurdiansyah (2018) highlights that Muslim travellers remain underserved due to tourism authorities and service providers lacking both awareness of the market's growth potential and understanding of this demographic's specific preferences and needs.

Tourism Australia, the country's national tourism body, is tasked with promoting Australia to both domestic and international visitors. In 2015, it launched a visitor guide for Muslim tourists, particularly targeting travellers from Malaysia, Indonesia, and Singapore. While this demonstrated initiative, Tourism Australia has largely overlooked other Muslim-majority regions such as the Middle East and North Africa (MENA), which represent significant untapped markets. Abodeeb et al. (2015) emphasise that understanding Arab culture and travellers' perceptions and motivations is crucial for creating effective tourism products. They further stress that Australian destination marketers must develop a strong image, identity, and brand while addressing and reducing any negative perceptions among current and potential Arab visitors.

These challenges reveal the absence of comprehensive systems or guidelines to promote and manage Muslim Friendly Tourism and Hospitality in Australia. Developing a governance framework tailored for this sector would provide the structure, processes, and mechanisms needed to guide and regulate tourism management across local, regional, and national levels. Such a framework would also

create a systematic basis for decision-making, coordination, and collaboration among stakeholders. Hall (2011) proposes governance typologies characterised by varying relationships between actors and steering modes. A well-designed tourism governance framework should balance economic benefits with the preservation of cultural and natural resources, ensuring that tourism contributes to the sustainable well-being of destination countries.

1.4 RESEARCH QUESTIONS (RQ)

The following key questions are derived from the problem statement.

1. What are the challenges and opportunities of implementing MFTH in Australia?
2. What are the factors that support the implementation of MFTH to the overall tourism economic development in Australia?
3. How to develop a suitable governance framework to assist policymakers and the relevant stakeholders in implementing MFTH in Australia?

1.5 RESEARCH OBJECTIVES (RO)

The aim of this research is to propose a governance framework for promoting, developing, and managing Muslim Friendly tourism and hospitality in Australia. This aim will be achieved via the following objectives:

1. To analyse the challenges and opportunities of implementation of MFTH in Australia.
2. To determine the factors that support the implementation of MFTH to the overall tourism economic development in Australia.
3. To develop and propose a suitable governance framework to policymakers and the relevant stakeholders in developing MFTH in Australia.

1.6 SCOPE OF THE RESEARCH

Australia is in its early stage of development of its Muslim Friendly Tourism and Hospitality sector due to a lack of any preexisting systems or guidelines. The scope of this research is to focus solely on Muslim Friendly Tourism and Hospitality related factors and the development of a governance framework that suits promoting MFTH in Australia. This research will be conducted in two leading states in Australia which are popular among domestic and international tourists, namely New South Wales (NSW) and Queensland (QLD). According to Australian tourism statistics, these two states comprise almost two-thirds of the share of the overall tourism industry in Australia. This study will be comprised of qualitative research conducted among selected tourism industry stakeholders such as hotels and restaurants, tour operators, governmental and educational institutions, tourism associations, and transport providers from both states.

1.7 SIGNIFICANCE OF THE RESEARCH AND THE EXPECTED OUTCOMES

The findings of this study will benefit Australia in developing a Muslim Friendly tourism and hospitality sector. Further, the introduction of a Governance framework to develop and manage MFTH in Australia would be a net value add - from a socioeconomic perspective - to the country. The findings of this research may serve the interests of various stakeholders in Australia such as:

1. Government policymakers such as Tourism Australia, the Australian Trade & Investment Commission, and the Department of Foreign Affairs and Trade of Australia in formulating policies and strategies to develop MFTH in Australia.
2. Service providers in the tourism industry, such as hotel and restaurant owners and managers, tour operators, transport providers, tourism industry associations, and destination marketing organisations (DMOs) in better understanding the needs of Muslim travellers in devising their service offerings.

3. Academic institutions such as universities and tourism research institutes, using their existing knowledge of Muslim Friendly Tourism and Hospitality in Australia, and would help such institutions to embark on further studies in this fast-growing industry sector.
4. Muslim Friendly Tourism standards for Australia and will create a pathway to compete in the global halal travel and tourism industry.
5. Muslim Friendly Tourism and Hospitality consultation resources for Western countries.

1.8 OPERATIONAL DEFINITION OF TERMS

The definition of terms may assist in understanding the important concepts used in the research.

1.8.1 Governance

Governance refers to self-organizing, inter-organisational networks characterised by interdependence, resource exchange, rules of the game, and significant autonomy from the state (Rhodes, 2007).

1.8.2 Halal

Halal refers to what is permissible under Islamic law, and it guides Muslims in every aspect of their lives, such as transactions, consumption, interaction, etc. (Izberk-Bilgin & Nakata, 2016).

1.8.3 Halal Tourism

Halal tourism focuses on the fulfilment of the needs of Muslim consumers, such as access to restaurants that are gambling-free, beverages that are alcohol-free, and foods that contain halal meat (Henderson, 2016).

1.8.4 Muslim Friendly

When used to refer to a service, a facility, or a destination, it means that it has taken into account the faith-based needs of Muslim travellers, but not necessarily all of their needs (Crescent rating, 2016).

1.8.5 Muslim Friendly Tourism

The term Muslim Friendly in the tourism industry denotes an attempt to make the tourism experience enjoyable to observant Muslims. As such it is almost akin to the concept of 'halal tourism' but in a wider context to include allowing Muslims to perform religious duties. In other words, Muslim Friendly destinations not only offer plenty of 'Halal' services (such as halal food and beverages, sex-segregated swimming pools, etc.) but also comfortable places for Muslims to perform their daily prayers (Battour, 2016).

1.8.6 Muslim Friendly Hospitality (MFH)

It refers to “the development and delivery of tourism services, facilities, and experiences that align with the values and religious practices of Muslim travellers. This includes the availability of halal food, prayer spaces, modest accommodations, family-oriented services, and the exclusion of non-permissible (haram) elements such as alcohol and gambling, while still maintaining inclusivity for non-Muslim tourists” (Battour, M., & Ismail, M. N. (2016).

1.8.7 Muslim Friendly Tourism and Hospitality (MFTH)

Muslim Friendly Tourism and Hospitality is the provision of travel and hospitality products and services that comply with Islamic principles that enhance Muslim travellers' satisfaction (Rahman et al., 2017).

1.8.8 Tourism

Tourism is a social, cultural, and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes (UNWTO, 2008).

1.8.9 Tourist

A visitor (domestic, inbound, or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise (UNWTO, 2008).

1.8.10 Tourism Governance

Tourism governance is therefore a complex and multidimensional issue in which the state and other actors depend on each other (Borges et al., 2014).

1.9 THESIS STRUCTURE

The study is divided into five chapters: introduction, literature review, research methodology, results and findings, discussions, conclusions and recommendations.

Chapter one starts with the introduction and background of the study, the problem statement, research questions, research objectives, the scope of the study, the significance of the study, operational definitions and organisation of the study.

Chapter two provides background information on Muslim Friendly Tourism and its current and future trends, the definition of “Halal” and “Muslim Friendly Tourism”, past literature related to Muslim Friendly Tourism, and the key service touchpoints of Muslim travellers, the halal industry and halal industry-related studies conducted in Australia, the tourism stakeholders, and the governance of tourism in Australia, and the Muslim Friendly Tourism and Hospitality related frameworks.

Chapter three describes the methodology of the research. The research design, sampling procedure and sampling size, instrument development, primary information sources – interviews, data collection, the details of data analysis and validity and reliability.

Chapter four presents the results and discussions of the study, including the justification of developing MFTH framework for Australia and answers all objectives of the study. In addition, this chapter provides a comprehensive review of the governance of Muslim Friendly Tourism and Hospitality (MFTH) in Australia.

Chapter five summarises the main findings regarding the study's objectives. Next, the researcher highlights the knowledge and practical contributions of the study. The researcher also highlights the study's limitations. Finally, the researcher offers recommendations for future research. See Figure 1.3.

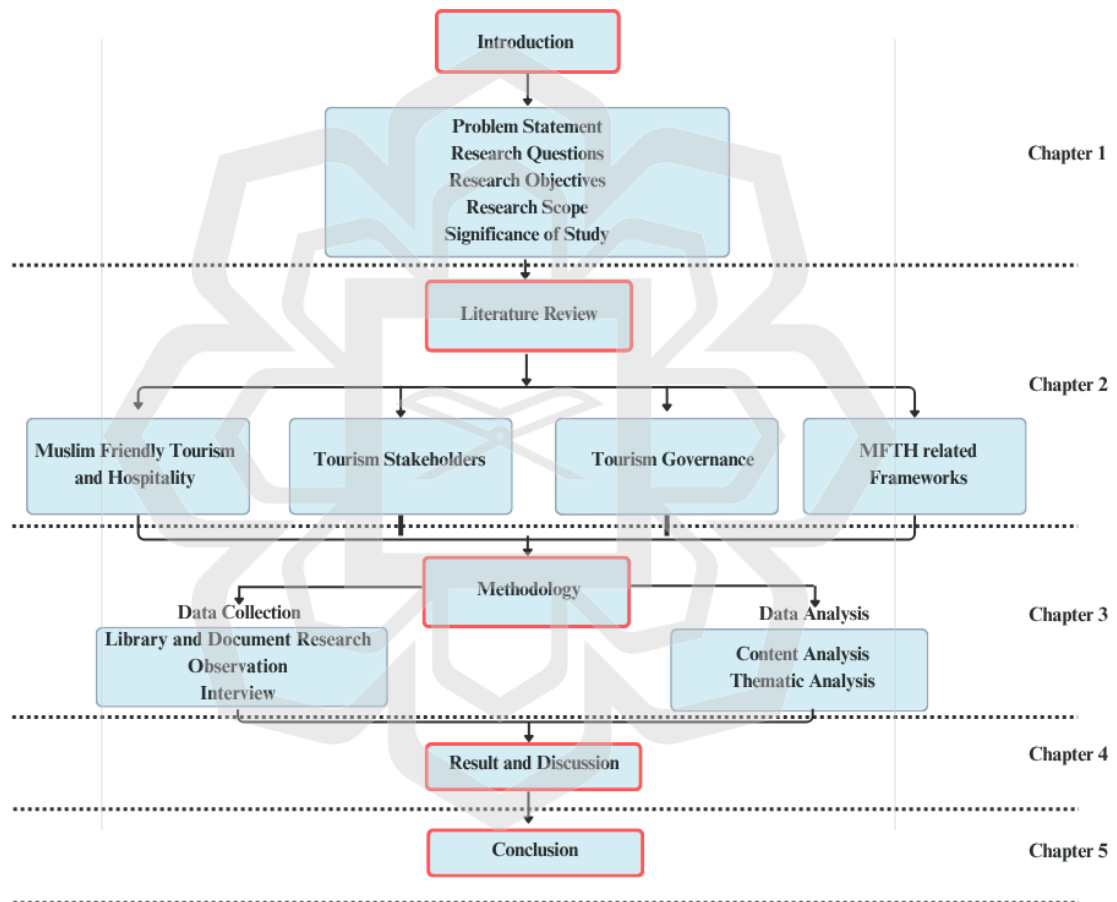


Figure 1.3 Research Structure

CHAPTER TWO

LITERATURE REVIEW

2.1 INTRODUCTION

This chapter discusses relevant works of literature related to Muslim Friendly Tourism and Hospitality (MFTH) and provides an extensive overview of how this concept has evolved in Muslim minority countries. It further examines the importance and impact of developing MFTH in these contexts. The discussion also elaborates on tourism and tourism governance in Australia. In addition, the chapter reviews the regulatory systems framework for Muslim Friendly hospitality (MFH) and offers a detailed analysis of the CrescentRating ACES 3.0 framework for MFTH.

2.2 DEFINITION OF HALAL

Halal is an Arabic term that means "permissible" or "lawful" according to Islamic principles and teachings. "Haram" is the opposite of halal and means unlawful or prohibited. One of the verses of Al-Quran, which orders Muslims to only eat halal food is in Surah Al-Baqarah, 2:168. The verse is as follows:

"O mankind, eat from whatever is on earth [that is] lawful and good and do not follow the footsteps of Satan. Indeed, he is to you a clear enemy".

(Al-Baqarah, 2:168)

Halal refers to actions, practices, or matters that are permissible according to Islamic law. It indicates that something is lawful and within the boundaries set by Islam. Halal is the baseline for what is considered acceptable and is a requirement for Muslims to abide by. Some examples include consuming halal food, engaging in permissible

business transactions, and fulfilling obligatory acts of worship such as prayer, fasting, Zakat (obligatory charity), and performing Hajj (pilgrimage to Makkah).

A Muslim should not only be paying attention to what they consumed, or their actions, or what is produced, but also how it is processed, and the intentions behind consumption or action (Razzaq et al., 2016). Halal needs to be understood in the context of Islamic law, based on what is *fard* (compulsory), *halal* (allowed), *mustahabb* (recommended), *makruh* (disliked), and *haram* (forbidden), which defines the morality of all human actions (Razzaq et al., 2016). For example, performing the five daily prayers at their designated times is *fard* (compulsory) for every Muslim. Consuming food that is prepared according to Islamic dietary laws is *halal* (allowed) and such foods must not contain pork, blood, alcohol, or any meat that is not slaughtered according to prescribed Islamic methods. Voluntarily giving to charity and helping those in need is *mustahabb* (recommended). Wasting food, water, or other resources unnecessarily is *makruh* (disliked) in Islam, and every Muslim must be mindful of their consumption and avoid extravagance and wastefulness in their day-to-day life. Consuming pork and any food products derived from pigs is explicitly *haram* (forbidden) in Islam. As stated above, the concept of *halal* and *haram* is not reserved only for food; some verses from the Quran also mention other things that are considered *haram* - gambling and the consumption of alcohol being among two examples - as mentioned in Surat al-Maaidah (5:90). The verse is as follows:

“O you who believe! Intoxicants (all kinds of alcoholic drinks), gambling, al-Ansab, and al-Azlam (arrows for seeking luck or decision) are an abomination of Shaitan's (Satan) handiwork. So, avoid (strictly all) that (abomination) in order that you may be Successful.”

(Surat Al-Maaidah, 5:90)

The prophet Mohammed (peace be upon him) said,

“Every intoxicant is Khamr (wine) and every Khamr is unlawful”

(Sunan Ibn Maja 3390)

The above Hadith of the prophet Mohammed (peace be upon him) reiterates the statement of the Quran.

The principles of halal and haram according to Sharia law (Islamic law) are derived from the Quran, the Hadith (the Prophet Mohammed's teachings) and the consensus of Islamic scholars. The principles of Sharia govern various aspects of life, including food and drinks, financial transactions, social interactions, personal conduct, and worship to name a few. It is also worthwhile to note that the interpretation and application of halal according to Sharia law can vary among different scholars and schools of thought within Islam.

The concept of *halal* extends beyond dietary compliance to encompass a holistic framework guiding Muslim travellers' behaviours, expectations, and decision-making processes within tourism and hospitality contexts. In Muslim-Friendly Tourism and Hospitality, halal principles directly shape the design and delivery of services, including the provision of halal-certified food and beverages, alcohol-free environments, prayer facilities, modest recreational spaces, and ethical business practices.

Importantly, the broader Sharia-based classifications such as *fard*, *mustahabb*, *makruh*, and *haram* influence not only what Muslim travellers consume, but also how they engage with tourism experiences. For example, the obligation (*fard*) to perform daily prayers necessitates accessible prayer spaces in hotels, airports, and attractions, while the prohibition (*haram*) of alcohol and gambling affects destination choice and accommodation preferences. Similarly, the discouragement (*makruh*) of wastefulness aligns with sustainable and responsible tourism practices, reinforcing the compatibility between Islamic principles and contemporary sustainability agendas.

Thus, halal in the context of tourism is not limited to compliance but represents a comprehensive value system that informs service standards, destination competitiveness, and the overall travel experience for Muslim tourists. Integrating these principles into tourism offerings is essential for destinations seeking to effectively cater to the growing global Muslim travel market.

2.3 DEFINING MUSLIM FRIENDLY TOURISM

The Muslim Friendly concept is a relatively new one and is rooted in the concept of halal. For a product or service to be halal or Muslim Friendly, it must meet the requirements of Islamic law. Halal tourism is a similarly new term, and is assumed to be similar to other terms, such as Islamic tourism, Sharia tourism, Sharia travel, halal-friendly tourism destination, Muslim Friendly travel destinations, and halal lifestyle (Jaelani et al., 2017), but regardless of the term(s) that are used, the core meaning for all of the above is related to compliance with the rules and guidance of the halal concept and Islamic Sharia (El-Gohary, H., 2016). See Table 2.1.

Table 2.1 Various Definitions of Muslim Friendly Tourism (Source: El-Gohary, 2016).

Author(s)	Definition
Islamic Tourism Centre - Malaysia (2015)	Any activity, event and experience undertaken in a state of travel that is in accordance with Islam.
Ala-Hamarneh (2011)	An economic, cultural and religious (conservative) concept.
Duman (2011)	All tourism activities by Muslims that originate from Islamic motivations and are realised according to Syariah principles.
Henderson (2010)	All product development and marketing efforts designed for and directed at Muslims.
Hassan (2007)	The type of tourism that adheres to the values of Islam.
Shakiry (2006)	All forms of tourism except those that go against Islamic values.

2.4 HALAL TRAVEL GLOSSARY

The following Table 2.2 illustrates the concepts and definitions widely used in the halal travel industry.

Table 2.2 Concept and Definition (Source: Crescent Rating, n.d).

Concept	Definition
Muslim travel	Muslims travelling for any purpose.
Muslim tourism	Muslims travelling for tourism.
Halal travel	Muslim travellers, who do not wish to compromise their faith-based needs while travelling for a purpose, which is permissible or it can also be defined as halal conscious travellers, travelling for any purpose, which is halal (permissible).
Islamic travel	Muslim travelling mainly for religious reasons and / or to visit Islamic religious sites.
Muslim Friendly destination	Destinations catering to the needs of the Muslim travellers.
Muslim Friendly facility/service	The service or the facility has considered some faith-based needs of Muslims travellers. Although halal-friendly facility/ service may also convey the same meaning. The term Muslim-friendly service/ facility is more appropriate.
Sharia compliant services/facility	- The service or the facility not only caters to all the key needs of the Muslim travellers, but also strictly adheres to many other Islamic requirements. This includes adhering to company governance and operations, which consider several Islamic requirements such as halal non-interest-based financing, among other aspects.

Halal tourism is one of the new phenomena that emerged from the growth of the halal industry. As halal tourism-related concerns advance within the tourism industry, many Muslim and non-Muslim countries are set to capture the Muslim tourist market by providing tourism products, facilities and infrastructures to cater to their needs (Samori et al., 2015). Halal tourism or Muslim Friendly Tourism has gained the attention of many countries and stakeholders in the tourism industry since the introduction of Shari'ah compliant hoteliers. Religion and belief may influence daily activities while travelling (Aziz, A. H. B. A. (2018), and tourism – and halal tourism by extension - are deeply rooted in Islamic Shari'ah and represent an important part of every Muslim life (El-Gohary, H., 2016); the Quran encourages people to travel and

explore the world created by the almighty Allah. The nine verses from the Quran which mention about travel are listed as follows (see Table 2.3):

Table 2.3 Quranic Quotes on Travel (Source: Aziz, 2018).

No.	Surah (Chapter)	Verse Number
1	Al-Mulk	15
2	Muhammad	10
3	Luqman	31
4	Yusuf	109
5	Ar-Rum	42
6	Ali 'Imran	137
7	Ar-Rum	9
8	An-Naml	69
9	Al-An'aam	11

The term 'halal tourism' is developed to fulfil the needs of Muslim tourists, comprising any products that have been set based on Islamic law (halal) (Ambali and Bakar, 2014; Shafii and Wan Siti Khadijah, 2012). Halal tourism has recently been gaining popularity and has now become one of the fastest-growing niches in the tourism industry (Elasrag, 2016:25). Bhuiyan et al. (2011) affirmed that halal tourism contributes to the increasing foreign exchange and employment opportunities. Halal tourism is considered the religious tourism subcategory created based on Islamic law. The Islamic principles are also implemented in other aspects, such as halal food, transportation, hotel, logistics, Islamic finance, and travel packages. To ensure “halal compliance”, halal certification guarantees all Muslim tourists that all the products, services, and tourist facilities have met the requirements stipulated in the Sharia, (Samori et al., 2016). In Japan, at Narita and Kansai International Airports, many prayer rooms and halal-certified Japanese foods, such as Udon and Ramen, are mushrooming in big cities. Prayer rooms are also available in shopping centres in big cities, such as Osaka, Kyoto, and Tokyo (Samori et al., 2016). Halal tourism can be defined from two

perspectives: from a Muslim travellers' point of view, halal tourism would refer to the engagement in objects and activities that adhere to Islamic teachings or facilitate the religious practices of Muslims (Battour and Ismail, 2016), and from the perspective of service providers, halal tourism is the provision of services that meet the needs of Muslim travellers.

2.5 NEEDS OF A MUSLIM TRAVELLER

Muslim travellers have multiple faith-based needs which vary in their level of importance. CrescentRating (2020b) has categorised the needs of Muslim travellers into three categories of escalating priority, also known as the Faith-Based Service Needs 2.0; these needs are sorted under “Need to have”, “Good to have”, and “Nice to have”. This categorisation helps service providers to better understand which services are the most important to Muslim travellers and provide them a general picture of services that are relevant to all Muslim travellers broadly, though there may be segments of Muslim travellers that may have additional. or fewer, preferences in each category. Figure 2.1 illustrates the needs of a Muslim Traveller.



Figure 2.1 Faith-based Service Needs 2.0 (Source: Global Muslim Travel Index 2019 CrescentRating – Mastercard).

Need to have emphasises the availability of halal food, prayer facilities, water-friendly washrooms at tourist destinations, and safety and security with no Islamophobia at visiting destinations. Good to have emphasises social causes, Ramadan fasting experiences, local Muslim experiences, such as Muslim heritage sites, and local mosques, and meeting the Muslim community. Nice to have emphasises recreational spaces with privacy and no non-halal activities including the sale and consumption of alcohol, discotheque, or gambling resorts in the vicinity. Practically, the understanding of Muslim travellers' needs and concerns can serve as a guide for service marketers, hospitality industry managers and policymakers to further develop their Muslim Friendly offerings (Said et al., 2022).

2.6 THE KEY SERVICE TOUCHPOINTS OF A MUSLIM TRAVELLER

The destinations can use the CrescentRating Halal Friendly Travel (CRAHFT) tool to identify the key touchpoints for Muslim Friendly services: this tool maps the Muslim traveller's journey along key service segments and the level of importance they are most likely to place when it comes to providing Muslim Friendly services. By carefully understanding this tool and implementing it, tourism stakeholders could prioritise their services accordingly to make Muslim travellers' journey worry-free. See Figure 2.2.

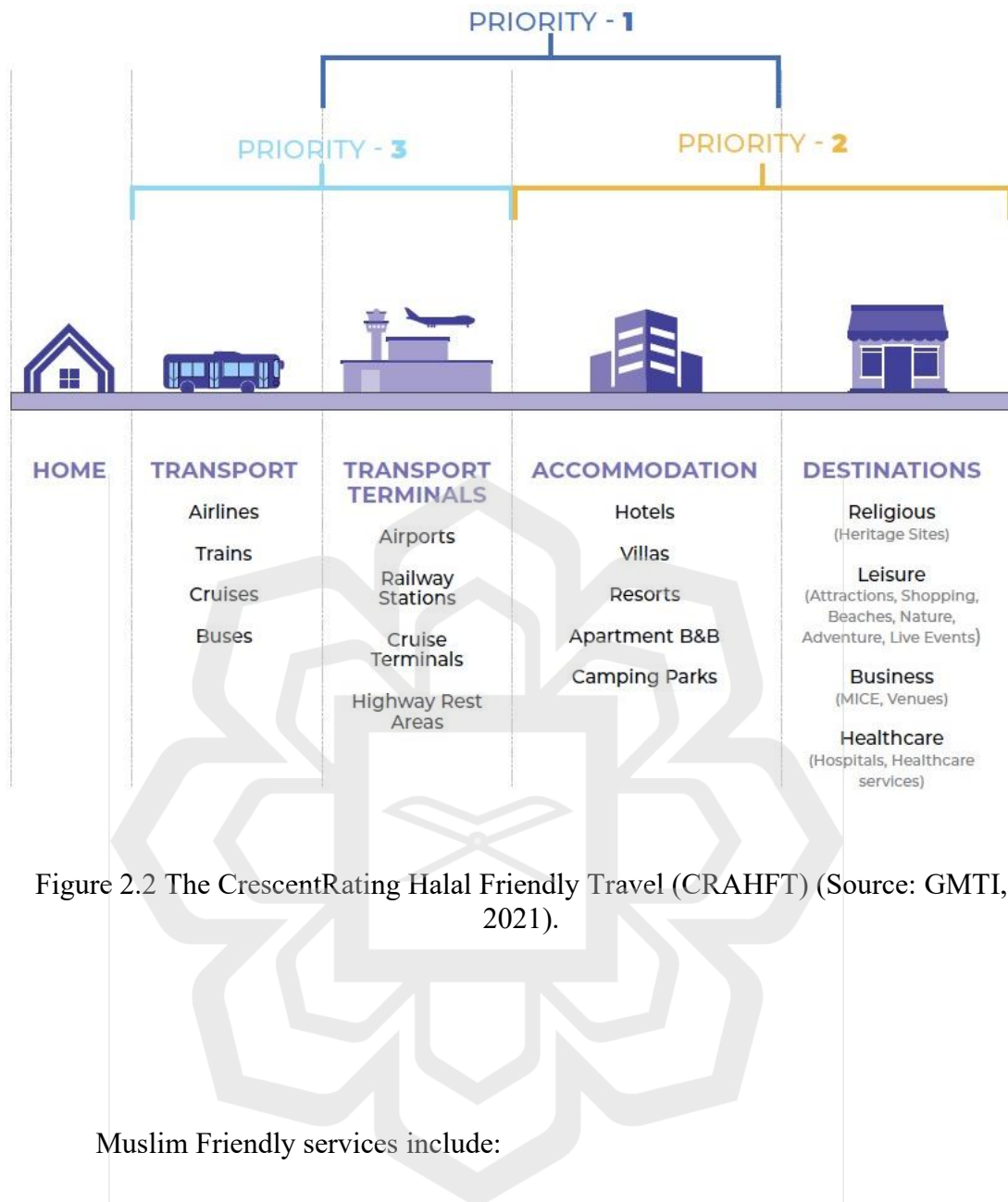


Figure 2.2 The CrescentRating Halal Friendly Travel (CRAHFT) (Source: GMTI, 2021).

Muslim Friendly services include:

Priority 1 encompasses critical service points such as airports and hotels, which serve as primary touchpoints in the travel journey and therefore require comprehensive provision of Muslim-friendly facilities.

Priority 2 includes event venues, shopping malls, and tourist attractions, where the integration of such services enhances the overall travel experience.

Priority 3 comprises supporting infrastructure, including highway rest areas, aircraft, and railway stations, which, while secondary in nature, remain important in ensuring continuity of Muslim-friendly provisions throughout the travel experience.

Destinations can use this insight to allocate their resources to service segments requiring the most urgent attention. However, it is important to note that all service segments remain important for Muslim travellers and that each service provider needs to deliver the required service experiences expected by customers. However, it is important to note that all service segments remain important for Muslim travellers and that each service provider needs to deliver the required service experiences expected by customers (CrescentRating, 2021).

2.7 AN OVERVIEW OF TOURISM GOVERNANCE

Governance within the tourism sector is inherently complex, as it involves multiple stakeholders, each with distinct priorities, interests, and agendas. Strengthening institutional governance is therefore essential to developing effective tourism policies and implementing organisational changes within government institutions that sustain competitiveness. Bramwell and Lane (2011) describe tourism governance as the process of creating social order through the regulation and mobilisation of collective action among stakeholders. Derco (2012) further stresses that effective governance requires collaboration between government and industry to establish organisational arrangements that promote cooperation. This involves coordination among service providers, supported by legal frameworks and clearly defined roles and responsibilities for different entities, including state, regional, and local governments as well as regional and local destination management organisations (DMOs). Pechlaner et al. (2012) link destination governance to corporate governance, suggesting that factors such as stakeholder involvement, efficiency, demonstrated performance, cooperation levels, and acceptance of the tourism organisation are central to achieving effective destination governance.

2.7.1 Conceptual Positioning of Muslim-Friendly Tourism and Hospitality (MFTH) Governance

Building on the preceding discussion, this study adopts an integrated conceptual approach to analyse Muslim-Friendly Tourism and Hospitality (MFTH), focusing on how halal principles are translated into policy, coordinated across multiple actors, and operationalised within tourism systems. In this context, MFTH is understood as a multi-level system involving government agencies, industry participants, and religious bodies operating within both formal and informal regulatory environments. This is particularly evident in the Australian context, where tourism governance is decentralised and market-driven, and where no unified national framework for MFTH currently exists. Within such a setting, halal is conceptualised not merely as a religious requirement but as a normative foundation that informs policy development, regulatory practices, and service delivery. The effectiveness of MFTH is therefore shaped by the extent to which different actors such as policymakers, tourism organisations, halal certification bodies, service providers, and Muslim travellers can align their roles and expectations. At the same time, MFTH is viewed as a system of value co-creation, where the delivery of Muslim-friendly experiences depends on the integration of services across key touchpoints, including accommodation, food and beverage, transport, and attractions. The inclusion of the Regulatory Systems Framework further reinforces a systems-based perspective, highlighting the interconnections between policy, legislation, standards, implementation processes, and feedback mechanisms within a dynamic and evolving structure.

The reviewed literature collectively informs the development of the proposed MFTH governance framework by identifying key structural, operational, and contextual gaps. First, it establishes halal as a comprehensive value system that shapes Muslim travellers' expectations and behaviours, thereby requiring tourism systems to translate these principles into practical service standards and operational guidelines. Second, the literature highlights significant challenges, particularly in the Australian context, including fragmented policy approaches, inconsistencies in halal certification, and limited coordination across different actors within the tourism and hospitality sectors. Third, it emphasises the importance of collaboration and alignment among relevant stakeholders, as the current fragmented approach constrains the effective delivery of

Muslim-friendly services. Finally, through models such as the Regulatory Systems Framework and the CrescentRating ACES 3.0 model, the literature provides both structural and operational insights that guide the identification of key variables such as regulations, resources, challenges, opportunities, and determining factors used in this study. Together, these insights support the development of a context-sensitive, multi-level MFTH governance framework that integrates policy coherence, coordination mechanisms, and service system alignment, thereby enhancing both theoretical contribution and practical relevance in advancing MFTH within non-Muslim-majority destinations like Australia.

2.8 MUSLIM FRIENDLY TOURISM AND HOSPITALITY RELATED FRAMEWORKS

Muslim Friendly Tourism and Hospitality governance frameworks are strategic mechanisms designed to guide and regulate the industry's efforts in creating an environment sensitive to Muslim travellers' religious, cultural, and lifestyle preferences. The governance frameworks outline policies, procedures, and standards that guide tourism destinations, hotels, restaurants, and related service providers in offering Muslim Friendly services. The governments and businesses recognise the economic significance of this market segment. Therefore, development and adherence to a well-defined governance framework becomes strategically important. There are two MFTH industry-related frameworks referred to in this study:

- a) Regulatory Systems Framework for Muslim-Friendly Hospitality.
- b) Muslim Friendly Tourism and Hospitality framework for destinations.

The Regulatory Systems Framework for Muslim Friendly Hospitality describes creating regulatory guidelines or frameworks to ensure that MFH services are tailored to meet the needs and preferences of Muslim travellers. The regulatory framework consists of Government Policy, Laws and Regulation, comprises of Implementation Guidelines, Manual Procedures, Circulars and the lowest level of Quality Standards &

Term of References (Jais, A. S., & Marzuki, A, 2018). On the other hand, the Muslim Friendly Tourism framework describes how the destinations must encompass various aspects to ensure a welcoming and comfortable experience for Muslim visitors. Both these frameworks illustrate the overall governance of MFTH in a country or a destination.

2.8.1 Regulatory Systems Framework for Muslim Friendly Hospitality

The Department of Standards Malaysia (2015) classifies the MFH segment into three distinctive specialization which is the Food and Beverage, Accommodation and Travel and Tours. See Figure 2.3.

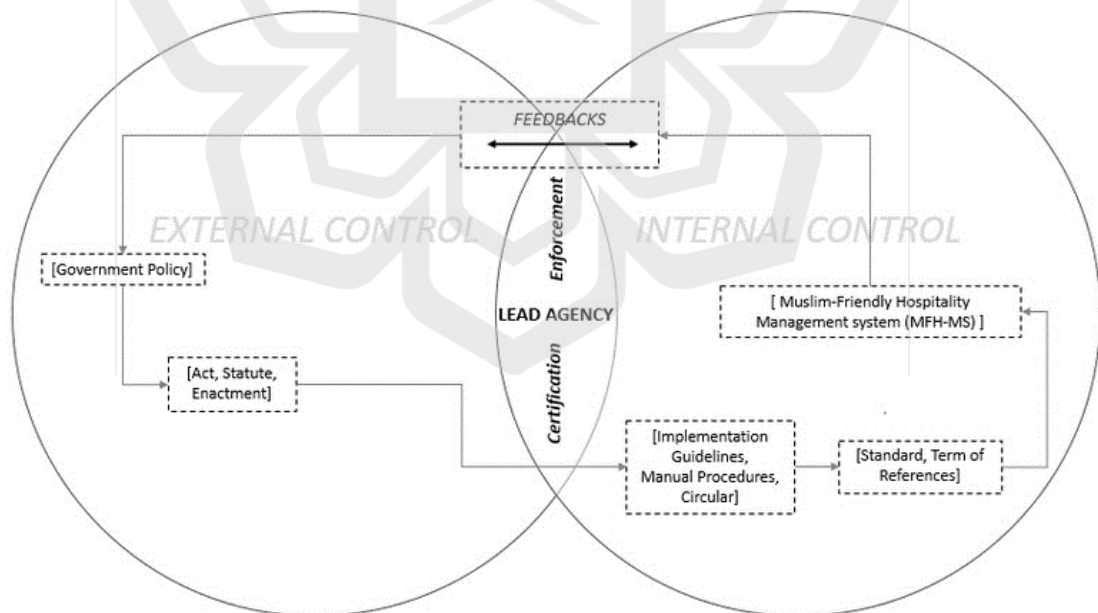


Figure 2.3 Regulatory Systems Framework for Muslim Friendly Hospitality (Source: Proposing a Muslim Friendly hospitality regulatory framework using systems approach).

