

Serving Muslim Travellers in Non-Muslim Countries: Ecosystem Gaps, Trust, and Opportunity

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Abstract

The continued growth of Muslim travel presents significant opportunities for non-Muslim destinations while highlighting the need for more inclusive and coordinated tourism systems. Although previous studies have examined halal food, prayer facilities, destination image, and traveller behaviour, limited attention has been given to how these elements collectively influence destination readiness. This study addresses that gap through a Systematic Literature Review guided by the PRISMA 2020 framework. Following a structured screening process, 22 peer-reviewed studies published between 2010 and 2026 were analysed using inductive thematic analysis. Three interconnected themes emerged: destination ecosystem gaps, trust, and destination opportunities. The findings indicate that fragmented halal services, inconsistent certification, limited digital information, and weak stakeholder coordination reduce traveller confidence and weaken destination readiness. Trust was identified as the central mechanism linking destination capability with positive outcomes, including stronger destination image, visitor satisfaction, SME participation, digital innovation, tourism competitiveness, and sustainable tourism development. Based on these findings, the study proposes the Ecosystem Gaps, Trust and Opportunity (EGTO) Framework, which reconceptualises Muslim-friendly tourism as a destination capability model. The framework provides policymakers and tourism practitioners with a structured approach for strengthening destination readiness while enhancing traveller confidence and long-term destination competitiveness.

Keywords: Muslim Travellers, Non-Muslim Countries, Ecosystem Gaps, Trust, Opportunities

1. Introduction

Muslim-friendly tourism has evolved into one of the fastest-growing segments of the global tourism industry. As international travel by Muslim travellers continues to expand, destinations are increasingly recognising the need to provide services that accommodate religious practices while maintaining high standards of hospitality. Early discussions in this field focused primarily on tangible service requirements such as halal food, prayer facilities, and faith-sensitive accommodation. More recent scholarship, however, has broadened this perspective by recognising that Muslim travellers evaluate destinations through the overall quality, reliability, and coherence of the travel experience rather than through individual facilities alone (Battour & Ismail, 2016; Samori et al., 2016).

This broader perspective is particularly relevant in non-Muslim countries. Unlike Muslim-majority destinations, where halal services are often embedded within everyday business practices, non-Muslim destinations typically operate in environments where such services remain optional, fragmented, or unevenly distributed. Although many destinations have invested in halal-certified restaurants, prayer spaces, or Muslim-friendly accommodation, these initiatives are frequently implemented independently rather than as part of an integrated tourism system. Consequently, Muslim travellers often face uncertainty when searching for reliable information, verifying halal credentials, locating suitable facilities, or navigating unfamiliar service environments. The challenge, therefore, extends beyond the availability of Muslim-friendly services to the consistency and coordination of the wider tourism ecosystem.

Evidence from several non-Muslim destinations illustrates this concern. Research undertaken in South Korea demonstrates that halal-friendly destination attributes influence not only destination image but also travellers' behavioural intentions, indicating that Muslim visitors evaluate both the availability and the credibility of destination offerings (Han et al., 2019). Similar observations have emerged from studies conducted in Japan, New Zealand, and other minority-Muslim contexts, where travellers frequently rely on visible assurances, trustworthy information, and culturally responsive services to reduce uncertainty during their journeys. These findings suggest that fragmented service provision can weaken travellers' confidence even when individual Muslim-friendly facilities are available.

Trust therefore becomes a central consideration in understanding Muslim traveller experiences. Existing research consistently associates trust with destination image, perceived value, satisfaction, and future travel intentions (Al-Ansi & Han, 2019; Sodawan et al., 2022). In non-Muslim settings, however, trust assumes an even more significant role because

travellers often cannot rely on the surrounding environment to provide implicit religious reassurance. Instead, confidence must be developed through transparent communication, visible certification, knowledgeable personnel, and consistent service delivery. Trust, in this context, represents more than a psychological response; it reflects travellers' overall judgement regarding whether a destination is genuinely prepared to accommodate their religious and practical needs.

Although Muslim-friendly tourism has attracted increasing scholarly attention over the past decade, much of the existing literature continues to examine individual service components, including halal food, accommodation, destination attributes, or tourist behaviour. Comparatively fewer studies have considered how these elements interact within a broader tourism ecosystem, particularly in non-Muslim countries where service provision depends on coordination among multiple public and private stakeholders. Viewing Muslim-friendly tourism through an ecosystem perspective offers a more comprehensive understanding of destination readiness because it acknowledges that travellers experience destinations as interconnected systems rather than as isolated services.

Addressing this gap has become increasingly important as non-Muslim countries seek to participate in the expanding Muslim travel market. According to the Mastercard-CrescentRating Global Muslim Travel Index 2024, Muslim travel expenditure is projected to reach approximately USD 225 billion by 2028, highlighting the strategic significance of this market for destinations worldwide (Mastercard-CrescentRating, 2024). Beyond its economic potential, improving Muslim-friendly tourism can also encourage greater social inclusion, strengthen destination reputation, enhance service quality, and create new opportunities for small and medium-sized tourism enterprises. Consequently, developing a credible and coordinated Muslim-friendly tourism ecosystem should be viewed not merely as a market response but as part of broader destination competitiveness.

Against this background, this study examines how non-Muslim countries can better serve Muslim travellers by addressing ecosystem gaps and strengthening trust as a foundation for destination opportunity. Using a systematic literature review guided by the PRISMA 2020 framework, the study synthesises research published between 2010 and 2026 relating to Muslim-friendly tourism, halal service accessibility, destination readiness, traveller trust, and tourism practices in non-Muslim contexts.

Building upon the insights generated from the review, this paper proposes the **Ecosystem Gaps, Trust, and Opportunity (EGTO) Framework**. The framework explains

how weaknesses within the tourism ecosystem create uncertainty for Muslim travellers, how coordinated and credible destination support strengthens trust, and how enhanced trust contributes to greater inclusion, stronger destination image, improved SME participation, and long-term tourism competitiveness. By integrating these relationships into a single conceptual model, the study extends existing Muslim-friendly tourism literature beyond individual service attributes towards a more holistic understanding of destination readiness.

