

ENHANCING MUSLIM-FRIENDLY TOURISM IN AUSTRALIA: OPPORTUNITIES, CHALLENGES, AND FUTURE DIRECTIONS

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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. This paper will be looking at the evolution of Muslim-Friendly Tourism (MFT) in Australia, especially in terms of governance systems, perceptions of stakeholders, and future strategic aspects. A qualitative interpretivist design was adopted in which 15 semi-structured expert interviews were carried out in New South Wales and Queensland among policymakers, industry representatives, academicians and international Muslim travel experts. It indicates that MFT has strong awareness of this as a high-growth economic segment, but the conceptual vagueness and fragmentation of governance limit its strategic integration. In addition to the provision of the services, cultural safety proved to be an important factor of Muslim traveller experience. This study contributes to the development of the body of knowledge on Muslim-friendly tourism in a non-OIC setting and offers recommendations regarding the development of the Australian global competitiveness based on evidence.*

Keywords: *Muslim-Friendly Tourism, Governance, Cultural Safety, Sustainable Tourism Development, Non-OIC Destinations*

Introduction

The global tourism has experienced tremendous change in the last 20 years with an apparent rise in segmentation of the market, value tourism preference and increasing significance of culturally sensitive tourism experiences (Hua Chin, 2018). The most striking change in this changing context is the fact that the Muslim travel market is growing at a rapid pace in the world. Having almost two billion Muslims in the world, and an ever-increasing number of middle and upper-income travellers, the Muslim travellers have become one of the most rapidly growing and lucrative segments of the world tourism. The 2025 projection will see the number of international arrivals by Muslim tourists rise to about 186 million. This growth is projected to rise in the long run witnessing the projections that the number of arrivals is set to grow to 245 million by 2030 and on the same note, the number of traveller expenditure is likely to record high growth with an estimated figure of US 235 billion projected to be spent by 2030.

According to the Mastercard-Crescent Rating Global Muslim Travel Index (GMTI, 2025) historically, the Muslim-dominant nations have been leading in the evolution of the Muslim-friendly tourism, but some non-OIC destinations have shown impressive improvement in the quest to win Muslim travellers in recent years (Boğan, 2020). Countries like Singapore, Japan, South Korea, and the United Kingdom have embraced proactive measures which combine governance systems, certification systems, industry training and specific marketing. Such campaigns have led to the powerful destination branding and the enhanced traveller confidence, making Muslim-friendly tourism more of a mainstream, as opposed to the revealing niche (Battour et al., 2010). The popularity of these destinations reveals the increased topicality of MFT in non-Muslim environments and the necessity of a coordinated policy and industry involvement. Australia is one such very interesting example of the global trend. Australia is an established competitive international tourism destination and has a portfolio of natural landscapes, diverse cultural attraction sites and quality tourism infrastructure. Australia had become more visible in the global Muslim travel industry in the last few years of time and was ranked consistently the top 10 non-OIC Muslim-friendly destinations. See Table 1.

Table 1 GMTI 2025 Rankings - Top 10 Non-OIC destinations

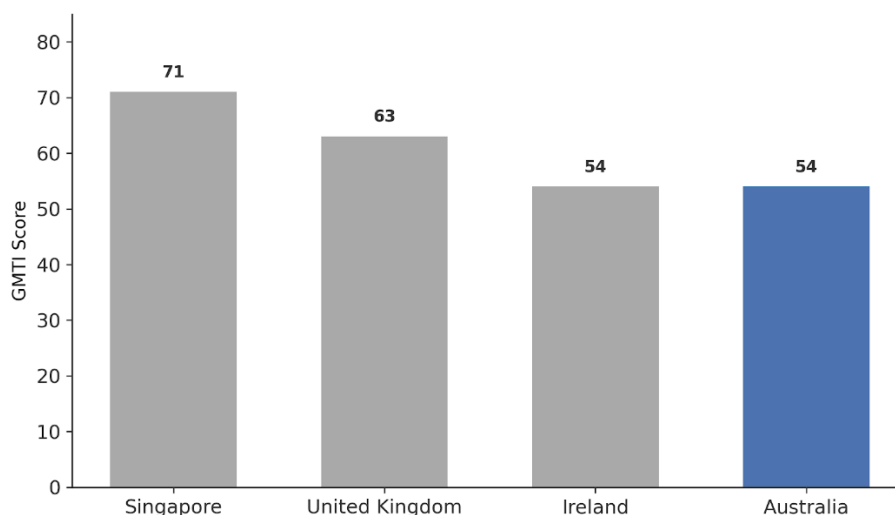
Non-OIC Rank	Change VS 2024	MTI 2025 Rank	Destination	GMTI 2025 score	Change VS 2024
1	0	11	Singapore	71	+5
2	0	22	United Kingdom (UK)	63	+5
3	+1	23	Hong Kong	62	+10
4	-1	27	Taiwan	58	+3
5	0	29	Thailand	57	+6
6	+2	34	Ireland	54	+6
6	+2	34	Australia	54	+6
8	+4	36	Philippines	53	+7
9	-3	38	Spain	52	+3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

Source: Mastercard-Crescent Rating – Global Muslim Travel Index 2025

It enjoys good air connectivity with Southeast Asia and Middle East, multicultural society, and a with the availability of Halal food especially in the urban regions. In addition to that, Muslim majority nations like Indonesia and Malaysia are also on the list of the important source markets

of Australia and Muslim travellers in other parts of the world like the Middle East, South Asia, and Europe are also offering a growing number of inbound tourism flows. While a generally positive image of Muslim-friendly tourism is emerging, its development in Australia remains uneven and at a relatively nascent stage. While a generally positive image of Muslim-friendly tourism is emerging, its development in Australia remains uneven and at a relatively nascent stage. Recent initiatives led by Tourism Australia the Australian Government agency responsible for attracting international visitors include the publication of dedicated Muslim visitor guides, most notably the 2010 release *A Muslim Traveller's Guide to Australia*, followed by an expanded 68-page edition in 2015 developed in collaboration with HalalTrip. Additional targeted promotional activities, such as the launch of a Muslim travel consortium in Indonesia in October 2024, further demonstrate efforts to engage this growing market segment. These initiatives, alongside limited industry training programs, indicate increasing institutional recognition of the Muslim travel market and its potential. However, such efforts remain fragmented and have yet to be embedded within a coherent, nationally coordinated framework, thereby constraining the sector's capacity for systematic development and long-term competitiveness.