When describing this regulatory framework, Jais, A. S., & Marzuki, A. (2018) state that each dotted box in Figure 2.3, signifies a smaller subsystem with their process. Each of these subsystems is contingent on each other as the outcomes will affect the rest of the subsystems in a continuous loop. In this framework, it starts with the Government Policy. The government will dictate the direction of the industry, by creating policies and an environment that support the development of the halal industry, which among others creates capabilities, infrastructure, capacity building, human capital development and financial support. At this stage, the government will determine which lead agency to take the administrative role in maintaining the systems. Below are the key elements included in the MFH regulatory framework (Jais, A. S., & Marzuki, A, 2018):

i. Government Policy on MFH

- a. The government must devise a policy on MFH for its existence and sustainability. Especially in the MFH sector, the tourism sector requires strong government policies to fully mature by formulating policies that create a conducive environment (Khairil, W. A., & Yuhanis, A. A. (2011). Islamic Tourism Centre Malaysia, (2013) insists that the policy and the legal framework are vital in ensuring the integrity of the MFH and alleviating the repercussion resulting from misusing the term “Muslim Friendly”.

ii. Act, Statute and Legislation

- a. Without proper and adequate legislative power, it is difficult to enforce as well as manage MFH as a practical system. Therefore, the governments need to introduce relevant acts and legislation tied directly to MFH for better control and governance of this sector.

iii. Implementation Guideline, Manual Procedures and Circulars

- a. There must be guidelines, circulars, or manual procedures available related to MFH services. The halal certification system must be regulated and strictly followed. It is important for the lead agency to comprehensive implementation guidelines and manual procedures on the adoption of MFH in the tourism sectors, together with its certification procedures.

iv. Standards and Terms of Reference

- a. The development and implementation of Standards and Terms of Reference (ToR) are crucial in the context of MFH products and services. The development and adherence to standards and ToR in MFH provide a structured and effective approach to creating an inclusive, respectful, and high-quality travel experience for Muslim travellers.

v. Internal Control Measures

- a. To uphold the integrity of Muslim Friendly hospitality as a credible rating and accreditation system, a set of internal control systems needs to be set in place. There must be a link between these internal control systems to a legislative document, which has to bear in authority. It is recommended to be used alongside with established standards to best ensure the accountability of the MFH practices through systematic management.

vi. Lead Agencies

- a. There must be a government agency that must be given the task to coordinate and lead in the implementation of MFH in a country. Over time, this agency can become a point of reference among stakeholders and industry players and be seen as an industry expert for MFH in that respective country. The agency must be bestowed with the necessary legislative power to ensure and uphold the accountability of Muslim Friendly implementation in that country.

vii. Feedback systems

- a. The feedback system is vital to ensure that the process is running according to its intended objectives, acting as a check and balance tool, and providing consistent data on the wellbeing of the systems. It also acts as a continuous measure of quality improvement through responses, either positive or negative feedback. The Lead agency's task is to collect, analyse and propose a continuous improvement of existing systems to preserve the integrity of MFH practices from the policy implementation to the application of MFH at the operational level.

2.8.2 Muslim Friendly Tourism and Hospitality Framework for Destinations

CrescentRating (2021) has created a model framework for creating a more Muslim Friendly destination, known as the CrescentRating ACES model. ACES stands for Access, Communications, Environment, and Services. This model evaluates the level of inclusivity and supports that destinations provide in order to attract Muslim visitors. The ACES model categorises four key areas in which destinations need to improve to attract more Muslim visitors. Further, these four areas are classified under three major segments:

- i. Macro policies.
- ii. Market outreach.
- iii. Capacity & Capacity building.

ACES also highlights the need for multiple tourism stakeholders from various sectors to come together to truly create a more Muslim Friendly tourism environment. In addition, the ACES model can be used as a checklist by the researcher to highlight sectors that require more attention in the destination of developing MFTH. See Figure 2.4 and 2.5.

CRESCENTRATING ACES MODEL

Strategic tool based on the GMTI framework to enhance Muslim travel experience

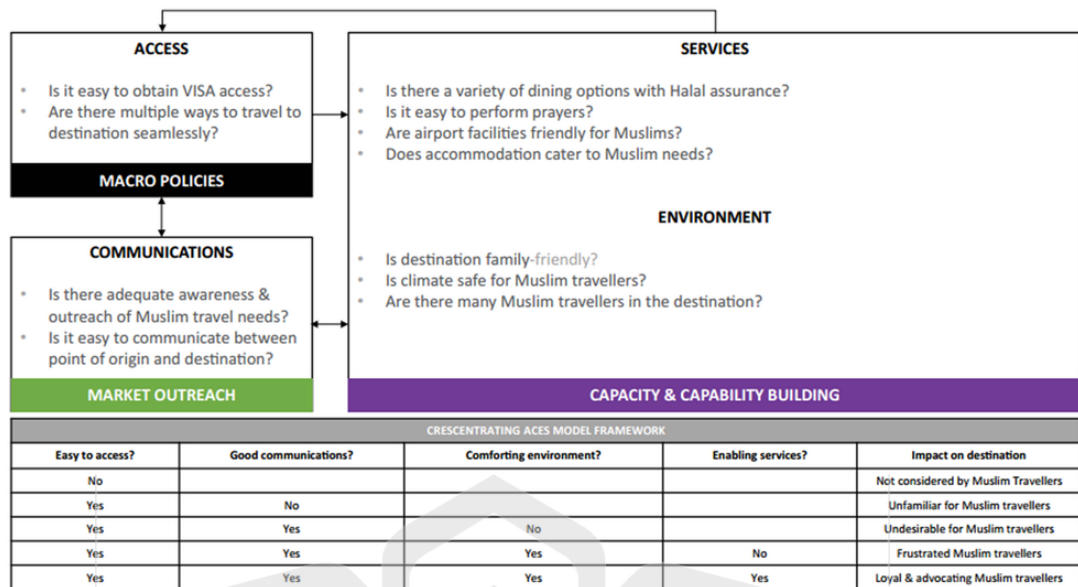


Figure 2.4 CrescentRating ACES model (Source: GMTI, 2021).

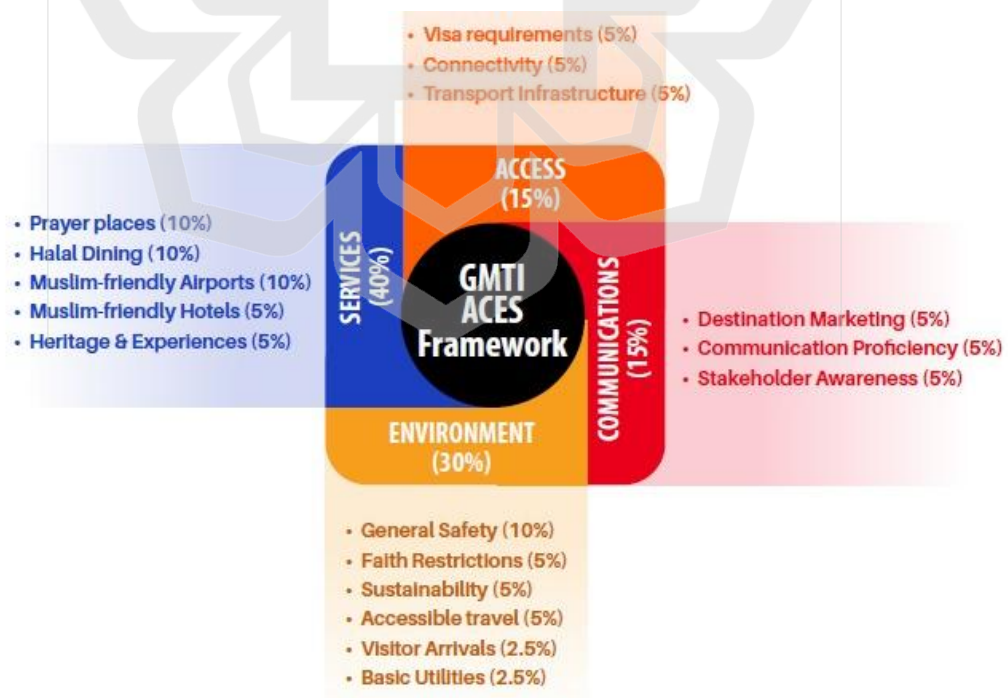


Figure 2.5 ACES 3.0 Framework (Source: GMTI, 2025).

The four key areas of the ACES model are as follows:

a) Access – (15% total weightage)

Destinations that are more difficult to access are less likely to be considered by travellers. Macro-level policies of the destinations must address this primary factor of access before taking any other initiatives. Access is a key strategic area encompassing visa requirements, connectivity, and transport infrastructure. By considering these factors, the Access criteria may provide insights into how accessible a destination is for Muslim travellers and help identify areas for improvement.

b) Communications – (15% total weightage)

With destinations having ease of access, the next step is to have good communications - both in terms of awareness and in terms of the communications services offered between the destination and country of origin. A destination with poor outreach will remain relatively unfamiliar for Muslim travellers and therefore be less likely to be considered as a potential destination. Communications criteria include language proficiency in destinations based on the languages used by travellers, as well as the ease of communications and the availability of communication through digital means in the destination. These factors provide insight into a destination's communication strengths and help improve its appeal to Muslim travellers.

c) Environment – (30% total weightage)

Destinations next must ensure that the overall environment of the destination is comfortable. This area refers to factors regarding the environment of the destination such as safety, accessibility of travel, basic utilities, Muslim visitor arrivals, any restrictions based on or against one's faith, etc. These factors provide insight into how supportive and appealing a destination's environment is for travellers. An environment that is not friendly and alien to Muslim travellers will generally create an undesirable experience.

d) Services – (40% total weightage)

The final critical area is to ensure that the services in the destination enable Muslim travellers to travel as they please, whilst remaining capable of abiding by their religious needs wherever they are. To first attract then subsequently sustain the growth of Muslim travellers, facilities must cater to the faith-based

needs of Muslim travellers at all key points, including halal dining facilities and spaces for prayers, the two foremost of Muslim travellers. Furthermore, the criteria also encompass Muslim Friendly airports, hotels, heritage sites, and cultural experiences. These elements emphasise how well a destination meets the practical and cultural requirements of Muslim travellers by offering appropriate accommodations, prayer spaces, halal dining choices, and meaningful opportunities for cultural engagement.

This study will employ the regulatory systems framework for Muslim Friendly hospitality and the ACES 3.0 framework for Muslim Friendly Tourism and Hospitality for destinations to identify its research variables. The research variables will be categorised into five components, including regulations, resources, challenges, opportunities, and determining factors, during the development of the research instruments.

2.9 MUSLIMS IN AUSTRALIA

Islam is a minority religion in Australia, yet it is represented by a diverse and steadily growing community. The earliest recorded Muslim connection to Australia dates back to the 1750s, when fishermen from southern Sulawesi made contact with Indigenous peoples in northern Australia. More permanent settlement began in the 1860s with the arrival of Afghan cameleers, who contributed significantly to inland transport and development. Today, Muslims form a small but important religious group in Australia, supported by mosques, Islamic schools, halal food outlets, cultural centres, and community organisations that serve their needs. According to the 2021 Australian Census, 813,392 people identified as Muslims, representing approximately 3.2% of the national population (Australian Bureau of Statistics, 2021).

Muslims in Australia come from a wide range of cultural backgrounds and follow diverse Islamic traditions. They make valuable contributions to Australian society across multiple fields, including education, healthcare, business, the arts, and

sports. As such, Islam plays a meaningful role within Australia's multicultural identity. Local Muslim communities also contribute to tourism and hospitality, particularly through the establishment of halal-certified restaurants and eateries in major cities and suburbs. A notable initiative is the Islamic Museum of Australia, founded in May 2010, which showcases Islamic art and highlights the historical and cultural contributions of Muslims both within Australia and globally (Islamic Museum of Australia, n.d.).

2.9.1 Other Religious Communities in Australia

Australia is among the most successful multicultural societies in the world, uniting a multitude of cultures, experiences, beliefs, and traditions. Australia has a rich history of migrants contributing to the country's social and economic fabric, and Australia's religious statistics provide an indicator of cultural identity and ethnicity. Table 2.4 illustrates the distribution of the top 10 religions by population in Australia.

Table 2.4 Religion Ranked by Size (Source: Australian Bureau of Statistics, 2021).

Australia - Total persons (Usual residence)	2021		
	Religion	Number	% Greater Capital Cities %
	Western (Roman) Catholic	4,994,187	19.6 20.1
	Anglican	2,496,267	9.8 8.1
	Islam	813,395	3.2 4.5
	Christian	688,443	2.7 2.8
	Hinduism	683,995	2.7 3.7
	Uniting Church	673,267	2.6 2.0
	Buddhism	615,822	2.4 3.2
	Presbyterian and Reformed	414,889	1.6 1.4
	Greek Orthodox	390,961	1.5 2.1
	Baptist	347,335	1.4 1.4

2.10 HALAL INDUSTRY IN AUSTRALIA

Australia has been associated with the halal industry for decades by becoming one of the most significant contributors in the production of halal meat exports to the rest of the world. Taking advantage of its rich availability of meat livestock and established capability for mass production of red meat and meat products, Australia has become one of the biggest contributors to the halal meat market (Marzuki, Hall & Ballantine 2012a). Australia is also known as the world's top halal meat producer and exporter since the 1980s, alongside Argentina, Brazil, New Zealand and the United States (Zurinna Raja, 2006). Australia exported AU\$3.1 billion of meat and live animals to Organisation of Islamic Corporation (OIC) countries in 2018, making it the second-largest exporter after Brazil. Australia's second largest OIC export was cereals, representing AU\$1.9 billion in value, (Food Processing, 2019). Australia is also known as the first and only country in the world which has a government-supervised halal meat program. All Australian meat processing facilities that export to Islamic markets are required to comply with the Australian Government Authorised Halal Program (AGAHP). This program is jointly managed by Islamic societies and the Department of Agriculture, Fisheries and Forestry (2023) to ensure that meat production meets both international food safety standards and Islamic religious requirements.

Islamic banking and finance constitute a fast-growing sector in Australia, with services available for more than 30 years through various funding channels. Nevertheless, as of 2022, the country did not have an official Islamic bank operating under a fully unrestricted banking license. Instead, a number of banks and financial institutions provide Islamic banking products within a limited and specialised scope, both locally and internationally, and some Australian banks have established dedicated Islamic banking divisions (Ijarah Finance, n.d.). Recently, Australia licensed its first-ever Islamic bank called the Islamic Bank of Australia (IBA), and IBA will be the first Australian bank to offer a full suite of retail and business banking services all without interest, and fully Sharia-compliant for the first time in Australian history (Techwire Asia, 2022). In addition, Crescent Wealth, Australia's only prudentially regulated Islamic Superannuation fund, continues to grow exponentially.

Australia witnesses an annual event called Halal Expo Australia, which is one of the only national events of its kind in Australia, showcasing halal food, products and services as well as the healthy halal lifestyle as it is realizable within Australia. HEA is always a large multicultural & Islamic event and it is held in the major cities of Australia. HEA also always provides unique opportunities for both local and overseas halal industry players, halal certification bodies, Islamic leaders, interfaith leaders, and ministry representatives to meet and seek consensual responses on critical issues relating to not just the halal industry but in schools of thought such as professional ethics and harmonious relations.

The Governmental organisations of Australia have been engaging with the global halal industry stakeholders for several years to promote the halal industry. In 2022, Austrade (Australian Trade and Investment Commission) partnered with Malaysia's Halal Development Corporation (HDC) and organised the World Halal Business Conference Circuit in the city of Melbourne (Austrade, 2022). Several local and international halal industry players had a series of expert panel discussions on halal industry-related matters, potential commercial partnerships, understanding of commercial opportunities, and networking with heads of governmental organisations of both countries and the policymakers.

2.11 MUSLIM FRIENDLY AND HALAL INDUSTRY RELATED STUDIES CONDUCTED IN AUSTRALIA

There have been several studies conducted by academic institutions in Australia related to the halal industry. However, there have been only a few research conducted on the Muslim Friendly tourism industry. However, most of the research has been conducted in the areas of Islamic finance followed by the halal food industry. The following table 2.5 illustrates some of the research work carried out in Australia.

Table 2.5 Previous Researchers on Muslim Friendly Tourism and the Halal Industry in Australia.

Authors	Topic	Focus of the study
Jamila Abodeeb, Erica Wilson, and Brent Moyle, (2015)	Shaping destination image and identity: insights for Arab tourism at the Gold Coast, Australia.	Explore how destination image can be shaped, created, and crafted, from an induced-source, supply-side perspective to better cater to Arab visitors, on the Gold Coast, Australia.
Sarhan, N. M., McMurray, A., & Kopanidis, F. (2015)	The Challenges and Opportunities in Addressing the Needs of Middle Eastern Tourists: An Australian Cultural Perspective	This paper focuses on the specific needs of Middle Eastern tourists visiting the Gold Coast, Queensland, Australia, aiming to provide insights and recommendations for the tourism sector.
Noela Michael, (2013)	Understanding Tourist Motivations: Emirati Leisure Travel to Australia	Emirati nationals from the cities of Abu Dhabi and Dubai their motivations to undertake leisure travel to a western country like Australia.
Yvette Reisinger, (1997).	Cross-cultural differences in tourism: Indonesian tourists in Australia.	This paper focusses the cultural differences between the Indonesian and Australian populations in a tourism context and recommends that such cultural understanding should be the basis of employee training in appropriate sectors of the tourism industry.
Voloder, L. (2015).	The “Mainstreaming” of halal: Muslim consumer citizenship in Australia.	The ways halal consumption works to produce local, national, and global orientations in citizenship and belonging for Australian-Muslims.
Foorough Kavian, Kaye Mehta, Eileen Willis, Lillian Mwanri, Paul Ward, and Sue Booth, (2020)	Migration, Stress, and the Challenges of Accessing Food: An Exploratory Study of the Experience of Recent Afghan Women Refugees in Adelaide, Australia.	Explore the migration journey and food experiences of Afghani women refugees in both their transition country (Iran or Pakistan) and in Australia.
Delma Poniman, Sharon Purchase, Joanne Sneddon, (2015).	Traceability systems in the Western Australia halal food supply chain.	Understand how individuals in facilitating organisations perceive the halal idea logic and the benefits that a traceability system can provide to the halal food processing industry.
Mohd Hafiz Zulfakar, (2015)	Australia’s Halal Meat Supply Chain (AHMSC) Operations: Supply Chain Structure, Influencing Factors and Issues.	Understand the current halal meat supply chain structure and examines the roles and responsibilities of the various stakeholders involved in its operations.
Salim Farrar, (2011)	Accommodating Islamic Banking and Finance in Australia.	Providing a general review of IBF from a legal perspective and sets out the regulatory framework and assesses the extent to which it obstructs the development of IBF in Australia.

2.12 TOURISM IN AUSTRALIA

Australia's tourism industry is an important sector of the country's economy, contributing significantly to employment, income, and economic growth. Australia's natural beauty and diverse cultural experiences make it a popular destination for international and domestic tourists. The country is home to numerous iconic attractions, such as the Great Barrier Reef, Uluru National Park, the Sydney Opera House, Blue Mountains National Park, and the Great Ocean Road, among others. In addition to the above attractions, there are several places that Muslim tourists would prefer visiting during their trip such as the Islamic Museum of Australia (IMA), situated in Melbourne and providing insights into Islamic art, culture, and history through various exhibits and interactive displays. Islamic Cultural Centres and prominent mosques in the main cities including the Auburn Gallipoli Mosque is an Ottoman-style Mosque situated in a suburb of Sydney. In addition, the Broken Hill Mosque in NSW is one of the most intriguing heritage sites built in 1887, it's now the only surviving mosque built by Afghan cameleers in Australia (Broken Hill City Council). The Gold Coast is a coastal city in southeastern Queensland and is located on the east coast of Australia. The Gold Coast does have a long history with Middle Easterners. While the numbers of tourists to Australia from Arab countries and the Gulf States are comparatively small, they are a high-yield market and of growing importance for certain destinations like the Gold Coast (Abodeeb et al., 2015).

2.12.1 International Visitors to Australia from June 2019 to June 2024

As of June 2024, Tourism Australia reported around 7.97 million international arrivals, reflecting year-on-year growth and highlighting the strong recovery of the country's tourism sector. Nevertheless, the current Figure 2.6 remain below the 9.30 million visitors recorded in 2019.

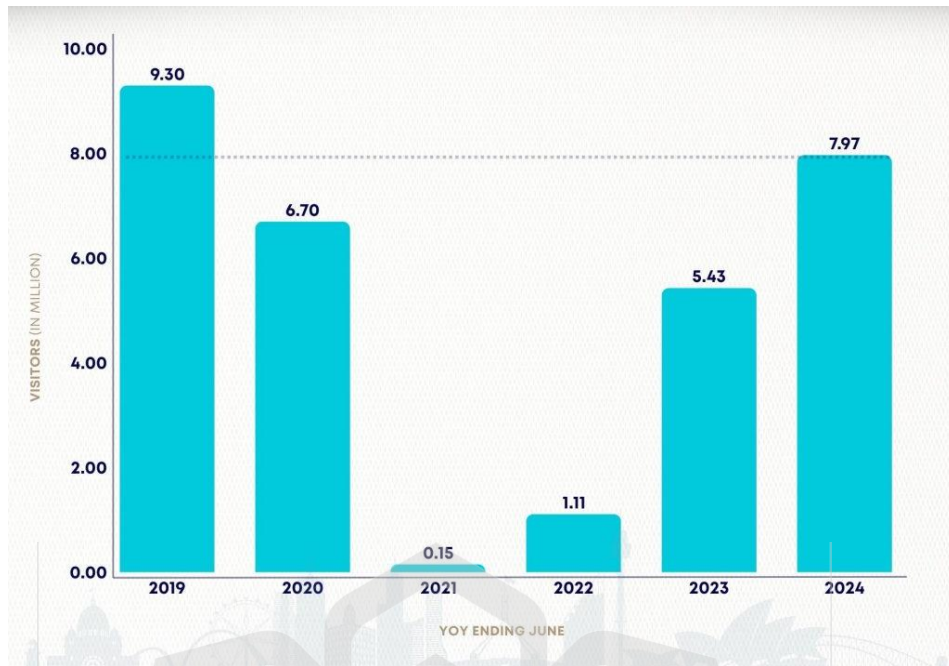


Figure 2.6 International Visitor Arrivals to Australia (Source: Australia Tourism Statistics, 2024).

2.12.2 Most Visited States in Australia in 2023



Figure 2.7 States and Territories of Australia.

Most tourists go to New South Wales when they visit Australia, according to the Overseas Arrivals and Departures data from the ABS (Australian Bureau of Statistics, 2023). NSW accounted for 37.5% of all short-term visitors' state or territory of stay whilst in Australia, followed by Victoria (24.4%), Queensland (22.8%), Western Australia (9.3%), South Australia (2.9%), Australian Capital Territory (1.3%), Tasmania (0.9%) and the Northern Territory (0.9%). See Figure 2.7.

In this study, the researcher has chosen the states of NSW and Queensland which represent almost two-thirds of the total tourism industry in Australia.

2.12.3 The Economic Importance of Tourism in Australia

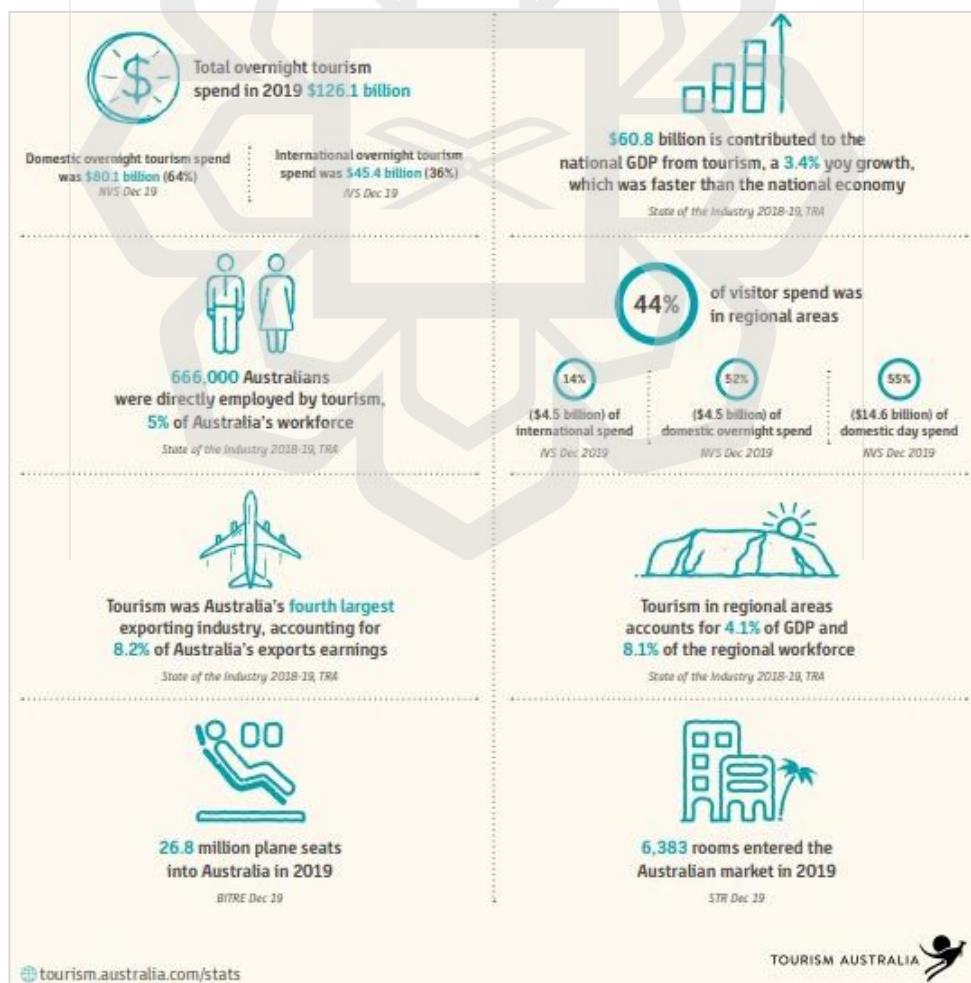


Figure 2.8 The Value of Tourism – Australia (2019) (Source: Tourism Australia, 2022).

Australia is recognised as one of the world's leading tourist destinations, with its tourism sector contributing \$152 billion to the national economy, supporting over 300,000 businesses, and providing employment for more than 660,000 people (The Department of Foreign Affairs & Trade, 2021). In the financial year of 2018-19, Australia generated \$60.8 billion in direct tourism gross domestic product (GDP), representing a growth of 3.5 percent over the previous year, faster than Australia's overall national GDP growth. 44 cents of every dollar generated by tourism were spent in regional destinations and tourism was Australia's fourth largest exporting industry, accounting for 8.2 percent of Australia's export earnings. In 2018-2019, 9.3 million international visitors arrived in Australia, an increase of 3.0 percent compared to the previous year. Australia is currently one of the highest-yielding destinations in the world, with international visitors spending \$44.6 billion in 2018-2019 compared to the previous year, a growth of 5 percent (Tourism Australia, 2021).

There are several agencies responsible for promoting tourism in Australia at the national and state levels. At the national level, Tourism Australia is the government agency responsible for promoting Australia as a whole as a potential tourism destination to international and domestic markets, and Tourism Australia organisation is active in 15 key markets and its activities include advertising, PR and media programs, trade shows and industry programs, consumer promotions, online communications, and consumer research. See Figure 2.9.

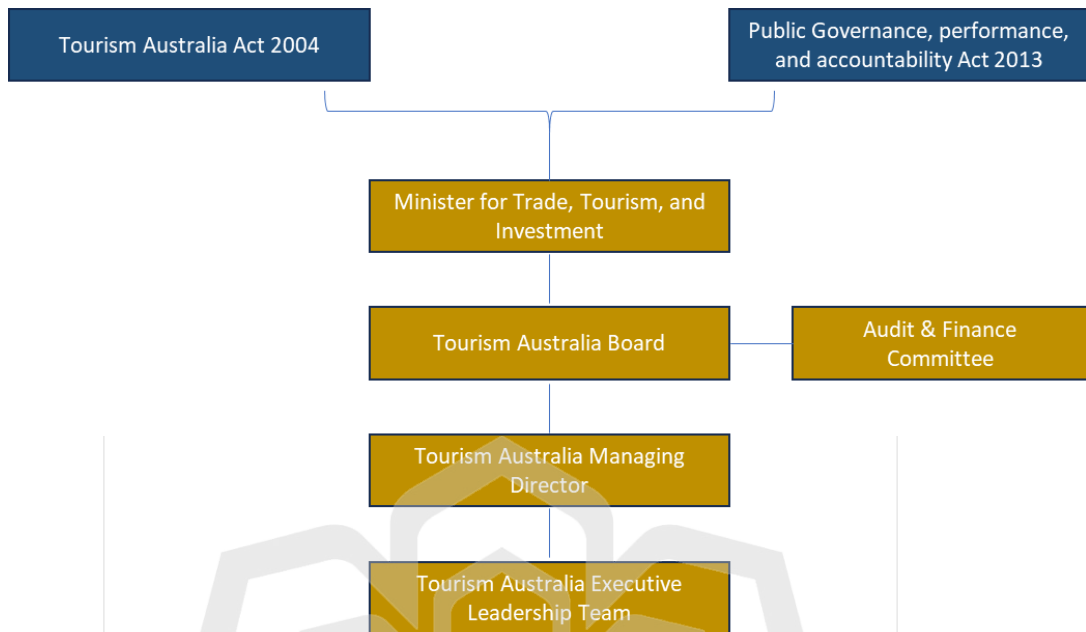


Figure 2.9 Tourism Australia Governance Framework (2022-2023) (Source: Tourism Australia, 2023).

Tourism Australia is a corporate Commonwealth entity formed under the Tourism Australia Act 2004 (TA Act). It is governed by a Board of Directors that is appointed by the Minister responsible for tourism under the TA Act and the Public Governance, Performance and Accountability Act 2013 (PGPA Act) (Tourism Australia annual report – 2021/2022). See Figure 2.10.

AMBITION	FULL RECOVERY TO FY19 EXPENDITURE LEVELS BY FY2025			
PURPOSE	GROW DEMAND TO ENABLE A COMPETITIVE AND SUSTAINABLE AUSTRALIAN TOURISM INDUSTRY			
ANNUAL GOALS	GROW VISITOR EXPENDITURE	IMPROVE BRAND METRICS	DRIVE INDUSTRY RECOVERY	REBUILD THE BUSINESS EVENTS PIPELINE
AREAS OF FOCUS	LEISURE			BUSINESS EVENTS
	AUDIENCES – Willing travellers [mass market] (Domestic) – Long stay, less impacted by travel risk [Working holiday makers, visiting friends and relatives] (International) – Prospective travellers in low risk travel corridors (International) MARKETS Australia, NZ, China, Japan, India, Singapore, South Korea, UK, USA, Germany, Indonesia, Malaysia, France, Canada, Italy			AUDIENCES Domestic event planners, corporate meeting decision-makers, International incentive and association decision makers
STRATEGIC PRIORITIES	1. DRIVE OPPORTUNISTIC CONVERSION IN THE SHORT-TERM, CONCENTRATING ON SPECIFIC AUDIENCES [LONG STAY] AND MARKETS [LOW RISK TRAVEL CORRIDORS] 2. EXPEDITE RECOVERY FOR AVIATION AND DISTRIBUTION 3. BE A UNIFYING VOICE FOR INDUSTRY 4. ELEVATE AND CHAMPION INDIGENOUS TOURISM 5. DRIVE AWARENESS OF, AND CAPABILITY FOR, SUSTAINABLE TRAVEL 6. LONG-TERM DEMAND GENERATION AND GROWTH			7. BOLSTER THE BUSINESS EVENTS INDUSTRY
ENABLING FACTORS	Insights driven strategies and decision-making Engaged and supportive stakeholders Motivated staff Agile resourcing Tight but flexible financial management Robust governance			

Figure 2.10 Tourism Australia – Strategic Planning Model (Source: Tourism Australia, 2022).

Some of the other key agencies involved in promoting tourism include:

- a) Austrade: This agency is responsible for helping Australian businesses, including those in the tourism industry (Australian Government (2022)).
- b) Department of Infrastructure, Transport, Regional Development and Communications: This department is responsible for developing and implementing

policies and programs to support the tourism industry, including infrastructure development and aviation policy (Australian Government, n.d.).

- c) Department of Foreign Affairs and Trade: This department supports the tourism industry by promoting Australia as a destination overseas (Australian Government, n.d.).
- d) Department of Agriculture, Water and the Environment: This department supports sustainable tourism by managing Australia's natural and cultural assets, such as national parks and World Heritage sites, (Australian Government, n.d.).
- e) State and Territory Tourism Agencies: Each state and territory in Australia has its own tourism agency responsible for promoting tourism within their respective regions. These agencies work together with Tourism Australia to promote Australia as a whole (Tourism Australia, n.d.).

These agencies work collaboratively to promote the Australian tourism industry, support its development and growth, and ensure its sustainability.

2.12.4 Tourism Governance in Australia

The Australian Trade and Investment Commission (Austrade) works closely with Tourism Australia, the Department of Foreign Affairs and Trade, and state and territory governments to coordinate the delivery of whole-of-government tourism objectives. Austrade is responsible for tourism policy, projects, programmes, and research. Within Austrade, Tourism Research Australia provides international and domestic tourism intelligence, including statistics and analysis. In terms of tourism development, the public sector has the role of regulating the overall framework for the operation of the tourism industry and planning, managing, and promoting tourism (Liu et al., 2020).