Accordingly, this paper makes three principal contributions. First, it synthesises the fragmented literature on Muslim-friendly tourism in non-Muslim countries through an ecosystem perspective. Second, it positions trust as the pivotal mechanism connecting ecosystem readiness with destination competitiveness. Finally, it introduces the EGTO Framework as a conceptual guide that may assist policymakers, destination managers, and tourism practitioners in designing more inclusive, credible, and future-ready Muslim-friendly tourism ecosystems.

2. Literature Review

2.1 Muslim-Friendly Tourism in Non-Muslim Settings

The rapid growth of Muslim travel has transformed Muslim-friendly tourism from a niche market into an increasingly important area of tourism and destination development. As the number of Muslim travellers continues to increase worldwide, destinations are paying greater attention to providing services that accommodate religious practices while maintaining high standards of hospitality. Early studies largely focused on tangible requirements such as halal food, prayer facilities, and accommodation that supports Islamic values (Battour & Ismail, 2016; Samori et al., 2016). While these remain fundamental components of Muslim-friendly tourism, subsequent research has shown that travellers evaluate destinations through a much broader lens that encompasses service quality, accessibility, convenience, and the overall travel experience.

This broader perspective is particularly relevant in non-Muslim countries, where Muslim-friendly services are generally not embedded within mainstream tourism systems. Unlike Muslim-majority destinations, where halal food and religious facilities are often readily available, non-Muslim destinations typically provide these services selectively and with varying degrees of consistency. Consequently, Muslim travellers may spend additional time identifying halal-certified restaurants, locating suitable prayer spaces, or verifying whether tourism providers genuinely understand their religious requirements. The travel experience

therefore depends not only on the availability of Muslim-friendly facilities but also on how easily those facilities can be accessed and trusted.

Recent studies increasingly recognise that Muslim travellers judge destinations holistically rather than through individual service encounters. Oktadiana *et al.* (2016) argued that Muslim travellers' needs extend beyond basic religious requirements to include comfort, accessibility, and confidence throughout the travel journey. This suggests that the quality of Muslim-friendly tourism cannot be assessed solely by counting the number of halal restaurants or prayer facilities available. Instead, travellers evaluate how effectively destinations organise and communicate these services in ways that reduce uncertainty and support informed travel decisions.

Research conducted in non-Muslim destinations provides further evidence of this shift. Studies from Japan, South Korea, New Zealand and other minority-Muslim contexts consistently demonstrate that Muslim travellers value destinations that provide reliable information, visible service assurance, and culturally responsive hospitality. In these settings, the availability of Muslim-friendly services remains important, but equally important is the extent to which those services are clearly communicated and integrated into the wider tourism environment. Destinations that provide fragmented or poorly coordinated services may still leave visitors uncertain despite investing in selected Muslim-friendly initiatives.

These developments suggest that Muslim-friendly tourism should no longer be understood simply as the provision of halal products or faith-sensitive facilities. Rather, it reflects a destination's overall capacity to create an environment in which Muslim travellers can travel comfortably, confidently, and without unnecessary difficulty. Viewing Muslim-friendly tourism from this broader perspective provides an appropriate foundation for examining the structural issues that continue to limit destination readiness in many non-Muslim countries.

2.2 Ecosystem Gaps

Although many non-Muslim destinations have introduced Muslim-friendly initiatives, their implementation often remains uneven. Rather than experiencing a seamless tourism environment, Muslim travellers frequently encounter fragmented services that require additional effort to identify, verify, and access. These shortcomings do not necessarily reflect a lack of commitment by destination providers; instead, they reveal the practical challenges of incorporating faith-sensitive services into tourism systems that were not originally designed with Muslim travellers in mind.

The literature identifies several recurring areas where these gaps become apparent. Access to halal-certified food remains one of the most frequently discussed challenges, particularly where certification systems differ across countries or where certified establishments are limited in number. Prayer facilities present a similar issue. While some airports, shopping centres, and tourist attractions provide dedicated spaces, their availability is often inconsistent, making daily religious observance more difficult during travel. Certification visibility, multilingual information, and knowledgeable frontline staff have also emerged as important concerns because travellers frequently depend on these cues when making decisions in unfamiliar environments.

Several studies illustrate how these challenges influence destination readiness. Henderson (2016) emphasised that credible halal certification becomes particularly important in environments where Muslim travellers cannot assume that food preparation complies with Islamic requirements. Razzaq *et al.* (2016), examining New Zealand, similarly found that accommodation providers and tourism operators faced practical limitations in responding to Muslim visitor expectations despite recognising the market's potential. From the supplier perspective, Jia and Zhang (2021) argued that operational constraints, limited expertise, and market uncertainty often discourage businesses from expanding Muslim-friendly offerings, even where demand exists.

Evidence from East Asia reinforces these observations. Research conducted in Japan demonstrates that halal assurance and the availability of prayer facilities significantly influence destination preferences among Muslim travellers (Saville & Mahbubi, 2021). Likewise, Han *et al.* (2019) found that travellers' perceptions of South Korea were shaped not simply by individual facilities but by the overall accessibility and visibility of Muslim-friendly services. Similar conclusions were reached by Papastathopoulos *et al.* (2020, 2022), who reported that Muslim travellers assign particular importance to selected hospitality attributes that are not always prioritised within conventional tourism service models.

Viewed collectively, these studies suggest that destination readiness depends less on the presence of individual Muslim-friendly facilities than on how effectively those facilities are coordinated within the broader tourism environment. Fragmented service provision increases uncertainty and requires travellers to invest additional time and effort throughout their journey. Understanding these structural gaps is therefore essential before considering how Muslim travellers evaluate the destinations they visit.

2.3 Trust

If ecosystem gaps describe the structural limitations of a destination, trust explains how Muslim travellers respond to those limitations. Travelling in unfamiliar environments inevitably involves a degree of uncertainty, but this uncertainty becomes more pronounced when visitors must continually assess whether essential religious requirements can be fulfilled. Under such circumstances, trust becomes a practical mechanism that enables travellers to judge whether a destination is dependable, transparent, and genuinely prepared to accommodate their needs.

Existing research consistently identifies trust as a key determinant of destination evaluation. Al-Ansi and Han (2019) demonstrated that trust develops through travellers' assessments of destination performance, perceived value, and satisfaction, ultimately influencing destination image and loyalty. Rather than emerging from a single positive encounter, trust reflects an accumulation of experiences that reassure visitors that services will perform as expected throughout their journey. Rodrigo and Turnbull (2019) similarly argued that Muslim travellers evaluate value through multiple dimensions, including authenticity, reassurance, and compatibility with religious practices. These findings indicate that trust is closely associated with confidence rather than merely customer satisfaction.