In the rural areas, there are inconsistencies in the availability of halal food, religious facilities, and culturally relevant services. Moreover, knowledge of Muslim friendly tourism among tourism operators is usually minimalised with inadequate knowledge on the wider faith, cultural and informational demands. Such loopholes cast important doubts on the willingness of Australian authorities to exploit the potential of the Muslim travel market to the full. Academically, the field on the Muslim-friendly tourism has developed significantly with studies devoted to their satisfaction with the destination, destination image, behavioural intentions, and quality of services. Nevertheless, a significant portion of such literature is still focused on Muslim-majority or is based on quantitative and tourist-focused methods. The Australian case has had the majority of existing research being conceptual or secondary data and document analysis in nature and does not provide a lot of information on how the perception of Muslim-friendly tourism, its governance, and its operationalisation are perceived by the key stakeholders. Therefore, a significant gap exists in the research of the strategic, institutional, and cultural aspects of MFT development in Australia that is based on qualitative and stakeholder-driven research. See Figure 1.



Source: Mastercard-Crescent Rating – Global Muslim Travel Index 2025

Figure 1 Australia's Position Among Top Non-OIC Destinations

Research Gap and Study Justification

Most of the existing literature on Muslim-Friendly Tourism (MFT) has been concerned with product quality, destination image, tourist satisfaction, and behavioural intentions in Muslim-majority or OIC context. These studies have made considerable strides in understanding the behaviour of Muslims travelling, but there are numerous gaps. Research on the MFT has tended, as it should, to focus on the service and consumers' view, and given less attention to institutional, cultural safety and governance dimensions that influence the development of the MFT, especially in non-OIC destinations. Thus, we have a limited understanding of the social construction of MFT and its strategic position in multicultural tourism systems, like Australia. In terms of methods, most of the existing research has been based on quantitative research in the form of surveys and structured models with a focus on tourists' perceptions and behaviour. These methods offer only partial insight into the intricate institutional mechanisms, the dynamics of multiple stakeholders, and the context that affects the implementation of MFT. There has been limited research using qualitative methods which enable deeper investigation into perceptions and decision-making processes of key actors. Thus, the qualitative evidence based on stakeholders is necessary, as the development of Muslim Friendly Tourism is not just the tourist preferences, but also the decision of the policy, the system of governance, the practice of the industry and socio-cultural interaction. The views of policy makers, tourism operators, academics and Muslim travel experts can offer insights into institutional barriers, strategic opportunities and culturally sensitive areas that are hard to quantify. Filling these gaps leads to increased theoretical knowledge and empirical evidence of MFT development in non-OIC environments like Australia.

Literature Review

This has increased a need to review tourism plans by both Muslim-majority and non-Muslim-majority destinations to ensure products, services, and governance systems are tailored to meet tourism demands based on faith (Effendi et al., 2021). Muslim-Friendly Tourism (MFT), which is also called halal tourism or Islamic tourism, has a broad meaning of tourism products and services that ease traveling experiences in a manner that does not violate Islamic values and practices (Nurdiansyah, 2018). Although no general definition exists, MFT normally includes access to halal food, prayer areas, accommodation that is culturally sensitive, modest recreational areas, and a friendly atmosphere without discrimination. Notably, Muslim-friendly tourism does not mean exclusivity as it is an inclusive service model that makes the services more comfortable and accessible to Muslim travellers, not meaningfully less useful to non-Muslim visitors (Gabbrakhmanov, 2016). With destinations becoming more and more competitive by focusing on niche and high-value markets, MFT has proved to be a source of economic benefit as well as a source of inclusion by culture.

Conceptualising the notion of Muslim-Friendly Tourism

The fast rate of development of the global Muslim tourist market has enhanced the academic interest in knowing and conceptualising tourism forms consistent with Islamic values and practices. In this literature, the terms Muslim-Friendly Tourism (MFT), Halal Tourism, and Islamic Tourism are all used interchangeably with each other, which many times brings confusion to the concept. Although there are similar traits to these terms, scholars have become more interested in suggesting that these terms are different but similar constructs that need close distinction especially when used in non-Muslim majority settings (Suhartanto et al., 2021; Jamaludin, 2023). The traditional interpretation of halal tourism is tourism that is in line with the Islamic law (Shariah) especially when it comes to food, drink, accommodation and recreation (Uriawan et al. 2025). The initial research defined halal tourism mostly in terms of

how it offers halal-certified food, alcohol-free restaurants, and gender-separated recreational solutions. This view is compliant in nature, whereby, religious permissibility and the observation of formal halal standards are important (Zulvianti et al., 2022). Although halal tourism has continued to be a crucial part of the Muslim travel, scholars have criticised this bias in understanding as being too simplistic as far as the various needs and behaviours of Muslim travellers are concerned. Islamic tourism, in its turn, is commonly perceived as more value-filled and spiritually oriented way of travelling. It also includes not just compliance with halal but also with religious experiences of travel issues including pilgrimage, visiting of Islamic heritage places and activities that promote the spiritual consideration and learning of religion. Islamic tourism is thus inextricably connected with the issue of religious identity and practice and targeting mostly Muslim travellers who are in search of faith-oriented experiences. Thus, Islamic tourism is more exclusive and not very mainstream tourism strategy and destinations that do not have a majority of Muslims (Nafis et al., 2024).