Tourism Ministers' Meetings (TMM) bring together tourism ministers from the Australian, state and territory governments to discuss tourism policy matters of mutual interest. Chaired by the Australian Government Minister for Trade, Tourism and Investment, the Tourism Ministers' Meetings bear the collective responsibility of

implementing Tourism 2020, the national tourism strategy. Its work is supported by the Australian Standing Committee on Tourism (ASCOT), which is chaired by Austrade and includes representatives from Tourism Australia, the Department of Foreign Affairs and Trade, each state and territory tourism organisation, and relevant state departments with responsibility for tourism policy, (OECDiLibrary, 2020). See Figure 2.11.

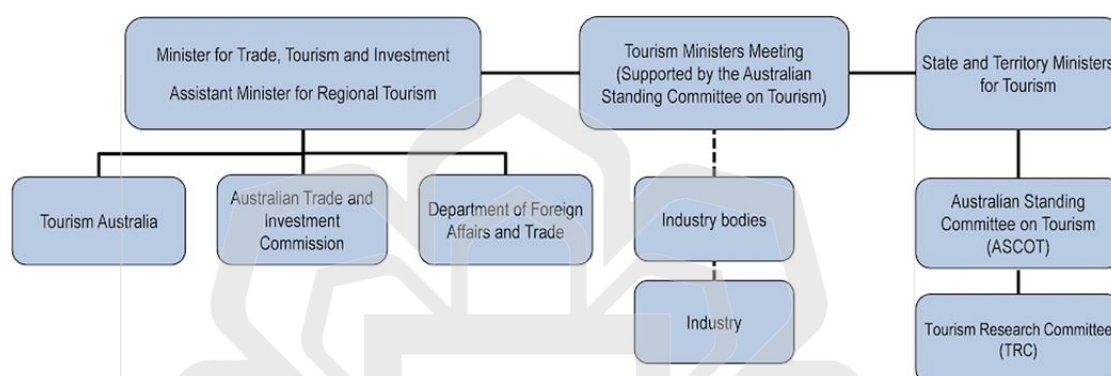


Figure 2.11 Organisational Chart of Tourism Bodies of Australia (Source: OECD, adapted from the Australian Government, 2020).

At the state level, each state and territory have its own tourism agency responsible for developing and promoting tourism in their respective regions. For example, the local government agency, Visit Victoria is responsible for promoting tourism in the state of Victoria. At the local level, many councils have a tourism department or officer who works with local businesses and organisations to promote tourism in their region. In addition to government agencies, there are also several industry associations and organisations that play a role in tourism governance in Australia. For example, the Australian Tourism Industry Council is a peak industry body that represents the interests of tourism businesses and organisations across Australia. Overall, the governance of tourism in Australia involves a complex network of government agencies and industry bodies working together to promote and develop tourism in the country.

2.12.5 Tourism Stakeholders in Australia

Australia has a diverse range of tourism stakeholders involved in the country's tourism industry. These stakeholders work collaboratively to develop, promote, and enhance Australia's tourism industry, showcasing the country's unique offerings and ensuring memorable experiences for visitors. See Figure 2.12.

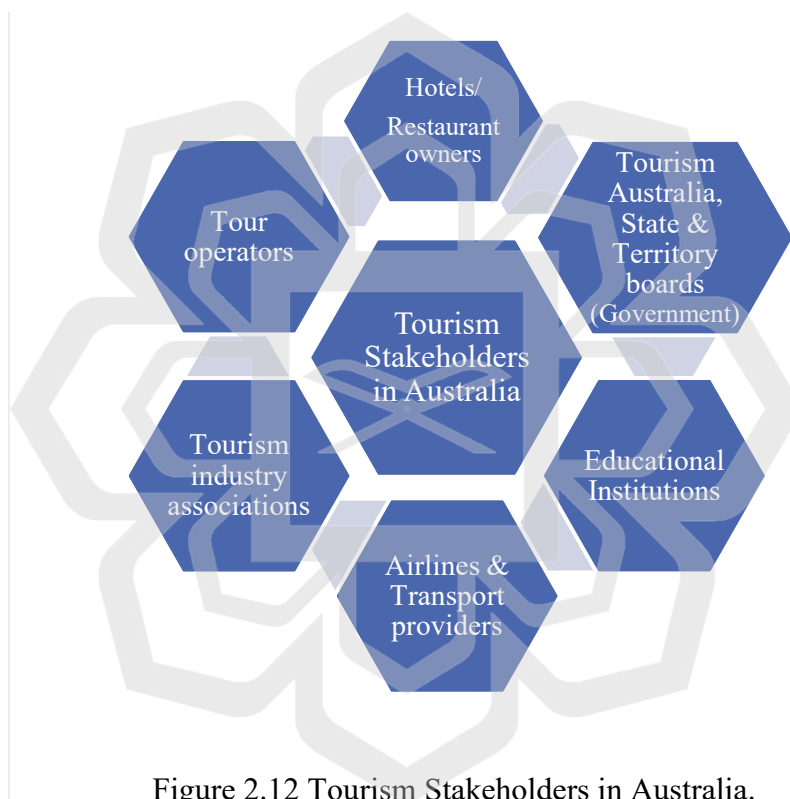


Figure 2.12 Tourism Stakeholders in Australia.

2.12.6 Types of Tourism Promoted by Tourism Australia

According to Tourism Australia (Tourism Australia, n.d.), they promote various types of tourism to cater to a wide range of interests and preferences. Here are some of the types of tourism promoted by Australia:

- a. Nature and Wildlife Tourism: Australia is known for its diverse and unique ecosystems, including the Great Barrier Reef, the Outback, rainforests, and national parks.
- b. Coastal and Beach Tourism: With its stunning coastline, Australia attracts beach lovers and surf enthusiasts from around the world.
- c. Adventure Tourism: Australia's vast and varied landscapes provide ample opportunities for adventure tourism. For example, activities such as hiking, rock climbing, abseiling, mountain biking, caving, and Whitewater rafting etc.
- d. Indigenous Tourism: Australia has a rich indigenous heritage, and many tourists are interested in learning about and experiencing Aboriginal culture.
- e. Food and Wine Tourism: Australia's culinary scene has gained international recognition, with its vibrant food and wine culture.
- f. City and Cultural Tourism: Australia's major cities, including Sydney, Melbourne, Brisbane, Perth, and Adelaide, offer a vibrant mix of cultural experiences.
- g. Eco-Tourism: Australia is committed to sustainable tourism practices and promotes eco-tourism experiences that focus on conservation and minimizing environmental impact.
- h. Outback and Indigenous Cultural Experiences: The vast Australian Outback provides a unique opportunity for visitors to experience the remote and rugged landscapes, learn about bush survival skills, and gain insights into the traditional Aboriginal way of life.

2.13 CHAPTER SUMMARY

This chapter provides background information on Muslim Friendly tourism and its current and future trends. The definition of “Halal” and “Muslim Friendly tourism” have been elaborated. The next section discusses past literature related to Muslim Friendly tourism, the needs of a Muslim traveller, and the key service touchpoints of Muslim travellers. Moreover, the Muslims and other religious communities in Australia, halal industry and halal industry-related studies conducted in Australia have been reviewed

and discussed. In addition, the tourism stakeholders, and the governance of tourism in Australia have been analysed in detail. For this study, the regulatory systems framework for Muslim Friendly hospitality and the Muslim Friendly Tourism and Hospitality framework for destinations (ACES 3.0 framework) have been examined and recommended.



CHAPTER THREE

METHODOLOGY

3.1 INTRODUCTION

A research methodology is a vital component of any study as it guarantees the achievement of the research aims and objectives. This chapter outlines the methodology adopted in this research, which follows a qualitative approach. Furthermore, it presents the research design, the development of research instruments, the sampling process, sample size, data collection strategy, and the data analysis procedure.

3.2 RESEARCH DESIGN

A research design is a plan, structure, and investigation strategy to answer research questions and problems (Kumar, 2011). In other words, a research design is a set of procedures that determines how the required data will be collected and analysed, as well as how this data will be used to answer the research question (Grey, 2014). This study employs qualitative methods for data collection and analysis to gain a deeper understanding of the current state of Muslim Friendly tourism and hospitality in Australia. The qualitative approach involves examining non-numerical data such as text, video, or audio to explore concepts, perspectives, and experiences, providing in-depth insights into issues and generating new ideas for further research (Bhandari, 2020).

This study is divided into four phases to answer three research objectives. In the first phase, the researcher will conduct a literature review to identify relevant literature in order to obtain information and understanding about this study from previous studies. In the second phase, the researcher will conduct interviews with several tourism

industry stakeholders to collect and gather their opinions and suggestions towards this study's concept, strategies, and the future. The aim is to ensure that all tourism stakeholders' perspectives are represented in the sample. It is used as an optimal tool to collect data according to the individuals' personal perspectives, histories, and experiences (Charmaz, 2005). In the third phase, the researcher will conduct observations on the key touchpoints in the tourism ecosystem such as tourism-related services, service facilities, and tourism destinations enabling the researcher to devise improvements and suggestions. Lastly, in the fourth phase, the researcher aims to analyse the data collected and present the results. See Figure 3.1.

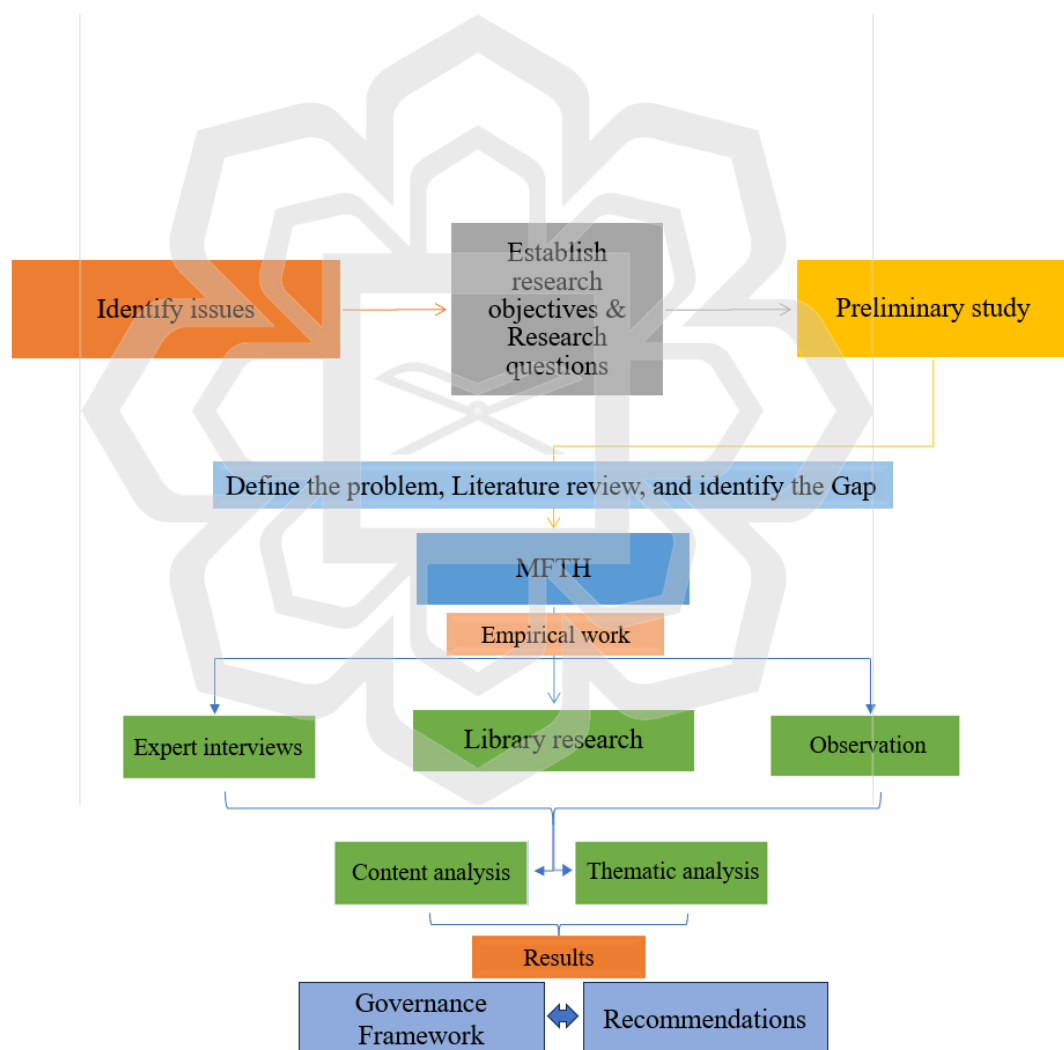


Figure 3.1 Research Design

3.3 SAMPLING PROCEDURE AND SAMPLE SIZE

There is no precise figure for the total number of stakeholders in the Australian tourism industry. As this study adopts a qualitative approach, a purposeful sampling method will be used. Purposeful sampling is a non-probability technique in which participants are deliberately chosen because they possess characteristics relevant to the study. It is particularly effective for exploring issues in depth with relatively small samples. The main objective is to identify individuals or groups most capable of providing meaningful insights to address the research questions. This method works best when sufficient background knowledge about the research topic is available (Palinkas et al., 2015). The more information we have, the higher the quality of our sample will be. Purposeful sampling is widely used in qualitative research for the identification and selection of information-rich cases related to the phenomenon of interest (Palinkas et al., 2015). This involves identifying and selecting individuals or groups of individuals that are especially knowledgeable about or experienced with a phenomenon of interest (Cresswell & Plano Clark, 2011).

In qualitative research, determining an adequate sample size ultimately relies on judgment and experience in assessing the quality of the data in relation to the study's objectives, the research method used, the purposeful sampling strategy adopted, and the intended research outcomes (Sandelowski, 1995). There are no definitive methods or rules for establishing the appropriate size of a qualitative sample. Instead, researchers consider various guidelines to evaluate whether their chosen sample is suitable (Mocănașu, 2020). While saturation is frequently cited as the justification for concluding sampling, most studies provide limited detail on how saturation was determined (Bowen, 2008; Francis et al., 2010). For this study, a sample of 15 stakeholders from the tourism industry in the states of New South Wales and Queensland, Australia, were selected.

The selection of 15 stakeholders from New South Wales and Queensland is justified by their strategic importance to Australia's tourism sector and their engagement with diverse international markets, including Muslim travellers. The sample size is considered adequate based on the concept of information power, whereby the richness, relevance, and specificity of the data rather than numerical size determine

sufficiency. Additionally, the iterative process of data collection and analysis allowed the researcher to assess the adequacy of the sample continuously, ensuring that the data generated were sufficiently comprehensive to address the study's objectives.

3.4 DATA COLLECTION

The data collection was designed to address the following three research objectives: 1) to analyse the challenges and opportunities associated with the implementation of MFTH in Australia; 2) To determine the factors that support the implementation of MFTH to the overall tourism economic development in Australia; and 3) to develop and propose a suitable governance framework to assist policymakers and relevant stakeholders in advancing MFTH in Australia. To achieve these objectives, the researcher employed three data collection methods: library research, interviews, and field observation.

These methods were selected as they provide rich data and effectively address the research questions. Among the three, in-depth interviews served as the primary source of data. A mixed qualitative approach involves integrating multiple techniques within a single study, such as combining interviews with document analysis and observations (Silverman, 2020).

3.4.1 The Library Research

This research used academic articles, academic journals, books, databases, and other scholarly materials. This assisted the researcher in gaining knowledge and understanding of current issues and knowledge regarding the subject under study. The Dar-al Hikma library of IIUM, and the e-library of the University of Technology, Sydney (UTS) were utilised in this research. Further, the Halal Knowledge Centre

(HKC 2.0) web portal was utilised for the e-resources, industry insights, and market intelligence. The web portal of CrescentRating (A leading authority on halal/Muslim travel and tourism based in Singapore) was utilised to extract the industry trends and past research reports.

In addition, document and social media reviews were conducted on news items, tourism websites, social media sites, customer feedback & reviews, and other government documents that support the primary sources of information and further enhance the analysis of Muslim Friendly tourism in Australia. The main advantages of document review are that it provides a ready-made and easily accessible source of data (Yin, 2009), offers information within the context of participants' environments, and helps verify or corroborate evidence from other sources (Bowen, 2009). In this study, the Tourism Australia website was also used to obtain tourism statistics and other relevant information.

3.4.2 Interviews

An interview is a qualitative research method that collects data through asking questions and engaging in verbal communication between the researcher and the participant. It is a key data-gathering technique frequently used in survey designs as well as in exploratory and descriptive studies (Nick, 2006). For decades, interviews have been a primary tool of empirical inquiry across the social sciences. In applied linguistics, their use has grown significantly in recent years, particularly in qualitative studies exploring participants' identities, experiences, beliefs, and orientations toward various phenomena (Talmy, 2010).

3.4.2.1 Instrument Development

Instrumentation refers to the use of measurement tools or tests that follow specific psychometric rules. These rules ensure that numbers are assigned consistently to values or categories across subjects, events, and studies, thereby producing reliable and valid evidence for evaluating research outcomes (Burns & Grove, 2001). When developing an instrument, it should always align with the context and the objectives of the research. Interview questionnaire content was adapted from various literatures; the instrument was then reviewed by experts. After that, it was pre-tested with 3 target respondents from academic, hospitality and tour operating backgrounds.

Based on the research objectives, the CrescentRating ACES 3.0 framework was utilised together with the Regulatory Systems Framework for Muslim Friendly Hospitality in developing the questionnaire for the interview (Appendix 1). The questions were tailored to and aligned with the research objectives. The questionnaire covered five main variables such as resources, challenges, opportunities, and regulations, and determined factors that support the implementation of MFTH to Australia's overall tourism economic development; the research supervisor then validated the questions. Questions were designed to give the interviewees freedom and flexibility to answer. The questions should avoid being vague, ambiguous, pleading, threatening, and loaded (Rahman, 2017). See Figure 3.2.

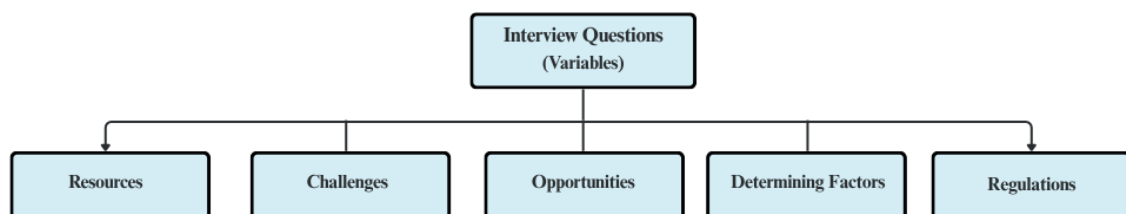


Figure 3.2 Interview Questions – Variables.

3.4.2.2 Resources

The questions developed for this variable focused on the availability of halal accommodation, halal restaurants, transportation, prayer areas or mosques, and shops offering locally made halal products. These questions were derived from the services dimension of the ACES model, which highlights essential facilities for Muslim travellers, including halal food, halal hotels, prayer spaces, airports, and other unique experiences that can be accessed and enjoyed by Muslim tourists.

3.4.2.3 Challenges

The challenges variable was further broken down into questions that explore the specific difficulties Australia encounters in developing Muslim Friendly tourism within the country. This section included questions aimed at identifying the challenges that policymakers and service providers currently encounter in developing the sector, considering both internal and external environmental factors.

3.4.2.4 Opportunities

The opportunity variable explored the anticipated benefits of developing Muslim Friendly tourism in Australia and whether it is considered a viable sector for investment and economic return. Smith et al. (2010) emphasise that effective tourism planning requires developing both existing and potential attractions, services, and facilities, along with ensuring resource allocation for such development. This principle formed the basis for formulating the questions under the opportunity variable. Enhancing current and potential attractions, services, systems, and facilities should therefore be aligned with the future opportunities available to Australia.

3.4.2.5 Determining Factors

The determining factor variable inquired into the factors that support the implementation of MFTH to the overall tourism economic development in Australia. There are several determining factors that influence the success of a destination. These factors can vary depending on the specific context and target audience. Therefore, this variable helped the researcher to identify the important factors that need to be addressed in developing MFTH in Australia. Supply factors such as destination accessibility, attractions, tourism infrastructure and amenities, accommodation, service quality, price competitiveness, overall attractiveness and destination image, special events, as well as disasters and crises, are key determinants influencing international tourist flows (Gidebo, 2021).

3.4.2.6 Regulations

The regulatory variables inquired about whether there are any specific rules, guidelines, and policies that governments, tourism boards, or relevant authorities put in place to ensure that tourism services are aligned with Islamic principles and cater to the needs of Muslim travellers. The regulations are designed to enhance the overall experience for Muslim travellers and to attract this growing segment of the tourism market of any country. Therefore, government policy regarding halal tourism is needed because it regulates, guarantees, and protects both the halal tourism operators and users (El-Gohary, 2016).

3.4.3 Selection Criteria for Stakeholders

The selection of participants in this study was guided by clearly defined criteria to ensure the inclusion of information-rich cases aligned with the research objectives.

First, participants were required to have demonstrated expertise or professional involvement in the tourism and hospitality sector, particularly in areas of policy development, service provision, or industry representation. Second, stakeholders were selected based on their direct experience with international tourism markets, including exposure to or engagement with Muslim travellers and Muslim-Friendly Tourism and Hospitality (MFTH) practices. Third, the sample ensured representation across key stakeholder categories government bodies (national and state), tour operators, hospitality providers, industry associations and consultants, Muslim community organisations, and academic experts thereby capturing diverse yet complementary perspectives across the tourism ecosystem. Fourth, geographical relevance was considered, with a focus on New South Wales and Queensland due to their prominence in Australia's tourism industry, while also incorporating national-level stakeholders whose roles and influence extend across the entire country. Finally, participants were selected based on their decision-making capacity or strategic influence, ensuring that insights reflect both operational realities and policy-level considerations.

The sample size of 15 participants is justified within the context of qualitative research, where the emphasis is placed on depth, relevance, and analytical richness rather than numerical representation. This study adopts the principle of information power, whereby a smaller, carefully selected sample is considered sufficient when participants possess specialised knowledge, the study aim is focused, and the quality of dialogue is high. The inclusion of senior-level professionals such as executives from national tourism bodies, industry leaders, and academic experts enhances the depth and credibility of the data, reducing the need for a larger sample.

A comprehensive list of the stakeholders who were interviewed is provided in Table 3.1.

Table 3.1 The Experts.

No	Stakeholders' (Sector)	Expert informants' pseudonyms	Justification/ Background	Dates of interviews conducted
1	National, state & territory board (Governmental organisations) Austrade Tourism Australia Tourism & Events Queensland	#1	Executive General Manager Eastern Markets and Aviation · Tourism Australia	29 th Oct 2024
		#2	Director - Southeast Asia - Tourism and Events Queensland.	11 th April 2024
		#3	Senior Advisor - International and Diversification Visitor Economy & Client Programs Division - Austrade	22 nd July 2024
2	Tour operators	#4	Managing Director - Jom Australia Private Tours, Sydney.	04 th April 2024
		#5	Chairman - Gruppo Halal Tours, Queensland.	26 th March 2024
3	Hotels/ Restaurant owners	#6	Chairman - Nando's restaurant franchise chain. Sydney.	24 th March 2024
		#7	The Chef - Emirates airline kitchen - Sydney Airport, Manager Aseel Halal restaurant chain in Sydney	04 th August 2024
4	Tourism industry associations/ Consultants	#8	National Manager – Industry Development & Capability, Australian Tourism Export Council – (ATEC)	22 nd July 2024
		#9	Founder & CEO of CrescentRating & HalalTrip.	11 th March 2024
		#10	Visiting Professor, Centre for Research and Innovation in Tourism, Advocate of Indigenous tourism Australia.	28 th March 2024
		#11	Professor, UNESCO Chair in Futures Studies at the Sejahtera Centre for Sustainability and Humanity, Tourism development expert, Queensland. Advisor to Governments.	31 st March 2024
5	Representative from Muslim organisations	#12	The President - Australian National Imam Council (ANIC).	04 th May 2024.
6	Educational institutions	#13	Professor - Department of Tourism, Sport & Hotel Management, Griffith Business School, Griffith University, Australia.	21 st March 2024
		#14	Associate Professor at James Cook University, Australia. Regional Vice President of International Tourism Studies Association (ITSA).	05 th June 2024
		#15	Faculty of Islamic Studies, Charles Sturt University. Australia. Director of the Centre for Islamic Studies and Civilisation (CISAC)	02 nd May 2024

Before conducting the interview, the following steps were taken:

1. The researcher made appointments with the interviewees via phone call and followed with an official written invitation.
2. Before starting the interview, the researcher explained the nature and scope of the study to the interviewees.
3. Next, consent forms were distributed to interviewees. The interviewees read and signed a consent form indicating they understood the study's nature and volunteered to participate.
4. The interview length will vary from 30 minutes to 1 hour, with an average length of 45 minutes per interview.
5. All interviews were digitally recorded and transcribed. This was to minimise taking notes actively during the interview thus enabling the researcher to concentrate on the conversations and ask important questions.

3.4.4 Observation

Observation is a qualitative research method that encompasses not only participant observation but also ethnography and fieldwork. In an observational research design, multiple study sites may be involved, and observational data can serve as auxiliary or confirmatory evidence (Gray, 2009). In this study, observation was used to collect primary data, complementing information obtained from respondents. As noted by Hammersley and Atkinson (1983, as cited in Hang, 2013), field observations provide realistic, first-hand accounts of research phenomena and help validate findings from other sources, particularly semi-structured interviews. The researcher conducted observations by evaluating facilities relevant to the tourism and hospitality industry, including airports, major tourist destinations, key cities, shopping malls, and cultural sites in Queensland and New South Wales, Australia. The observation was guided by governance-based criteria aligned with the study's MFTH conceptual framework. It examined policy and regulatory alignment, stakeholder roles and coordination, and the practical implementation of Muslim-friendly services.

The researcher initially identified tourism-related locations and service providers and conducted personal site visits across the selected states. On 8 September 2024, a field visit was undertaken to prominent tourist destinations in New South Wales, including the Sydney Opera House and the Harbour Bridge area. During these visits, multiple observation techniques were employed, such as taking detailed field notes, capturing photographs, and recording videos to systematically gather information. This process also enabled the researcher to cross-check and validate data obtained from participants, consistent with established observational research practices (Meyer, 2001).

Prior to visiting the identified sites, a structured observation checklist was developed to ensure that no critical aspects were overlooked during the data collection process. The use of such a checklist provided a systematic framework for observation and enhanced the reliability of the data gathered. Observation tools included memos, checklists, recorded notes, and visual documentation such as photographs, all of which are considered essential components of effective field observation (Fathimath, 2016).

The observation checklist focused on several key areas relevant to Muslim-friendly tourism. These included the availability of prayer facilities, the presence of wudu-friendly toilets, access to halal-certified accommodation, and the provision of halal dining options. In addition, attention was given to the availability of spaces that support privacy and family-oriented activities, as well as the extent to which service providers demonstrated understanding and respect for cultural sensitivities to ensure the comfort and safety of Muslim visitors.

Observations were systematically recorded using structured field notes immediately following each site visit and stakeholder engagement. A standardized observation protocol was developed to maintain consistency across diverse settings, including tourism facilities, hospitality establishments, and stakeholder meetings. The recorded notes were organised into descriptive accounts detailing observable elements such as physical arrangements, staff behaviour, informational materials, and service processes and reflective comments, which captured the researcher's interpretations, emerging patterns, and connections to governance dimensions. Where relevant, documentary evidence such as brochures, policy documents, and publicly available guidelines was also collected to support and enrich the observational findings. This

rigorous documentation process enhanced the reliability of the data and supported subsequent coding and thematic analysis.

The observational data played a complementary role to the semi-structured interview findings by providing contextual and behavioural validation of stakeholder perspectives. While interviews captured participants' perceptions, intentions, and reported governance practices, observations allowed the researcher to assess how these practices were implemented in real-world contexts. In some cases, observations confirmed alignment between stated policies and actual practices, while in others, minor discrepancies revealed gaps between formal governance frameworks and their practical application. The integration of these data sources facilitated methodological triangulation, thereby enhancing the credibility, depth, and overall robustness of the study. Collectively, this approach provided a comprehensive understanding of Muslim-friendly tourism governance dynamics within the Australian context.

3.5 DATA ANALYSIS

The data obtained from various collection methods were further processed to provide a clearer explanation of the findings. Information gathered from literature reviews, document reviews, interviews, and observations was analysed using both content and thematic analysis. Content analysis is a systematic technique that organises meaningful material into fewer categories based on explicit coding rules and themes, enabling valid inferences from texts or other sources (Stemler, 2001; Krippendorff, 2004). Thematic analysis, on the other hand, identifies and interprets patterns or themes within a dataset, often generating new insights and understanding (Elliotte, 2018).

For example, in conducting thematic analysis, all interview transcripts from tourism stakeholders were thoroughly reviewed to gain an overall understanding of the data. The responses were then extracted and compiled into a single table, which served as the unit of analysis. This table was organised into four sections: "respondent

identifier,” “interview text,” “interpretation of the underlying meaning,” and “descriptive codes.”

Interpreting the context of respondents’ views and perceptions was a complex process. For this reason, the “interview texts” were condensed into an “interpretation of the underlying meaning,” which summarised and reflected the essence of the responses. These condensed interpretations were then reviewed as a whole and abstracted into “descriptive codes.” The “descriptive codes” represented the recurring threads of meaning within the condensed texts and highlighted the key features of the research. Both manual analysis and ATLAS.ti software were employed to facilitate this process. The systematic steps undertaken in conducting the thematic analysis are given below. See Figure 3.3.

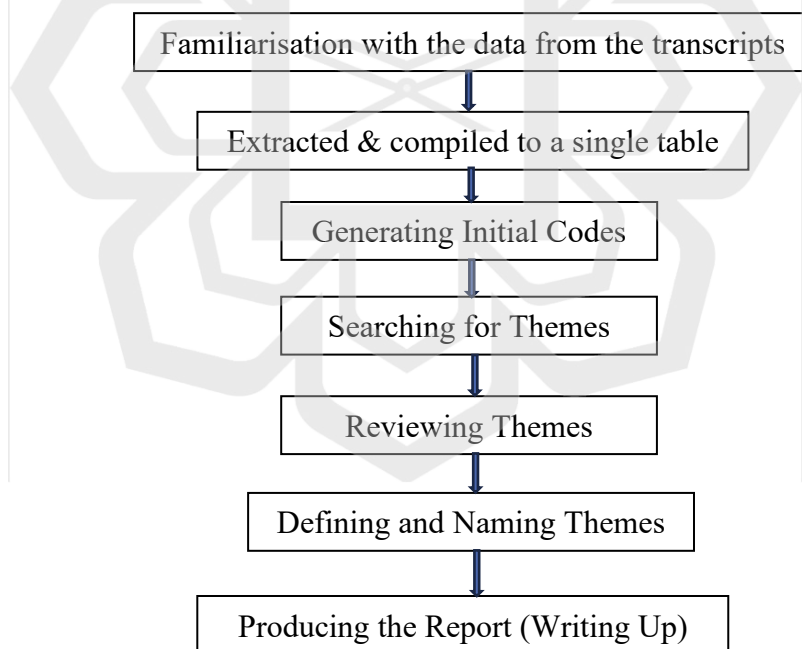


Figure 3.3 The Steps Taken to Conduct Thematic Analysis.

The observation data in this study were analysed systematically using thematic analysis. Field notes were transcribed, organised by research site and research questions, and reviewed repeatedly to ensure familiarisation. Initial codes were generated to identify recurring patterns in service practices, governance implementation, and Muslim-friendly provisions, which were then grouped into broader themes aligned with the study's conceptual framework. Where structured checklists were used, observed elements such as halal compliance and facility provision were categorised and compared across sites. The findings were interpreted beyond mere description to examine gaps between policy and practice and were triangulated with interview and document data to enhance credibility and analytical rigour.

Qualitative content analysis was used to examine key documents related to the governance of Muslim-Friendly Tourism and Hospitality (MFTH) in Australia. Relevant government policy documents, Tourism Australia strategy documents, industry reports, and halal certification guidelines were purposively selected and carefully reviewed. The data were coded using both theory-based categories, informed by governance, stakeholder, and institutional perspectives, and themes that emerged directly from the documents. The codes were then grouped into broader themes to identify patterns, governance practices, and key challenges within the MFTH context. This systematic approach strengthened the clarity and credibility of the analysis. See Table 3.2.

Table 3.2 Summary of Research Questions, Methodology, and Analysis.

Research Questions	Methodology	Data Analysis
1. What are the challenges and opportunities of implementing MFTH in Australia?	Interviews Literature review Observation	Content analysis Thematic analysis
2. What are the factors that would support the implementation of MFTH to the overall tourism economic development in Australia?	Interviews Document/ Economic reviews	Content analysis Thematic analysis
3. How to develop a suitable governance framework that could assist policymakers and the relevant stakeholders to implement MFTH in Australia?	Interviews Expert opinion Document reviews	Content analysis Thematic analysis

3.5.1 Research Flow on Data Analysis

The governance framework for developing MFTH in Australia was formulated through the discussion and triangulation of findings from the literature review, expert interviews, field observations, and document reviews. To better understand this process, it is essential to outline the analysis flow of the research, which is illustrated in Figure 3.4.