Studies undertaken in non-Muslim destinations further illustrate the importance of trust. Han *et al.* (2019) observed that halal-friendly attributes significantly influenced Muslim travellers' perceptions of South Korea, not only by improving service evaluations but also by strengthening the destination's overall image. Hamdy and Eid (2024) extended this discussion by proposing that Muslim-friendly destination image represents a distinct dimension of destination branding because Muslim travellers rely on cues that differ from those influencing the broader tourist market. Visible certification, knowledgeable service personnel, accurate information, and consistent communication therefore become important signals that help reduce uncertainty and strengthen destination credibility.

Trust is also closely linked to perceptions of risk. Olya and Al-Ansi (2018) argued that uncertainty regarding halal products and services may discourage travel unless destinations provide reliable assurance mechanisms. This observation is particularly relevant in non-Muslim countries, where Muslim travellers often depend on certification systems, official information sources, and trustworthy recommendations when making travel decisions. The availability of these mechanisms allows visitors to devote greater attention to their travel experience rather than continuously verifying whether services meet their religious requirements.

Overall, the literature suggests that trust represents the critical connection between destination readiness and traveller behaviour. While destinations may invest in Muslim-friendly facilities, those investments create meaningful value only when they are sufficiently credible to inspire confidence among visitors. Trust therefore transforms service provision into a positive travel experience and provides the foundation upon which destinations can create wider tourism benefits.

2.4 Opportunity

Addressing the needs of Muslim travellers creates opportunities that extend well beyond increasing visitor numbers. As the Muslim travel market continues to expand, destinations that successfully develop credible and inclusive tourism environments are likely to strengthen not only their market position but also the overall quality and resilience of their tourism industry. Opportunity, therefore, should be understood as the broader value generated when destination readiness and traveller confidence develop together.

The economic significance of this market has been well documented. Mohsin *et al.* (2016) identified halal tourism as an emerging growth sector, while the Mastercard-CrescentRating Global Muslim Travel Index (2024) projects Muslim travel expenditure to reach approximately USD225 billion by 2028. These projections demonstrate considerable commercial potential but also imply increasing competition among destinations seeking to attract Muslim travellers. Sustained success will depend less on promotional activities than on the ability to deliver travel experiences that consistently meet visitor expectations.

The literature also points towards wider destination benefits. Improvements in Muslim-friendly services contribute to stronger destination image, greater visitor satisfaction, and increased likelihood of repeat visitation (Han *et al.*, 2019; Hamdy & Eid, 2024). At the same time, local businesses benefit from expanding opportunities to participate in the Muslim travel market through halal-certified food services, accommodation, transport, retail, and specialised tourism products. These developments create opportunities for SMEs while encouraging closer collaboration between tourism authorities, certification bodies, and service providers.

Digital innovation is becoming an increasingly important contributor to these opportunities. Ainin *et al.* (2020) demonstrated that online discourse influences travellers' perceptions of halal tourism, while Yousaf and Xiucheng (2018) highlighted the importance of official digital communication in supporting destination visibility. More recently, Hoang and Nguyen (2025) suggested that artificial intelligence can improve Muslim traveller experiences

by facilitating destination discovery, providing personalised recommendations, and improving access to reliable information. Such developments indicate that technology has the potential to strengthen destination readiness while simultaneously enhancing visitor confidence.

Taken together, the literature suggests that opportunity is not created simply by recognising the economic potential of Muslim tourism. Rather, it emerges when destinations translate inclusive planning, coordinated service delivery, and credible communication into positive visitor experiences. Under these conditions, Muslim-friendly tourism contributes not only to economic performance but also to stronger destination reputation, wider stakeholder participation, and more sustainable tourism development.

2.5 Literature Synthesis

The literature demonstrates that Muslim-friendly tourism in non-Muslim countries extends well beyond the provision of halal food or prayer facilities. Instead, travellers evaluate destinations through the combined quality, accessibility, and credibility of the services that support their journey. Existing studies have substantially improved understanding of Muslim traveller behaviour, destination attributes, and service provision, yet these themes are often examined independently. Comparatively little attention has been given to how they interact as components of a broader tourism system.

The review undertaken in this study indicates a clear progression. Structural gaps within destination systems influence the ease with which Muslim travellers can fulfil their religious and practical needs. These conditions subsequently shape trust, which affects destination image, visitor confidence, and behavioural intentions. When destinations respond effectively to these challenges, wider opportunities emerge through stronger competitiveness, improved stakeholder participation, digital innovation, and more inclusive tourism development.

This synthesis suggests that Muslim-friendly tourism in non-Muslim countries is fundamentally an ecosystem management issue rather than solely a service provision issue. Recognising these interrelationships provides the conceptual foundation for the Ecosystem Gaps, Trust and Opportunity (EGTO) Framework proposed in this study. The following section describes the systematic review methodology used to develop and substantiate this framework.

3. Methodology

This study employs a Systematic Literature Review (SLR) to synthesise existing knowledge on Muslim-friendly tourism in non-Muslim countries. Given that relevant studies are dispersed

across tourism, hospitality, destination marketing, consumer behaviour, and Islamic marketing, an SLR provides a systematic approach for consolidating evidence, identifying recurring themes, and developing broader conceptual insights.

The review follows the PRISMA 2020 guidelines (Page et al., 2021) to ensure transparency in study identification, screening, eligibility assessment, and selection (Figure 1). Beyond summarising existing literature, the review adopts a thematic synthesis to examine how recurring evidence contributes to understanding destination readiness for Muslim travellers. This process ultimately informed the development of the Ecosystem Gaps, Trust and Opportunity (EGTO) Framework.