The concept of Muslim-Friendly Tourism has also become more inclusive and adaptable to attract the gap between Islamic tourism and halal tourism. MFT is a term that can be applied to the tourism setting, services and experiences, which are provided to meet the faith requirements of Muslim travellers without restricting non-Muslim visitors to their religious beliefs (Hanafiah et al., 2020). MFT places more emphasis on comfort, accessibility, cultural sensitivity and informed choice as opposed to halal compliance and religious motivation (Samori et al., 2016). This conceptualisation is especially applicable in destinations that aim to attract the attention of Muslim travellers and at the same time be able to retain a wide and inclusive tourism product. According to more recent studies, Muslim-Friendly Tourism is to be perceived as a spectrum and not a solid category. Muslim travellers differ widely in regard to religiosity, culture, travel motivations as well as expectations. This means that the destinations that use MFT approach do not have to offer entirely Islamic environments but must have enough information, services, and facilities to allow Muslim travellers to exercise their religion easily when travelling (Rahmawati et al., 2022). This is particularly applicable to MFT as an option in the non-OIC destination, where total halal or Islamic tourism models would not be feasible or culturally consistent. One of the most popular models of understanding the needs of Muslim travellers is Faith-Based Service Needs model that divides the services into three categories of needs: need-to-have, good-to-have and nice-to-have. Needs to have are the most critical needs and normally involve the availability of halal foods, fundamental prayer areas, and a guarantee of security and respect (Wardi et al., 2018). These factors are regarded as being non-negotiable among most Muslim travellers, and they are extremely important in the destination selection and satisfaction.

Good-to-have services complement but are not necessarily necessary. These can be in terms of Muslim friendly accommodation amenities, details on where one can find the mosque, washrooms which are water friendly and simple leisure facilities (Rasul, 2019). This kind of services adds to good travelling experience and makes destinations competitive but does not necessarily translate into definitive factors among all travellers. Gender-segregated recreational amenities, Islamic cultural experiences and Shariah-compliant financial services are the examples of the so-called nice-to-have services serving more observant or niche segments of the Muslim travel market (Mutmainah et al., 2024). This stratified model brings out the diversity of the Muslim travel segment and the relevance of strategic prioritisation of service delivery. It is also a good analytical prism to evaluate destination preparedness and industry competence. Notably, a lack of a definition of MFT which is universally accepted is a common thread within the literature. Scholars are becoming more aware that conceptual clarity is not

just informed by the discourse of the academia but the practice of the industry, governance structures, and the perceptions of travellers. Such conceptual ambiguity supports the rationale of empirical studies that portrays the manner in which major stakeholders perceive and actualise Muslim-Friendly Tourism in particular destination set-ups.

While the work undertaken by previous research has made great strides in understanding the Muslim-friendly tourism, there are still divergent views that are disputed in the literature. Some studies focus on the halal tourism concept primarily based on religious compliance and the provision of services like gender-segregated facilities, halal food, etc., while others support the need for more comprehensive and inclusive perspectives that prioritize cultural sensitivity, accessibility, and the overall experience. However, in non-OIC settings, researchers and scholars are increasingly proposing that the notion of strict compliance-based interpretations might not be feasible on the ground and that other Muslim-Friendly Tourism models should be promoted that focus on flexibility and inclusion with informed choice. The literature is, however, divided, and there is no consensus for the most appropriate conceptual framework in the multicultural tourism context, like Australia. Thus, additional empirical evidence is needed to balance out these opposing views.

Muslim-Friendly Tourism beyond OIC Destinations

Although the initial studies of Muslim-friendly tourism concentrated mainly on the Muslim majority states, recent articles have changed this trend by targeting non-OIC destinations that have achieved the successful incorporation of MFT as a tourist destination approach (Sa'adah Muhamad et al., 2019). The increasing literature emphasizes that the development of MFT in non-Muslim settings would rely less on the transformation of religion and on the governance, coordination of policies, education in industries, and branding. Singapore has been generally considered as a model non-OIC tourist destination. It has been successful due to effective halal certification system and strong government control and close associations between tourism departments and Islamic institutions (Rahman et al., 2020). Proper guidelines, reliable certification procedures and regular communication have increased confidence among the travellers and minimized uncertainty. Researchers underline that the practice by Singapore can illustrate how institutional clarity and trust-building instruments can play an important role in destination image among Muslim travellers. The United Kingdom is a rather different, but also a very educative case. Instead of centralised governance on halal, the development of Muslim-friendly tourism in the United Kingdom (UK) has been driven by market initiatives, personal certification organisations as well as destination-based promotion. Studies emphasize that multiculturalism, high populations of resident Muslims, and inclusion of Muslim-friendly urban tourism products contribute to the development of Muslim-friendly experiences (Muhamad et al., 2019).

The UK system, however, also reports some problems connected with fragmentation, uneven standards, and regional inequalities. Japan is a relative newcomer to the Muslim friendly tourism arena and has been mainly spurred by the rise in inbound tourism and the international events (Jaelani, 2017). The capacity building, training of industry, and provision of information, which are led by government, is highlighted in studies on the experience of Japan. Japanese tourism players have also concentrated in education, awareness and practical adjustment as opposed to religious compliance. According to scholars, the success of Japan is because it focuses on being transparent enough to say what is and what is not available to it, rather than striving to recreate halal environments completely. The theme of governance and certification comes out prominently in these non-OIC settings. Successful development of MFT is always

linked to integrated policy frameworks, plausible assurance systems and proper role delineations by the stakeholders. On the other hand, destinations that have no coherence in their governance tend to have inconsistent delivery of services, poor awareness of the industry and low market penetration. Notably, the literature warns of universal methods and that MFT strategies have to be tailored to fit local cultural, political and institutional environments.

Australia and Global Muslim Travel market

The Australian experience of working with the Muslim travel market has received growing scholarly and industry interest in the last ten years (Battour et al., 2018). Australia is an established tourist destination in the international market and enjoys the advantages of a good infrastructure, good destination branding, and a reputation of being safe and full of natural beauty. The geographic location of the country is close to the Southeast Asia and increased air links with the Middle East also make the country more attractive to the Muslim travellers. Market potential is specially observed in the high inbound traffic of Muslim dominated countries into Australia like Indonesia and Malaysia which are also considered to be the main source markets of Australia. Moreover, the Middle Eastern countries are well-known when it comes to travellers that are also high-yield and have longer fliers and spend more per-capita. In addition to the Muslim-majority countries, the Muslim travel market is diverse as Muslim travellers come to Australia, Europe, South Asia, and North America as well (Wajdi & Aji, 2020). To counter these opportunities, Australia has come up with various programs that have been introduced to boost the Muslim-friendly tourism. These involve coming up with the Muslim visitor guide, destination specific promotion materials and industry level training like the Muslim Host training program. The accessibility to halal food, mosques and culturally diversified tourism products in major cities is relatively good and depends on the Australian multicultural social fabric.