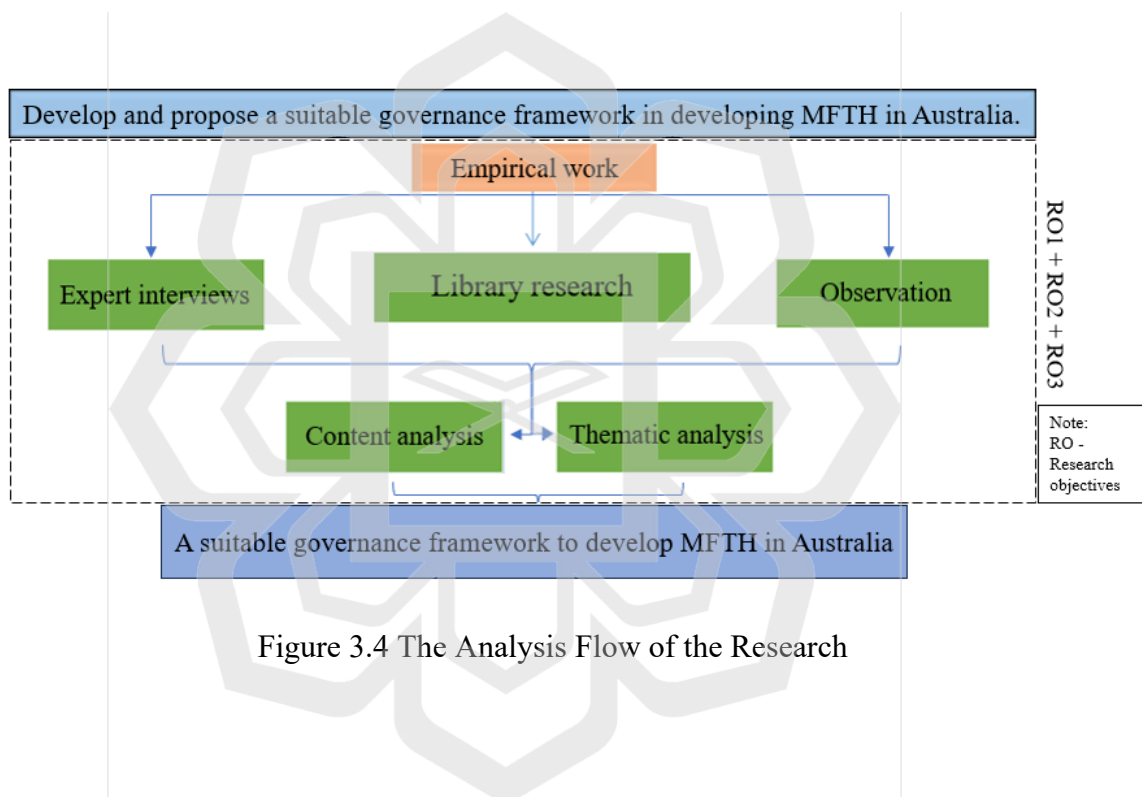


Figure 3.4 The Analysis Flow of the Research

3.6 VALIDITY AND RELIABILITY

In research, validity and reliability are essential concepts that pertain to the quality and trustworthiness of the study. These terms are often used in both quantitative and qualitative research. Validity refers to whether the results of the study are true and certain - "true" in the sense that the findings of the research accurately represent the case, and "certain" in the sense that the findings of the research are backed by facts (Guion, 2011). The researcher embarked on a more holistic approach to gain a more in-

depth understanding of the current trend. The data collection strategy, coding and analysis process, and triangulation method can reflect the proper value perspectives (Noble & Smith, 2015). The researcher ensured that all data collection and the data analysis process were completed with full integrity and honesty. All stages of data collection and analysis were conducted with full integrity, transparency, and adherence to established ethical research standards. Data were gathered systematically and without manipulation, and participants' responses were recorded and transcribed accurately to preserve their original meanings. During the analysis, coding and theme development were grounded strictly in the data, with no alteration, omission, or selective interpretation to fit predetermined expectations. An audit trail was maintained to document methodological decisions and analytical procedures, ensuring transparency and accountability. These measures ensured that the research process was conducted honestly and that the results faithfully represent the empirical evidence. More importantly, the researcher adhered to the principles of scientific integrity by avoiding fraud and acknowledging all resources used accurately. Reliability was ensured by working with independent data coders for data accuracy, appropriateness, and meaning.

This study employed a triangulation approach by utilizing various methods, including library research, observation, and interviews. Data gathered from each interview with tourism stakeholders were recorded and transcribed in real-time to incorporate their perspectives and establish a coherent chain of evidence. Data from the interviews were also involved in ensuring the validity and reliability of the proposed framework (Dorussen et al., 2005). In addition, to ensure the validity of the research, peer review was used. Peer review or peer debriefing is a discussion of the researcher's interpretation and conclusion with other individuals (Johnson, 1997). Therefore, using peer debriefs not only validates data but also adds credibility to the research (Creswell & Miller, 2000).

3.7 RESEARCH ETHICS

Ethical guidelines established by International Islamic University Malaysia (IIUM) were strictly followed throughout this research study. Prior to data collection, ethical approval was obtained in accordance with the university's research governance requirements. The study ensured voluntary participation, informed consent, confidentiality, and the anonymity of all respondents. Participants were clearly informed about the purpose of the research, their right to withdraw at any stage without penalty, and the secure handling of their data. All information collected was used solely for academic purposes and managed in line with IIUM's ethical standards for integrity, transparency and respect for participants.

3.8 CHAPTER SUMMARY

This chapter provided the methodology of the research. The research design, sampling procedure, sampling size, instrument development, and validity and reliability were discussed in detail. The data collection plan has been thoroughly discussed followed by the details of data analysis. The next chapter presents the result and discussion of every research objective.

CHAPTER FOUR

RESULTS AND DISCUSSION

4.1 INTRODUCTION

The following sections demonstrate research outcomes regarding the governance system for Muslim Friendly Tourism and Hospitality (MFTH) in Australia. The research design follows a systematic framework matching investigation goal through data analysis of thematic research and observational fieldwork and review literature material. The research focuses on understanding how political frameworks, business standards, and customer collaboration drive Australian MFTH development. The research reveals multiple challenges concerning policy execution, regulatory mismatches, financial possibilities, and cultural elements that affect the market sector.

This chapter divides its content into different main sections. This section provides definitions of MFTH in Australia, together with stakeholder perceptions on Muslim Friendly tourism. This part explains the key obstacles facing MFTH expansion by focusing on regulations that create restrictions along with bureaucratic hurdles and the lack of stakeholder coordination. The research provides economic insight into the MFTH market while revealing marketing and infrastructure weaknesses that obstruct Muslim traveller attraction in Australia.

The research shows that cultural sensitivity is a fundamental aspect that determines how hospitality practices should be conducted. The hospitality experiences of Muslim tourists in Australia depend heavily on two factors regarding Muslim traveller needs and local attitudes toward Islam. Government incentives, as well as industry alliances and international benchmarking practices, play crucial roles in designing MFTH implementation success, according to the chapter. This document introduces a governance framework that contains recommendations for organised MFTH management strategies in Australia.

The research shows that Australia demonstrates solid Muslim Friendly tourism practices across the country, yet essential gaps remain in regulatory frameworks along with infrastructure development and marketplace progress. Australia can become a prominent Muslim travel destination by implementing specific policies and strengthening alliances between stakeholders while developing strategic marketing approaches. This research demonstrates that MFTH governance should be reformed through an inclusive system to provide Muslim tourists with an authentic feeling of welcome within diverse Australian tourism spaces. Many data points used in this chapter enable an all-encompassing analysis of MFTH governance, which creates a basis for policy development and strategic industry improvements in the following sections. The following section synthesises the core themes identified through manual thematic analysis, mapping respondents' insights to each research objective.

4.1.1 Key Findings from Thematic Analysis

This study re-iterates some of the key findings from the thematic analysis. This section presents a summary of the themes derived from respondents' insights. Thematic analysis was conducted manually to categorise key patterns emerging from the data. Below is a structured table summarizing the themes and respondents' contributions to each research objective (RO), illustrating how the themes were derived. See Table 4.1.

Table 4.1 Key Findings from Thematic Analysis.

Question	Respondents	Theme	Remarks
What are the governance challenges in MFTH?	R1	Policy and Regulation Gaps	"Muslim Friendly tourism is not well captured by any regulation, hence the operators must always look for it on their own."
	R3	Stakeholder Coordination and Engagement	"Disjointed communication and lack of clarity on Muslim needs lead to an inconsistent approach to policy practice."
	R8	Bureaucracy and Visa Challenges	"A lot of bureaucracies exist. When we talk about the tourism board and locals, they can't just make decisions on their own."
How do visa policies affect Muslim tourism?	R2	Bureaucracy and Visa Challenges	"It's not easy to get a visa anymore for the Malaysian passport holder... this policy needs immediate revision."
	R5	Government Policy Restrictions	"Some tourists complain that their visa got rejected despite having all the required documentation."
	R10	Tourism Board Limitations	"Tourism Australia should make it easier for inbound Muslim tourists by advocating policy reforms."
How do government agencies influence MFTH development?	R2	Role of Government Agencies and Tourism Boards	"Tourism Australia spent \$10 million on general promotion but has not focused on MFTH."
	R6	Lack of Promotion and Awareness	"MFTH has not been prioritised in mainstream tourism marketing efforts."
How does community participation shape MFTH governance?	R4	Community Participation and Stakeholder Engagement	"Muslim travellers want an inclusive experience, not a separate 'Muslim itinerary.'"
	R6	Cultural Sensitivity in Hospitality Practices	"There is a lack of staff training on cultural sensitivity in major tourism hubs."
What challenges do Muslim travellers face in Australia?	R1	Limited Awareness of Muslim Traveller Needs	"Some tourism operators hesitate to market MFTH services openly due to fear of public backlash."
	R3	Islamophobia and Societal Attitudes	"There is an underlying resistance towards accommodating Muslim tourists in certain regions."

How does societal perception affect Muslim Friendly tourism?	R4	Islamophobia and Societal Attitudes	"Muslim travellers want to feel they are coming to a safe zone for Muslims."
	R6	Cultural Sensitivity in Hospitality Practices	"Service providers should be trained to accommodate diverse traveller needs without bias."
What is the economic potential of MFTH in Australia?	R2	Untapped Market for Muslim Friendly Tourism	"Australia is not marketing itself as a Muslim Friendly destination despite its multicultural appeal."
	R4	Lack of Promotion and Awareness	"There is a huge market opportunity that remains unexplored due to a lack of targeted promotional campaigns."
How well is MFTH promoted in Australia?	R1	Lack of Promotion and Awareness	"If MFTH was included in government promotional materials, it would have a massive impact."
	R5	Marketing and Strategic Planning Deficiencies	"Australia needs a dedicated MFTH strategy within its broader tourism framework."
What infrastructure developments are needed for MFTH?	R3	Faith-Based Models and Infrastructure Development	"Muslim travellers need more halal-certified restaurants and prayer spaces in key tourist destinations."
	R6	Muslim Friendly Accommodation and Facilities	"Hotels should be incentivised to include prayer spaces and halal food options."
What training programs exist for MFTH development?	R2	Training and Capacity Building in MFTH	"There are no structured training initiatives that educate tourism operators on the needs of Muslim travellers."
	R6	Workforce Preparedness and Sensitization	"Tourism workers need cross-cultural training to cater effectively to Muslim tourists."

This thematic summary provides a systematic overview of how the participants' insights were mapped against the study's research objectives, thereby reinforcing the credibility and rigour of the findings. Each theme identified through the analysis is further elaborated upon in the following sections, ensuring that the interpretation of results remains closely grounded in empirical data. This approach enables a coherent

and methodical progression throughout the chapter, linking the thematic structure to an in-depth examination of governance issues and developmental prospects for Muslim Friendly Tourism and Hospitality (MFTH) in Australia.

4.2 FUNDAMENTALS OF MUSLIM FRIENDLY TOURISM AND HOSPITALITY (MFTH) IN AUSTRALIA

The global tourism industry experiences increasing growth of Muslim Friendly Tourism and Hospitality as it provides specialised travel experiences for Muslim visitors (Battour & Ismail, 2016). Abdullah et al., (2020) describe that many countries (including those such as South Korea, Japan, Australia, Thailand, and New Zealand, which do not have a domestic Muslim majority) are beginning to introduce tourism products related to the halal concept or Islamic orientation.

4.2.1 Literal Meaning of Muslim Friendly Tourism and Hospitality

The tourism model of Muslim Friendly Tourism and Hospitality provides services and facilities that adhere to Muslim travellers' religious and ethical needs (Henderson, 2016). The essential values of Muslim Friendly Hospitality derive from Islamic religious principles that focus on dietary conduct and prayer requirements, modest behaviour, and lifestyle guidance (Samori, Salleh, & Khalid, 2016). Academic dialogues regarding MFTH refer to it as part of halal tourism while recognizing that the essential elements include dietary care as well as facilities for prayer, gender-separated spaces, and Shariah-approved accommodations (Hanafiah, Hasan, & Mat Som, 2022). Muslim Friendly stands as an alternative to Islamic tourism and Sharia-compliant tourism by emphasizing visitor accessibility regardless of complete adherence to Islamic law (Battour, Ismail, & Battor, 2011). Muslim Friendly Tourism and Hospitality (MFTH) holds varied interpretations across contexts. It is seen as a flexible model

rooted in Islamic values that emphasises halal food, prayer spaces, modesty, and cultural sensitivity (Samori et al., 2016). Unlike Islamic or Shariah-compliant tourism, MFTH allows broader accessibility (Battour et al., 2011).

The author views Muslim Friendly Tourism and Hospitality (MFTH) as a flexible, inclusive model grounded in Islamic values that caters to the religious and ethical needs of Muslim travellers without requiring full Shariah compliance. Rather than aligning strictly with Islamic or Shariah-compliant tourism, MFTH is presented as a more accessible alternative that prioritises key elements such as halal food, prayer facilities, modesty, and cultural sensitivity. The author also highlights that in Australia, the development of MFTH is less driven by government regulation and more influenced by market dynamics and community initiatives. Therefore, Australian policymakers should gain a deeper understanding of the true concept of MFTH as demonstrated by countries such as Singapore, Taiwan, Japan, Hong Kong, and the UK to effectively advance this promising sector.

4.2.2 Key Terminologies in Muslim Friendly Tourism and Hospitality

MFTH demands knowledge of multiple sector-specific vocabulary that exists within the Muslim tourist sector. Different parties active in the tourism industry use overlapping yet independent terminology when discussing Muslim Friendly services. The most common terms include halal tourism and Islamic hospitality, Shariah compliant tourism, Muslim Friendly tourism and faith-based tourism.

Halal tourism represents a comprehensive tourism system grounded in adherence to Islamic dietary laws, moral standards, and lifestyle requirements, enabling Muslim travellers to access halal-certified products and services while staying in Shariah-compliant, alcohol-free environments (Stephenson, 2014). In the Australian context, the effective governance of Muslim-friendly tourism and hospitality (MFTH) requires robust certification systems and regulatory oversight to ensure consistency and credibility, as current practices among accommodation and leisure providers remain

uneven. Closely related, the concept of Islamic hospitality extends beyond physical provisions such as halal food and accommodation to emphasise service excellence, guest welfare, cultural sensitivity, and ethical conduct, reflecting core Islamic values of respect, inclusivity, and kindness (Henderson, 2016). Embedding these principles within service training frameworks in Australia can significantly enhance the experience of Muslim visitors, although this dimension remains largely unregulated compared to the more visible aspects of halal tourism.

At a more stringent level, Shariah-compliant tourism represents a model in which all operational, administrative, and financial aspects strictly adhere to Islamic law (Kadir et al., 2021). This approach is predominantly observed in Muslim-majority destinations such as Saudi Arabia and the United Arab Emirates and presents practical challenges when applied in non-Muslim contexts like Australia. Consequently, full Shariah compliance may not be feasible or necessary; however, an understanding of its principles allows Australian service providers to selectively incorporate relevant Muslim-friendly elements without compromising broader market appeal. In this regard, Muslim Friendly Tourism (MFT) offers a more flexible and adaptable framework, enabling destinations to provide essential services—such as halal dining, prayer facilities, and culturally appropriate service without requiring full Shariah compliance (Pamukcu & Sariisik, 2021). This model aligns well with Australia's diverse and secular tourism landscape, supporting incremental and voluntary adoption through adaptable governance mechanisms.

Furthermore, Muslim Friendly Tourism can be situated within the broader context of faith-based tourism, which encompasses travel motivated by religious or spiritual purposes across all faiths (Seyfi & Rasoolimanesh, 2023). This broader framing highlights both opportunities and challenges, as the growing global Muslim travel market must compete alongside other religious tourism segments. Therefore, strategic marketing and inclusive governance policies are essential to position Australia as a diverse and welcoming destination. Integrating MFTH within a wider faith-based tourism approach not only supports inclusivity but also strengthens Australia's appeal to a global audience seeking ethically aligned and culturally sensitive travel experiences.

The term "Muslim Friendly Tourism" best suits the Australian context as it allows flexibility, inclusivity, adaptability, and alignment with the country's socio-political environment. While halal tourism implies comprehensive compliance with Islamic law across all services, which may be challenging to implement within Australia's secular and highly diverse tourism industry. However, MFTH offers a more flexible framework that accommodates the needs of Muslim travellers without alienating non-Muslim visitors. This model aligns with Australia's secular tourism infrastructure while accommodating essential needs like halal food options, prayer facilities, and modest leisure activities. In addition, MFTH brings into line, with Australia's multicultural branding and commitment to cultural inclusivity, the means for positioning the country to tap into the rapidly growing global Muslim travel market without compromising its secular policy framework. Subsequently, the adoption of Muslim Friendly Tourism provides a balanced approach that supports market growth, enhances cultural sensitivity, and sustains broad visitor appeal.

4.2.3 Interpretation of MFTH by Respondents

Australian stakeholders perceive Multicultural Friendly Tourism History differently depending on their professional role in the industry as well as their market experience and cultural sensibilities. The understanding and practical application of MFTH differ significantly among stakeholders who participated in interviews consisting of tourism professionals and government representatives and Muslim community leaders.

The informants' responses reveal a range of perspectives on Muslim Friendly or halal tourism, highlighting both areas of consensus and divergence. The majority of informants emphasised the importance of providing halal food and prayer facilities, as these are central to the needs of Muslim travellers. Informant 2, a director of tourism and events for Southeast Asia, similarly highlighted that halal food is a "primary area," while Informant 4, a local Muslim tour operator, added that accommodating prayer breaks and providing access to iconic mosques enriches the experience for Muslim tourists. Several informants stressed the necessity of inclusivity, such as Informant 1,

the Executive General Manager for Eastern Markets and Aviation for Tourism Australia, pointed out that Australia must ensure that Muslim travellers "feel welcome" and have access to halal food and places to pray. These insights suggest a shared understanding of basic faith-based needs as a foundation for Muslim Friendly tourism.

On the other hand, minority perspectives extended the conversation beyond these basic needs, advocating for broader cultural and experiential integration. Informant 10, a visiting professor at Centre for Research and Innovation in Tourism in Australia, argued for a more expansive interpretation of Muslim Friendly tourism, rooted in Islamic principles and social justice, criticizing the West's limited focus on food and accommodation. Informant 4 further suggested employing tour guides with shared cultural backgrounds to foster sensitivity and understanding, while Informant 11, a tourism development expert and an advisor to the government on tourism affairs in Australia, emphasised the importance of creating spaces where travellers feel "culturally safe," drawing analogies from Indigenous tourism practices. Informant 6, previously a chairman of an international restaurant franchise chain, underscored the need for novelty in attractions, stating that Muslim tourists seek "something new, something different" rather than generic cityscapes.

The government bodies of Tourism Australia and Austrade view MFTH mainly as a specialised market that holds economic opportunities. The market demand for Muslim Friendly services continues to rise, yet the tourism industry has just started developing its services for this particular segment. Informant 1 stated,

"Australia has the diversity, but it is not marketing itself well to Muslim travellers."

(Informant 1)

The findings indicate multiculturalism functions as a positive factor, yet the market needs a better structured promotion plan combined with service system development.

Tourism operators and hoteliers adopt operational changes mainly by offering halal dining choices and establishing prayer facilities for MFTH destinations. A few

businesses delay adopting MFTH systems because they mistakenly believe it will affect market demand and question its profitability benefits. Informant 6 explained,

"We provide halal food upon request, but there is no real demand for Muslim-specific services."

(Informant 6)

The perception of Muslim travellers from Southeast Asia and the Middle East faces contradiction from document review results, which show these tourists are high spenders in search of destinations that fulfil their requirements.

Muslim community representatives prioritise both Muslim inclusion and accessibility in their evaluations. The main goal, according to several respondents, lies in providing Muslim travellers with a universally welcoming atmosphere instead of designing separate tourism experiences. Informant 12, the President of the Australian National Imam Council, highlighted the importance of cultural sensitivity, stating:

"People want to feel that when they come here, they are coming to a place that is safe for Muslims."

(Informant 12)

Studies based on site observations confirm that major international airports in Sydney and Brisbane maintain prayer areas, yet there is a lack of signages about Muslim Friendly services at otherwise typical hotels and tourist spots, thus making it hard for Muslim tourists to predict the accessibility of faith-friendly facilities.

Research from educational institutions alongside insights from Australian educational and research institutions show that Australia needs an organised structure for MFTH like the approaches used in other countries. Many informants suggested integrating relevant topics into the undergraduate curriculum to provide foundational knowledge, though concerns were raised about implementation challenges. Informant 10, a professor for research and innovation centre in tourism, stated:

"Undergraduate degree programs should incorporate Muslim Friendly tourism into their course curriculum."

(Informant 10)

The majority of participants expressed concern over the limited research conducted by academic institutions in Australia on this topic. Informant 11 described the situation as a pointing out that while there is substantial research and conferences in regions like Malaysia, Indonesia, Singapore, and Brunei, in comparison Australia lacks similar efforts.

"Huge gap in knowledge,"

(Informant 11)

The Australian tourism market integrates MFTH into its multicultural tourism policies instead of viewing it as an independent tourism segment. Industry-wide standards require policy interventions because of this viewpoint.

The majority of sectors within Australia show increasing recognition of MFTH, yet their interpretations about it remain diverse. Australia faces reduced competitiveness in global halal tourism since there are no standardised definitions or policies, which leads to service delivery gaps. Total progress in reducing these disparities demands the joint work of government agencies together with tourism operators and members from the Muslim community to create precise guidelines coupled with better marketing strategies and inclusive tourist experiences.

4.3 GOVERNANCE CHALLENGES IN MFTH

Several organisational issues affect the governance framework of Muslim Friendly Tourism and Hospitality (MFTH) in Australia. Although Australia thrives with a well-developed tourism industry embracing diversity, it does not possess a structured governance system for Muslim Friendly Tourism and Hospitality. The lack of national policies leads to random industry approaches, makes service delivery inconsistent, and

reduces understanding of a Muslim traveller's requirements. Three main constraints to the effective governance of MFTH emerge from the combined results of the thematic analysis together with field observation records and document review findings: policy and regulatory deficiencies and bureaucratic and visa-related hurdles and operational deficiencies of stakeholder coordination and engagement.

The development of MFTH encounters sharp obstacles because of cumbersome visa regulations and bureaucratic procedures. The metamorphosis of visa policies across different countries has prevented major Muslim tourist markets from Malaysia and Indonesia from visiting Australia. Recent interviews with industry stakeholders suggest that Australia's decreasing number of Muslim visitors since COVID-19 began relates to increased visa difficulties, which prevent tourists from visiting due to simpler entry procedures at competing tourist destinations.

Government agencies, along with tourism boards and private sector players, together with Muslim community organisations, fail to establish effective cooperation, which remains weak throughout. A single governing body for MFTH governance could coordinate operations better so market development opportunities would be maximised. Research and site observations show that businesses remain undisciplined regarding Muslim travel market economics since government-led MFTH promotion programs are scant. This paper investigates each governance challenge through qualitative data from interviews, together with field information and policy research literature (see Figure 4.1).

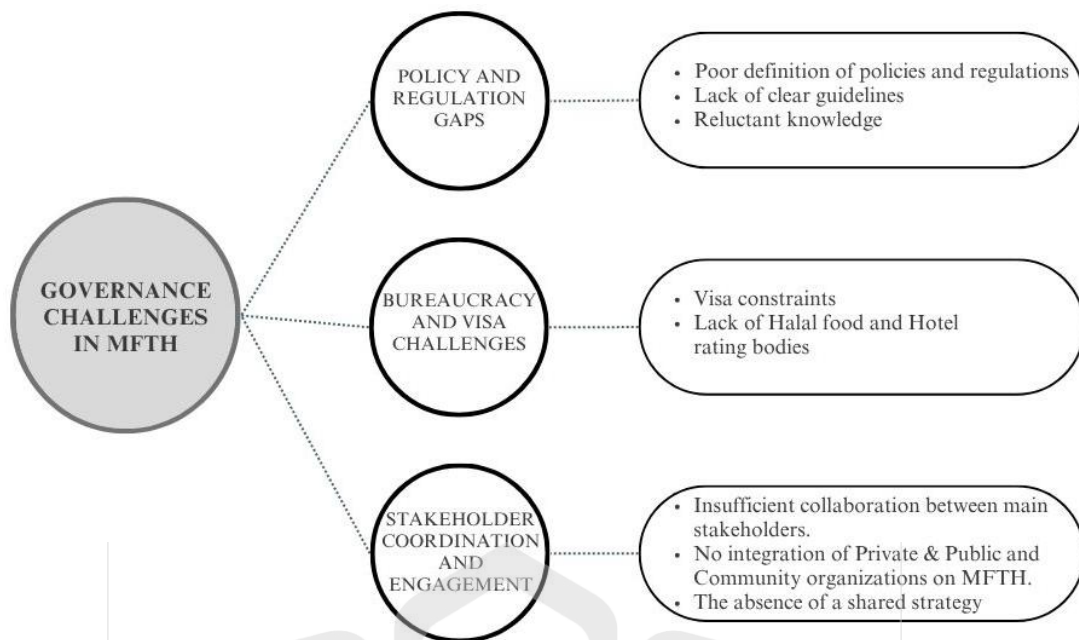


Figure 4.1 Governance Challenges in MFTH in Australia.

4.3.1 Policy and Regulation Gaps

The poor definition of policies and regulations presents a major governance obstacle in the advancement of Muslim Friendly Tourism and Hospitality (MFTH) throughout Australia. Australia does not possess government policies or official regulations that guide Muslim Friendly service standards similar to those found in Taiwan, Malaysia, Indonesia, and the UAE. Informant 9 from the global tourism industry stated:

“I would say if you can look at Hong Kong and Taiwan and see how they have slowly improved in this sector. I think they are very similar in terms of the ecosystem to Australia.”

(Informant 9)

The absence of policy guidance makes tourism operators, hoteliers, and food service providers responsible for their approach to Muslim travellers without standardised service standards, resulting in lost business potential. Interviews with tourism stakeholders revealed a strong demand for government-led action. Informant 3 from the tourism sector stated:

"The government needs to take the lead in setting industry standards. Without a policy framework, businesses are left guessing on how to cater to Muslim travellers."

(Informant 3)

Industry representatives express their irritation about the lack of clear guidelines through interview research. Tourism operators demonstrate reluctant knowledge about effective Muslim traveller service provision, and they have established their systems to offer halal services and culturally sensitive experiences. Informant 5 stated,

"Muslim Friendly tourism is not well captured by any regulation, so operators must always look for it on their own."

(Informant 5)

The methodology depends on independent Muslim organisations to choose their approach to Muslim Friendly practices in the absence of government support or regulation.

The available information from field observations backs this research by displaying crucial disparities in the distribution of MFTH services throughout different areas. Tourism destinations outside of major cities like Sydney and Brisbane struggle to provide even fundamental Muslim Friendly facilities in places such as the Blue Mountains and the Cairns Road. Informant 4, a tour operator, stated:

"I mean, we want to deliver more, but maybe some restrictions have been like, for example, you don't find hotels, Muslim friendly hotels in some locations. If you take them to regional Australia, I mean, the challenges you might face is the accommodation and halal food."

(Informant 4)

This gap in formal policy creates no necessary motivation for businesses serving these areas to establish halal certification or prayer facilities or training programs.

Tourism industry documents and reports demonstrate the missing strategy for promoting MTFH services in Australia. Although the NSW Visitor Economy Strategy

THRIVE 2030 recognises Middle Eastern tourists as lucrative visitors, it fails to establish any plans for Muslim Friendly service development. Tourism Australia's reports advocate market diversification, though they fail to establish MFTH strategies as fundamental elements in Australia's future tourism development. The MFTH market thrives through government policies that establish halal certification standards and financial motivators like in Taiwan and Japan (Setyaningsih 2021, Yasuda 2017). However, Australia does not have any dedicated policies or frameworks to support this rapidly expanding economic sector.

4.3.2 Bureaucracy and Visa Challenges

The analysis of interviews points towards broad apprehension regarding how visa constraints affect the development of the halal tourism market. Informant 5, of the tour operations, sector explained:

*"It's not easy to get a visa anymore for the Malaysian passport holder...
We are losing out on Malaysian tourists."*

(Informant 5)

Other members of the industry agree with the assessment that visa obstacles since COVID-19 have reduced Muslim travel to Australia, particularly from Southeast Asian regions.

The analysis of documentation proves that visa issues contributed to lower Muslim visitor numbers by hurting Australia's competitive position in the Muslim market when compared to competitor countries United Kingdom and Japan as well as Thailand. The THRIVE 2030 Strategy identifies the requirement for international market diversification yet provides restrictions on visas for numerous Muslim-majority countries. Visa-on-arrival programs that Malaysia and the UAE designed specifically for main tourism markets enable easy and convenient travel for Muslim visitors illustrated in Figure 4.2.

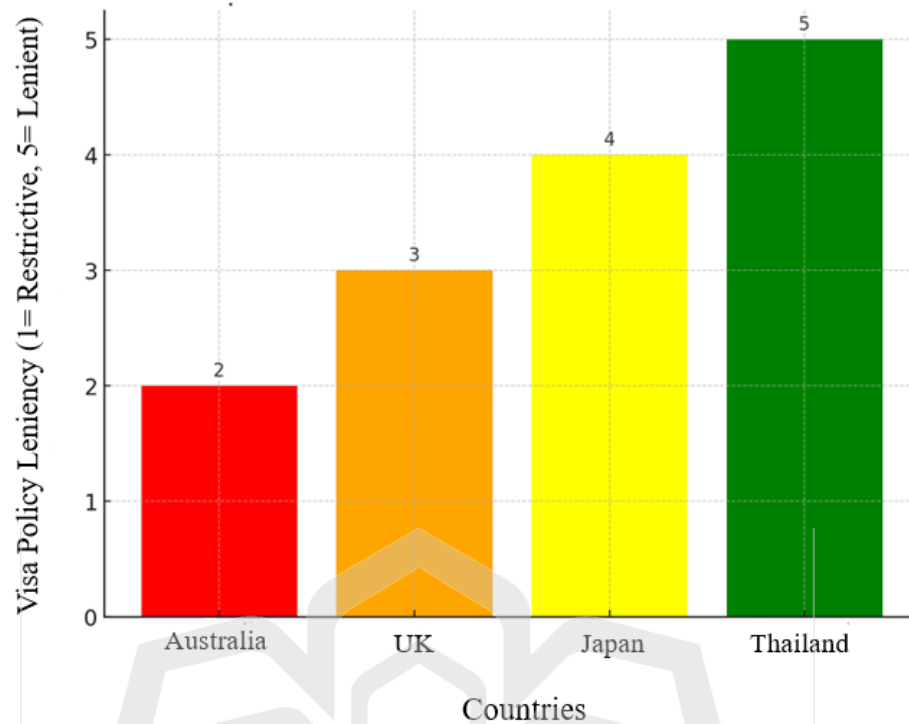


Figure 4.2 Comparison of Visa Policies for Muslim Travellers (Source: Author's own creation).

Figure 4.2 presents a comparative assessment of visa policy flexibility for Muslim travellers across four destinations: Australia, United Kingdom, Japan, and Thailand. The chart is constructed using a qualitative scoring model, where each country is assigned a score on a scale from **1 to 5**:

1 = Highly restrictive visa policies

5 = Highly lenient and accessible visa policies

The scores (Australia = 2, UK = 3, Japan = 4, Thailand = 5) are derived from a comparative analysis of three key criteria:

I. Ease of Visa Application

Evaluates the complexity of application procedures, including online accessibility, documentation requirements, processing time, and approval likelihood.

II. Visa-on-Arrival (VOA) or Visa-Free Access

Measures whether travellers can enter without prior approval or obtain visas upon arrival an important factor enhancing travel convenience.

III. Targeted Access for Muslim-Majority Countries

Assesses whether countries provide relaxed policies, special arrangements, or broader access for travellers from Muslim-majority nations.

Each country is rated against these criteria, and an overall score is assigned to reflect its relative level of accessibility:

1. **Australia (Score: 2)** - Strict visa requirements with no visa-on-arrival or e-Visa options for travellers from Malaysia, Indonesia, or the UAE. High rejection rates have been reported, especially for applicants from South Asian and Middle Eastern nations (Mastercard-CrescentRating, 2021).
2. **United Kingdom (Score: 3)** - More flexible than Australia, offering Standard Visitor Visas to many Muslim-majority countries. However, Pakistan and Bangladesh travellers face additional scrutiny (UK Home Office, 2023). Pew Research Center (2022) notes that visa rejection rates for Muslim travellers are lower than in Australia.
3. **Japan (Score: 4)** - Recently introduced e-Visas for Malaysia and Indonesia and eased restrictions for Middle Eastern travellers (Japan Immigration Services Agency, 2023). Business travellers from UAE, Saudi Arabia, and Qatar receive special visa waivers (Mastercard-CrescentRating, 2021).
4. **Thailand (Score: 5)** - Offers the most lenient visa policies, with visa-on-arrival and visa-free entry for many Muslim-majority nations (Thai Ministry of Foreign Affairs, 2023). This accessibility has fuelled Thailand's rapid growth in halal tourism (Pew Research Center, 2022).

Australia's stringent visa regulations significantly limit its appeal to Muslim travellers. With no visa-on-arrival or e-Visa options available for visitors from key Muslim-majority countries such as Malaysia, Indonesia, and the UAE, and with high rejection rates for applicants from South Asian and North African nations, Australia faces substantial barriers in positioning itself as a welcoming destination within the Muslim travel market. In contrast, countries that have adopted more relaxed visa

policies, such as Thailand and Japan, are experiencing notable advantages in attracting Muslim tourists. Thailand, in particular, has become a leader in halal tourism due to its visa-free and visa-on-arrival access for travellers from many Muslim-majority countries. Similarly, Japan's recent introduction of e-Visas and special waivers for Middle Eastern business travellers has improved its accessibility and competitiveness. The availability of visa-on-arrival and e-Visa options plays a crucial role in enhancing the travel experience for Muslims and significantly expands the market potential. These streamlined entry processes reduce travel friction and signal openness, making destinations more attractive to Muslim travellers seeking convenience and hospitality.