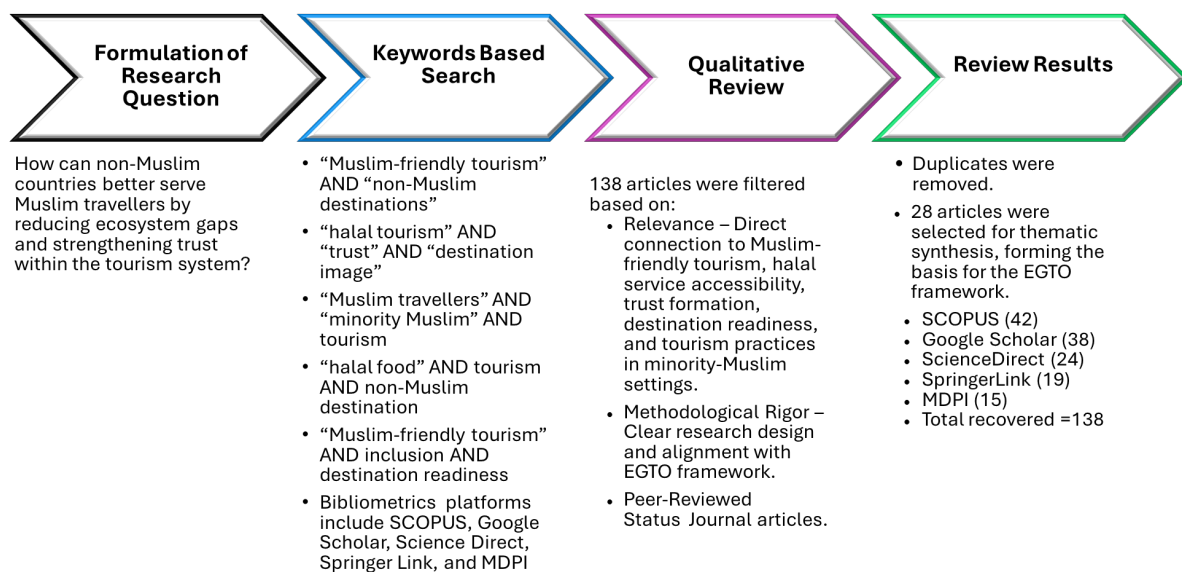


Figure 1. Process Flow of Systematic Literature Review According to PRISMA 2020

3.1 Research Objective and Guiding Question

The purpose of this review is to understand how Muslim-friendly tourism in non-Muslim countries is discussed in the literature, particularly in relation to service gaps, trust formation, and destination opportunity. The review is guided by the following main question:

How can non-Muslim countries better serve Muslim travellers by reducing ecosystem gaps and strengthening trust within the tourism system?

To support this central question, four sub-questions were formulated:

- i. What types of **ecosystem gaps** are most frequently discussed in studies on Muslim travellers in non-Muslim destinations?

- ii. How is **trust** understood and positioned in relation to Muslim traveller experience, destination image, and behavioural intention?
- iii. What **opportunities** emerge for destinations when Muslim-friendly tourism is approached through a more coordinated ecosystem lens?
- iv. How can the reviewed literature inform the proposed Ecosystem Gaps, Trust, and Opportunity Framework (**EGTO Framework**)?

3.2 Search Strategy and Database Selection

A systematic literature review was selected because the topic sits across several overlapping domains, including Muslim-friendly tourism, halal tourism, destination management, trust, inclusion, and non-Muslim destination readiness. The literature in this field is growing but remains somewhat scattered. A systematic review therefore provides a suitable approach for consolidating insights, identifying recurring themes, and building a clearer conceptual foundation. This is especially useful in an emerging area such as Muslim-friendly tourism, where reviews can help synthesise fragmented scholarship and support theory development (Battour and Ismail, 2016; Aziz *et al.*, 2025).

The search process was conducted across major academic databases commonly used in tourism, hospitality, and interdisciplinary social science research and designed to balance breadth and relevance by drawing from multiple sources rather than a single indexed database. The databases selected for this review were Scopus, ScienceDirect, SpringerLink, Google Scholar, and MDPI because they index a substantial number of peer reviewed studies relevant to tourism, destination marketing, Islamic marketing, hospitality, and Muslim traveller behaviour. Google Scholar was included to widen coverage and reduce the risk of excluding relevant peer reviewed studies that may not be equally visible across bibliographic databases. The review focused on studies published between 2010 and 2026 because Muslim-friendly tourism began to gain clearer conceptual and empirical visibility in the early 2010s, before expanding further through work on halal destination attributes, destination trust, travel behaviour, and digital service readiness. Key foundational and non-Muslim destination studies emerged during this period, including work on halal-friendly destination attributes and Muslim traveller behaviour in South Korea and other non-Muslim locations (Han *et al.*, 2019).

Table 1. Database Specific Strings Search Strategy

Database	Search String (Keywords)	Filters Applied	Articles Retrieved
SCOPUS	TITLE-ABS-KEY ("Muslim-friendly tourism" OR "halal tourism" OR "Muslim travellers") AND TITLE-ABS-KEY ("non-Muslim destination" OR "non-Muslim destination" OR "destination trust" OR "destination image")	English; Journal Articles; 2010–2026	42
Google Scholar (broader search)	"Muslim-friendly tourism" OR "halal tourism" AND "non-Muslim destination" OR "non-Muslim" AND "trust" OR "destination image" (manually filtered for relevance and peer reviewed status)	English only; peer reviewed journal sources; manual exclusion of grey literature	38
ScienceDirect	("Muslim-friendly tourism" OR "halal tourism" OR "Muslim travellers") AND ("non-Muslim destination" OR "destination trust" OR "tourism readiness" OR "inclusive tourism")	Peer reviewed research articles and reviews; Business, Tourism, Social Sciences	24
SpringerLink	("Muslim-friendly tourism" OR "halal tourism") AND ("non-Muslim destination" OR "non-Muslim destination" OR "trust" OR "destination competitiveness")	English; Journals only; Peer reviewed	19
MDPI	"Muslim travel" AND ("non-Muslim destinations" OR "destination trust" OR "inclusive tourism" OR "halal food access")	English; Open access journals; Full text	15
	Total recovered		138

3.3 Search Terms and Screening Criteria

To ensure sufficient coverage of the topic, the review used combinations of keywords related to Muslim-friendly tourism, halal travel, non-Muslim destinations, ecosystem readiness, trust, and traveller experience. The search terms were adapted slightly across databases depending on their search functionality, with the main combinations included as below:

- “Muslim-friendly tourism” AND “non-Muslim destinations”
- “halal tourism” AND “trust” AND “destination image”
- “Muslim travellers” AND “non-Muslim” AND tourism
- “halal food” AND tourism AND “non-Muslim destination”
- “Muslim-friendly tourism” AND inclusion AND “destination readiness”

This strategy was designed to capture both broader conceptual studies and more specific empirical work relating to service attributes, traveller confidence, and destination response.

