

12-1-2024

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Recommended Citation

Domingues, João and Almeida, Sofia (2024) "Exploring the Potential of Halal Tourism in a non-Muslim Destination: The case of Portugal," *International Journal of Religious Tourism and Pilgrimage*: Vol. 11: Iss. 6, Article 14.

doi:<https://doi.org/10.21427/YJKA-2H87>

Available at: <https://arrow.tudublin.ie/ijrtp/vol11/iss6/14>

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Exploring the Potential of Halal Tourism in a non-Muslim Destination: The Case of Portugal

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Halal Tourism has emerged as one of the most rapidly growing and auspicious market segments within the tourism industry. The main goal of this study is to ascertain whether Portugal has the necessary capabilities to develop a sustainable and competitive halal tourism market and if it can attract Muslim travellers. This research applied a qualitative methodology based on in-depth interviews with representatives of businesses companies and institutions from various subsectors of the tourism industry. Moreover, a netnographic technique was applied to gather secondary information. The results reveal that despite Portugal having full potential and all the conditions to develop halal tourism sustainably and competitively, there are still significant challenges to surpass, mainly a lack of products and services for this market, a lack of awareness from tourism agents, and the difficulty of complying with halal certification, as some businesses are not able to comply with the requirements or are not able to adapt to certain scenarios, mainly in the hospitality field. This study takes into consideration the tourism sector as a whole and not individual business needs. The outcome of this study aids decision-makers in Portuguese businesses and institutions in developing strategies and policies to generate significant competitive advantage in a crowded tourism market. The results provide a boost for halal tourism and help Portugal to become more competitive as a tourist destination. This facilitates a boost in Halal Tourism and helps Portugal as a touristic destination to become more competitive. Concerning the value of this research, to our knowledge, there is no study in Portugal with this level of depth, which makes such a great contribution to halal tourism literature.

Key Words: halal tourism; Portugal; Muslim, halal travel, tourism

Introduction

Halal tourism, can be defined as

Any tourism object or action which is permissible according to Islamic teachings to satisfy the needs of the Muslim traveler and achieve the destination's Muslim-friendliness (Battour et al., 2021:2)

This has become one of the fastest and most promising market segments in the global tourism sector. Therefore, raising stakeholders' awareness of this type of consumer is an urgent matter, as destinations struggle to find a significant competitive advantage to differentiate themselves from the competition. Despite a significant Islamic heritage left by more than six centuries of

occupancy, the current level of awareness about halal tourism and Muslim consumers' needs, lack of strategy, certified products, and adequate facilities, leaves Portugal, one of the largest tourism powerhouses in the world, with a long way to go to be able to develop a significant halal tourism market.

Portugal was chosen for this study due its importance as a European tourist destination, while at the same time with less propensity to develop halal tourism, despite its potential. This research develops future guidelines in that direction, which can be further applied to other European destinations. Furthermore, a strategic analysis of Portugal's current situation is carried out, namely

on how the country is performing in the present and its limitations; therefore, the findings can help businesses and institutions to develop strategies in order to attract this new, growing market.

According to the Organization of Islamic Cooperation & Statistical, Economic and Social Research and Training Center for Islamic Countries (2022), between 2014 and 2019 halal tourism earnings increased in Organization of Islamic Cooperation countries by 36.60%, reaching 153 billion USD, which represents 80% of global revenues of this segment. Projections are for 164 billion USD in earnings for OIC in 2024 and 208 billion USD generated worldwide in the same year. Thus, members of the Organization of Islamic Cooperation (OIC) are the biggest players in the halal travel and tourism market. According to Crescent Rating (2022), the top 20 OIC outbound markets represent 84% of the global Muslim travel market. Moreover, the top 10 non-OIC outbound markets represent 15% of the total Muslim outbound market, with the remaining 1% dispersed among other countries.

In this research, future development guidelines are indicated with the objective of developing halal tourism in Portugal, mainly concerned with easing certification processes that are hard to comply with, utilising the image of Portuguese ambassadors in Muslim countries such as Saudi Arabia, and providing training to improve tourism