The challenges regarding visa access draw attention through observational research conducted in specific locations. Businesses serving foreign Muslim guests in Sydney and the Gold Coast tourist areas have detected a reduction in bookings from Southeast Asian customers. Tourism operators report decreased promotional activities of Malaysian and Indonesian travel agents because of Australian visa obtaining difficulties.

Other than visa issues, bureaucratic problems impact MFTH's expansion potential. Multiple interviewees described the intricate administrative procedures together with multiple regulatory bodies when applying for food establishment halal certifications, noting the absence of any halal hotel rating certifying organisations and the lack of regulation for halal food certification in Australia. Halal certification in Malaysia operates through a centralised organisation, but Australia lacks an authoritative organisation to oversee halal accreditations, which causes business owners to face misguidance (see Figure 4.3).

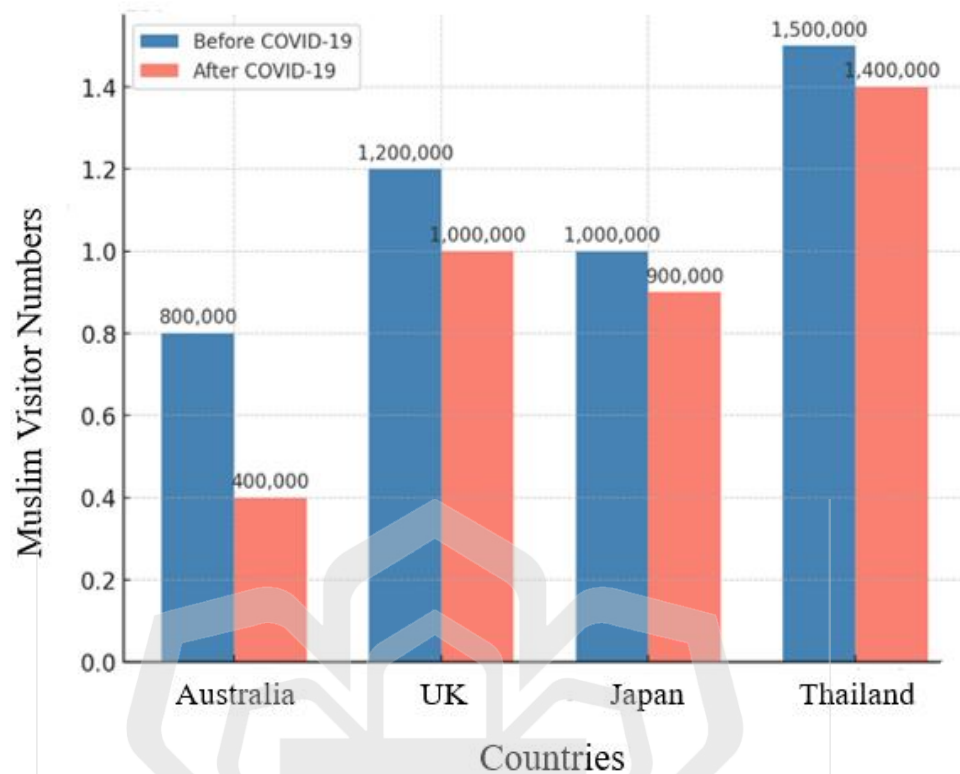


Figure 4.3 Impact of Visa Restrictions on Muslim Visitors (Source: Author's own creation).

The bar chart above was developed using comparative secondary data on Muslim visitor arrivals to Australia, the United Kingdom, Japan, and Thailand across two periods pre- and post-COVID-19 with data standardised to ensure consistency and comparability. A grouped bar chart format was used to present side-by-side comparisons for each country, enabling clear visualisation of changes in visitor numbers. This format was selected for its effectiveness in highlighting variations across categories and timeframes, allowing for easy identification of trends, declines, and recovery patterns. Ultimately, the chart supports the analysis by visually demonstrating the impact of visa restrictions, travel policies, and post-pandemic conditions on Muslim tourism flows.

1. **Australia** - Muslim visitor numbers dropped from 800,000 to 400,000 post-COVID due to strict visa policies and the lack of visa-on-arrival or e-Visa

options for Malaysia, Indonesia, and UAE travellers (Australian Department of Home Affairs, 2023). Australia's slow visa processing times have further deterred Muslim tourists (Mastercard-CrescentRating, 2021).

2. **United Kingdom** - Declined from 1.2 million to 1 million but maintained a relatively stable influx due to eased restrictions for travellers from the Middle East and Southeast Asia. However, Pakistan and Bangladesh visitors still face additional scrutiny (UK Home Office, 2023).
3. **Japan** - Experienced a moderate decline from 1 million to 900,000 post-pandemic but recovered faster than Australia due to e-Visas and visa waivers for Gulf travellers (Japan Immigration Services Agency, 2023).
4. **Thailand** - Minimal impact on visitor numbers, dropping only slightly from 1.5 million to 1.4 million, due to visa-on-arrival and visa-free entry for Muslim travellers (Thai Ministry of Foreign Affairs, 2023). These policies have helped Thailand remain a top halal tourism destination (Pew Research Center, 2022).

Australia's stringent visa policies have led to a notable decline in Muslim visitor numbers, highlighting the impact of restrictive entry requirements on tourism. In contrast, countries like Japan and Thailand, which have adopted more flexible visa arrangements such as e-Visas and visa-on-arrival options, are witnessing faster tourism recovery in the post-COVID era. These streamlined processes not only reduce barriers for travellers but also enhance a destination's appeal, particularly for Muslim tourists seeking ease of access and convenience. As global travel resumes, nations that prioritise simplified and inclusive visa procedures gain a significant competitive edge in attracting Muslim travellers, ultimately boosting their tourism sector and fostering long-term growth in this valuable market segment.

4.3.3 Stakeholder Coordination and Engagement

The inefficient governance of Muslim Friendly Tourism and Hospitality (MFTH) in Australia stems from insufficient collaboration between main stakeholders and their inadequacy to engage in formal partnerships. The integration of government agencies

with private enterprises and community organisations for MFTH promotion fails to exist in established halal tourism markets but remains scattered in Australian developments. The absence of a shared strategy has generated conflicting operational efforts since different organisations work alone without unifying leadership.

Research interviews show that the communication flow between Australian governmental departments, tourism service providers, and Muslim organisations on MFTH is not sufficient. Informant 5 described,

“The MFTH sector development lacks proper clarity regarding which agency bears the responsibility for creating the sector. The absence of responsibility between parties fails to produce desired outcomes and capture the Muslim travel market opportunities.”

(Informant 5)

Field observations indicate that the tourism boards maintain little visible alignment with their local businesses. When it comes to Muslim Friendly initiatives, only a limited number of cities, such as Brisbane, Melbourne, Sydney, and Perth have adopted them, yet these programs remain separated from larger national tourism plans. Being different from other destinations, Taiwan and Japan created official partnerships that connect governmental institutions with tourism businesses for the steady delivery of MFTH products (Setyaningsih, 2021; Yasuda, 2017).

The need for improved stakeholder cooperation becomes evident when examining official documents. The research documents released by Tourism & Events Queensland (TEQ) and Austrade stress the need to create connections with international trade partners without designing any special approach to develop partnerships within the MFTH sector. The Australian Tourism Export Council (ATEC) works to connect gaps through training initiatives, but their initiatives remain constrained because government support is minimal.

Local community groups can share the responsibility in nurturing the development of this lucrative industry. Informant 9 stated,

“The local Muslim community can play a huge role in enabling the destination to be more Muslim friendly in terms of both know-how and knowledge.”

(Informant 9)

Interviews with informants revealed further major obstacles to effective stakeholder involvement in Muslim Friendly Tourism and Hospitality in Australia. A key issue identified was the limited influence of government leadership, unlike Malaysia which has a dedicated Ministry of Tourism supporting halal tourism; Australia has no official body managing MFTH efforts. Informants also highlighted limited awareness among industry players, explaining that many professionals remain unaware of the economic potential of MFTH due to the absence of targeted education and practical training. Additionally, the informants pointed to fragmented efforts by private sector actors and community organisations. While Muslim groups have advocated for improved tourism services, their impact remains limited because of insufficient funding and a lack of stakeholder support.

4.4 ECONOMIC POTENTIAL AND MARKET GAPS

The sector projects a growth to \$225 billion by 2028 and includes 1.9 billion Muslim travellers worldwide (Mastercard-CrescentRating Global Muslim Travel Index, 2021). This segment offers strong economic potential but has yet to fully leverage its cultural diversity, existing halal facilities, and proximity to high-yield Muslim-majority markets, including those in the Middle East, Indonesia and Malaysia. Given the projected growth in Muslim travel markets and Australia's competitive advantages, strategic investment in this sector could yield significant returns through increased visitor numbers and expenditure (see Figure 4.4) (Sim, S., 2023).

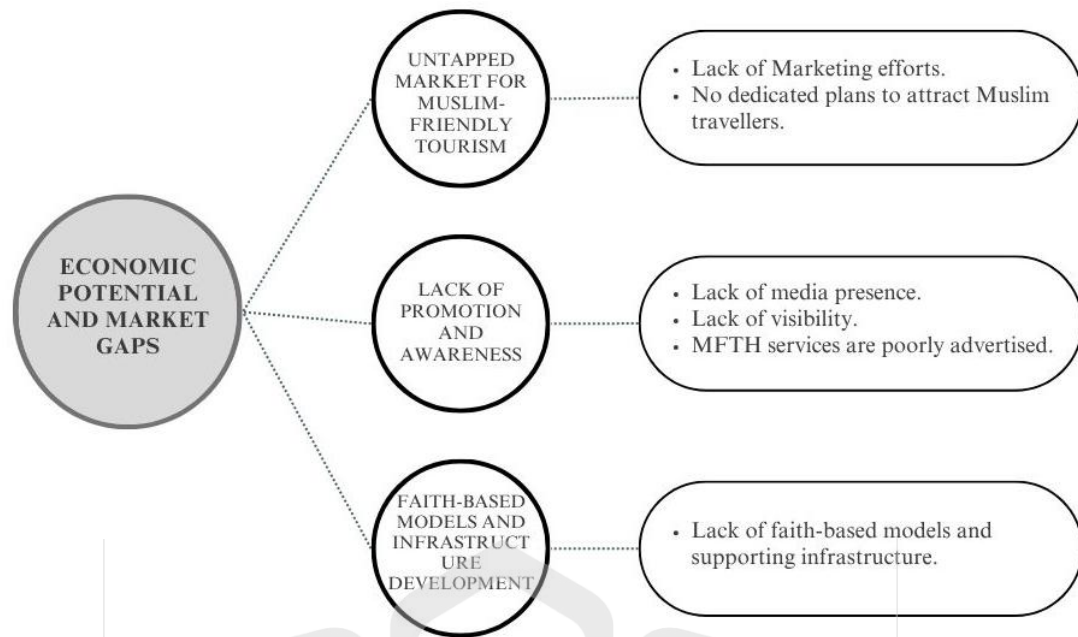


Figure 4.4 Economic Potential and Market Gaps.

4.4.1 Untapped Market for Muslim Friendly Tourism

The multicultural identity of Australia does not translate into maximum economic benefits for its expanding Muslim tourism sector. Businesses serving Muslim tourists view them as profitable visitors because they seek upscale hotel options together with halal dining facilities alongside activities that cater to extended families (Hall, 2011). Australia fails to advertise itself towards Muslim tourists effectively, thereby permitting Taiwan, Singapore, and Japan to gain control over emergent market share.

The data from interviews reveals an important deficiency when it comes to marketplace contact. Informant 5 stated:

"Australia has the diversity, but it is not marketing itself well to Muslim travellers."

(Informant 5)

Australia focuses its tourism strategies on general multicultural tourism but does not have dedicated plans to attract Muslim visitors. Australia differs from Singapore by

adopting a laidback strategy for halal tourism despite the country's categorical position as a global leader, while Singapore receives strategic government backing to lead the market (Henderson, 2016).

Informant 9, a global tourism expert, stated:

"We don't hear a lot about Australia in terms of targeting this market. So, I think that also probably has not helped in developing a Muslim friendly services ecosystem in Australia."

(Informant 9)

This lack of targeted marketing and strategic planning limits Australia's ability to compete in the growing Muslim tourism market. Interview respondents emphasised that without clear promotional campaigns, dedicated infrastructure, and policy-level support, Australia risks falling behind more proactive destinations. To unlock the full economic potential of Muslim Friendly Tourism and Hospitality, Australia must shift from a passive multicultural approach to a focused and inclusive tourism strategy that acknowledges the specific needs of Muslim travellers.

4.4.2 Lack of Promotion and Awareness

Interview data highlights the impact of this oversight. Informant 6, from the tourism sector, noted:

"If they can at least put that as part of their websites or in their promotion, that would have a massive impact."

(Informant 6)

This suggests that even minor improvements in marketing, such as adding halal-friendly filters to online booking platforms or conducting specific roadshows in the Muslim majority countries or in the Middle Eastern region, could significantly increase visibility and attract more Muslim travellers.

Informant 13, a leading tourism stakeholder in Australia, stated:

“We need a bit of a priority from our marketing agency in tourism Australia to target those markets, developing advertising campaigns, which are specifically catered for those markets.”

(Informant13)

Field observations confirm this lack of visibility. While Australia has a growing number of halal-certified restaurants, prayer spaces, and Muslim Friendly hotels, these services are poorly communicated, making it difficult for Muslim tourists to access relevant information. In contrast, destinations such as Japan, Taiwan, and South Korea have invested in digital tools, including mobile apps and online halal travel guides, to assist Muslim travellers (Setyaningsih, 2021; JNTO, 2023).

4.4.3 Faith-Based Models and Infrastructure Development

A major limitation to the scalability of MFTH in Australia is the lack of faith-based models and supporting infrastructure. Many successful halal tourism destinations such as Malaysia, Dubai, and Turkey have developed structured governance models that integrate religious considerations into national tourism policies. Australia, however, lacks a formalised approach, leaving MFTH development largely dependent on private sector initiatives.

Document reviews provide valuable insights into successful faith-based models. Malaysia’s halal tourism framework, Dubai’s Sharia-compliant hospitality standards, and Taiwan’s Muslim Friendly certification system serve as benchmarks that Australia could adopt. These models include:

- a) Halal certification programs for hotels and restaurants to ensure compliance with Muslim dietary laws.
- b) Government-backed subsidies and incentives for businesses investing in MFTH.
- c) Integrated prayer spaces in airports, shopping malls, and tourist sites to

accommodate Muslim travellers.

4.5 CULTURAL SENSITIVITY IN HOSPITALITY PRACTICES

Interviews with tourism operators, government officials, and Muslim community representatives reveal a disconnect between the industry's perception of Muslim traveller needs and the actual expectations of Muslim tourists. Many stakeholders equate MFTH solely with halal food availability, overlooking other critical elements such as prayer facilities, gender-sensitive accommodations, and culturally respectful customer service. Field observations confirm that while halal dining options are increasing in major cities, prayer spaces remain scarce, and front-line hospitality staff often lack cultural training to appropriately engage with Muslim guests (see Figure 4.5).

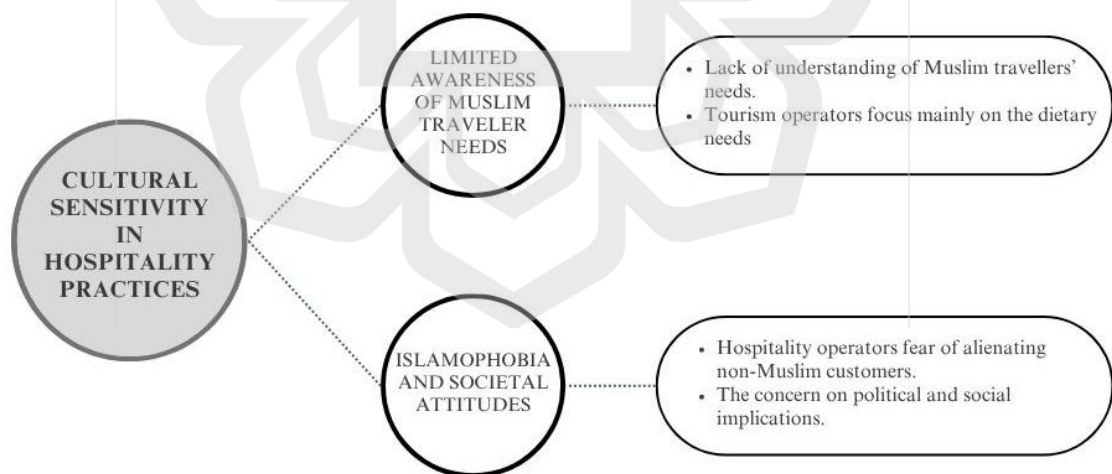


Figure 4.5 Cultural Sensitivity in Hospitality Practices.

4.5.1 Limited Awareness of Muslim Traveller Needs

Despite the economic potential of the Muslim travel market, many hospitality providers in Australia lack a clear understanding of what Muslim tourists require beyond halal food (WEKKE et al., 2024). Interviews with industry stakeholders reveal that most tourism operators associate Muslim Friendly tourism solely with dietary needs, neglecting other fundamental aspects such as prayer spaces, gender-sensitive services, and cultural engagement.

Informant 5 from the hospitality sector stated,

"Tourism operators are not aware of what Muslim tourists need beyond halal food. They think having a few halal restaurants is enough, but Muslim travellers need a more comprehensive experience."

(Informant 5)

This finding is reinforced by field observations, which indicate that while some high-end hotels in Sydney and Brisbane have begun offering halal meal options, very few provide designated prayer areas, qibla directions, or ablution (*Wudu*) facilities. In contrast, destinations such as Japan, South Korea, and Taiwan have implemented systematic changes including Muslim Friendly hotel certifications, prayer rooms at shopping malls, and clear signage for halal services to cater to this growing market (Setyaningsih, 2021; Yasuda, 2017).

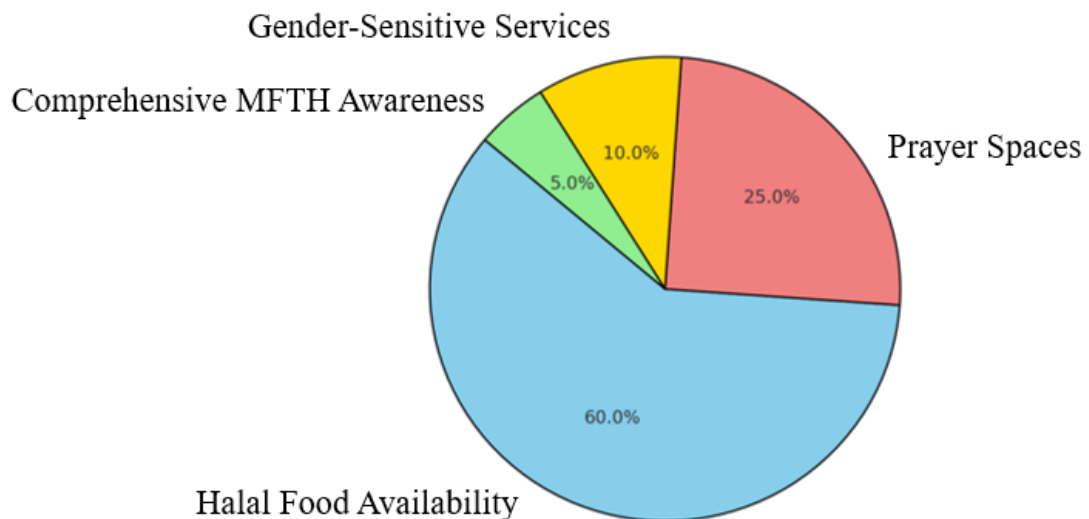


Figure 4.6 Tourism Operators' Awareness of Key MFTH Elements (Source: Author's own creation).

The Figure 4.6 illustrates the level of awareness among tourism operators regarding key components of Muslim Friendly Tourism and Hospitality (MFTH). It is developed using a proportional distribution approach, where each segment represents the relative share of awareness assigned to specific MFTH elements. The process involves:

i. Identification of Key MFTH Components

Four critical service areas were identified based on their significance to Muslim travellers, forming the core focus of the study. These include the availability of halal food, which ensures compliance with Islamic dietary requirements; access to appropriate prayer spaces to facilitate the performance of daily religious obligations; the provision of gender-sensitive services that respect privacy and cultural norms; and comprehensive awareness of Muslim-Friendly Tourism and Hospitality (MFTH) among service providers.

ii. Assessment of Awareness Levels

Awareness was evaluated through industry observation, literature review, or survey-based insights, estimating how well tourism operators understand and implement each element.

iii. Allocation of Percentage Values

Each component was assigned a percentage to reflect its relative level of awareness among tourism operators. Halal food availability accounted for the highest proportion at 60%, largely due to its strong global recognition and consistent demand among Muslim travellers. Prayer spaces represented 25%, indicating a moderate level of awareness, although their implementation remains inconsistent across tourism settings. Gender-sensitive services comprised 10%, reflecting a limited understanding and application of privacy-oriented and culturally appropriate service provisions. Finally, comprehensive MFTH awareness was assigned only 5%, highlighting a very low level of understanding of integrated and holistic Muslim-friendly tourism services.

iv. Visual Representation

The percentages are plotted as slices of a pie chart, ensuring the total equals 100%, which provides an immediate visual comparison of awareness gaps.

Tourism operators often emphasise halal food offerings while overlooking other essential aspects of Muslim Friendly tourism, such as accessible prayer spaces and gender-sensitive services. This narrow focus reflects a limited understanding of the broader needs of Muslim travellers. The lack of awareness around the full range of Muslim Friendly Tourism and Hospitality (MFTH) elements underscores the importance of structured training and capacity-building programs within the tourism sector. To address these gaps, governments and industry organisations should develop and implement standardised guidelines that promote a more holistic approach to Muslim Friendly tourism. Such initiatives would ensure consistency, improve service quality, and better cater to the diverse needs of Muslim travellers, ultimately enhancing their overall travel experience.

4.5.2 Islamophobia and Societal Attitudes

Interviews with tourism stakeholders indicate that some hospitality providers remain resistant to marketing their services as "Muslim Friendly" due to fears of alienating non-

Muslim customers. Others express concerns about the political and social implications of actively catering to Muslim travellers, reflecting broader societal tensions regarding Islam and multiculturalism. Informant 7 stated:

"There is still resistance within parts of the industry to actively market to Muslim travellers. Some businesses worry that branding themselves as Muslim Friendly will turn away other customers"

(Informant 7)

Field observations confirm that Islamophobic attitudes manifest in subtle ways within the tourism sector. For example, while some high-end hotels offer halal dining options, they often do not advertise them publicly, possibly to avoid being perceived as catering specifically to Muslim guests. Similarly, prayer facilities in major airports (such as Sydney and Brisbane) exist but are poorly signposted, making them difficult for Muslim travellers to locate.

4.6 FACTORS SUPPORTING THE IMPLEMENTATION OF MFTH IN AUSTRALIA

The successful implementation of Muslim Friendly Tourism and Hospitality (MFTH) in Australia is contingent upon several key enablers, including government initiatives, industry collaborations, stakeholder engagement, and market demand. Figure 4.7 illustrates the factors supporting the implementation of MFTH in Australia.

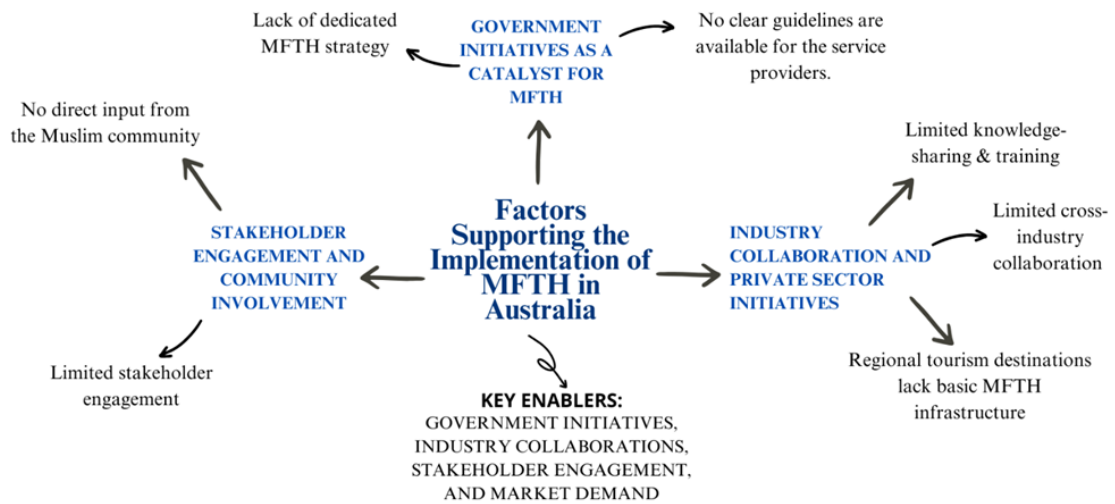


Figure 4.7 Factors Supporting the Implementation of MFTH in Australia.

Despite the challenges associated with governance gaps, visa restrictions, and societal attitudes, Australia possesses the foundational elements necessary to establish a thriving MFTH sector, provided that these factors are effectively harnessed. Figure 4.8 presents a Venn diagram portraying the overlapping roles of government agencies, private sector businesses, and Muslim community organisations.

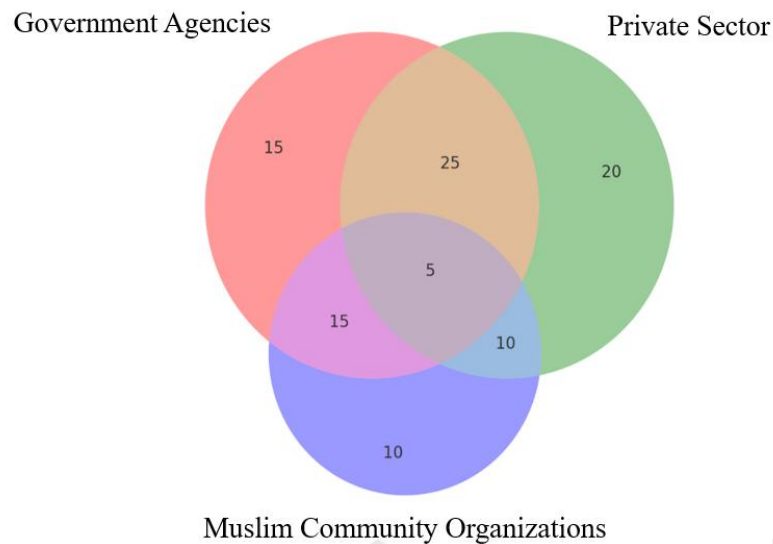


Figure 4.8 Overlapping Roles in MFTH Development (Source: Author's own creation).

The Venn diagram was constructed using a frequency-based approach to illustrate the level of involvement and collaboration among government agencies, private sector businesses, and Muslim community organisations in the development of Muslim Friendly Tourism and Hospitality (MFTH) in Australia. Data collected from sources such as surveys, interviews, or case studies were first coded according to stakeholder participation, and each instance was categorised into mutually exclusive groups: single stakeholder involvement, bilateral collaboration between two stakeholders, or trilateral collaboration among all three. The numerical values in each section represent the number of occurrences within these categories for example, 15, 20, and 10 indicate cases where only one stakeholder group was involved, while 25, 15, and 10 reflect collaborations between two groups, and 5 represents instances where all three stakeholders worked together. Care was taken to avoid double counting by assigning each case to only one category, ensuring accurate representation. Overall, the diagram quantifies stakeholder engagement and highlights the extent of partnerships and gaps in full collaboration within MFTH development.

Government agencies account for 15% of stakeholder involvement and are primarily focused on policymaking, regulatory frameworks, and international tourism

marketing. However, their engagement with Muslim organisations remains limited, which constrains the integration of faith-based considerations into broader tourism governance (Salleh, Hamid, & Hashim, 2019). In comparison, private sector businesses represent 20% and play a more active role in service delivery, investment in halal-related infrastructure, and promotional activities. Despite this, they often lack sufficient awareness of Muslim-Friendly Tourism and Hospitality (MFTH) standards and operate with limited regulatory guidance (Isa, Chin, & Mohammad, 2018). Muslim community organisations comprise 10% of stakeholder involvement, contributing mainly through halal certification, religious advisory roles, and advocacy efforts. Nevertheless, their influence over government policies and private sector strategies remains relatively constrained (Rosli, Jamaludin, & Ahmad, 2024).

Collaborative arrangements among stakeholders show varying levels of engagement and effectiveness. The partnership between government and private sector actors represents the largest share at 25%, reflecting joint efforts in tourism strategies and funding initiatives; however, these collaborations often overlook the inclusion of faith-based tourism considerations (Henderson, 2016). Government and Muslim organisations account for 15%, working together mainly on halal certification and promotional activities, yet lacking deeper policy integration to support faith-friendly infrastructure (Ali, Radzuan, & Hassin, 2022). Similarly, private sector businesses and Muslim organisations contribute 10%, collaborating to provide halal-friendly services but facing limitations due to insufficient financial backing and policy support from the government (Abdullah et al., 2024). Notably, comprehensive collaboration among all three stakeholder groups is minimal, at only 5%, resulting in fragmented service delivery and an unstructured approach to MFTH development. This limited multi-stakeholder integration highlights a critical gap in achieving cohesive and effective governance within the Muslim-friendly tourism sector (Pamukcu & Sariisik, 2021).

In many countries, government bodies, businesses, and Muslim organisations operate independently with limited structured collaboration, hindering the development of a cohesive Muslim Friendly tourism and hospitality (MFTH) ecosystem. Although private sector investment in MFTH services is increasing, the absence of clear policies, standardised guidelines, and targeted training programs limits its effectiveness and long-term impact. In contrast, countries like Malaysia and Singapore demonstrate how

a structured governance model fosters stronger coordination among stakeholders, leading to more strategic planning and consistent service delivery. This integrated approach not only enhances the overall quality of MFTH offerings but also positions these countries more competitively in the global Muslim travel market, serving as a model for others seeking to strengthen their MFTH sectors.

4.6.1 Government Initiatives as a Catalyst for MFTH

A major factor in the successful implementation of MFTH in Australia is government intervention through policy frameworks, funding incentives, and regulatory support. Currently, Australia lacks a dedicated MFTH strategy, leaving individual businesses to navigate the sector without clear guidelines. Informant 4 stated,

“I would like to see a bit more incentives from the government to the inbound operators like us in terms of promotion and financial incentives for catering for this market.”

(Informant 4)

In contrast, Singapore’s government actively promotes halal tourism through national policies, certification programs, and investment incentives, making it a global leader in MFTH (Henderson, 2016).

4.6.2 Industry Collaboration and Private Sector Initiatives

Field observations reveal disparities in MFTH service availability across different regions. While major cities like Sydney and Brisbane offer a modest range of halal-certified restaurants and prayer spaces, regional tourism destinations lack basic MFTH infrastructure. This inconsistency highlights the need for cross-industry collaboration to create a uniform standard of service delivery.

Interviews with industry professionals emphasise the importance of knowledge-sharing and training. Informant 14, from the hospitality sector, stated:

"Businesses are interested in catering to Muslim travellers, but they don't know where to start. More industry collaboration and training programs could make a difference."

(Informant 14)

4.6.3 Stakeholder Engagement and Community Involvement

Interviews with representatives from Muslim organisations in Australia highlight concerns about limited stakeholder engagement. Informant 12 stated:

"There is no platform where the Muslim community and tourism industry can come together to discuss MFTH. Without consultation, policies won't address real issues."

(Informant 12)

Field observations confirm this gap, as most Muslim Friendly services in Australia are developed without direct input from the Muslim community. In contrast, Malaysia, Singapore and Indonesia involve Islamic councils, tourism boards, and business associations in MFTH decision-making, ensuring culturally appropriate service provision (Henderson, 2016).

4.7 TRAINING AND CAPACITY BUILDING

The implementation of Muslim Friendly Tourism and Hospitality (MFTH) in Australia requires systematic training and capacity-building initiatives to ensure cultural competency among tourism professionals. While Australia is recognised as a diverse and multicultural destination, interviews, field observations, and document reviews

reveal significant gaps in industry preparedness for serving Muslim travellers (Muin et al., 2024). The lack of structured training programs, educational initiatives, and professional development opportunities has resulted in inconsistent service delivery, limited awareness of Muslim traveller needs, and missed opportunities in the global halal tourism market (Abas, Zahari, & Radzi, 2022).

4.7.1 Lack of Industry Training

One of the most pressing barriers to the expansion of MFTH in Australia is the absence of structured training programs for tourism and hospitality professionals. While some industry-led initiatives, such as the Australian Tourism Export Council's (ATEC) "Muslim Host – Culture Ready" program, offer limited cultural awareness training, these programs remain optional and are not widely adopted across the sector (Australian Tourism Export Council).

Interviews with tourism stakeholders highlight the industry's lack of preparedness. Informant 7, from the hotel sector, stated:

"We need training, but there is no structured program that educates tourism professionals about the needs of Muslim travellers."

(Informant 7)

Field observations reveal notable gaps in staff awareness and service delivery. While some top hotels in Sydney and Brisbane offer halal meals and prayer facilities, most staff lack adequate training in Muslim-friendly hospitality practices. In contrast, countries such as Japan, South Korea, and Taiwan have implemented industry-wide halal certification programmes to enhance cultural competence (Ahmad et al., 2020; Idris, 2024). These findings underscore the critical importance of introducing structured Muslim-Friendly Tourism (MFT) training for both tour guides and frontline staff, who collectively shape the end-to-end visitor experience. Equipping them with practical knowledge of halal requirements, cultural sensitivities, and appropriate communication

practices is essential to ensuring accurate information delivery and culturally respectful service interactions. Such targeted training would not only standardise service quality across all touchpoints but also strengthen overall industry readiness and credibility. Without these structured training initiatives, Australia risks losing its competitive edge in the global halal tourism market.