3.4 Inclusion and Exclusion Criteria

To maintain relevance and academic quality, studies were screened using clear inclusion and exclusion criteria (Table 2). Included studies were limited to peer reviewed journal articles and selected high-quality conference papers published in English between 2010 and 2026. Articles were retained if they addressed Muslim-friendly tourism, halal tourism, Muslim traveller experience, destination trust, destination image, service provision, or tourism readiness in non-Muslim settings. Studies were excluded if they were unrelated to tourism, focused solely on general Islamic consumption without tourism relevance, dealt only with Muslim-majority destinations without transferable insight, or lacked direct relevance to ecosystem gaps, trust, or destination opportunity.

Table 2. *Inclusion and exclusion criteria*

Criteria	Inclusion	Exclusion
Publication type	Peer reviewed journal articles and high quality conference papers.	Editorials, book reviews, dissertations, theses, reports, magazine articles, websites, blogs, and news items.
Language	English	Non-English publications
Publication period	2010 to 2026	Publications before 2010
Topical relevance	Studies related to Muslim-friendly tourism, halal tourism, Muslim travellers, destination trust, destination image, tourism readiness, inclusion, halal food access, or service provision in non-Muslim or non-Muslim settings.	Studies unrelated to tourism, studies focused only on general Islamic consumption without tourism relevance, or studies lacking direct relevance to Muslim traveller experience.
Geographical/context relevance	Studies on non-Muslim countries, non-Muslim destinations, or studies offering transferable insights for such locations.	Studies focused solely on Muslim-majority destinations without relevant implications for non-Muslim destination contexts.
Conceptual relevance	Studies discussing ecosystem gaps, trust, opportunity, service experience, cultural sensitivity, digital discoverability, stakeholder coordination, or destination competitiveness.	Studies with only weak mention of halal or Muslim travel and no substantial analytical contribution.
Accessibility	Full text available.	Abstract only, inaccessible full text, or incomplete publication records.
Duplication	Unique records only.	Duplicate records across databases.

3.5 Screening and Selection Process

The study selection followed the four stages recommended in the PRISMA 2020 framework: identification, screening, eligibility assessment, and inclusion (Page et al., 2021). The initial

search yielded 138 publications. After removing 26 duplicate records, 112 studies remained for title and abstract screening.

During the screening stage, 60 studies were excluded because they were not sufficiently relevant to Muslim-friendly tourism in non-Muslim destinations or did not address destination readiness, trust, ecosystem gaps, or tourism opportunities. The remaining 52 full-text articles were assessed against the inclusion and exclusion criteria. A further 30 studies were excluded because they focused primarily on Muslim-majority destinations, lacked sufficient analytical relevance, or did not contribute directly to the objectives of the review. Consequently, 22 studies were retained for the final thematic analysis.

3.6 Data Extraction and Thematic Analysis

A structured data extraction process was undertaken to ensure consistency across the 22 selected studies. Information extracted from each article included the author(s), year of publication, study context, destination setting, research methodology, principal findings, and conceptual contribution to the review. The extracted information was organised using a review matrix to facilitate systematic comparison across studies (Table 3).

The selected studies were subsequently analysed using inductive thematic analysis, allowing recurring concepts to emerge from the literature rather than being predetermined. Three dominant themes were identified: ecosystem gaps, trust, and opportunity. The first theme, ecosystem gaps, captured recurring weaknesses in destination readiness, including halal food access, prayer facilities, certification visibility, staff awareness, digital information, and stakeholder coordination. These issues have been consistently reported as factors influencing Muslim travellers' experiences in non-Muslim destinations (Battour & Ismail, 2016; Han *et al.*, 2019; Jia & Zhang, 2021; Saville & Mahbubi, 2021).

The second theme, trust, reflects how Muslim travellers evaluate destination credibility, service reliability, and confidence when travelling in unfamiliar environments. Previous studies consistently associate trust with destination image, perceived value, visitor satisfaction, and behavioural intention, highlighting its role in shaping destination choice and loyalty (Al-Ansi & Han, 2019; Rodrigo & Turnbull, 2019; Rahman *et al.*, 2020; Hamdy & Eid, 2024).

The third theme, opportunity, represents the broader benefits that emerge when destinations improve their readiness to accommodate Muslim travellers. Beyond economic growth, the literature points to opportunities for strengthening destination image, increasing SME participation, improving digital visibility, encouraging stakeholder collaboration, and

enhancing tourism competitiveness (Mohsin et al., 2016; Ainin et al., 2020; Yousaf & Xiucheng, 2018; Mastercard-CrescentRating, 2024; Hoang & Nguyen, 2025).

Rather than treating these themes as independent findings, the analysis examined how they interact across the reviewed studies. A recurring pattern emerged whereby ecosystem gaps shaped travellers' confidence in destination readiness, trust mediated travellers' evaluation of destination credibility, and stronger trust contributed to wider destination opportunities. This thematic synthesis provided the conceptual foundation for developing the Ecosystem Gaps, Trust and Opportunity (EGTO) Framework presented in the following section.

3.7 Selection Outcome

After applying the inclusion and exclusion criteria, 22 studies were selected for final analysis. The systematic synthesis of these studies not only clarified what is already established in the literature but also developed a clearer conceptual understanding of how non-Muslim countries can better serve Muslim travellers. By organising the evidence around recurring gaps, trust-related mechanisms, and destination opportunities, the review provides the foundation for the proposed EGTO Framework.