Although these positive changes are made, the literature reveals that there are still some gaps. Regional disparity has been mentioned among the most common challenges. Whereas big cities offer moderately friendly services to Muslims, smaller places tend to have large gaps in the form of non-existent halal meals, places of worship, and trained personnel (Binti et al., 2024). Such unequal distribution restricts the spread of tourism and the capacities of Australia to capture all the potential of Muslim travelling. There is also inconsistency in awareness and understanding among the tourism operators. According to research, most industry players currently consider Muslim-friendly tourism to only be associated with the provision of halal foods and do not consider other wider faith-related, informational and cultural requirements (Juliana et al., 2025). Lack of a nationally co-ordinated governance structure also contributes to the problem of fragmentation leading to dependence on voluntary initiatives and response on ad-hoc industry responses. It is thus argued by scholars that development in Muslim-friendly tourism in Australia is at an infantile stage as it experiences high market potential and low strategic integration (Cader et al., 2024). The current literature is based on secondary sources and theoretical analysis to a large extent; it is necessary to develop empirical research, which would reflect a stakeholder opinion and the institutional dynamics. It is crucial to understand the perceptions of various policy makers, industry players, academics and international talent on opportunities, challenges and future prospects to promote Muslim-friendly tourism in Australia in a consistent and sustainable way. This study is guided by a stakeholder-oriented governance perspective combined with cultural safety principles. The framework assumes that Muslim-Friendly Tourism development is influenced not only by service provision but also by interactions among institutional actors, governance mechanisms and socio-cultural

environments. This perspective supports understanding MFT as a multidimensional construct within non-OIC settings.

Methodology

Research Design

The research design that will be developed in this study is the qualitative, exploratory, and interpretivist research design to understand the evolution of Muslim-Friendly Tourism (MFT) in Australia. Qualitative approach is especially the right choice due to emerged nature and under-theorisation of MFT in non-Muslim-majority settings. Instead of gauging the predetermined variables, this study aims at investigating how the main stakeholders make sense of, operationalise and position Muslim-friendly tourism within the Australian tourism system. The study is based on the interpretivist paradigm, which acknowledges that the social constructs of tourism governance, service delivery, and cultural inclusion are institutional practices, policy discourses, and perceptions of stakeholders. A descriptive design was consequently adopted to reveal governance relations, institutional loopholes and future orientation factors that may not be well captured using quantitative techniques

Study Context and Sampling

The research was carried out in the New South Wales and Queensland states of Australia. The two states have been chosen intentionally because they are strategically important in the international tourism environment in Australia. New South Wales (NSW) and Queensland (QLD) share about two thirds of the total number of international tourists who visit Australia and are therefore the major inbound tourism destinations in the country. These states are leading national development in tourism because of their major gateway cities like Sydney and Brisbane and internationally recognised tourism destinations, like the Gold Coast and the Great Barrier Reef. In that way, they will offer a topical and strategically significant background to the study of the institutional preparedness, industry potential, and governance strategies linked to Muslim-Friendly Tourism. These two states were used to select a purposive sample of 15 stakeholders.

The purposive sampling was considered suitable as the study was aimed at getting in-depth insights which were based on expertise and not a statistical reflection. The selection criteria were the recognised expertise, professional involvement or decision-making roles of tourism governance, destination marketing, industry associations, academia and the global Muslim travel market. The sample was stratified to capture four major stakeholder groups, such as policymakers and government-related tourism agencies; tourism operators and tourism associations; academic researchers in the fields of tourism and Islamic studies; and specialists in the global Muslim travelling market. This multi-stakeholder design also facilitated triangulation of the perspectives and increased the analytical levels of the results. The transferability of the study is supported by the choice of New South Wales and Queensland. Since they have a dominant portion of inbound tourism and serve as main international portals, the insights developed by the stakeholders in these jurisdictions have wider applicability to the national tourism plan and the development of Muslim-friendly tourism in Australia. See Table 3.

Table 2: Participant Profile Summary

No	Stakeholder Group	Number of Participants	State Representation
1.	Policymakers / Government Tourism Bodies	4	New South Wales (2); Queensland (2)
2.	Industry Representatives / Associations	5	New South Wales (3); Queensland (2)
3.	Academic Experts	3	New South Wales (2); Queensland (1)
4.	Global Muslim Travel Market Experts	3	Australia (1); International (2)
Total		15	New South Wales and Queensland

The number of participants was 15, which was deemed appropriate as qualitative research is more concerned with depth, context and information power than with statistical representation. Some prior qualitative research suggests that the number of samples is not as significant as thematic saturation when determining the correct number of samples. Saturation was reached when there was a lack of new themes, concepts, or patterns in the subsequent interviews and responses were repetitive within the stakeholder categories. Moreover, representative and diverse stakeholders were recruited by purposive sampling to include policymakers, industry representatives, academics, and global Muslim travel specialists, which included multiple perspectives and analytical triangulation in institutional and professional contexts.

Data Collection

The primary data was gathered by use of 15 semi-structured expert interviews via the internet. The length of the interviews was between 45 and 75 minutes long and was audio-recorded with the informed consent of participants and transcribed verbatim. The fact that the research topic was strategic and policy-oriented made semi-structured interviews the most suitable choice. The experts have a contextual knowledge and institutional sense that goes beyond the observations at the operational level and hence one can have a reflective discussion on the structures of governance, market positioning, and long-term strategic planning. The discussions were structured based on an interview protocol which contained open ended questions including the conceptual knowledge of the participants on Muslim-Friendly Tourism, perceived economic and strategic opportunities, governance and institutional issues, culture-safety concerns, and future directions of development of this concept. The semi-structured nature allowed flexibility to discover new themes yet made the interviews similar to each other. This method produced depth, comparability and richness of analysis. The ethical considerations were very strict during undertaking the research. The study involved voluntary participation, and it was assured that all information remained confidential, and identifying information was taken out during the process of transcription. See Figure 2. Then, the data had been safely stored in line with the institutional research ethics requirements.