4.7.2 Role of Education in Promoting Inclusivity

Beyond industry training, educational initiatives play a crucial role in fostering inclusivity and cultural awareness within the tourism sector. Countries that have successfully implemented MFTH including Malaysia, Singapore, and Japan have incorporated cross-cultural education into their tourism development strategies, ensuring that hospitality professionals, policymakers, and service providers understand the cultural and religious needs of Muslim travellers (Suhartanto et al., 2025).

Interviews with educators and tourism experts emphasise the importance of education in shaping industry attitudes. Informant 10, from a university tourism program, stated:

"Creating cross-cultural values and languages in education leads to a generation of young people who are educated and respectful."
(Informant 10)

Field observations reveal gaps in the Australian tourism education system, where MFTH is not integrated into formal hospitality training programs. Unlike in Malaysia, Taiwan and Japan, where universities offer dedicated courses on halal tourism and Shariah-compliant hospitality. Examples include International Islamic University (IIUM) in Malaysia, the National Kaohsiung University of Hospitality and Tourism (NKUHT) in Taiwan, and Chuo University in Japan. However, Australian hospitality schools do not include MFTH as either core or elective courses within tourism and hospitality programs.

4.8 OBSERVATION AND LITERATURE REVIEW FOR VALIDATION

To ensure the credibility and robustness of the findings, this study employed field observation and literature review alongside content analysis (Che Haron et al., 2024). While interviews provided valuable insights from industry stakeholders, observations of real-world tourism infrastructure and a review of global MFTH governance models strengthened the validity of the research. These additional methods enabled cross-verification of claims, identification of inconsistencies, and alignment of Australia's MFTH challenges with international best practices (Siddiqui, Nafees, & Hamid, 2025). Field observations conducted in key tourism destinations in Queensland and New South Wales revealed disparities between stakeholder perceptions and actual MFTH service availability. While some respondents highlighted improvements in Muslim Friendly facilities, on-the-ground assessments demonstrated that such amenities were still limited in major tourist hubs and nearly non-existent in regional destinations.

4.8.1 Observation as a Validation Tool

Field observations were undertaken to evaluate the availability and accessibility of Muslim-Friendly tourism infrastructure across key Australian destinations, including Sydney, Brisbane, the Gold Coast, and regional areas such as the Blue Mountains and the Great Ocean Road. These assessments focused on several critical dimensions relevant to Muslim travellers. First, attention was given to the presence of prayer facilities and wudu-friendly restrooms, which are essential for the performance of daily religious practices. Second, the availability of halal-certified accommodation and dining options was examined to determine the extent to which tourism providers cater to Islamic dietary requirements. Third, observations considered the provision of spaces that support privacy and family-oriented activities, reflecting the cultural and social preferences of Muslim visitors. Finally, the study assessed the level of cultural sensitivity demonstrated within tourism services, including staff awareness and responsiveness to Muslim needs. Collectively, these observational areas provided a comprehensive understanding of how well tourism destinations accommodate and

support Muslim-friendly travel experiences. See Table 4.2.

Table 4.2 Findings from Field Observations on MFTH Infrastructure (Availability in Major Cities vs. Regional Areas) (Source: Author's own creation).

MFTH Infrastructure	Sydney (Major City)	Brisbane (Major City)	Blue Mountains (Regional)	Cairns Road (Regional)
Halal-Certified Restaurants	Many, but poorly advertised	Moderate availability, limited signage	Very few, mostly non-certified	Almost none
Prayer Spaces in Public Areas	Present but not well signposted	Present at airport, scarce elsewhere	No dedicated spaces	No dedicated spaces
Muslim Friendly Hotels	Limited, mostly high-end	Some mid-range and high-end	Rare, mostly independent guesthouses	None reported
Staff Awareness of MFTH Needs	Inconsistent, some training evident	Limited awareness, ad-hoc responses	Minimal awareness	No awareness reported
Transport Access to halal food	Moderate, with some halal delivery options	Moderate availability in city centre	Very limited, no dedicated services	No access to halal-certified food

a) Prayer Facilities and Wudu-Friendly Restrooms

Observations at Sydney International Airport and Brisbane Airport confirmed the existence of dedicated prayer rooms, but these facilities were poorly signposted and difficult to locate. In popular tourist areas such as the Sydney Opera House and the Gold Coast, there were no designated prayer spaces, forcing Muslim travellers to use public spaces for prayers. In contrast, Japan, Malaysia, and South Korea have strategically

placed prayer rooms in shopping centres, theme parks, and train stations to accommodate Muslim tourists. In regional areas like the Blue Mountains, there were no prayer facilities within a 100-kilometer radius, confirming stakeholder concerns about the lack of infrastructure for Muslim travellers in non-urban settings. According to Hall & Prayag, (2019) the prayer and wudu facilities are crucial for Muslim Friendly hospitality, enhancing the overall experience for Muslim tourists. These amenities cater to religious practices, making destinations more appealing and accommodating for Muslim travellers seeking halal options. See Figure 4.9 a) and b).



Figure 4.9 a) Prayer Room at Sydney Airport, b) Prayer Room at Brisbane Airport.

b) Halal-Certified Accommodation and Dining Options

While some respondents claimed that halal food availability had improved, observations indicated that most restaurants in major cities do not display halal certification, making it difficult for Muslim travellers to verify food authenticity. Some eateries offered halal meals alongside pork-based dishes, raising concerns about cross-

contamination. Moreover, self-declared halal eateries are commonly seen throughout Sydney, as there is currently no official body responsible for certifying halal accommodations or dining establishments. See Figure 4.10.



Figure 4.10 Self-claimed Halal Eatery in Sydney

Hotels showed limited engagement with halal certification, with no major Australian hotel chain actively marketing itself as Muslim Friendly. In contrast, hotels in Malaysia, Singapore, Dubai, and Indonesia prominently advertise halal-certified kitchens, gender-segregated facilities, and Muslim Friendly room amenities. According to Sarhan et al. (2015), “there has been a significant lack of information and understanding among Gold Coast accommodation management regarding the specific needs of Middle Eastern tourists” and provided some practical managerial and marketing recommendations, including suggested best practices, for hoteliers serving international tourists, especially those from the Middle East.

c) Cultural Sensitivity in Tourism Services and Staff Awareness

Field observations in high-end hotels and major tourist attractions revealed that most frontline hospitality staff lacked cultural competency in serving Muslim travellers. When asked about halal food availability or prayer facilities, many staff members were either unaware or provided vague information. This aligns with stakeholder comments on the lack of structured MFTH training programs in Australia's tourism sector. Comprehensive research conducted on cross-cultural awareness in Melbourne hotels by Mallinson (2000), which revealed that a significant challenge in Melbourne's hotel sector was the low level of cross-cultural awareness among management, which directly led to inadequate investment in staff training for cultural sensitivity and diverse guest service requirements.

These findings support the interviewee's claims that Australia has not fully embraced Muslim Friendly tourism and that existing services are inadequate or inconsistently implemented.

4.8.2 Literature Review as a Supporting Source

The literature review provided comparative insights into successful MFTH governance frameworks from Malaysia, Singapore, Taiwan, and Japan, reinforcing the study's findings on policy gaps, infrastructure deficiencies, and stakeholder engagement challenges in Australia. See Figure 4.11.

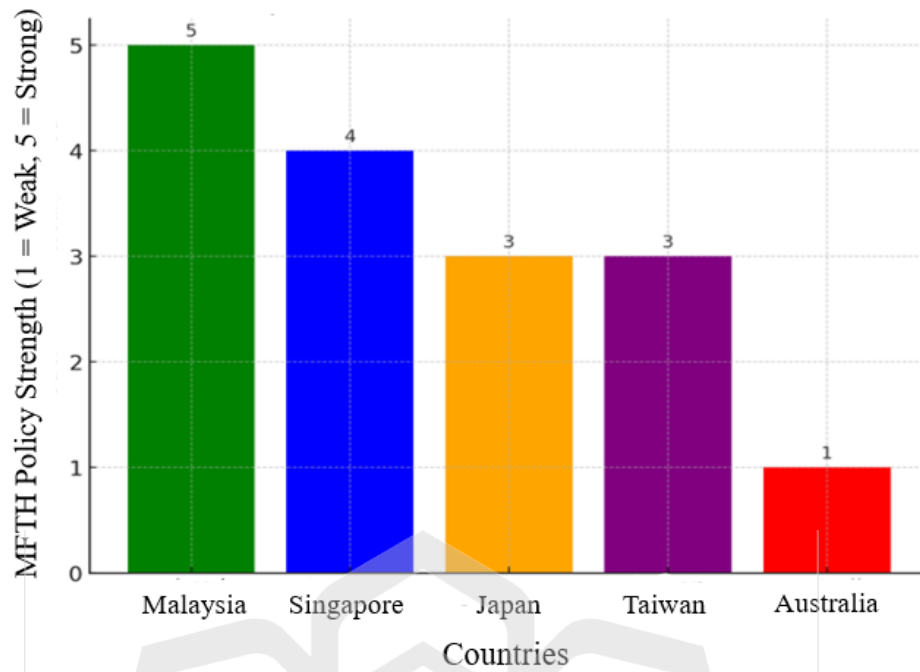


Figure 4.11 Comparison of MFTH Governance Models (Source: Author's own creation).

The construction of the bar chart is based on a comparative scoring methodology. First, key governance indicators were identified such as the presence and effectiveness of regulatory frameworks, the robustness of halal certification processes, the level of government support, and the extent of collaboration within the tourism industry. Each country was then evaluated against these criteria using qualitative and/or quantitative data, including policy reviews, industry reports, and stakeholder insights. Scores were assigned on a standardised scale from 1 to 5, where 1 represents minimal or underdeveloped governance and 5 indicates a highly structured and effective system. These scores were then plotted on the bar chart, with countries on the horizontal axis and their corresponding scores on the vertical axis, allowing for a clear visual comparison of MFTH governance strength across the selected countries.

1. Malaysia (Score: 5) – The strongest MFTH governance model, with well-established halal certification, government-backed initiatives, and a structured regulatory framework

2. Singapore (Score: 4) – A structured but slightly less comprehensive system than Malaysia, with strong halal certification and tourism infrastructure but fewer government-led MFTH initiatives (Singapore Tourism Board, 2022).
3. Japan (Score: 3) – Moderate MFTH policies, with recent improvements in halal tourism facilities but lacking national-level governance for MFTH (Japan National Tourism Organisation, 2023).
4. Taiwan (Score: 3) – Similar to Japan, with growing awareness and industry-driven MFTH initiatives but limited government involvement (Taiwan Tourism Bureau, 2023).
5. Australia (Score: 1) – The weakest governance model, with no dedicated MFTH policies, limited halal-certified tourism infrastructure, and a fragmented approach to Muslim Friendly services (Australian Trade and Investment Commission, 2023).

Malaysia stands out in Muslim Friendly Tourism and Hospitality (MFTH) governance, driven by robust regulatory support and strong industry alignment. Countries like Malaysia and Singapore, which have structured halal certification systems and active government involvement, tend to perform better in implementing effective MFTH frameworks. In contrast, nations such as Japan and Taiwan are making progress but require more proactive government participation to strengthen their MFTH models. Meanwhile, Australia lags significantly in this area, missing a key opportunity to attract the growing segment of Muslim travellers. Strong governance and certification mechanisms remain essential for building trust and enhancing competitiveness in this sector.

4.8.2.1 Key Themes from Literature and Their Alignment with this Study

The synthesis of key themes identified in the existing literature and their relevance to the current study provides a structured basis for analysis. By aligning established theoretical and empirical insights with the research objectives, it highlights areas of convergence and divergence, particularly in relation to Muslim-Friendly Tourism and

Hospitality (MFTH). This comparison provides a critical foundation for situating the study within the broader academic discourse while identifying gaps that the present research seeks to address.

i. Importance of Government-Led Policy Development

The importance of government-led policy development in Muslim Friendly Tourism and Hospitality (MFTH) is widely supported in the literature. Studies by Henderson (2016) and Hasanah and Harun (2018) demonstrate that countries with thriving MFTH sectors have structured governance systems guided by government agencies. This aligns closely with the findings of this study, which reveal that Australia currently lacks a centralised policy body to oversee and guide MFTH initiatives.

ii. Economic Benefits of Halal Tourism Investment

The economic benefits of investing in halal tourism are also well documented. Research from Ghani (2016) and Echchabi, Bocanet, & Grassa (2022) illustrates how structured MFTH policies in countries like Malaysia and the United Arab Emirates have attracted high-spending Muslim travellers, significantly boosting national economies. In contrast, economic reports from Tourism Australia confirm that Australia has not yet fully tapped into this lucrative market segment.

iii. Need for Industry Training and Standardisation

A recurring theme in the literature is the need for industry-wide training and standardisation. Henderson (2016) and Battour & Ismail (2016) emphasise the importance of equipping tourism professionals with the necessary skills and certifications to provide consistent and culturally sensitive services. This study supports these findings by revealing a clear lack of structured MFTH training among Australian tourism operators, which results in inconsistent service delivery.

iv. Role of Private Sector Engagement and Incentives

Finally, private sector engagement and business incentives play a crucial role in advancing MFTH. Case studies from Dubai and Malaysia highlight how financial incentives, including halal certification subsidies and training programs, have driven wider adoption of Muslim Friendly practices (Alhosani, & Zaidan, 2014; Isa, Chin, & Mohammad, 2018). Interview respondents in this study echoed similar suggestions,

stating that government-supported certification and financial aid could motivate Australian businesses to offer more inclusive services.

4.8.3 Global MFTH Governance Models and Their Relevance to Australia

Global governance models of Muslim Friendly Tourism and Hospitality (MFTH) offer valuable insights for Australia's tourism development. In Malaysia, the government actively promotes halal tourism through structured policies, certification programs, and targeted marketing strategies. The Islamic Tourism Centre (ITC) plays a key role in ensuring that hospitality businesses comply with halal tourism standards, providing a regulatory model that Australia currently lacks (Hall and Prayag, 2019). Singapore presents another strong example, where the MUIS Halal Certification System enables government collaboration with private businesses to streamline halal accreditation and integrate MFTH within mainstream tourism services. This structured approach could be effectively replicated in the Australian context (Henderson, 2019). Taiwan supports MFTH by offering financial subsidies to businesses for obtaining halal certification and by developing prayer spaces in public areas. A similar incentive program in Australia could encourage wider adoption of Muslim Friendly services (Setyaningsih, 2021). In Japan, the Japanese National Tourism Organisation (JNTO) has introduced halal tourism guidelines and mandatory training programs to equip hospitality professionals with cultural competency for serving Muslim travellers. This addresses a significant training gap that remains unaddressed in Australia (Kurniawan, & Jatmika, 2021).

4.9 GOVERNANCE FRAMEWORK

A robust governance framework is essential to ensure that Muslim Friendly tourism is integrated into national tourism policies, regulatory standards are established, and stakeholders collaborate effectively. Content analysis of interviews, field observations,

and document reviews reveals that government agencies, tourism boards, the private sector, and Muslim community organisations must work together to establish a coherent governance structure.

4.9.1 Addressing Policy Gaps and Structural Challenges

Interviews with industry stakeholders confirm the need for structured policy intervention. Informant 6, from the hospitality sector, stated:

"We need a national strategy that outlines how Muslim Friendly tourism should be implemented. Right now, businesses are left to figure it out on their own."

(Informant 6)

Field observations further reveal inconsistencies in MFTH services across different regions. While Sydney and Brisbane offer relatively better halal dining and prayer facilities, regional tourism destinations lack even the most basic Muslim Friendly infrastructure. This disparity stems from the absence of clear policies guiding businesses on how to cater to Muslim travellers.

4.9.2 The Role of Government Agencies and Tourism Boards

Government intervention is crucial for the successful governance of MFTH. Currently, Australia lacks a centralised authority overseeing Muslim Friendly tourism, resulting in a fragmented approach where individual businesses operate without regulatory guidance (Salleh, Hamid, & Hashim, 2019).

Interviews with policymakers indicate a lack of coordination between government agencies. Informant 4 stated:

"There's no single agency responsible for Muslim Friendly tourism. Everyone is working in isolation, which limits progress."

(Informant 4)

To establish a cohesive governance framework, the following government agencies must play a role:

- a. **Tourism Australia** should promote MFTH in national campaigns and collaborate with Muslim-majority markets.
- b. **Austrade** must offer grants and incentives to support halal tourism businesses.
- c. **State and Territory Tourism Boards** should expand MFTH policies to include regional areas.
- d. **Halal Certification Bodies** need to simplify and standardise accreditation for tourism operators.

4.9.3 Private Sector Involvement and Industry Collaboration

The private sector plays a critical role in implementing MFTH, as businesses are directly responsible for delivering Muslim Friendly services (Abdullah, *et al.*, 2024). However, interviews reveal that many tourism operators lack awareness and guidance on how to cater to Muslim travellers.

Informant 7 stated:

"We know there is demand for Muslim Friendly services, but there are no guidelines on how to implement them. The industry needs clear standards and support."

(Informant 7)

Field observations highlight inconsistencies in MFTH service adoption. While some hotels and restaurants voluntarily obtain halal certification, many lack designated prayer areas, culturally sensitive service training, or gender-inclusive accommodations.

To boost private sector involvement:

- a. Train tourism operators on halal tourism, Muslim traveller needs, and cultural inclusivity.
- b. Provide incentives like halal certification subsidies and grants for infrastructure.
- c. Foster collaboration among hotels, airlines, and tour operators for seamless Muslim Friendly travel.

Best practices from Dubai's luxury hospitality industry and Japan's Halal Tourism Guidelines highlight how private sector involvement can drive MFTH success when supported by government-backed regulations and training programs (Kurniawan, & Jatmika, 2021; Stephenson, 2014).

4.9.4 Community Participation and Stakeholder Engagement

Muslim community organisations are essential stakeholders in MFTH governance as they provide cultural insights, certification expertise, and engagement with Muslim travellers (Rosli, Jamaludin, & Ahmad, 2024). However, interviews reveal that these organisations are not currently involved in tourism policy discussions. Informant 12 from a Muslim organisation stated,

"The government and tourism industry rarely consult with us on MFTH policies. We can provide valuable input, but we're not included in decision-making."

(Informant 12)

By involving Muslim community representatives in MFTH governance, Australia can enhance cultural authenticity, build trust with Muslim travellers, and develop policies that truly reflect the needs of the market (Ali, *et al.*, 2022). A structured governance framework is essential for the successful implementation and expansion of MFTH in Australia.

4.10 ESTABLISHING MFTH GOVERNANCE FRAMEWORK FOR AUSTRALIA

A structured governance framework is essential for ensuring the effective integration of Muslim Friendly Tourism and Hospitality (MFTH) within Australia's national tourism policies. The framework aims to address policy gaps, establish clear regulatory standards, enhance stakeholder collaboration, and facilitate private sector participation. It provides a roadmap for government agencies, industry stakeholders, and Muslim community organisations to develop a cohesive MFTH governance model.

4.10.1 Government-Led Policy Development

A centralised authority is critical for governing Muslim Friendly Tourism and Hospitality (MFTH) in Australia, as the findings highlight fragmentation in policy, certification, and service delivery, leading to inconsistent standards and reduced competitiveness. Establishing a government-led body, aligned with Tourism Australia, would improve coordination across stakeholders and enable consistent national frameworks in collaboration with relevant organisations in Australia. It could also address visa-related barriers by working with the Department of Home Affairs to facilitate access for key markets. Overall, this approach would strengthen policy alignment, enhance industry practices, and improve Australia's attractiveness as a Muslim-friendly destination. The following government entities should play a key role:

- a. **Tourism Australia:** Promote MFTH in national tourism campaigns and collaborate with Muslim-majority markets.
- b. **Austrade:** Offer grants and incentives to businesses implementing MFTH initiatives.
- c. **State and Territory Tourism Boards:** Expand MFTH policies to include regional destinations.
- d. **Halal Certification Bodies:** Develop standardised and transparent accreditation processes for hospitality and tourism services.

Policy Recommendations:

- a. **Establish a National MFTH Governing Body:** A dedicated national authority is essential to address the fragmentation identified in the findings and to provide strategic leadership for MFTH development in Australia. This body, potentially aligned with Tourism Australia, would coordinate efforts across government agencies, industry stakeholders, and Muslim community organisations, ensuring policy coherence and effective implementation.
- b. **Develop Clear Regulatory Guidelines for Halal-Certified Tourism Services:** The absence of consistent standards has led to confusion and reduced trust among both service providers and Muslim travellers. Establishing clear, nationally recognised regulatory guidelines developed in collaboration with bodies such as Australian National Imams Council (ANIC) would ensure uniformity in halal certification and Muslim-friendly practices across the tourism sector.
- c. **Integrate MFTH into Existing Tourism Policies and Marketing Strategies:** Embedding MFTH within broader national and state tourism frameworks would ensure it is not treated as a niche segment but as a strategic growth area. Integration into existing policies and promotional campaigns led by organisations such as Tourism Australia would increase visibility in key international markets and align MFTH initiatives with Australia's overall destination branding.
- d. **Improve Visa Accessibility for Travellers from Key Muslim-Majority Markets:** The findings highlight visa-related barriers as a significant constraint affecting inbound tourism from countries such as Malaysia and Indonesia. Streamlining visa processes through collaboration with the Department of Home Affairs including simplified application procedures, faster processing times, and targeted visa facilitation measures would enhance accessibility and encourage greater visitor flows.

4.10.2 Stakeholder Coordination and Industry Collaboration

Effective governance of Muslim Friendly Tourism and Hospitality (MFTH) requires stronger coordination among government agencies, tourism businesses, and Muslim community organisations, as the findings highlight fragmentation, inconsistent service delivery, and limited industry awareness. Facilitated by a central body such as Tourism Australia, structured collaboration through partnerships and advisory platforms would enable stakeholders to co-develop policies, standards, and marketing strategies, ensuring both commercial viability and cultural appropriateness. Engagement with organisations like Halal Australia would further improve consistency and credibility in halal practices, while joint training initiatives would enhance industry capability. This collaborative approach addresses the identified gaps by improving coordination, strengthening policy implementation, and enhancing service quality, ultimately supporting a more integrated and competitive MFTH ecosystem in Australia. Key Actions for Strengthening MFTH Implementation:

- a. **Industry Training Programs:** Developing structured training modules for tourism operators is essential to address the knowledge gaps identified in the findings, particularly regarding halal requirements, prayer facilities, and culturally appropriate service delivery. Training can include certification courses, workshops, and online learning platforms, equipping businesses with practical skills to meet Muslim traveller expectations.
- b. **Public-Private Partnerships:** Fostering strategic alliances between tourism boards, airlines, hotels, and restaurants is critical to overcoming the fragmented approach highlighted in the findings. Collaborative initiatives can streamline MFTH implementation by aligning service standards, marketing efforts, and customer experiences across the travel value chain.
- c. **Community Engagement:** Active inclusion of Muslim community organisations in policy development and implementation is vital to ensuring authenticity and cultural sensitivity. The findings indicate that a lack of community involvement has contributed to gaps in understanding and service delivery.
- d. **Digital Infrastructure:** Establishing robust digital platforms, including websites and mobile applications, is crucial for improving accessibility to MFTH-related information. The findings highlight that limited visibility and fragmented

information sources hinder travel planning for Muslim visitors. A centralised digital ecosystem could provide real-time information on halal-certified restaurants, prayer facilities, accommodation options, and travel guidelines.

4.10.3 Infrastructure Development and Investment

Investment in MFTH-friendly infrastructure is critical to addressing the gaps identified in the findings, particularly the limited availability and visibility of halal food outlets, prayer facilities, and Muslim-friendly accommodation. The lack of such infrastructure has constrained service accessibility and reduced Australia's appeal to Muslim travellers. Strategic investment, guided by national coordination through bodies such as Tourism Australia, would support the development of dedicated facilities in key tourist destinations, including airports, hotels, and public attractions. This includes expanding halal-certified dining options in collaboration with organisations like Halal Australia, as well as integrating prayer spaces and culturally appropriate amenities into tourism infrastructure planning. Such investments would not only enhance the inclusivity and quality of visitor experiences but also strengthen destination competitiveness, encourage longer stays, and drive economic benefits through increased tourist satisfaction and repeat visitation.

Strategic Initiatives:

- a. **Develop prayer spaces and Wudu-friendly restrooms:** Providing dedicated prayer facilities and ablution-friendly (Wudu) restrooms in key tourist locations addresses a major service gap identified in the findings, enabling Muslim travellers to comfortably fulfil religious obligations and enhancing overall destination accessibility.
- b. **Offer subsidies for halal certification:** Financial incentives can encourage tourism businesses to obtain halal certification, reducing cost barriers and increasing the availability of verified halal services, thereby improving consistency, trust, and industry participation.

- c. **Enhance transport accessibility:** Improving transport links to halal dining outlets and religious facilities ensures ease of movement for Muslim visitors, addressing accessibility challenges and supporting a more seamless and convenient travel experience.
- d. **Promote destination branding:** Integrating Muslim-friendly offerings into national marketing strategies led by Tourism Australia would increase global visibility, strengthen Australia's positioning in the halal tourism market, and attract travellers from key Muslim-majority regions.

4.10.4 Standardisation and Certification Mechanisms

The absence of standardised guidelines has been identified in the findings as a major barrier to consistent and reliable MFTH services, leading to confusion among operators and reduced trust among Muslim travellers. Establishing a unified certification system, in collaboration with recognised bodies such as Australian National Imam Council (ANIC), would provide clear, nationally recognised standards for halal-compliant food, accommodation, and other tourism services. This would promote service consistency, enhance credibility, and support industry adoption by giving operators a clear framework to follow. In practice, standardisation would improve traveller confidence, ensure cultural and religious authenticity, and strengthen Australia's competitiveness in the growing global Muslim tourism market.

Proposed measures as below:

- a. **National MFTH Accreditation System:** Establish a nationally recognised certification program for hotels, restaurants, and tour operators to ensure consistent Muslim-friendly service standards and build industry credibility.
- b. **Halal-Friendly Ratings:** Implement tiered certification levels (e.g., Basic, Advanced, Premium) to reflect the degree of service inclusivity, guiding both operators in improving offerings and travellers in making informed choices.
- c. **Consumer Awareness Campaigns:** Promote MFTH-certified services through

digital platforms, travel apps, and print media to increase visibility, inform Muslim travellers, and encourage engagement with compliant businesses.

4.10.5 Implementation and Monitoring Mechanisms

The implementation and monitoring mechanisms must be designed to operationalise the proposed Muslim Friendly Tourism and Hospitality (MFTH) governance framework in Australia. They outline how coordinated institutional structures and clearly defined stakeholder roles can support effective policy execution, while emphasising the importance of systematic monitoring through measurable performance indicators. By integrating governance with ongoing evaluation, this approach ensures accountability, consistency, and continuous improvement in MFTH development.

4.10.5.1 Governance Structure

To address the fragmentation and coordination gaps identified in the findings, a multi-stakeholder governance structure is proposed to oversee the implementation and monitoring of Muslim Friendly Tourism and Hospitality (MFTH) in Australia. This structure ensures that policy, industry practice, and community perspectives are integrated for effective governance.

- a. **Policy Development Unit** led by Tourism Australia and Austrade, would be responsible for regulatory oversight, policy formulation, and alignment with national tourism strategies, addressing the current lack of strategic coordination.
- b. **Industry Advisory Board** comprising representatives from hotels, airlines, and halal certification bodies such as Halal Australia, would provide insights on operational feasibility, emerging trends, and best practices, ensuring that policies are commercially viable and practically implementable.
- c. **Community Engagement Forum** including Muslim organisations and

religious councils, would safeguard cultural and religious authenticity in MFTH services, directly responding to the gaps in cultural sensitivity identified in the findings.

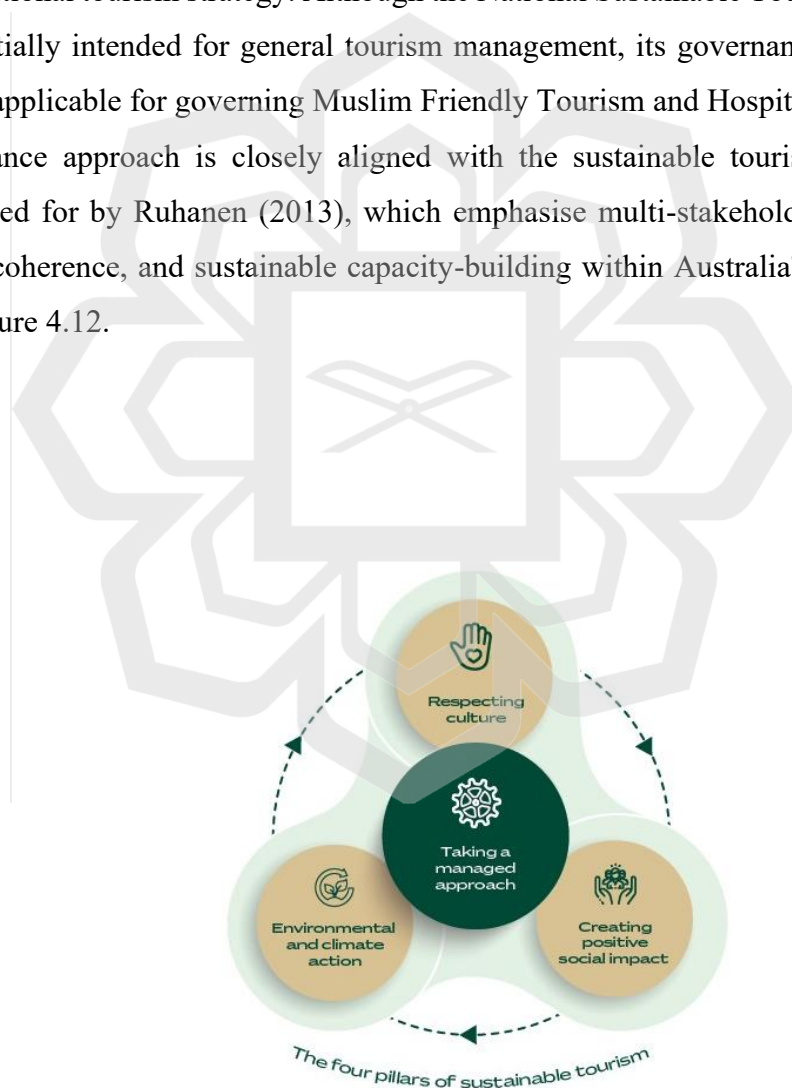
4.10.5.2 Performance Metrics and Evaluation

To ensure the governance framework for Muslim Friendly Tourism and Hospitality (MFTH) is effective and responsive, a robust system of performance metrics and evaluation is essential. The findings highlight that a lack of measurable outcomes and monitoring mechanisms has contributed to inconsistent service delivery, limited industry uptake, and weak accountability. Establishing clear key performance indicators (KPIs) provides both a benchmark for success and a feedback loop for continuous improvement.

- a. **Increase in Halal-Certified Establishments** would directly measure industry adoption and compliance with standardised MFTH practices, addressing gaps in service availability and credibility.
- b. **Growth in Muslim Tourist Arrivals**, particularly from key source markets, would assess the practical impact of MFTH policies and marketing initiatives on visitor flows, linking policy actions to measurable tourism outcomes.
- c. **Stakeholder Satisfaction Surveys**: Collected from both operators and Muslim travellers would provide qualitative insights into service quality, cultural appropriateness, and operational challenges, ensuring that policies remain grounded in real-world experiences.
- d. **Economic Impact Assessment** would quantify revenue growth and broader financial benefits within the MFTH sector, demonstrating the value of investment and guiding resource allocation. Together, these metrics create a structured evaluation framework that not only monitors implementation effectiveness but also informs adaptive policy adjustments, strengthens industry accountability, and enhances Australia's competitiveness in the global Muslim tourism market.

4.10.6 Existing National Sustainable Tourism Framework (NSTF) of Australia

The National Sustainability Framework was developed collaboratively by Austrade in partnership with all State and Territory Governments, Tourism Australia, and with input from a wide range of industry and government stakeholders (Austrade,2023). The National Sustainable Tourism Framework (NSTF) provides a governance model to guide tourism development in a sustainable manner, balancing economic, social, cultural, and environmental goals. It is specifically designed to embed sustainable practices within the visitor economy and supports the broader objectives of the THRIVE 2030 national tourism strategy. Although the National Sustainable Tourism Framework was initially intended for general tourism management, its governance principles are highly applicable for governing Muslim Friendly Tourism and Hospitality sectors. The governance approach is closely aligned with the sustainable tourism principles as advocated for by Ruhanen (2013), which emphasise multi-stakeholder collaboration, policy coherence, and sustainable capacity-building within Australia's tourism sector. See Figure 4.12.



2. Global Sustainable Tourism Council, *GSTC Industry Criteria Version 3, 2016*
3. Available at www.austrade.gov.au/sustainabletourism

Figure 4.12 National Sustainability Framework for the Visitor Economy (Source: Austrade, 2023).

The NSTF emphasises:

- a. Collaborative Governance: Encouraging partnerships among government agencies, tourism businesses, community groups, and consumers.
- b. Every tourism operation needs to follow policies which unify sustainability goals with cultural inclusion standards.
- c. The effort intends to build capacities by creating specialised workforce training initiatives which respond to market development requirements.
- d. Visitor Experience Improvement Includes the Development of Sensitively Cultured Experiences and Responds to Multiple Types of Travellers.

MFTH would gain a stronger governance foundation when the NSTF principles guide service development as a combination of inclusivity and economic feasibility and cultural awareness. The NSTF delivers strategic benefits that strengthen the interagency connections between state entities and corporate firms and Muslim faith organisations which were previously introduced in Sections 4.3 and 4.9 of this chapter.

4.10.6.1 National Sustainable Tourism Framework (NSTF) vs Stakeholder Theory from Freeman

The Stakeholder Theory from Freeman (2010) establishes a firm theoretical basis to implement NSTF principles within the Muslim Friendly Tourism and Hospitality sector. Organisations need to address the needs and expectations of all their stakeholders according to Stakeholder Theory to accomplish enduring organisational achievement. All entities with a relation to or influence over the organisation's goals form its stakeholders.

The MFTH governance structure in Australia contains three main stakeholder groups which include:

- a. Government agencies (e.g., Tourism Australia, Austrade)
- b. Private sector businesses (e.g., hotels, airlines, tour operators)
- c. Muslim community organisations (e.g., Islamic councils, cultural associations)

The adoption of Stakeholder Theory enables the MFTH sector to incorporate inclusive decision-making processes alongside equitable benefit sharing through ongoing stakeholder consultation which Australia currently lacks (Section 4.3.3 on Stakeholder Coordination and Engagement describes this need).