Table 3. Thematic Summary of Selected Studies

Author(s) and Year	Article Title	Journal	Context / Destination	EGTO Dimension	Core / Supporting	Key Contribution to This Paper
Battour and Ismail (2016)	<i>Halal tourism: Concepts, practises, challenges and future</i>	<i>Tourism Management Perspectives</i>	General / conceptual	Ecosystem Gaps	Supporting	Establishes the foundational components and challenges of halal tourism.
Samori et al. (2016)	<i>Current trends on Halal tourism: Cases on selected Asian countries</i>	<i>Tourism Management Perspectives</i>	Selected Asian destinations	Ecosystem Gaps	Supporting	Shows how halal tourism evolved in Asia and why destination readiness matters.
Mohsin et al. (2016)	<i>Halal tourism: Emerging opportunities</i>	<i>Tourism Management Perspectives</i>	General / emerging market	Opportunity	Supporting	Positions halal tourism as a growing strategic opportunity for destinations.
Henderson (2016)	<i>Halal food, certification and halal tourism: Insights from</i>	<i>Tourism Management Perspectives</i>	Malaysia and Singapore	Ecosystem Gaps / Trust	Supporting	Useful for halal food assurance and certification visibility,

	<i>Malaysia and Singapore</i>					especially in a minority-Muslim setting like Singapore.
Oktadiana et al. (2016)	<i>Muslim travellers' needs: What don't we know?</i>	<i>Tourism Management Perspectives</i>	General / cross-context	Ecosystem Gaps	Supporting	Broadens Muslim traveller needs beyond basic service lists.
Razzaq et al. (2016)	<i>The capacity of New Zealand to accommodate the halal tourism market—or not</i>	<i>Tourism Management Perspectives</i>	New Zealand	Ecosystem Gaps	Core	Strong non-Muslim destination evidence on accommodation shortcomings and weak signalling.
El-Gohary (2016)	<i>Review: Halal tourism, is it really Halal?</i>	<i>Tourism Management Perspectives</i>	General / conceptual	Ecosystem Gaps	Supporting	Useful for conceptual clarity and caution over halal tourism branding.
Olya and Al-Ansi (2018)	<i>Risk assessment of halal products and services: Implication for tourism industry</i>	<i>Tourism Management</i>	General / tourism services	Trust	Supporting	Supports the trust dimension through risk, contamination, and service assurance logic.
Yousaf and Xiucheng (2018)	<i>Halal culinary and tourism marketing strategies on government websites: A preliminary analysis</i>	<i>Tourism Management</i>	Japan, South Korea, Thailand, China	Trust / Opportunity	Core	Important for digital visibility, communication quality, and state-led destination signalling in non-Muslim venues.
Han et al. (2019)	<i>Exploring halal-friendly destination attributes in South Korea: Perceptions and behaviors of Muslim travelers toward a non-Muslim destination</i>	<i>Tourism Management</i>	South Korea	Ecosystem Gaps / Trust	Core	One of the strongest direct studies for this paper: destination attributes, image, and behavioral intention in a non-Muslim destination.
Al-Ansi and Han (2019)	<i>Role of halal-friendly destination performances, value, satisfaction, and trust in</i>	<i>Journal of Destination Marketing & Management</i>	Non-OIC destination context	Trust	Core	Central evidence for trust, destination image, satisfaction, and loyalty.

	<i>generating destination image and loyalty</i>					
Rodrigo and Turnbull (2019)	<i>Halal holidays: How is value perceived by Muslim tourists?</i>	<i>International Journal of Tourism Research</i>	Muslim tourist holiday context	Trust	Supporting	Useful for showing that value perception in halal travel is multidimensional.
Rahman et al. (2020)	<i>The impact of tourists' perceptions on halal tourism destination: A structural model analysis</i>	<i>Tourism Review</i>	Halal tourism destination perception	Trust / Opportunity	Supporting	Supports the linkage between perception, loyalty intention, and destination outcomes.
Ainin et al. (2020)	<i>Sentiment analyses of multilingual tweets on halal tourism</i>	<i>Tourism Management Perspectives</i>	Social media / halal tourism discourse	Opportunity	Supporting	Useful for digital visibility and broader online discourse around halal tourism.
Papastathopoulos et al. (2020)	<i>What services do Muslim tourists want? Uncovering nonlinear relationships and unobserved heterogeneity</i>	<i>Tourism Management Perspectives</i>	Hotel services / Muslim tourists	Ecosystem Gaps	Supporting	Helps identify which services are prioritized by Muslim tourists.
Suhartanto et al. (2021)	<i>Holistic tourist experience in halal tourism evidence from Indonesian domestic tourists</i>	<i>Tourism Management Perspectives</i>	Indonesia	Trust / Opportunity	Supporting	Useful for linking holistic halal experience to satisfaction and intention.
Jia and Zhang (2021)	<i>Turning impediment into attraction: A supplier perspective on halal food in non-Islamic destinations</i>	<i>Journal of Destination Marketing & Management</i>	Non-Islamic destinations	Ecosystem Gaps	Core	Very important for supplier-side constraints in non-Muslim destination food provision.
Saville and Mahbubi (2021)	<i>Assessing Muslim travellers' preferences regarding food in Japan using conjoint analysis: An exploratory study on the importance of prayer room availability and halalness</i>	<i>Heliyon</i>	Japan	Ecosystem Gaps / Trust	Core	Highly relevant Japan study on halalness and prayer room availability.

Abdullah et al. (2022)	<i>The contestation of the meaning of halal tourism</i>	<i>Heliyon</i>	Destination stakeholder perspective	Ecosystem Gaps	Supporting	Useful for conceptual nuance and tensions in halal tourism branding.
Papastathopoulos et al. (2022)	<i>Which hotel services really matter to Muslim travellers?</i>	<i>International Journal of Hospitality Management</i>	Hotel services / Muslim travellers	Ecosystem Gaps	Supporting	Sharpens service-priority evidence for Muslim travellers.
Hamdy and Eid (2024)	<i>Muslim-friendly tourist destination image in travel and tourism</i>	<i>International Journal of Intercultural Relations</i>	Destination image / Muslim-friendly tourism	Trust / Opportunity	Core	Strengthens the destination image and competitiveness side of EGTO.
Hoang and Nguyen (2025)	<i>The role of AI assistants in promoting sustainable Halal tourism in non-Muslim destinations</i>	<i>Discover Sustainability</i>	Non-Muslim destinations	Opportunity / Trust	Core	Directly useful for digital discoverability, service facilitation, and future-ready support in non-Muslim contexts.

4. Results / Findings

4.1 Ecosystem Gaps in Serving Muslim Travellers in Non-Muslim Countries

A consistent pattern emerging from this review is that the principal challenge facing non-Muslim destinations is not the absence of Muslim-friendly services, but the lack of coordination between them. Across the reviewed studies, halal food, prayer facilities, certification, digital information, staff preparedness, and stakeholder collaboration are often available to varying degrees. However, these elements frequently operate as separate initiatives rather than as components of a coherent tourism system. Consequently, Muslim travellers may encounter unnecessary uncertainty even when essential services exist.