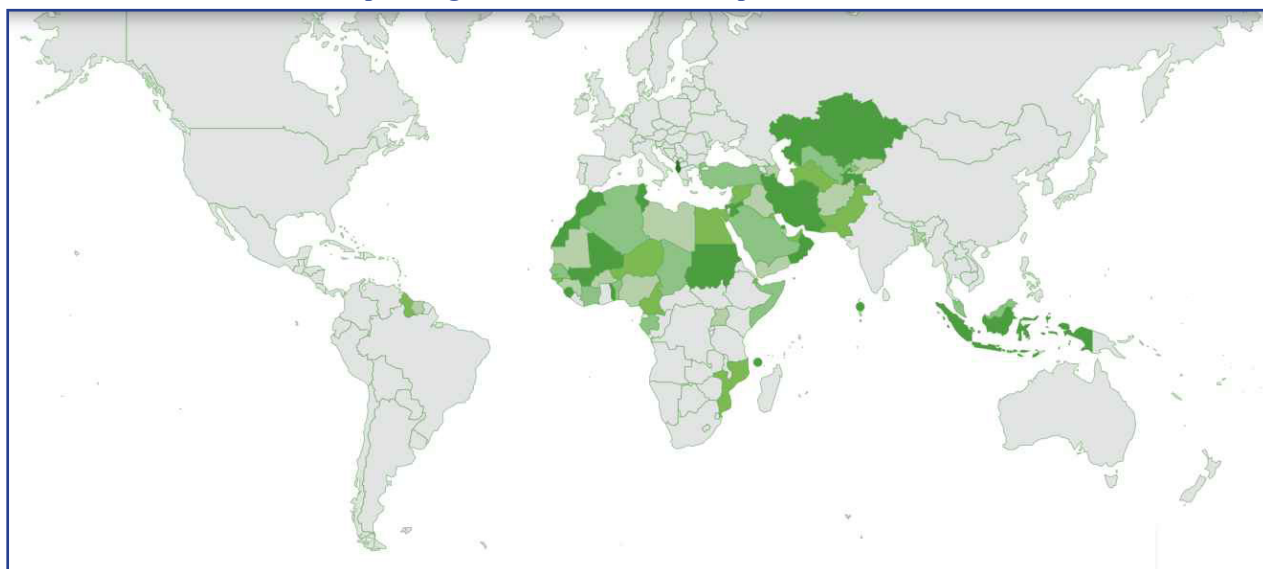
agents' perceptions. This paper's general objective is to understand whether Portugal has the necessary capability and facilities to develop a sustainable halal tourism market.

The specific research objectives are to

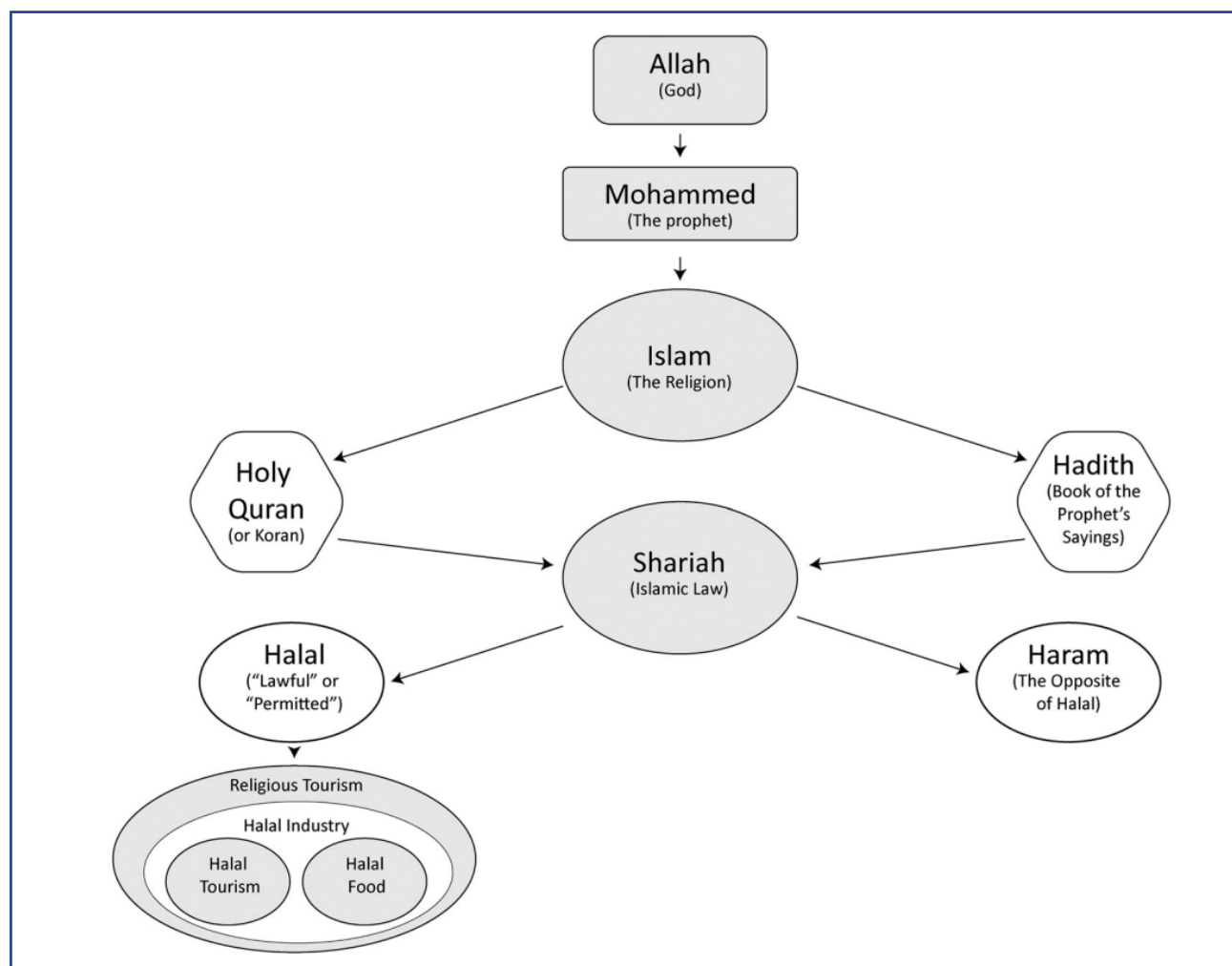
- i) identify tourism agents' level of knowledge about halal tourism;
- ii) analyse the main problems with developing halal tourism in Portugal; and
- iii) develop guidelines and best practice to boost halal tourism in Portugal.