MFTH services obtain optimal effectiveness when governance bodies build their delivery model from Muslim tourist requirements and standards because this approach generates tourism sectors that deliver cultural sensitivity and financial profitability. See Figure 4.13.

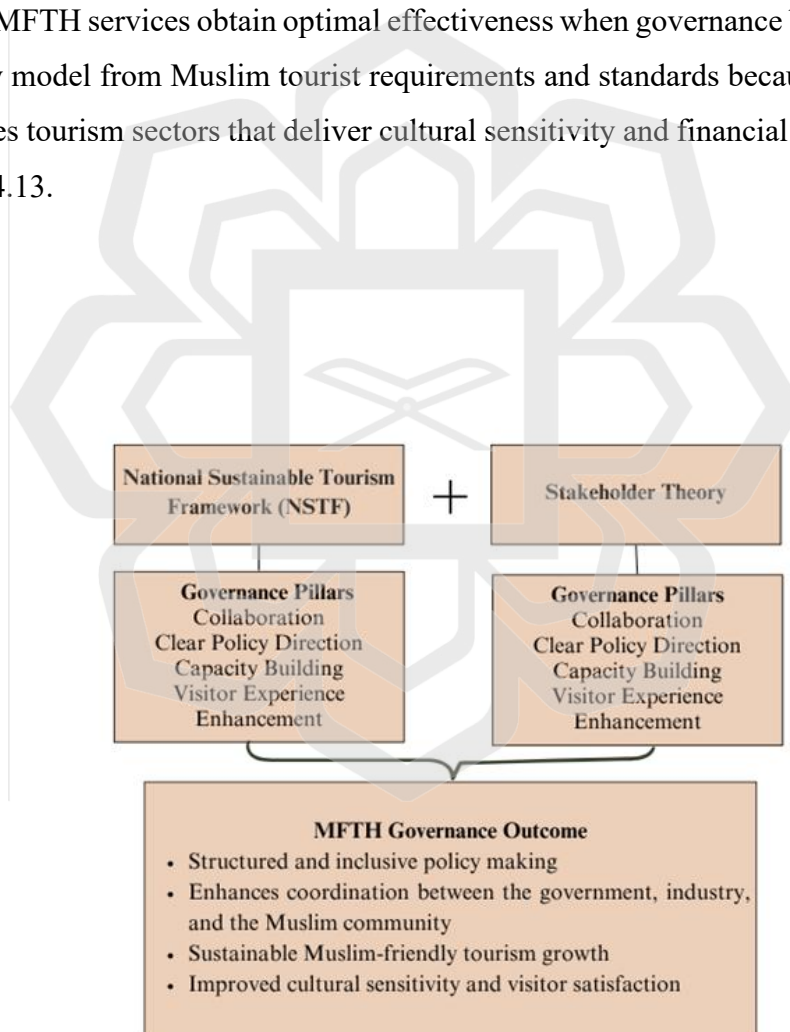


Figure 4.13 Integration of NSTF and Stakeholder Theory for MFTH Governance.

The above flowchart demonstrates the collaboration between NSTF and Stakeholder Theory which creates an organised inclusive model of sustainable governance for Muslim Friendly Tourism and Hospitality in Australia.

4.10.6.2 Established MFTH Governance Framework for Australia

The proposed 6-Step Framework for Muslim Friendly Tourism and Hospitality (MFTH) Governance in Australia constitutes a comprehensive and sustainable governance model, derived from the integration of the National Sustainable Tourism Framework (NSTF) and other relevant theoretical concepts, and is substantiated by evidence obtained through thematic analysis.

Step 1: Centralised Policy Integration and Institutional Design

Addressing Australia's policy gap in MFTH requires establishing a centralised national governance mechanism that streamlines strategies across regions. Currently, the absence of unified direction leaves individual businesses navigating MFTH independently, creating service inconsistencies between metropolitan and regional destinations. Policy and Regulatory Alignment, which is essential for eliminating ambiguity in MFTH governance and ensuring consistency across all regions. Institutional theory highlights how structured policies promote uniformity and legitimacy in emerging sectors (Soares et al., 2021). Complementing this, policy network theory shows that interdependent institutions function more effectively through cooperative frameworks (Seok et al., 2021) Furthermore, agenda setting theory explains how a national MFTH body can elevate Muslim Friendly tourism as a formal priority within broader tourism policy (Wang et al., 2022). This body should guide policy standardisation, integrate halal certification, and facilitate targeted campaigns with Muslim-majority markets. The reform must ensure regulatory clarity, address visa entry challenges, and expand regional participation in MFTH development. Establishing this strategic governance unit will provide consistency, direction, and legitimacy to MFTH policy planning. See Figure 4.14.

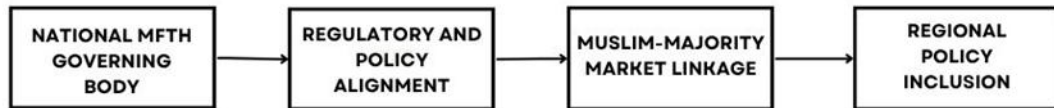


Figure 4.14 Model Step 1.

Step 2: Stakeholder Coordination and Participatory Governance

Stakeholder coordination and participatory governance follows, promoting inclusive collaboration among government bodies, industry players, and Muslim communities, a necessity echoed by respondents highlighting fragmented communication and lack of unified action. The fragmentation of MFTH initiatives in Australia reflects the lack of stakeholder coordination. Government agencies, tourism boards, private businesses, and Muslim community groups must collaboratively shape policy. Collaborative governance theory supports participatory structures where trust and mutual goals drive outcomes (Sentanu et al., 2023). Stakeholder theory asserts that inclusive governance recognises the interests of all actors, particularly marginalised voices such as Muslim communities (Atsakpo et al., 2024). Social exchange theory further explains how reciprocal benefits enhance cooperation between public agencies and private or community players (Fan et al., 2021). To operationalise this, stakeholder engagement forums, advisory councils, and cross-sector task forces must be institutionalised. These platforms will allow tourism operators, halal certifiers, and religious councils to co-create strategies and standards. A participatory approach will ensure cultural relevance, avoid duplication of efforts, and promote ownership across all sectors, leading to more authentic and scalable MFTH development. See Figure 4.15.

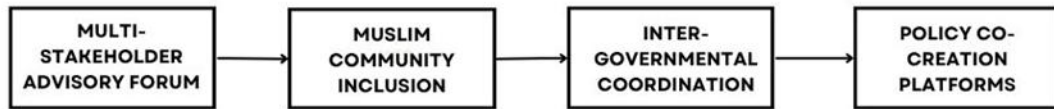


Figure 4.15 Model Step 2.

Step 3: Private Sector Empowerment and Market Responsiveness

The private sector is critical in actualizing MFTH services on the ground, yet many operators remain unaware or underprepared. Field interviews reveal a need for structured guidance, financial incentives, and operational clarity. Cultural Sensitivity and Workforce Training ensure that tourism operators are well-equipped to deliver respectful and inclusive services. The thematic analysis showed a clear gap in staff training and cultural awareness, making this step indispensable. Resource-based theory supports investment in internal competencies, such as staff training and halal service delivery, to gain competitive advantage (Ofori, & Appiah-Nimo, 2022). Innovation diffusion theory explains how new standards and practices, like halal certification, spread through industry when early adopters are supported (Coskun, 2021). Service dominant logic theory emphasises value co-creation with consumers, meaning Muslim travellers must be considered as co-designers of tourism services (Font et al., 2021). Targeted government grants, certification subsidies, and collaborative programs can boost private adoption. A coordinated ecosystem involving hotels, airlines, and tour operators will ensure seamless MFTH travel experiences. With proper support, the private sector can become both compliant and innovative in delivering culturally inclusive services. See Figure 4.16.

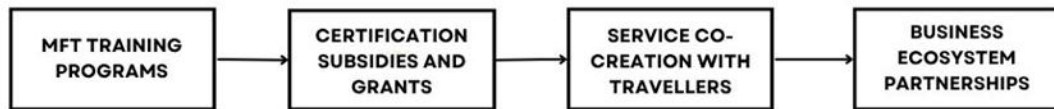


Figure 4.16 Model Step 3.

Step 4: Infrastructure Development and Service Standardisation

The infrastructure development and service standards step target the critical shortage of halal-certified restaurants, prayer spaces, and Muslim Friendly accommodations, particularly in regional areas like the Blue Mountains and Cairns. Uneven distribution of Muslim Friendly infrastructure in Australia reflects both investment gaps and a lack of national benchmarks. While urban centres are more developed, regional areas fall behind, discouraging wider destination participation. Equity theory suggests that fair distribution of resources across regions enhances trust and accessibility (Dangi & Petrick, 2021). Public goods theory validates government investment in shared infrastructure, such as prayer spaces and Wudu facilities (Zulvianti et al., 2022). Standardisation theory underscores the importance of uniform service quality, especially in hospitality (Roblek et al., 2021). A national accreditation system, backed by clear halal-friendly service tiers, will promote consistency across hotels, restaurants, and travel services. Destination branding that highlights MFTH credentials can increase visibility and tourist trust. The policy should also invest in digital infrastructure, such as MFTH mobile apps and directories, to facilitate real-time access to certified services. These collective initiatives will enhance regional integration and raise service standards across the entire industry. See Figure 4.17.

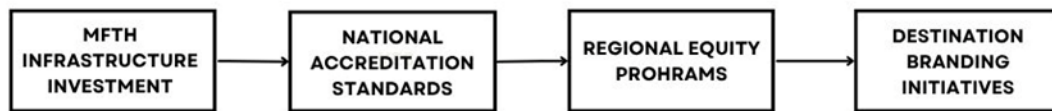


Figure 4.17 Model Step 4.

Step 5: Monitoring Framework and Adaptive Policy Mechanisms

Ongoing implementation of MFTH requires a strong monitoring and evaluation mechanism to track progress, measure impact, and enable adaptive change. Monitoring, feedback, and continuous improvement secures the framework's adaptability and long-term success through iterative evaluation. Governance cycle theory illustrates that policies must be revised based on feedback and outcomes (Hartman, 2023). The logic model framework provides a structure for linking inputs to measurable outcomes such as increased certifications and tourist arrivals (Fauzi et al., 2025). Systems theory emphasises interconnectedness, where the failure of one governance element affects others (Farsari, 2023). A robust monitoring unit should assess key performance indicators like the number of certified businesses, regional participation, and stakeholder satisfaction. Stakeholder feedback loops must be established for continuous policy refinement. Economic assessments should capture MFTH's contribution to tourism growth. Transparent reporting builds accountability, while real-time data systems can guide timely interventions. This approach ensures the governance framework remains responsive, credible, and aligned with both industry shifts and traveller expectations. Therefore step 5 Monitoring Framework and Adaptive Policy Mechanisms is significant because it ensures that Muslim Friendly Tourism and Hospitality (MFTH) governance remains effective, responsive, and sustainable over time. Rather than treating policy implementation as a one-off process, this step embeds continuous evaluation, feedback, and improvement into the system. See Figure 4.18.

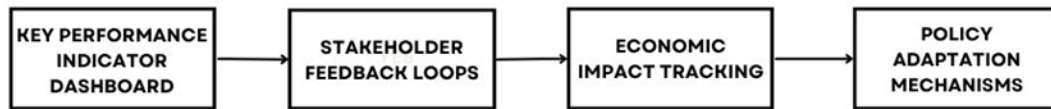


Figure 4.18 Model Step 5.

The proposed Six-Step Governance Framework provides a strategic and inclusive roadmap to embed Muslim Friendly Tourism and Hospitality (MFTH) into Australia's national tourism landscape. Each step builds upon empirical insights and theoretical justifications to address existing policy voids, stakeholder fragmentation, and infrastructure inequalities. By establishing a centralised MFTH governing body, aligning policies, and integrating Muslim-majority market strategies, Step 1 lays the foundation for national cohesion. Step 2 emphasises participatory governance, ensuring that Muslim community voices, industry operators, and government agencies work collectively through co-creation platforms. Step 3 mobilises the private sector by enhancing capacity, incentivizing service innovation, and promoting value co-creation with Muslim travellers. Step 4 targets structural deficiencies through infrastructure investment, accreditation systems, and regional equity to ensure uniform quality and access. Step 5 ensures long-term sustainability through adaptive policy mechanisms, stakeholder feedback systems, and rigorous monitoring frameworks. Step 6 ensures clear and targeted communication of facilities, services, and destination branding to Muslim travellers. Together, the six steps are interdependent and cyclical, designed to evolve with market demands and traveller expectations. This governance model supports cultural awareness and enhances the attractiveness of destinations for Muslim travellers, while also aligning with the National Sustainable Tourism Framework (NSTF)'s broader objectives of fostering inclusive, social, cultural, sustainable, and diverse tourism growth in Australia. Effective implementation of this model can position Australia as a leader in ethical and faith-based tourism governance in the Asia-Pacific region. See Figure 4.19.

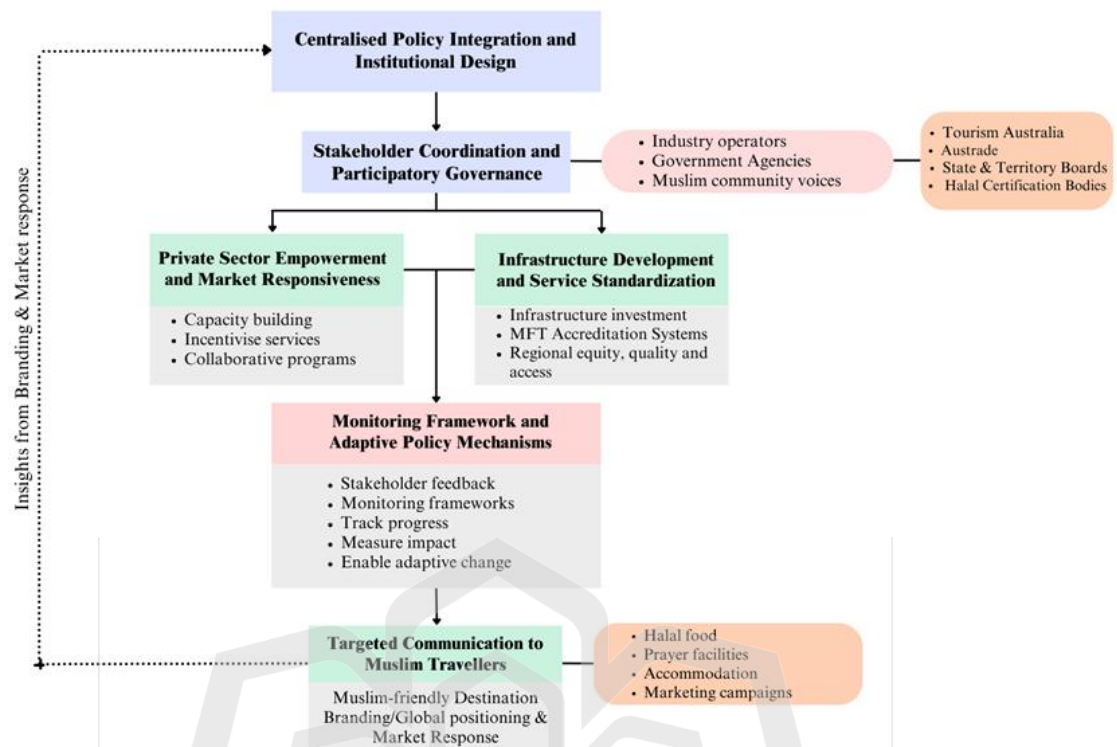


Figure 4.19 Established Governance Framework for MFTH in Australia.

The established governance framework for Muslim-Friendly Tourism and Hospitality (MFTH) in Australia is conceptualised as a theory-informed, empirically grounded, and context-sensitive model that integrates governance, institutional, stakeholder, and collaborative governance perspectives. Grounded in governance theory, the framework emphasises multi-level coordination, policy integration, and regulatory mechanisms in shaping effective and accountable MFTH development. Institutional theory highlights the role of norms, structures, and legitimacy within a secular environment, while stakeholder and collaborative governance perspectives underscore the importance of inclusive, multi-actor engagement involving government, industry, certification bodies, and the Muslim community. Empirically validated through triangulated findings, the framework reflects observed industry realities and addresses key challenges such as fragmentation, limited institutional support, and the need for adaptive, market-driven approaches in a non-OIC context.

The six-step governance framework operates as a circular and interconnected model, where each stage sequentially builds on the previous and feeds into the next. Step 1 initiates the process through centralised policy integration and institutional design, creating a formal structure to guide MFTH development. This leads naturally into Step 2, where stakeholder coordination and participatory governance ensure that policy implementation is inclusive and culturally informed. Step 3 follows by empowering the private sector, translating strategic intentions into actionable service delivery through business engagement and market responsiveness. Step 4 addresses the need for physical and service infrastructure, standardising experiences across regions. Step 5 introduces adaptive monitoring, where ongoing evaluation informs refinement and future policy shifts. Finally, Step 6 focuses on Muslim Friendly destination branding and global positioning, enhancing visibility and competitiveness in Muslim travel markets. Insights from branding and market response then cycle back to Step 1, informing strategic updates and keeping the governance model dynamic and continuously responsive. This framework is crucial as it holistically integrates National Sustainable Tourism Framework (NSTF)'s sustainability pillars with stakeholder inclusivity, directly responding to the challenges and opportunities identified in empirical data. No other model currently provides this level of contextual alignment with Australia's tourism governance landscape and MFTH needs.

4.10.6.3 Comparative Benchmarking of the Proposed MFTH Governance Framework

The benchmark of the proposed MFTH framework can be understood through its comparison with existing frameworks in both OIC and non-OIC contexts, highlighting its distinct contribution. In OIC countries, MFTH frameworks are typically state-led, highly structured, and standardised, supported by strong institutional mechanisms, formal halal certification systems, and integrated national tourism policies. In contrast, non-OIC frameworks are generally market-driven, fragmented, and less formalised, often embedded within broader inclusive tourism strategies with limited governance integration and standardisation.

In comparison, the proposed MFTH framework demonstrates a more comprehensive and structured approach than typical non-OIC models, while remaining adaptable to the realities of a secular and multicultural environment. It incorporates multi-level governance, stakeholder coordination, certification mechanisms, and workforce development, thereby addressing gaps commonly identified in non-OIC settings. At the same time, unlike many OIC frameworks, it emphasises flexibility, private sector engagement, and adaptive implementation rather than relying solely on centralised control.

Furthermore, the framework is strengthened by its empirical grounding through triangulated findings, ensuring alignment with real-world industry conditions, and its circular, adaptive design, which facilitates continuous feedback and policy refinement. Compared to existing models, it offers a more integrated and dynamic system that connects policy, industry capability, and market responsiveness. As such, the framework can be benchmarked as a holistic, context-sensitive, and practically applicable model, particularly suited for advancing MFTH in non-OIC destinations seeking a balanced approach between standardisation and flexibility.

4.11 CHAPTER SUMMARY

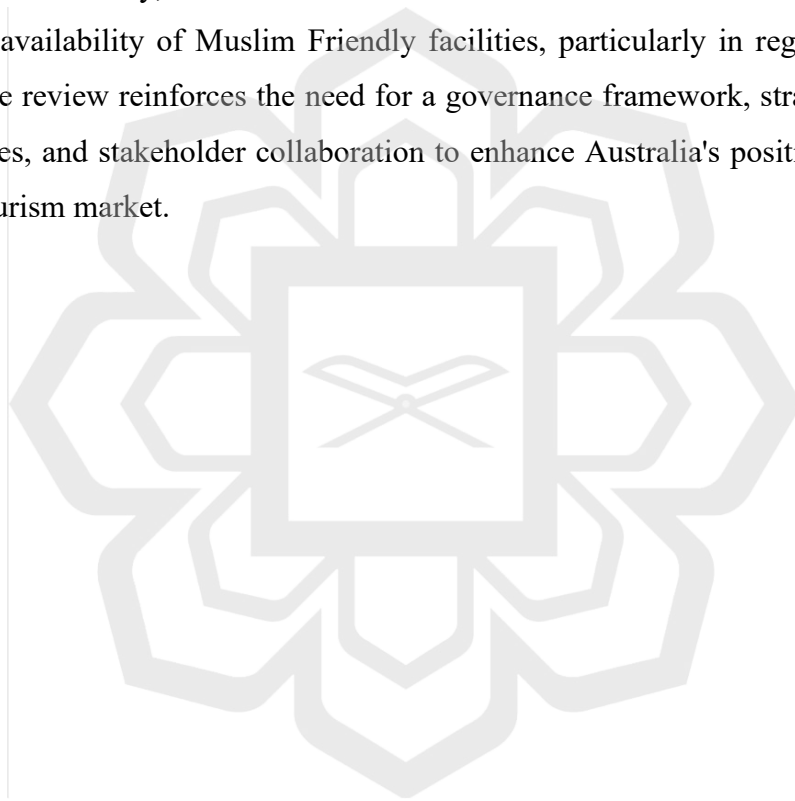
The findings of this study provide a comprehensive analysis of the governance of Muslim Friendly Tourism and Hospitality (MFTH) in Australia, highlighting the structural, economic, cultural, and regulatory challenges associated with its development. By incorporating thematic analysis, field observations, and literature review, the study presents a well-rounded perspective on the current state of MFTH governance and the potential pathways for improvement. Table 4.3 summarises the key governance challenges, economic gaps, and policy recommendations identified in this study. See Table 4.3.

Table 4.3 Key Governance Challenges, Economic Gaps, and Policy Recommendations.

Category	Key Issues Identified	Policy Recommendations
Key Governance Challenges	Lack of a centralised MFTH authority	Establish a national MFTH governing body.
	Inconsistent regulatory framework	Develop standardised guidelines for halal tourism.
	Poor stakeholder engagement.	Strengthen collaboration between government, industry, and Muslim communities.
Economic Gaps	Untapped high-spending Muslim tourist market	Implement targeted marketing strategies for Muslim travellers.
	Limited halal-certified accommodation and dining options	Provide incentives for businesses to obtain halal certification.
	Lack of promotional efforts in MFTH sector	Integrate MFTH into national and state tourism campaigns.
Policy Recommendations	Introducing MFTH industry training programs	Make MFTH awareness training mandatory for tourism operators.
	Difficulties with visa accessibility for key Muslim-majority markets	Simplify visa processes for travellers from Malaysia, Indonesia, and the Middle East.
	Lack of investment in MFTH infrastructure in regional areas	Develop more prayer spaces, halal food options, and signage in the regional areas.

The study identifies governance challenges, including policy and regulatory gaps, visa restrictions, and weak stakeholder coordination, which hinder the structured development of MFTH in Australia. Economic potential remains largely untapped, as Australia has not capitalised on the growing demand for halal tourism, unlike leading MFTH destinations such as Malaysia, Singapore, and the UAE. The findings also reveal cultural sensitivity issues in the tourism industry, including limited awareness among hospitality providers, inconsistencies in service delivery, and resistance from certain industry players to actively market Muslim Friendly services.

Additionally, field observations validate stakeholder claims regarding the limited availability of Muslim Friendly facilities, particularly in regional areas. The literature review reinforces the need for a governance framework, strategic marketing initiatives, and stakeholder collaboration to enhance Australia's position in the global halal tourism market.



CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

5.1 INTRODUCTION

It was investigated how government policy, stakeholders' collaboration, showing respect for Muslim culture, and developing the market can help or hinder the process of implementing Muslim Friendly Tourism and Hospitality (MFTH) in Australia. The aim was to assess current government systems and single out both problems limiting and opportunities for supporting the MFTH approach in Australian tourism.

According to the findings, Australia accepts multiculturalism and provides certain Muslim Friendly services, but there is no organised plan or legislation in Australia to support the development towards a Muslim Friendly tourism destination. The thematic analysis was guided by a wide range of opinions provided by government agencies, industry professionals, and leaders within the Muslim community. Major issues observed were gaps in law enforcement, involvement of uncoordinated or mismatched groups, weak ways of advertising, and opposition from people due to prejudice against Muslims and a lack of awareness of their culture.

The study points out that failing to lead efficiently undermines Australia's involvement in the worldwide Muslim travel market. The presence of 1.9 billion Muslims worldwide and estimates that halal tourism will reach \$225 billion in 2028 show that MFTH is underexploited in Australia, even though it is a major economic opportunity (Mastercard-CrescentRating, 2021; Pew Research Center, 2021). It adds significant knowledge to discussions in academia and practice, which can be used to change policies, reform industries, and make travel more satisfactory for Muslim tourists (Henderson, 2016).

5.2 REVISIT THE RESEARCH OBJECTIVES

We carried out this study to critically evaluate the governance of MFTH in Australia, by figuring out key gaps, the roles of stakeholders and what could be done to develop the sector in a structured way. The objectives were reached by conducting thematic analysis of conversations with industry stakeholders, reviewing associated documents, and observing activities on the ground. The research objectives were as follows:

1. To analyse the challenges and opportunities of implementation of MFTH in Australia

This objective aims to critically examine both the barriers and enablers to implementing Muslim Friendly Tourism and Hospitality (MFTH) in the Australian context. Challenges may include societal and institutional factors such as cultural prejudice, lack of awareness about Muslim travel needs, insufficient halal-certified services, or weak inter-agency coordination (Refer to Chapter 4, Section 4.3). On the other hand, opportunities may arise from growing demand from global Muslim travellers, Australia's multicultural appeal, and the potential to diversify tourism markets (Refer to Chapter 4, Section 4.4). This investigated these dimensions to uncover gaps and challenges in current practices and identified areas with untapped potential, helping policymakers and stakeholders understand the current landscape of MFTH in Australia. Therefore, the first objective has been successfully achieved.

2. To determine the factors that support the implementation of MFTH to the overall tourism economic development in Australia

This objective focuses on identifying and analysing the key drivers that can help facilitate the successful implementation of MFTH and contribute to the broader goals of tourism-led economic growth. These may include policy support, public-private partnerships, community engagement, availability of infrastructure and services that align with Muslim traveller needs (e.g., halal food, prayer spaces), and effective marketing strategies that highlight Australia as an inclusive destination (Refer Chapter 4, Section 4.6). This objective also examined and assessed how these supportive factors can increase tourist arrivals, extend length of stay, and enhance tourist satisfaction, ultimately contributing to national and regional economic development through job creation, revenue generation, and market diversification.

3. To develop and propose a suitable governance framework that could assist policymakers and the relevant stakeholders in developing MFTH in Australia

The final objective involves the development of a context-specific governance framework that provides clear guidance, coordination mechanisms, and strategic actions for implementing MFTH in Australia effectively. This framework was developed from the findings from the first two objectives and will include roles and responsibilities of various stakeholders, including government agencies, tourism boards, Muslim communities, industry operators, and civil society organisations. It addresses issues related to regulation, certification, capacity building, awareness campaigns, and cross-sector collaboration. The purpose is to offer a structured, inclusive, and sustainable roadmap that ensures MFTH is integrated into Australia's tourism strategy while promoting intercultural understanding and economic resilience. Thus, the third objective of the study was achieved.

5.2.1 Integrated Analysis of Findings Across Research Objectives

The integration of findings across the three research objectives reveals a coherent pattern that informs both the empirical and theoretical understanding of Muslim-Friendly Tourism and Hospitality (MFTH) in Australia. The first objective identifies key challenges and opportunities, highlighting structural gaps such as fragmented governance, limited institutional support, and inadequate workforce readiness, alongside emerging opportunities driven by growing Muslim travel demand and Australia's multicultural positioning. The second objective builds on this by identifying enabling factors, including stakeholder engagement, market potential, service adaptation, and the role of training, certification, and policy support in enhancing tourism economic development. The third objective synthesises these insights into the development of a suitable governance framework, which responds directly to the identified gaps and leverages the opportunities through coordinated, multi-level interventions.

Across these objectives, a clear pattern emerges: while market demand and industry awareness are increasing, the effective implementation of MFTH is

constrained by the lack of structured governance, standardisation, and coordinated stakeholder action. Theoretically, these findings align with governance theory in emphasising the need for integrated policy and regulatory mechanisms; institutional theory in explaining how the absence of formal structures and norms limits legitimacy and consistency; stakeholder theory in highlighting the importance of inclusive engagement among government, industry, and community actors; and collaborative governance theory in underscoring the role of coordination and shared decision-making. Collectively, the integrated findings suggest that advancing MFTH in a non-OIC context requires a holistic, adaptive governance framework that bridges policy, industry capability, and market responsiveness, thereby enabling sustainable, culturally competent, and economically beneficial tourism development in Australia.

5.3 RESEARCH CONTRIBUTION

The research makes meaningful contributions to different areas by explaining the governance of MFTH in Australia. It solves issues identified by academics, provides advice to the tourism industry, shows the right policy path for policymakers, and improves what Muslim travellers expect. They are divided into four areas: academic, industry, authority within the government, and areas where consumers are affected.

5.3.1 Academic

On an academic level, the research deals with a current issue in the tourism governance area by discussing the link between multiculturalism, faith-based tourism, and government policies in Australia.

While most studies on Muslim Friendly Tourism and Hospitality (MFTH) have focused on Muslim-majority countries with strong religious legal frameworks, such as

Malaysia, there is limited research on how MFTH can be developed in secular, multicultural societies like Australia (Battour & Ismail, 2016; Mohsin et al., 2016; Bouma, 2016).

It contributes to existing theories by framing Muslim faith-based tourism not just as a market opportunity, but as a governance challenge — involving questions of policy coordination, stakeholder responsibility, and inclusive decision-making. It uses detailed observation to explain the impact of decentralised rule, lack of ties to regular tourists, and social and political matters on tourism companies and tourists alike. Using manual thematic analysis allowed the researcher to show that a lack of centralised structure for governance affects the delivery of MFTH services.

5.3.2 Industry Contribution

The findings of this study guide the industry to know and meet the needs of Muslim guests. According to surveys, some tour operators miss the wider aspect of Muslim friendliness, since they only emphasise halal food and forget about other necessities, such as where to pray, services for both sexes, and cultural awareness. Because of this, the level of service and the chances for business growth are restricted.

The study explains that looking at Muslim travellers' expectations and following worldwide best practices could help the industry improve in different ways, for instance, by offering employees more training, accepting halal certification, upgrading infrastructure, and being more inclusive in how they communicate. MFTH is also highlighted as something that should be treated as part of an overall tourism plan that can help reach new tourists and raise money.

5.3.3 Authority Contribution

This research delivers clear policy guidance for government bodies and tourism boards. The main reason cited is that at the national level, there is no firm MFTH system, which has resulted in ad hoc efforts, less competitiveness, and unused opportunities. According to the study, we should hurry in forming a joint MFTH policy that includes halal certification, proper guidelines for infrastructure, visa reforms, and funding support for businesses that adopt practices that will benefit Muslims.

The study suggests that MFTH can be guided by an advisory council made up of tourism representatives, people in the industry, and Muslim community leaders. This can benchmark Japan, Taiwan and Malaysia, which have both set up policies that meet the demands of MFTH and are now well-known destinations for this sector.

5.3.4 Consumer Contribution

Muslim travellers in Australia are urged to experience travel that respects their culture and is easy for them to access. It underlines the problems that Muslim travellers have when the services they require, like halal food or places to pray, are missing or not well-communicated. It proves that Muslim tourists want to experience Australia, whilst ensuring that their religious habits are honoured and respected.

5.4 RESEARCH CHALLENGES

A detailed study about the governance of Muslim Friendly Tourism and Hospitality (MFTH) in Australia encountered certain methodological and practical challenges. Because of these challenges, the research process of gathering data, reaching the main participants, and interpreting the results became somewhat complicated and difficult.

5.4.1 Methodological Challenges

a. Access to Key Stakeholders:

It was very hard to meet with policymakers, government officials, and leaders in the tourism sector. Diverse participation was restricted since the engagement rate from institutions was significantly lower than what had been aimed for. Such issues are also a sign that MFTH is yet to achieve full interest at official Australian levels.

b. Limitations in Secondary Data:

While field observations and interviews were rich in context, secondary data, especially official documents related to MFTH, were limited. Given that most relevant Australian reports pertain to general tourism, reports from countries like Japan, Taiwan, and Malaysia comparatively easier to access and review.

c. COVID-19 Aftershocks:

One key methodological challenge was the difficulty in accessing reliable and representative secondary data. Due to the ongoing post-COVID recovery, key indicators such as international tourist arrivals into Australia had not yet returned to pre-pandemic levels. This limited the accuracy of tourism-related datasets and made it difficult to assess the full potential and demand for Muslim Friendly Tourism and Hospitality (MFTH) based on current trends, as they may not reflect longer-term or pre-COVID patterns.

5.4.2 Practical Challenges

a. Limited Awareness Among Participants:

A regular problem was that many actors did not know about MFTH or understood it only in terms of having halal food. Often, this meant the researcher had to invest more time in explaining the topic during interviews, which at times reduced how deeply the participants' answers went.

b. Fragmented Involvement Across Sectors

Australia's tourism sector lacks a centralised regulation or support framework for Muslim Friendly Tourism and Hospitality (MFTH), with efforts being scattered across various independent operators without cohesive policy guidance. Such fragmentation made it difficult to spot shared practices and review the rules of how agencies are managed.

5.4.3 Ethical Considerations

a. Cultural Sensitivity:

To research faith-based tourism, the researcher had to be very sensitive to cultural and religious matters, especially when talking about Islamophobia, how religions are accommodated, and difficulties faced by stakeholders in the industry. The importance of respect and confidence for the participants was always in mind as these sensitive topics were discussed.

b. Representation of Marginalised Voices:

The researcher also had to worry about getting the thoughts of Muslim leaders and travellers exactly and with compassion. Because public debates about Muslims in Western countries often rely on politics or stereotypes, special measures were taken to offer these opinions fairly and honestly.

c. Power Dynamics in Stakeholder Interviews:

The researcher remembered that some interviewees' powerful positions could influence how they responded in the interviews. Throughout the analysis, the effort was made to understand and think about the researcher's reflexivity.