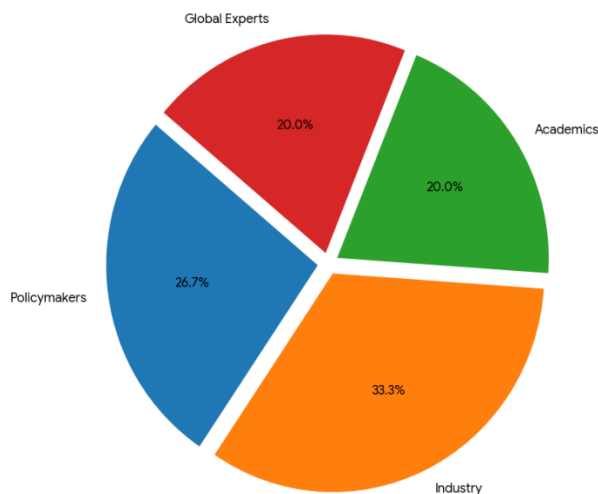


Figure 2: Stakeholder Distribution Chart

Data Analysis

The data collected through the interview have been analysed based on thematic analysis based on a systematic and iterative interpretation of the data. The thematic analysis was chosen because it is flexible and applicable to finding the patterns of meaning of the qualitative data, in particular, in the exploratory and interpretivist studies. The analysis had three interrelated steps, which included open coding, axial coding, and selective coding. The open coding was conducted by reading through transcripts to determine the preliminary concepts and those that were repeated. The generation of codes was inductive to enable the data to give rise to themes.

During the axial coding stage, related codes were clustered and narrowed down by discovering the connections between governance structures, market opportunities, cultural aspects, and institutional challenges. Lastly, the selection of the most salient themes involved selective coding to combine and synthesise the themes, thereby creating a coherent thematic framework to answer the research questions. NVivo qualitative data analysis package was used in cases where it was necessary in order to organise transcripts, code, and increase transparency of the analytical process. Although the software facilitated the systematic data management, interpretation was researcher based to provide the contextual richness and theoretical sensitivity. The repeated comparative approach to responses by the stakeholder groups enhanced the soundness and unity of the emergent themes.

Trustworthiness

The engagement with the interview data and comparative analysis of the themes within stakeholder groups improved the level of credibility. Member checking involved verifying interpretations with selected participants through sharing key interpretations, to ensure consistency and accuracy. Furthermore, coding and thematic interpretations were discussed among researchers to reduce the personal bias and analytical similarity throughout the research. Transferability was promoted by providing rich descriptions of participants and study contexts, and dependability was supported by an audit trail of sampling, coding, and reflection on the analysis.

Findings

This part provides the research results of the thematic analysis of 15 semi-structured expert interviews carried out with the main stakeholders in the domain of policy, industry, academia, community leadership and global Muslim travel expertise. The data were coded using an inductive approach to analysis and coded progressively using open, axial, and selective coding to get five themes related to each other. All these themes sum up the perception of Muslim-Friendly Tourism (MFT) as limited and restrictive, and as perceived in the Australian tourism scenario. See Figure 3.

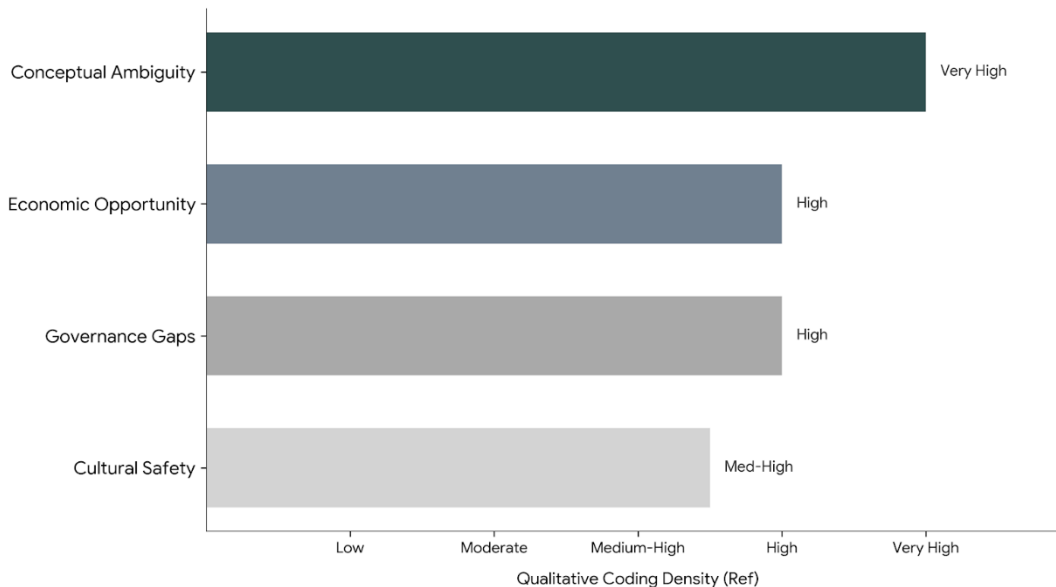


Figure 3: Thematic Density of Stakeholder Interviews (NVivo Analysis)

This Figure 3 illustrates the frequency and importance of each theme based on the 15 expert interviews conducted for your study.

Muslim-Friendly Tourism as a Strategic Growth and Diversification Opportunity

In every section of the stakeholder groups, Muslim-Friendly Tourism was being defined and rather positioned as a strategic economic opportunity but never as a niche or peripheral market. Respondents highlighted the fast development of the global Muslim travelling market and its suitability to the Australian tourism diversification goals especially during the post-pandemic recovery phase. The policy and industry stakeholders explained how the Muslim travellers are a high-yield segment, where the travellers are family oriented, the stay duration is longer and the amount spent per-capita is relatively high. Some of the respondents observed that this sector fits quite well with the overall Australian objectives of ensuring culturally sensitive and sustainable tourists rather than the mass tourism sectors that portray the notion of overconsumption and pressure on the destination. Along with the economic value, the stakeholders highlighted the market diversification as the primary incentive to participate in Muslim-Friendly Tourism.