This fragmentation is evident across different destination contexts. Research conducted in New Zealand identified limitations in accommodation and destination signalling that reduced the country's readiness to accommodate Muslim visitors (Razzaq et al., 2016). Similar observations were reported in Japan, where halal assurance and prayer room availability significantly influenced travellers' food choices and overall travel confidence (Saville & Mahbubi, 2021). In South Korea, Muslim travellers evaluated destinations not only on the availability of halal-friendly facilities but also on how clearly these services could be identified

and accessed (Han *et al.*, 2019). Collectively, these studies indicate that isolated improvements rarely translate into a seamless travel experience.

The review also highlights that ecosystem gaps are shaped by both supply-side and destination-level constraints. From the perspective of tourism providers, expanding Muslim-friendly services often involves operational challenges, limited expertise, inconsistent certification practices, and uncertainty regarding market demand (Jia & Zhang, 2021). Earlier work similarly cautioned that destinations may promote halal tourism before developing the organisational capability required to support those claims consistently (Battour & Ismail, 2016; El-Gohary, 2016). These findings suggest that ecosystem gaps are not simply operational deficiencies but reflect broader weaknesses in destination planning and coordination.

Viewed together, the evidence suggests that destination readiness depends less on the presence of individual Muslim-friendly facilities than on the ability of destinations to integrate those facilities into a reliable and accessible tourism ecosystem. Strengthening this capability requires coordinated planning, clearer communication, and stronger collaboration among tourism authorities, certification bodies, service providers, and local businesses. Without such integration, Muslim-friendly initiatives are likely to remain fragmented, limiting both traveller confidence and destination competitiveness.

4.2 Trust as the Missing Link

The review identifies trust as the mechanism that connects destination readiness with Muslim travellers' overall experience. While ecosystem gaps explain where weaknesses occur, trust determines how those weaknesses influence destination evaluation. The findings suggest that Muslim travellers assess not only whether Muslim-friendly services are available, but also whether they can rely on those services throughout their journey. In non-Muslim destinations, where religious facilities are less predictable, trust becomes particularly important because it reduces uncertainty and strengthens confidence.

Several studies consistently support this relationship. Al-Ansi and Han (2019) demonstrated that trust strengthens destination image, perceived value, visitor satisfaction, and loyalty, while Rodrigo and Turnbull (2019) and Rahman *et al.* (2020) similarly found that confidence in destination services positively influences behavioural intention. Evidence from South Korea further shows that clearly communicated halal-friendly services improve travellers' perceptions of the destination (Han *et al.*, 2019). Hamdy and Eid (2024) argued that Muslim-friendly destination image should be recognised as a distinct construct because

Muslim travellers evaluate destinations using criteria that extend beyond conventional tourism services.

The findings also indicate that trust is reinforced through visible assurance rather than promises alone. Reliable halal certification, accurate digital information, knowledgeable frontline staff, and consistent service delivery reduce perceived risk and enable Muslim travellers to make travel decisions with greater confidence (Olya & Al-Ansi, 2018). Trust should therefore be viewed as an outcome of effective destination management rather than simply customer satisfaction. It is the mechanism through which destination readiness is translated into a positive travel experience.

4.3 Opportunity Beyond Accommodation

The review demonstrates that Muslim-friendly tourism creates opportunities that extend beyond accommodating religious needs. Destinations that improve their readiness are likely to strengthen visitor confidence while simultaneously enhancing their broader tourism ecosystem. This suggests that Muslim-friendly tourism should be viewed as a strategic investment in destination capability rather than a niche market initiative.

The economic potential of the Muslim travel market is well established, with expenditure projected to reach approximately USD225 billion by 2028 (Mastercard-CrescentRating, 2024). However, the reviewed studies indicate that long-term benefits depend on how effectively destinations organise and communicate Muslim-friendly services rather than on market demand alone. Improvements in destination readiness have been associated with stronger destination image, increased visitor satisfaction, and greater behavioural intention (Han *et al.*, 2019; Hamdy & Eid, 2024).

The findings further highlight opportunities for wider stakeholder participation. SMEs, tourism operators, certification bodies, and destination management organisations all contribute to strengthening Muslim-friendly tourism through coordinated service delivery. Digital technologies also play an increasingly important role by improving destination visibility, facilitating access to reliable information, and supporting personalised travel experiences (Ainin *et al.*, 2020; Yousaf & Xiucheng, 2018; Hoang & Nguyen, 2025). Collectively, these findings suggest that the greatest opportunities emerge when Muslim-friendly tourism becomes part of a coordinated destination strategy that enhances both visitor experience and long-term competitiveness.

4.4 Synthesis Toward the EGTO Framework

The findings of this review indicate that ecosystem gaps, trust, and destination outcomes are not independent concepts but interconnected dimensions of destination capability. Rather than operating in isolation, they form a reinforcing system in which destination readiness influences traveller trust, while stronger trust contributes to improved destination outcomes. These outcomes subsequently encourage further investment and continuous service improvement, helping to reduce existing ecosystem gaps over time.

This synthesis forms the basis of the proposed Ecosystem Gaps, Trust and Opportunity (EGTO) Framework. Unlike previous studies that examine individual Muslim-friendly tourism attributes separately, the EGTO Framework explains how destination capability develops through the interaction of these three dimensions. It therefore provides a more integrated perspective for understanding how non-Muslim destinations can strengthen both traveller confidence and long-term tourism competitiveness.

5. The Ecosystem Gaps, Trust and Opportunity (EGTO) Framework

Figure 2 presents the proposed Ecosystem Gaps, Trust and Opportunity (EGTO) Framework, developed from the thematic synthesis of the reviewed literature. The framework conceptualises Muslim-friendly tourism in non-Muslim countries as a destination capability model in which ecosystem readiness, traveller trust, and destination outcomes operate as an interconnected system rather than as independent constructs. While previous studies have examined these elements separately, the EGTO Framework integrates them into a single conceptual perspective (Battour & Ismail, 2016; Al-Ansi & Han, 2019; Hamdy & Eid, 2024).

The framework proposes that destination ecosystem gaps form the starting point of Muslim travellers' experiences. Weaknesses in halal services, prayer facilities, certification, digital information, staff competency, and stakeholder coordination create uncertainty that influences travellers' confidence when visiting non-Muslim destinations (Jia & Zhang, 2021; Saville & Mahbubi, 2021). Trust therefore functions as the central mechanism linking destination capability with visitor perceptions. As destinations provide more reliable information, credible assurance, and consistent service delivery, traveller confidence, credibility, and perceived reliability increase (Olya & Al-Ansi, 2018; Rodrigo & Turnbull, 2019).