5.5 SUMMARY OF KEY FINDINGS

This section summarises the main results of the study according to governance challenges, available market opportunities, and the preparedness of society and the industry. The information used came from thematic interview analysis, on-site fieldwork, and review of documents, all of which gave a detailed overview of what MFTH currently is and what it might become in Australia.

5.5.1 Key Governance Challenges

a. Absence of a National MFTH Policy Framework

The governance issue that stood out the most was that there is no unified policy for MFTH. While Malaysia, Taiwan and Japan set rules and frameworks for Muslim Friendly travel, Australia does not have equivalent policy direction. As a result, people in remote and rural areas often face inconsistent delivery of services and mostly have to depend on the temporary solutions put in place by individual businesses.

b. Bureaucracy and Visa Restrictions

Difficulty in obtaining visas became a key reason for decreased tourism from the nations of Malaysia and Indonesia. Participants said that rules put in place after COVID made people slow their travel, and some government measures unintentionally harmed those traveling legally. Informant 5, a tour operator, stated:

“The travel agents have been complaining to me that it's not easy to get a visa anymore for the Malaysian passport holder. Now, I don't know what policy government brought it up”.

(Informant 5)

This highlights the increasing difficulty Malaysians face in obtaining visas to enter Australia. Prior to the COVID-19 pandemic, both Malaysia and Indonesia consistently ranked among the top 10 source countries for short-term visitor arrivals to Australia.

c. Fragmented Stakeholder Engagement

Because there was little coordination among tourism boards, industry groups, and Muslim community organisations, the development of services was not effective. In turn, stakeholder positions are not clear, and separate initiatives are followed instead of working together.

5.5.2 Market Gaps and Opportunities

a. Untapped Economic Potential

Even though Australian society includes almost 1 million Muslim population and is well-placed for MFTH trade, it has not made effective use of this opportunity. In addition, Muslim tourists who travel from Southeast Asia and the Middle East are on the lookout for vacations with both culture and halal food and related facilities. Nevertheless, the country faces problems with a lack of support activities and facilities for people of faith, such as prayer rooms and specially designed Muslim Friendly accommodations.

b. Inadequate Marketing and Visibility

Muslim Friendly services are not marketed as widely as one would expect. Members of the hospitality industry stressed that small efforts such as providing halal filters online and advertising present facilities can help Australia attract more tourists. It was noticed that Australia had big challenges in branding and digital outreach as part of its MFTH planning. Several participants highlighted the inconsistency and lack of visibility in promotional efforts. Informant 9, a global tourism expert, noted the lack of continuity, stating:

“Marketing communication is probably one of the key aspects that Australia needs to look at... it has done strongly one year and then probably going very silent the next few years.”

Similarly, Informant 4, a leading tour operator, emphasised the need for greater digital presence and promotional support, sharing: stating:

“If they can at least put that as part of their websites or in their promotion, that would have a massive impact”

(Informant 4)

These insights illustrate a broader issue of fragmented promotional strategies and underutilised digital platforms, which limit Australia’s ability to effectively engage the global Muslim travel market.

c. Infrastructure Limitations and Faith-Based Models

As Malaysia has established a religious tourism framework, Australia depends on companies and organisations to introduce such certifications on their own. Because there are limited accreditation programs and government initiatives, it discourages tourism providers from investing in Muslim Friendly services and infrastructure.

5.5.3 Societal and Industry Readiness

a. Limited Cultural Awareness in the Industry

Many travel industry professionals believe that Muslim Friendly tourism is just about eating halal food, not considering prayer facilities, comfortable facilities for females, and customer service that meets cultural expectations. Because the focus is limited, it becomes hard to create a holistic MFTH experience.

b. Islamophobia and Social Resistance

Experts noted that the phenomenon of Islamophobia does not let some businesses openly highlight their Muslim Friendly options. Since some fear that non-Muslim customers wouldn’t find such branding welcoming, they do not label their services as Muslim Friendly, even if they meet the needs.

c. Workforce Training and Future Readiness

In Australia, the tourism industry continues to face challenges due to the limited availability of training programmes that equip staff to effectively engage with diverse religious and cultural needs. Several respondents emphasised the importance of

integrating cross-cultural education and specialised training into both academic curricula and industry practice to ensure future workforce readiness. At present, only a few industry bodies, such as the Australian Tourism Export Council (ATEC), offer targeted initiatives like the “Muslim Host – Culture Ready” programme, which aims to enhance understanding of Muslim-friendly service provision. However, this programme provides only a general overview and is delivered through pre-recorded, fee-based content, limiting its depth and broader impact.

In this context, the findings on workforce training and future readiness underscore the need for more structured MFTH training modules, clear certification pathways, and strengthened frontliner competencies. Triangulated evidence indicates that, despite increasing awareness, there remains a lack of formalised training and standardised competency frameworks across the industry. This highlights the importance of developing modular training that addresses halal compliance, cultural sensitivity, and service adaptation, supported by recognised certification pathways to ensure consistency and credibility. Furthermore, equipping frontline staff with practical, context-specific skills is critical, positioning workforce readiness as a central pillar in advancing a structured and sustainable MFTH ecosystem in a non-OIC context.

5.6 RECOMMENDATIONS FOR POLICY AND GOVERNANCE

To resolve the gaps and problems found in the governance category, this section suggests certain recommendations that aim to strengthen the policy and administrative base of Muslim Friendly Tourism and Hospitality (MFTH) in Australia. The plan points out the need for government help, changes to rules, combined efforts by agencies, and practical support for Muslim travellers.

5.6.1 Developing a Structured MFTH Policy Framework

The study identified *fragmented governance, absence of a unified national MFTH policy, and inconsistent halal standards* across states. Respondents highlighted confusion among operators and low confidence among Muslim travellers due to unclear certification systems.

Recommendations:

a. Establish a National Muslim Friendly Tourism Strategy:

There is an urgent need for a central MFTH policy in Australia that defines what is expected from halal services, cultural respect, and upgrading the country's infrastructure. By using best practices from Malaysia's Halal Tourism Master Plan, Taiwan's New Southerland Policy of Halal Tourism industry development, and Japan's system of integrated certifications, the policy can effectively guide the introduction of the program in Australia.

b. Institutionalise MFTH within the National Tourism Agenda

The public sector should consider MFTH an official part of national tourism strategies and provide targeted funding, set goals for its advancement, and track its achievements. The addition of MFTH to federal and state tourism plans would show how serious a nation is about tourism and attract new funding and worldwide recognition. It is commendable to note that the NSW Visitor Economy Strategy 2030 roadmap has added the United Arab Emirates, Qatar, and Saudi Arabia to its target list, aiming to attract tourists from these nations to boost the state's visitor economy (NSW Visitor Economy Strategy 2030).

The discussion paper presented by the Austrade on taking forward THRIVE 2030 Action Item 6.3: "Develop an International Diversification Strategy to identify emerging markets for travel and education; strengthen key bilateral relationships in the Indo-Pacific region and beyond through the growth of people-to-people links and Brand Australia marketing." Six Muslim-majority countries in the Indo-Pacific region will be included in this strategy, which is a promising move.

c. Provide Regulatory Clarity for Halal Certification:

There is no single organisation in Australia that supervises halal certification in the tourism sector. Setting up a shared registration system for halal certification together with the Muslim community will simplify things for tourism operators and win the trust of consumers.

International examples such as Hong Kong underscore the importance of unified governance in Muslim Friendly tourism. In a recent development, Hong Kong has begun aligning tourism boards, Muslim leaders, and businesses to promote halal tourism more strategically. This integrated approach—combining government leadership, industry coordination, and inclusive marketing—demonstrates how non-Muslim-majority destinations can proactively attract Muslim tourists through clear policy commitment and stakeholder engagement (Salaam Gateway, 2024).

5.6.2 Simplifying Visa Processes

The research revealed that *post-pandemic visa restrictions* and *perceived entry barriers* significantly discouraged travel from key Muslim-majority markets (e.g., Indonesia, Malaysia).

Recommendations:

a. Visa Reforms for Muslim-Majority Countries:

Authorities should examine visa policies after the pandemic and realise how these have indirectly blocked travel from Malaysia and Indonesia. It was clear from the surveys that travel restrictions on Muslim visitors were making it much harder for them to visit the nation.

b. Introduce Facilitated Entry Programs:

Australia can decide to use visa-on-arrival or e-visas for Muslim-majority countries, which are popular tourism outbound destinations. To ensure safety and smooth operations, these measures should be paired with robust monitoring systems—such as

biometric verification and real-time travel tracking similar to the integrated border security models successfully used by countries like Japan and Thailand.

5.6.3 Improving Stakeholder Coordination

A major gap identified was *weak coordination among government, industry, and Muslim communities*, leading to inconsistent service provision and missed market opportunities.

Recommendations:

a. Create a National MFTH Advisory Council:

The government needs to set up an advisory group made up of tourism officials, business leaders, Muslim community members, and policy advisors to handle the MFTH project. The council's duties would be to develop and maintain standards, oversee learning programs, work on infrastructure upgrades, and gather feedback.

b. Foster Multi-Level Government Collaboration:

Collaboration between federal, state, and local governments is essential to ensure a unified approach. Furthermore, relevant facilities should be accessible not only in major metropolitan areas but also across rural and regional parts of Australia.

c. Promote Transparent Information Sharing:

All local areas need to have a visible and reliable list of certified Muslim Friendly restaurants, prayer places, hotels, and companies that provide the same services, as arranged by and shared by the authorities.

5.7 RECOMMENDATIONS FOR INDUSTRY AND MARKET DEVELOPMENT

Apart from governing bodies, the progress of MFTH in Australia depends primarily on what the industry does. Tourism businesses may be offered support, allowing them to promote their businesses, and give them a chance to earn more by specifically investing their resources and boosting their capabilities.

5.7.1 Enhancing Promotional Strategies

The findings highlighted *limited targeted marketing, low visibility of Australia as a Muslim-friendly destination, and underutilisation of digital platforms.*

Recommendations:

a. Develop Targeted MFTH Marketing Campaigns:

It would be helpful if Tourism Australia and the regional tourism boards prepare unique promotions for Muslims living in Indonesia, Malaysia, and the Middle East. The advertisements should be based on pictures and words that communicate equity, personal safety, and a welcoming environment for Muslims.

b. Utilise Influencers and Celebrity Endorsements:

To resonate with Muslim audiences, Australia should collaborate with well-known figures from the Muslim world. Informant 1 suggested:

“Using celebrities from Muslim countries as ambassadors can enhance Australia’s appeal to Muslim travellers.”

(Informant 1)

In countries like Southeast Asia and the Middle East, using celebrity marketing encourages more people to trust a brand.

c. Expand Digital Outreach and Accessibility:

Planning their trip before traveling is something Muslim users do by using digital platforms. Offering halal map-like filters and lists of services for Muslims on halal travel platforms such as Salambooking.com, Halalbooking.com or mobile phone applications, and destination guides would help people feel more welcome in Australia.

5.7.2 Capacity Building Through Training

There was a clear lack of *cultural awareness among frontline staff* and *limited integration of MFTH in education and training systems*.

Recommendations:

a. Mandatory Cultural Sensitivity Training for Frontline Staff:

All these companies should conduct frequent workshops to help their teams understand what Muslim travellers expect when it comes to their meals, when and how to pray, links to modesty, and the right greetings. It will prevent incidents where the traveller faces the wrong kind of services and disappointments. A strong example for Australia is the approach taken by the Hong Kong Tourism Board (HKTB), which has actively collaborated with local tourism stakeholders to enhance their understanding of the needs of Muslim travellers by offering training programs and supporting them through the accreditation process (Travellah Inspirasi Travel, 2025).

b. Incorporate MFTH in Hospitality Education:

The vocational educational institutes and universities must integrate the MFTH modules into their educational programs. If the next generation of tourism specialists is exposed to inclusive service from the start, they will be able to meet the needs of diverse religious sectors more easily.

c. Certification Programs for Businesses:

Through partnerships with Muslim associations, Australia can develop a recognition system for MFTH providers that offer services aligned with halal standards and inclusive community values. It would help develop trust and boost the quality of the sector. Another valuable example for Tourism Australia is Hong Kong's introduction of a Muslim Friendly accreditation system for hotels and tourist attractions, which complements its existing halal restaurant certification program. This initiative is spearheaded by the Hong Kong Tourism Board (HKTB) (Travel Weekly Asia, 2024).

5.7.3 Encouraging Private Sector Investment

The study identified *limited investment in halal infrastructure*, especially in regional areas, and *lack of incentives for businesses* to adopt MFTH practices.

Recommendations:

a. Incentivise Halal-Certified Ventures:

The federal and state governments should offer tax incentives or subsidies to support hotels and other tourism businesses to invest in Muslim Friendly infrastructure, such as halal restaurants, prayer areas, or compliant hotels for Muslim tourists. These steps would make it easier for people to become entrepreneurs.

b. Support Infrastructure Upgrades in Regional Areas:

Sydney, Brisbane, and Melbourne are well set for Muslim travellers, but places like Cairns and Sunshine Coast are not. Supportive grants and partnership strategies must be set up to encourage tourism operators in these locations to get ready for Muslim travellers.

c. Facilitate Public–Private Partnerships (PPP):

Shared funding programs between government agencies and private sector businesspeople might aid in promoting halal tourism and hospitality related events or

activities such as MFTH guides on the internet, developing an exclusive mobile App for MFTH availabilities, and tourism road shows appealing to tourists from Muslim countries.

5.8 RECOMMENDATIONS FOR SOCIAL AND CULTURAL INCLUSIVITY

Although infrastructure and regulations matter, truly successful Muslim Friendly Tourism and Hospitality (MFTH) needs a cultural change throughout Australia and its tourism sector. The suggestions below stress awareness, education, and include everyone to fight against Islamophobia, ignorance about cultures, and to improve the way Muslim tourists are welcomed.

5.8.1 Addressing Islamophobia in the Industry

The findings highlighted Islamophobia and *negative stereotypes* emerged as significant barriers affecting both demand (traveller perceptions) and supply (industry readiness).

Recommendations:

a. Launch Public Awareness Campaigns on Inclusive Tourism:

Authorities responsible for tourism and multicultural affairs should launch campaigns to refute common stereotypes and explain the advantages of offering services to Muslim tourists. The goal should be to correct Muslim stereotypes and give them easy access to hotel, restaurant, and attraction services that cater to their specific needs. Informant 10 reiterated stating:

“Islamophobia remains a challenge, and it is crucial to shift the narrative around Muslim tourists,”

(Informant 10)

b. Encourage Inclusive Language and Representation in Marketing:

Tourism-related information, both online and offline, ought to reflect Muslim people in everyday surroundings. For example, it is important to present pictures of families from different cultures, include women in hijab in commercials, and display Arabic signs to reflect your commitment to everyone.

c. Recognise and Publicly Reward Inclusive Businesses:

Launch a yearly system where awards or certificates are given to those involved in tourism who excel in inclusion, respect for cultural habits, and being involved with the community. They can help all companies in the tourism and hospitality sector embrace Muslim Friendly practices.

5.8.2 Integrating Cultural Sensitivity in Education

A lack of *early-stage cultural education* and *limited experiential learning opportunities* was identified as a long-term barrier to inclusive tourism development.

Recommendations:

a. Introduce Interfaith and Cross-Cultural Modules in School Curricula:

From secondary schools, cross-cultural training ought to be added to the programs in tourism, hospitality, and public administration. Studying abroad or overseas placements for the tourism industry professionals will encourage Australians to respect other cultures and participate as active members of the world. Informant 10 further emphasised:

“Creating cross-cultural values and languages... leads to a generation of young people... educated and interested in respectful engagement.”
(Informant 10)

b. Build Industry–Education Partnerships for Experiential Learning:

Collaboration between travel and hospitality businesses, higher education, and vocational training centres should include internships and related activities. This way, students have the opportunity to experience different cultures and figure out what Muslim travellers look for. Furthermore, tourism and hospitality education providers can collaborate with universities in Malaysia and Indonesia to engage in knowledge exchange and joint learning initiatives.

c. Promote Cultural Events and Intercultural Dialogue:

Talking about jobs and opportunities can be supported through multicultural gatherings and discussion places arranged by local councils and tourism organisations. They lower the cultural difference and make it easier for people to understand Muslim visitors' expectations.

Therefore, by systematically linking governance, industry development, and socio-cultural inclusivity challenges to targeted and actionable strategies, the research not only addresses current gaps in Muslim-Friendly Tourism and Hospitality (MFTH) in Australia but also provides a coherent roadmap for sustainable sectoral advancement. This approach ensures that the recommendations are both contextually relevant and practically applicable, while the proposed research agenda opens pathways for deeper theoretical refinement and continued evidence-based inquiry. Collectively, this alignment enhances the study's academic rigour, policy relevance, and industry value, positioning it as a meaningful contribution to the evolving discourse on inclusive and sustainable tourism development.

5.9 LIMITATION OF THE STUDY

The study presents several limitations that should be considered when interpreting the findings and guiding future research.

Firstly, the research is context-specific, focusing on Muslim-Friendly Tourism and Hospitality (MFTH) within Australia as a non-OIC setting; therefore, the findings may have limited generalisability to other countries with different socio-political, cultural, and regulatory environments. While this contextual focus provides depth, it also means that caution should be exercised when applying the proposed governance framework beyond similar secular and multicultural contexts.

Secondly, the study adopts a qualitative, multi-method approach, and although triangulation enhances validity, the findings are inherently interpretive and may be influenced by researcher subjectivity and the perspectives of selected participants.

Thirdly, the sample size and stakeholder representation, while sufficient for qualitative inquiry, may not fully capture the diversity of views across the entire tourism industry, particularly smaller operators or less formal sectors.

Finally, the study reflects a specific time frame, and given the dynamic nature of tourism demand, policy, and global travel trends, some findings may evolve over time.

5.10 RECOMMENDATIONS FOR FUTURE RESEARCH

Building on the identified limitations, several recommendations for future research are proposed.

Firstly, to address the context-specific nature of this study, future research should undertake comparative analyses across multiple OIC and non-OIC destinations to further validate and refine the proposed MFTH governance framework across diverse socio-cultural and regulatory environments.

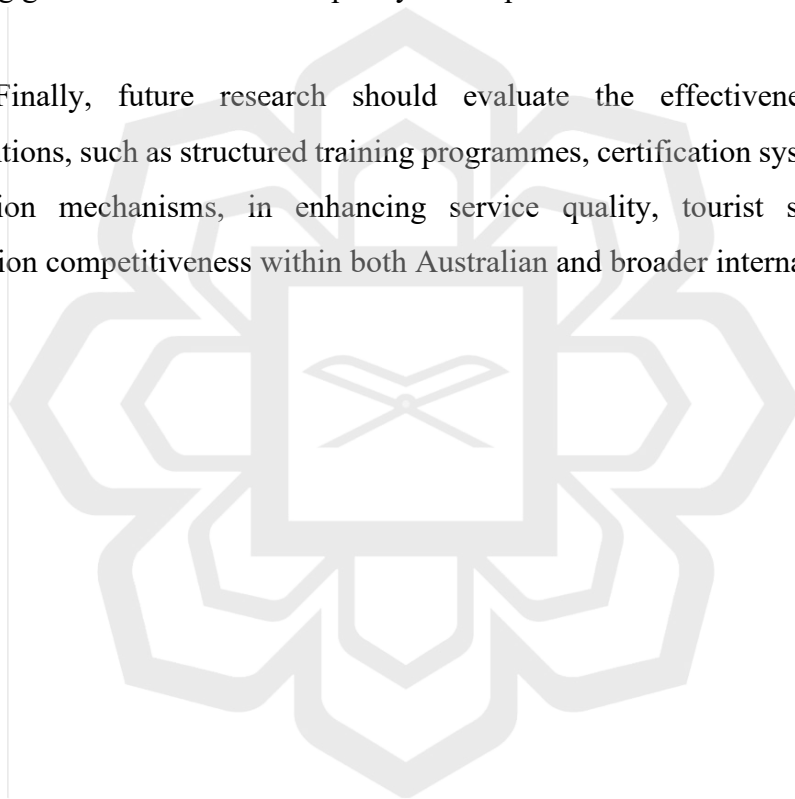
Secondly, to complement the qualitative approach and minimise subjectivity, future studies are encouraged to adopt quantitative or mixed method designs to test the

relationships, reliability, and scalability of the framework components across larger and more representative samples.

Thirdly, expanding stakeholder representation particularly by including small and medium-sized enterprises (SMEs) and participants from the informal sector would provide a more comprehensive understanding of industry perspectives.

Fourthly, longitudinal studies are recommended to examine how MFTH governance, industry readiness, and market dynamics evolve over time in response to changing global travel trends and policy developments.

Finally, future research should evaluate the effectiveness of targeted interventions, such as structured training programmes, certification systems, and policy integration mechanisms, in enhancing service quality, tourist satisfaction, and destination competitiveness within both Australian and broader international contexts.



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APPENDIX A

INTERVIEW QUESTIONNAIRE

THE GOVERNANCE OF MUSLIM FRIENDLY TOURISM & HOSPITALITY IN AUSTRALIA

No	Type of questions	
01	Background Information of Participant and Organisation	
02	Generic questions - What is your understanding of Muslim Friendly or Halal Tourism? - Describe your role in the tourism and hospitality industry. - What do you think about whether Muslim Friendly tourism is an important tourism sector that needs to be developed in Australia? - By Implementing MFTH, what benefits/ opportunities do you think would bring to Australia? - What is your opinion on whether Australia has the right resources and facilities to develop Muslim Friendly tourism and hospitality? - What factors can determine the implementation of Muslim Friendly tourism in Australia? - What are the challenges or concerns you think in relation to developing Muslim Friendly tourism and hospitality in Australia?	
03	Specific Types of Questions	
	Hotels/ Restaurant owners Tour operators Airline and transport providers	- What is your opinion on providing Muslim Friendly and hospitality services by your organisation? - What do you think of the resources you have in providing these services to Muslim travellers? - What benefits do you think your organisation may gain by providing Muslim Friendly services? - What challenges or difficulties your organisation may face in providing these services?
	Tourism Australia and state & territory boards (Government)	- What do you think about whether Muslim Friendly tourism and hospitality can be included in the existing tourism governance of Australia? - What do you think whether the government can introduce relevant acts or legislations tied directly to the MFH for better control and governance of this sector? - What is your opinion on whether the facilities required to promote Muslim Friendly tourism can be provided by Australia? - What do you think Muslim Friendly tourism can be added as another tourism segment that can be promoted by Tourism Australia?

		• What is your opinion about promoting Australia as a Muslim Friendly tourism destination to all OIC member countries?
	Tourism industry associations	• What is your opinion on providing Muslim Friendly and hospitality services by the industry players? • What do you think of the readiness of the industry players to provide Muslim Friendly services to Muslim travellers? • What benefits do you think industry players may gain by providing Muslim Friendly services? • What challenges or difficulties the industry players may face in providing these services?
	Educational institutions	• What do you think about the knowledge of Muslim Friendly tourism and hospitality amongst the tourism and hospitality industry players? • What is your opinion about the number of research work carried out by the academic institutions in this area in Australia? • What do you think about how academic institutions can help in developing this sector in Australia?
	Representative from Muslim organisations	• What are the challenges the Muslims face when travelling within Australia? • What do you think about the benefits Muslim Friendly tourism can bring to the local Muslim community? • What are your recommendations for developing Muslim Friendly tourism and hospitality in Australia?

APPENDIX B

EXPERT INTERVIEW

 INHART INTERNATIONAL INSTITUTE FOR HALAL RESEARCH AND TRAINING INTERNATIONAL ISLAMIC UNIVERSITY MALAYSIA	
STUDENT'S INFORMATION	
Name	Irshad A Cader
Matric No	G2214821
Programme	PhD in Halal Industry
University	International Institute for Halal Research and Training (INHART) International Islamic University Malaysia (IIUM)
Supervisor	Assoc. Prof. Dr. Mohammad Aizat Bin Jamaludin
Co-supervisor	Assoc. Prof. Dr. Betania Kartika Muflih
Thesis Title	The Governance of Muslim-Friendly Tourism & Hospitality in Australia.
Interview Questions	Research Objectives: 1. To analyse the challenges and opportunities of implementation of MFTH in Australia. 2. To determine the factors that support the implementation of MFTH to the overall tourism economic development in Australia. 3. To develop and propose a suitable governance framework that could assist policymakers and the relevant stakeholders in developing MFTH in Australia.

APPENDIX C

EXPERT REVIEW INFORMATION

Fill in by selected interviewee

EXPERT REVIEW INFORMATION	
Full Name	
Specialization/ Experience	
Position	
Duration (year)	
Date of Interview	
Signature and Verification	

APPENDIX D

INVITATION LETTER FOR EXPERT INTERVIEW



23rd July 2024

Kim Moore
GM Stakeholder Communications - Corporate Affairs
Tourism Australia.

Subject: Invitation to Participate in a Research Interview

Dear Eloise,

I hope this message finds you well. In connection to my recent correspondence with Galia Edwards regarding the above topic, I would like to take this opportunity to introduce myself and the research I am currently undertaking. I am a PhD research student focusing on the development of Muslim-friendly tourism in Australia, which is one of the fastest-growing tourism sectors globally.

I would like to express my gratitude for accepting my request to assist me by participating in a brief interview for my PhD research on "The Governance of Muslim-Friendly Tourism & Hospitality in Australia." This research aims to explore strategies to promote this sector in Australia, given its rapid global growth and substantial contribution, which is nearly equal to China's, to international tourism spending.

Given the significance of this fast-growing tourism sector, I value your assistance in my research, as the findings will be shared with Tourism Australia upon completion of my PhD. The interview is expected to last 15 to 20 minutes and can be conducted via Zoom or in person. Rest assured, all information provided during the interview will be kept confidential and solely used for academic research purposes.

Attached, you will find student information and a sample questionnaire for your reference. I would appreciate it if you could inform me of your availability sometime this week so that we can schedule a suitable time for the interview.

Thank you for your cooperation and support.

Best regards,

A handwritten signature in black ink, appearing to read "Irshad A. Cader", is shown.

Irshad A. Cader
PhD research student
INHART – Level 3, Block A, International Islamic University Malaysia,
Email: irshadaac@gmail.com Mobile: +61434505191

CC: Dr. Mohamed Aizat Jamaludin – Head of social science research and humanities - INHART

APPENDIX E

INVITATION PARTICIPATION CONSENT FORM



Subject: Interview Participation Consent Form

Dear,

I hope this message finds you well. I would like to express my gratitude for accepting my request to assist me by participating in a brief interview for my PhD research on "The Governance of Muslim-Friendly Tourism & Hospitality in Australia." This research aims to explore strategies to promote this sector in Australia.

Given the significance of this fast-growing tourism sector, I value your assistance in my research. The interview is expected to last 15 to 20 minutes and can be conducted via Zoom or in person. Rest assured, **all information provided during the interview will be kept confidential and solely used for academic research purposes.**

Warm regards,

A handwritten signature in black ink, appearing to read "Irshad A. Cader", is shown above the printed name.

Irshad A. Cader

PhD research student

INHART – Level 3, Block A, International Islamic University Malaysia,

Email: irshadaac@gmail.com Mobile: +61434505191

CC: Dr. Mohamed Aizat Jamaludin – Head of social science research and humanities - INHART

APPENDIX F

APPRECIATION FOR PARTICIPATING IN THE EXPERT INTERVIEW



27th March 2024

Mr. Hussain Baba
The Chairman
Gruppo Halal Tours,
Gold Coast, Queensland.

Subject: Appreciation for Participating in PhD Research Interview

Dear Br. Hussain,

I hope this message finds you in good spirits. I am writing to extend my heartfelt gratitude for your invaluable participation in yesterday's interview for my PhD research. Your insights and contributions have been immensely valuable to the progress of my study, and I wanted to take a moment to express my appreciation.

Your willingness to share your experiences, thoughts, and expertise during the interview was truly commendable. The depth of your responses and the clarity of your perspectives have provided a significant contribution to the development and refinement of my research.

I understand that participating in research interviews requires a considerable amount of time and effort, and I am sincerely grateful for your commitment and engagement throughout the process. Your enthusiasm for the topic and your willingness to engage in meaningful discussions have been instrumental in shaping the direction of my research.

Once again, thank you for your valuable participation and contribution to my PhD research. Your support and cooperation are deeply appreciated. Should you have any further insights or thoughts to share, please do not hesitate to reach out.

Wishing you continued success in your endeavours.

Warm regards,

Irshad A. Cader
PhD research student
INHART – Level 3, Block A, International Islamic University Malaysia,
Email: irshadaac@gmail.com Mobile: +61434505191

CC: Dr. Mohamed Aizat Jamaludin – Head of social science research and humanities - INHART

APPENDIX G

BIODATA OF THE STUDENT

Irshad A. Cader is a business and management professional with extensive experience in leading and managing internationally renowned businesses and organizations, holding a master's degree in management from one of Australia's most famous universities. He holds a post-graduate degree in Human Resources Development. In addition, he is a Graduate of the Chartered Institute of Marketing (UK). He is currently pursuing his PhD in Halal Industry Management at INHART – IIUM Malaysia. He has extensive work experience in Business Management, Marketing, Entrepreneurship Development, Human Resources, and capacity development across various fields in Australia, Southeast Asia, and the Middle East region.

Some of his key achievements include the establishment of the Duty-Free concept for the first time at all International Airports in Saudi Arabia, known as “Saudi Duty Free”. He has been instrumental in developing a high-end, well-renowned Halal cosmetic brand called “Sensi” in the Middle East. He has been a recipient of several international awards in the Private and Government sectors.

Irshad A. Cader was invited as a guest speaker at several international conferences and seminars including the 1st New Zealand Halal Expo and Halal Economic Forum 2025, 6th Indonesia International Halal Lifestyle Conference 2024, AZHAB Forum - Azerbaijan Halal Business Forum 2024, 1st Makkah Halal Forum 2024, 3rd Muslim-friendly Tourism Congress 2024 in Turkey, International Halal Science Conference 2023 IIUM - Malaysia, Sustainable Development and Halal Economy Conference 2022 in Doha, World Halal Summit 2018, 2019, 2020 & 2022 held in Istanbul Turkey, Round table Talk (The Jewels of Muslim World; Movers and Shakers 2017 & 2019) in Malaysia, OIC - Asia Africa Trade and Economic Forum 2017, as well as Halal Expo Australia 2018, and Indonesia International Halal Lifestyle Conference 2019.

In addition, his research papers have been published in the famous World Halal conference and academic journals. The topics of his research papers include: 1. Mechanisms to Create Awareness and Promote Halal Industry Globally, 2. The Dynamism of the Global Halal Industry and Its Impact on the Lifestyle of Families and Youth. 3. Challenges and recommendations in promoting the Halal Industry in the OIC and non-OIC member countries, 4. Challenges, Opportunities and Recommendations for MSMEs in the Global Halal Industry, 5. Empowering Halal MSMEs for economic growth and sustainability in the OIC and non-OIC member countries, 6. Muslim-friendly tourism in Australia – Challenges and Prospects.

APPENDIX H

PUBLICATIONS AND CONFERENCES

1. **Cader, A. I. A. A.,** Jamaludin, M. A., & Kartika, B. (2024). Muslim-friendly tourism in Australia: Challenges and prospects. *Halalsphere*, 4(2), 59-65.
2. **Cader, A.I.A.A** (2024). “The role of innovation in driving Marketing & Commercial excellence in the Muslim-Friendly tourism”. In: *3rd International Halal Tourism Congress 2024 (ISBN 978-625-00-2482-9)*, 10-12th May 2024, Izmir – Türkiye.
3. Invited as a speaker in the panel “**Global Halal Industry & Halal Friendly Tourism**” at the 1st New Zealand Halal Expo and Halal Economic Forum 2025 on 19th October 2025. Hosted by Halal Economic Forum New Zealand 2025.
4. Participated as a panel speaker in the session “**Protecting the Planet: Integrating Environmental Stewardship into Halal Tourism**” during the Halal in Travel Global Summit, 10th–12th June 2025, organized by Mastercard-CrescentRating and HalalTrip, Singapore.
5. Invited panel speaker at the Global Webinar themed “**Halal Tourism: Shaping Sustainable Travel Experiences,**” hosted by the Islamic Chamber of Commerce and Development (ICCD – OIC) on 16 April 2025.
6. Participated as a panel speaker in the session “**Upskilling the Muslim Lifestyle Industry Talent in the age of AI**” during the Halal in Travel Global Summit, 28 May 2024 - 30 May 2024, organized by MC and HalalTrip, Singapore.
7. Invited as a speaker in the session “**The Importance of Upskilling Halal Tourism Industry Talents in Modern Times**” at the Global Webinar organized on the theme “*OIC/SMIIC 9:2019 Halal Tourism Services – General Requirements Training for Women Experts*” by the Standards and Metrology Institute for Islamic Countries (SMIIC/OIC), Türkiye, on 14th May 2024.
8. Invited as a speaker in the panel “**Innovation in Marketing and Commercial Excellence: Travel and Tourism Industry**” at the 1st Makkah Halal Forum held in Makkah Saudi Arabia on 23rd January 2024. Hosted by Islamic Chamber Halal Services (ICHS) under the patronage of the Organization of Islamic Cooperation (OIC) and the Ministry of Commerce – KSA.
9. Invited panel speaker in the session “**Halal Tourism: understanding the emerging trends and challenges for Muslim-friendly destinations**” during the Halal in Travel Global Summit, 30th May 2023 to 1st June 2023, organized by Mastercard-CrescentRating and HalalTrip, Singapore.
10. Participated as a panel speaker in the session “**Hajj & Umrah in the new digital world**” during the Halal in Travel Global Summit, 31st May 2022 to 2nd June 2022, organized by Mastercard-CrescentRating and HalalTrip, Singapore.
11. Participated as a panel speaker in the session “**Hotels & Restaurants: Challenges & Opportunities in Ramadhan**” during the Ramadhan & Eid Dialog 23rd March 2022, organized by Mastercard-CrescentRating and HalalTrip, Singapore.
12. Invited panel speaker in the session “**Changes of the Tourism Paradigm in the Era of New Normal**” during the 2nd International Tourism Webinar hosted by the Indonesia Tourism Forum in collaboration with the World Travel & Tourism Council, 15th May 2020.