The historical dependence that Australia had on few source markets, especially China, was often mentioned as a structural weakness that was revealed amid the COVID-19. Southeast Asian and Middle East countries with Muslim majority were thus considered as strategic alternative markets, because Australia is geographically close, there are air connections, as well as existing trade and education connections. In addition to economic factors, some of the

participants highlighted the soft power and intercultural advantages of Muslim-Friendly Tourism. The perception in hosting the Muslim travellers was to support the image of Australia as a multicultural, inclusive and welcoming destination internationally. Specifically, religious and academic stakeholders pointed out that cultural exchange is mutual, thus indicating that, in particular, Muslim tourism could lead to mutual understanding, decrease stereotyping, and help Australian society to become more cohesive. All in all, the results support the idea that there is a big untapped market of Muslim-Friendly Tourism in Australia. Nonetheless, although the opportunity was recognised on a large scale, people at the same time admitted that such potential is still not fully exploited because of the conceptual, institutional, and governance-related barriers that were discussed in the following motifs.

Theoretical ambiguity and limited idea of Muslim-Friendly Tourism

One of the prevailing and common themes in interviews was the absence of conceptual clarity in regards to Muslim-Friendly Tourism. The respondents always reported confusion among the terms, Muslim-Friendly Tourism, Halal Tourism and Islamic Tourism, and no common ground among policy, industry and academic space. Research scholars pointed out that even in the academic books, no single definition of such concepts is universal. This uncertainty was talked about as not just a theoretical problem, but in fact, it was considered to have direct practical implications to the formation of a policy and the application to the industry. Some of the respondents pointed out that the Muslim-Friendly Tourism is a phenomenon that is mostly confused by the tourism stakeholders who only focus on the aspect of halal food, ignoring the wider issues of faith, culture, and informational requirements.

This call was reflected by their industry practitioners and community leaders who noted that many tourism operators view Muslim-friendly services as expensive, complicated, or subjugating because of this type of framing. Conversely, international Muslim travel analysts focused on a deeper interpretation of the needs of Muslim travellers, splitting them into the essential, value-adding, and value-added aspects of services. But this subtle system did not find much reflection in the tourism practice in Australia. Notably, variations in interpretation were also apparent even to specialists themselves. Some of the respondents defined Muslim-Friendly Tourism as a versatile and inclusive service model that can be applied to both Muslim and non-Muslim tourists, but others viewed Muslim-Friendly Tourism as a lifestyle based on religious principles. These opposing views though intellectually diverse led to confusion at the implementation level. The results imply that conceptual ambiguity is a structural obstacle, preventing the coordination of action and supporting the superficial involvement in Muslim-Friendly Tourism. In the absence of a collective agreement about the nature of MFT, and what it is not, policy efforts and reactions in the industry will remain scattered, sporadic, and mostly symbolic.

Governance and Institutional Shortfalls in Muslim-Friendly Tourism Development

Although market potential is largely understood, the members of the study always found governance and institutional gaps to be significant challenges to the successful development of Muslim-Friendly Tourism in Australia. The lack of a nationally co-ordinated framework of MFT was observed by the stakeholders in all groups, and was leading to the dependence on haphazard, voluntary and destination-specific efforts. Policy stakeholders recognized that despite the various programs and promotion activities that have been done over the years, the same are not sustained and integrated. Representatives of the industry also outlined the development of Muslim-Friendly Tourism as being reactive and not proactive, and in many

cases, it was influenced by a short run signal and not long-term vision. One of the issues that were being brought out by various players is the lack of coordination of roles among the government agencies, tourism organizations and industry associations. This fragmentation was observed to restrict accountability and scaling of Muslim-friendly services out of major metropolitan regions. Although bigger cities like Sydney or Brisbane were seen as reasonably prepared, small-time destinations were often reported to have little to no infrastructure that was Muslim friendly like availability of halal food and usable prayer rooms.

Another important challenge in governance was certification and assurance. According to the participants, confusion about halal certification, the lack of a nationally accepted system of rating that is Muslim-friendly, and discrepancies in standards across service providers were noted. This institutional uncertainty was perceived to shake the traveller faith and make it difficult to market in the source markets which were mainly Muslim. In general, the results indicate that the present-day system of Muslim-Friendly Tourism in Australia is typified by institutional fragmentation and the absence of governance. The willingness and ability of the individual stakeholders are evident, but the lack of coordination on a system level restrains the shift of the isolated efforts to the viable national strategy.

Cultural Safety, Social Perceptions, and Muslim Tourist Experience

Thus, cultural safety has been highlighted by the participants as a key but under-studied aspect of Muslim-Friendly Tourism. The cultural safety was not only viewed as the state of tolerance, but as the sense of being truly welcome, respected and integrated into the tourism system. Some of the stakeholders pointed out that physical facilities are as influential in shaping the experiences of Muslim travellers as social interactions and symbolic signals. Accommodation venues, frontline service encounters and airports were discovered to be some of the most important areas where one develops their feelings of inclusion and exclusion. Respondents observed that the lack of visible mark of appreciation such as prayer space or culturally informed personnel may indicate apathy despite the absence of overt discrimination.

Islamophobia issues and risk perceptions were also raised, especially amongst the leaders of the community and academicians involved. Certain stakeholders were also afraid of the possibility that negative media stories and political rhetoric would affect industry perceptions as well as destination preferences of the Muslim travellers. These images were considered as being subtle yet powerful in terms of expectations and travel confidence. Meanwhile, respondents pointed to the transformational effect of positive tourism experiences. Meetings between Muslim visitors and host communities were perceived as the chance to break the stereotypes, develop empathy, and enhance the social bonds. A number of the stakeholders claimed that Muslim-Friendly Tourism is thus to be conceptualized as a social inclusion policy, rather than a business-only one. The results show that the lack of focus on cultural safety can jeopardize the gains made in the form of the services. In this regard, Muslim-Friendly Tourism goes beyond compliance and facilities, and involves emotional, symbolic and relational aspects of tourist experience.