Greater trust contributes to positive destination outcomes, including stronger destination image, higher visitor satisfaction, SME growth, digital innovation, tourism

competitiveness, and sustainable tourism development (Han et al., 2019; Ainin et al., 2020; Hoang & Nguyen, 2025; Mastercard-CrescentRating, 2024). These outcomes encourage further investment in destination capability and continuous service improvement, creating a reinforcing cycle that progressively reduces ecosystem gaps. Rather than depicting a linear relationship, the EGTO Framework illustrates a process of continuous improvement through which destinations strengthen both Muslim traveller confidence and long-term destination competitiveness.

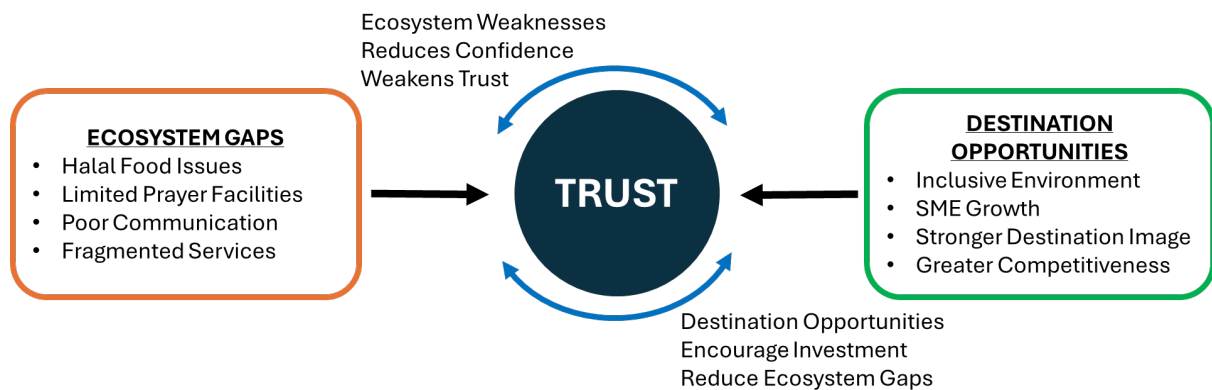


Figure 2. *The EGTO Framework for Serving Muslim Travellers in Non-Muslim Countries*

6. Implication

The findings of this review carry several implications for tourism stakeholders in non-Muslim countries. For policymakers and destination planners, the evidence suggests that Muslim-friendly tourism should not be approached only as a niche marketing exercise. Rather, it should be embedded within broader destination planning, service coordination, and tourism readiness strategies. This means that efforts to improve halal food access, prayer facilities, service communication, and digital guidance should be treated as interconnected destination functions rather than separate initiatives.

For tourism operators, especially those in accommodation, food services, transport, and attractions, the findings show that visibility and credibility matter as much as availability. A service that exists but is poorly signalled may fail to generate confidence. This means that providers should pay greater attention to certification display, staff readiness, online information quality, and practical service clarity. In non-Muslim settings, these trust-building signals can significantly shape the overall perception of the destination.

For SMEs, the review suggests that Muslim-friendly tourism creates opportunities for more targeted service development. Local restaurants, small hotels, travel platforms, guides, and transport operators can all benefit when Muslim traveller needs are better understood and more

clearly addressed. However, this potential is more likely to be realised when SMEs are supported by destination-level coordination and trusted information systems rather than left to adapt independently.

For researchers, the paper highlights the need to move beyond broad discussions of halal tourism and examine more closely how Muslim traveller experience is shaped in non-Muslim contexts. Future studies should pay greater attention to the links between service ecosystems, trust formation, digital support, and destination competitiveness. More empirical work is also needed on traveller experiences in specific non-Muslim destinations such as Japan, Taiwan, South Korea, and emerging Muslim-friendly markets in Europe and East Asia.

7. Conclusion

Muslim-friendly tourism has evolved beyond the provision of halal food, prayer facilities, and religious services. As demonstrated throughout this review, destination readiness depends on how effectively these elements are coordinated within a broader tourism ecosystem. Fragmented services, inconsistent information, and weak stakeholder collaboration continue to undermine traveller confidence, even when individual Muslim-friendly facilities are available. Addressing these ecosystem gaps therefore represents an important step towards strengthening destination capability in non-Muslim countries.

Based on the synthesis of 22 studies, this paper proposed the Ecosystem Gaps, Trust and Opportunity (EGTO) Framework as a conceptual model for understanding how destinations can enhance their readiness to serve Muslim travellers. The framework positions trust as the central mechanism linking destination ecosystem gaps with positive destination outcomes. As destinations improve service coordination, communication, and stakeholder collaboration, stronger traveller trust contributes to improved destination image, visitor satisfaction, SME participation, digital innovation, tourism competitiveness, and sustainable tourism development (Al-Ansi & Han, 2019; Han *et al.*, 2019; Hamdy & Eid, 2024).

The EGTO Framework also extends the current Muslim-friendly tourism literature by shifting attention from individual service attributes towards destination capability. This perspective encourages policymakers, destination management organisations, certification bodies, and tourism operators to view Muslim-friendly tourism as a continuous process of ecosystem development rather than a checklist of isolated initiatives. Such an approach is likely to strengthen both traveller confidence and long-term destination resilience.

Although this study is conceptual in nature and based on a systematic review of published literature, it provides a foundation for future empirical research. The proposed framework can be validated across different tourism settings, destination types, and cultural contexts to examine how ecosystem gaps, trust, and destination outcomes interact in practice. Future studies may also refine the framework by incorporating emerging technologies, digital tourism platforms, and evolving Muslim traveller expectations.

Ultimately, the future of Muslim-friendly tourism in non-Muslim countries will depend not only on expanding the availability of Muslim-friendly services, but on strengthening the capability of destinations to deliver those services in a coordinated, credible, and trustworthy manner. The EGTO Framework offers a practical and conceptual foundation for supporting this transition towards more inclusive, competitive, and sustainable tourism destinations.

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Conflict of Interest (if applicable)

Authors declare no conflict of interest.

Declaration on the Use of Generative AI

Authors declare Quillbot is generative AI used in the manuscript only for language enhancement.

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