Moving to Future-Oriented and Culturally Inclusive Tourism Governance

In the future, respondents regularly stressed the necessity to integrate Muslim-Friendly Tourism into the tourism planning of the long run and futures as opposed to the perception of the Islamic sector as a transient or opportunistic segment of such tourism. The stakeholders espoused a transition to strategic national vision in place of ad hoc initiatives that are consistent with wider tourism, multiculturalism and sustainability agendas. Experts in the futures market noted that it

is vital to predict the trends in demographic, economic, and cultural factors that will influence tourism demand in the world. The increase in Muslim numbers, the rise in affluence in the Muslim majority nations, and the demand on a group of travellers to have individualised experiences and those that are culturally sensitive were seen as structural forces that Australia cannot afford to overlook.

It was also emphasised that there should be a change in the narrative, which is looking at Muslim travellers as a potential threat or danger but as a source of wealth, new ideas, and cultural diversification. This re-packaging was regarded as the necessary condition of gaining political support, industry buy-in and popular acceptance. Airports and other gateways were found out to be symbolic entry points where such narratives could be portrayed. The stakeholders suggested that even minor design interventions, like prayer spaces, inclusive signage, and culturally informed staff training, would have a big impact on the first impression and the destination image in general. All the above findings imply that the future success of Muslim-Friendly Tourism in Australia is based on the ability to implement the governance reform, cultural safety, and futures thinking as a single strategy. In the absence of this integration, the current initiatives will stand to be disintegrated and underperforming. See Figure 4.

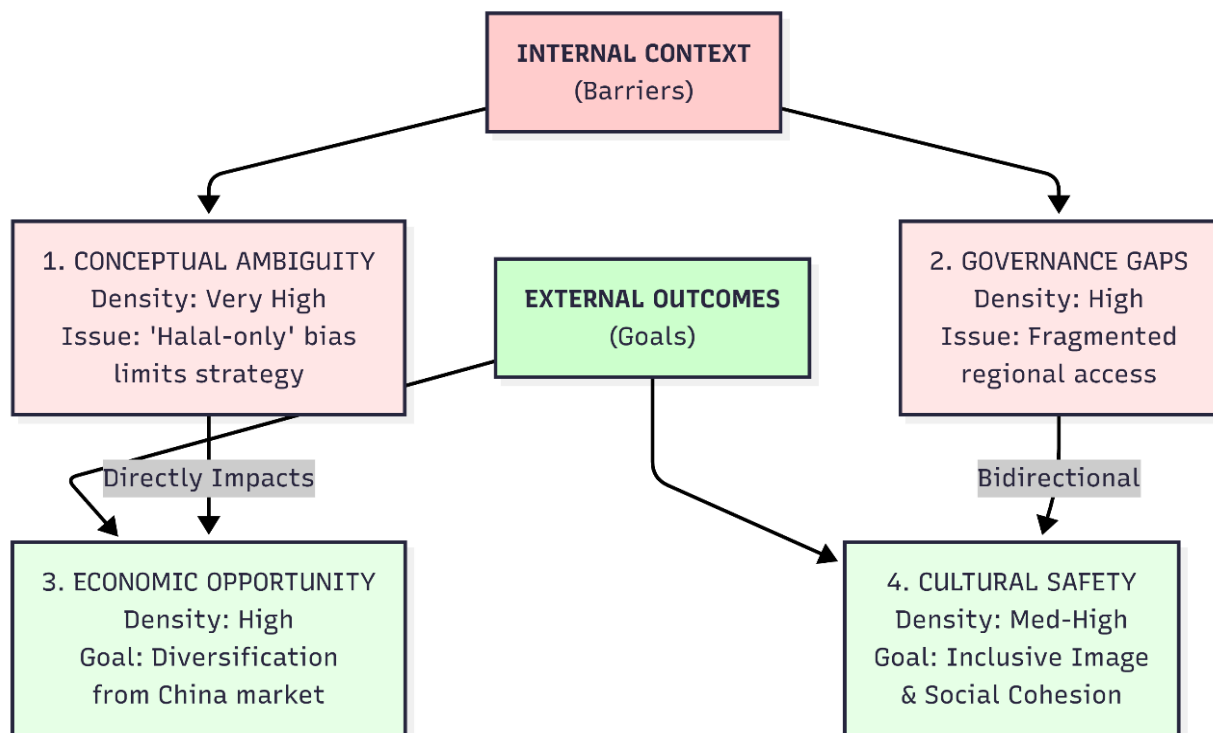


Figure 4: Integrated Model of Internal Barriers and External Outcomes in Muslim-Friendly Tourism Development

Discussion

This paper was aimed at investigating the conceptualisation, management and place-making of Muslim-Friendly Tourism (MFT) in the context of Australian tourism, and whether the current institutional strategies are adequate to ensure its sustainable and inclusive growth. The results are clear and comprehensive to the research questions and present structural gaps that the policy and industry need to address. In respect to the first research question, which is how Muslim-Friendly Tourism is perceived and conceptualised by the stakeholders, the study establishes that the concept of MFT as a new economic potential is deeply felt in the various sectors. Nonetheless, there is still ambiguity in the conceptual meaning. The role of MFT in the supply

of halal food is also the main link of many stakeholders, whereas wider aspects of governance coordination, cultural safety, and inclusive service design are not as widely recognised. The results thus can respond to the first research question by showing that despite MFT being accepted as having a strategic importance, the conceptual framing of this phenomenon has not been thoroughly developed.

The findings point to the fact that the Australian approach toward MFT is decentralised and imbalanced and not coordinated nationwide. Although some regions and individual operators have implemented adopting actions, there is inadequate coordination of the policy levels, as well as inconsistency in integrating certification and training with infrastructure development. The governance environment of Australia compared with non-OIC destinations that are more strategically oriented like Singapore and Taiwan depicts a fragmentation instead of institutional consolidation. Accordingly, the second question of the research is resolved by proving that the gaps in governance, but not the demand in the market, are the main barrier to MFT progress.

The results indicate that governance coordination coupled with cultural safety integration can enable MFT to serve as a channel of achieving an expanded tourism resilience, demographic responsiveness, and social cohesion. Cultural safety became the key factor influencing the experience of Muslim travellers that goes beyond physical infrastructure to include the sense of respect, representation and belonging. This realization illustrates the fact that the sustainable MFT development must be integrated structurally and not adjusted individually in terms of its services provision. In line with this, the third research question will be answered by explaining how the economic opportunity should be matched with inclusive governance in order to enforce long-term sustainability. In general, the research manages to address all research questions suggested. It shows that Australia has some serious structural strengths such as multicultural status, the availability of halal food, and regional connectivity, but the lack of coordinated governance and a lack of conceptual clarity inhibit the development of strategies. Thus, it is evident in the discussion that it is not the viability of the market that is the central challenge but rather the institutional integration. The synthesis of economic opportunity, governance alignment, and cultural safety into one analytic structure facilitates the study to build a more in-depth comprehension of the development of Muslim-Friendly Tourism in a country like Australia.

While New South Wales and Queensland were chosen due to their strategic location and the majority of international tourism activities, the results are not necessarily representative of all of Australia. The variation in infrastructure, population and the tourism policies and services offered between other Australian states and territories could affect the development and growth of Muslim Friendly Tourism differently. Hence, the results are analytical generalisations, not statistical.

Conclusion

The purpose of this research was to investigate the situation with the governance of Muslim-Friendly Tourism (MFT) development in Australia, the perceptions of stakeholders and challenges, as well as the strategic directions of the sphere in the future with references to Australia. Based on the experience of policy makers, industry stake holders, scholars, and international professionals, the study offers an in-depth answer to the research questions of the study and contributes to the knowledge on the topic of MFT in a non-OIC country. The results show that Australia has a considerable level of structural benefits in the global Muslim travel market which also incorporates the image of a secure tourist destination, the developed system

of multiculturalism, the system of halal-certified food environment, and the vicinity to some of the major source markets of the Southeast Asian region. Nonetheless, in spite of these advantages, the establishment of Muslim-friendly tourism is still not well organized and coordinated but more market-centered.

Lack of governance, poor institutional leadership and inadequate cultural competency in some sections of the tourism industry limits the potential of the country to realise its competitive potential. One of the main works of this research is that governance, coordination and cultural safety are identified as the pillars of developing sustainable MFT. Although literature tends to focus on the service provision, especially the availability of halal food and accommodations, this study points out that Muslim-friendly tourism goes beyond adaptations related to compliance. Traveller confidence and destination reputation are developed as a result of cultural safety, transparency and institutional coherence. In the absence of a systematic national system, efforts are prone to be informal and poorly balanced at the regional levels.

The study also situates Muslim-friendly tourism in the wider context of diversifying and resilience of tourism approaches to tourism. With the changing global trends in travel and the unabated growth in Muslim outbound tourism, the destinations that proactively incorporate both inclusive governance frameworks and responsive practices in connection with cultural aspects are bound to be able to attain greater long-term competitiveness. Examples of comparison with non-OIC leaders like Singapore and Taiwan have provided that coordinated policy direction and industry-wide participation is essential to a transition of symbolic adaptation to the stage of institutional maturity. In theory, the study adds to the expanding body of scholarship on Muslim-friendly tourism by broadening the scope of analysis to a western, multi-cultural destination setting, as well as incorporating the framework of governance and cultural safety into the MFT discussion. It changes the discourse of service-delivery focus to a multidimensional one which includes policy alignment, stakeholder collaboration, and strategic planning that is future-oriented.

This, in practice, implies the findings that what Australia should find in the opportunities is not market creation but strategic consolidation. By developing a coordinated approach on a national scale, increasing the training of the industries, strengthening the capacities of the regions, and attracting better communication mechanisms, the existing strengths can be turned into the sustainable competitive advantage. Through the incorporation of Muslim-friendly tourism into the wider inclusion and diversification agendas, Australia will be able to brand not just as a destination that conforms, but as a destination that is welcoming and culturally safe to Muslim travellers. To sum up, the concept of Muslim-Friendly Tourism in Australia is a strategically feasible and socially consistent direction towards developing tourism. Through institutionalized governance change and enhanced cultural assimilation, Australia can become a top destination in the changing global Muslim travel industry that is not an OIC country.

Implications

Policy Implications

The results of this study provide strong support that Muslim-Friendly Tourism (MFT) in Australia should be coordinated on a national level. Although personal efforts and market-driven changes do exist, the lack of a consistent overall strategy inhibits a level of strategic consistency and scalability in the long run. A national system of MFT would offer a clarity in definition, uniform direction and alignment of institutions on federal, state and regional scales.

Notably, this framework must not make MFT a religious policy agenda, but an extension of Australia at large into inclusive and culturally responsive tourism development. Incorporating Muslim-Friendly Tourism into tourism diversification plans in the country would provide the policy makers with the opportunity to match demographic trends, market intelligence and sustainability goals. Integrating MFT into the current multicultural and economic resilience models can help Australia to be more competitive in the global arena as well as strengthening national values of inclusion.

Industry Implications

The research highlights to the tourism operators and industry stakeholders the necessity to go beyond a very limited conception of Muslim-Friendly Tourism as merely provision of halal foods. The halal certification is still a cornerstone but the needs of Muslim travellers are multifaceted in that they entail access to prayer, privacy, clear communication of services, and respect as well as being culturally sensitive. The training programs in the industry should hence include cultural competency, service awareness, and inclusive communication strategies. The capacity-building initiatives should also go a step further to include areas outside the metropolitan centers to regional destinations, where infrastructure and awareness disparities are more evident. Enhancing regional preparedness would facilitate the goals of dispersing tourism and provide a more balanced economic involvement. Moreover, excellent and open communication of the existing Muslim friendly services, including online platforms, signs, and advertising tools are critical to establishing trust and abate uncertainty on the part of the Muslim travellers.

Theoretical Implications

In theory, this work has various significant implications on the development of the scholarship regarding Muslim-Friendly Tourism. To begin with, it broadens the geographical area of MFT research by studying the topic of development in non-OIC Western setting, which is a significant gap in the literature. Second, it opens a combined governance-cultural safety model that transcends service-based models of analysis. The study delves into the conceptualisation of cultural safety as structural and relational aspect of tourism experience, enhancing comprehension on inclusion in faith-sensitive tourism markets. Third, the study will include futures-oriented prism, where the growth of demographics and expansion of the global Muslim market will be connected with long term tourism planning and institutional preparedness. Such a proactive view of tourism establishes MFT as a reactionary or reactive marketization but proactive tourism development direction towards sustainable and inclusive tourism growth.

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