The main findings of this research indicate that levels of knowledge and awareness of Portuguese tourism agents and stakeholders about the halal tourism market are very low or even nonexistent in some cases. Moreover, the country faces severe challenges in developing this market, such as the absence of a clear strategy for the halal market, food and facilities, air connections to Muslim-majority countries, and problems accessing halal- or Muslim-friendly certification. To conclude, this research highlights the promotion of the image of Portuguese ambassadors, training, participation in tourism fairs and events, and greater ease of access to Muslim-friendly certification as guidelines for further development to boost this market in Portugal.

Map of Organization of Islamic Cooperation Countries



<https://icdt-cidc.org/member-states-map/>

Figure 1: Visual Representation of Halal Tourism

Source: (Rasul, 2019:3)

This paper is composed of five main sections, namely the introduction of the topic; the second section about the literature review, where the Halal Tourism concept is discussed; the third section presents the study methodology, namely the description and tools used for the exploratory phase and in the collection of information; the fourth section which presents the findings obtained via in-depth interviews and netnography; and the fifth section, which provides conclusions and the identification of future avenues for research into the development of halal tourism, with a focus on Portugal.

Halal Tourism

Due to the complexity of Halal Tourism, a full understanding of what composes the core of this concept is important. Despite the large number of tourists and

revenue generated, literature regarding Halal Tourism is still in its beginnings. Prayag (2020:1) states that

Despite halal tourism having received significant attention in the tourism and hospitality literature recently, this body of knowledge remains in its infancy.

Within the religion of Islam, three clear concepts are defined which are intrinsically different, those being: 'Islam'; 'sharia'; and 'halal', as shown in Figure 1.

Starting with Islam, at the center of the entire framework, it is conceptually defined as a religion / faith whose roots offer clear and defined guidelines to its followers, named Muslims. Islam, as a religion, is composed of the five pillars of the Islamic faith, which themselves are composed of five key practices / promises that Muslims must fulfill throughout their lifetime, these being

shahada, salah, zakat, sawm, and hajj. Furthermore, it should be stated that in some countries like Indonesia, Islam plays not only a key role in everyday life but also in state affairs, mainly in their legal and judicial systems, as mentioned by Slamet *et al.* (2022).

After Islam, comes *shariah* or Islamic law, this being derived from the central book of Islam, the Holy Quran, and the hadith. The first is composed of the literal word of God (Allah) recited by the Prophet Mohammed, and the second one is a collection of events about his life, sayings, and actions. Consequently

The Qur'an and the hadith are the primary sources of law and address most human actions (Mohsin *et al.*, 2016:2).

It must be noted that in the verses of the Holy Quran, travel is heavily emphasised as a means of achieving spiritual goals, thus Mohsin *et al.* (2016:3) state that

The lessons from Quran propose that to achieve a closer and complete submission to God, one needs to witness the beauty of His creation and understand how small a man is before the greatness of God.

After Islam and sharia comes the word '*halal*' which is of Arabic origin, and literally translates as 'allowed.' Mohsin *et al.* (2016:4) state that this concept 'relates to approved and permitted forms of behavior' and applies to different facets of life. The converse of halal is the concept of *haram*, which at its core means what is forbidden, and harmful to the body and society according to Islamic law. A clear example of what is considered haram is buying or engaging with products related to alcohol, or gambling (Heesup *et al.*, 2019). The meaning of the word 'Islamic' must be clarified as it is different from 'halal' because 'Islamic' indicates something which is strongly related to religion and its doctrines as noted by Battour and Ismail (2016).

Halal Tourism Framework

Due to the multidisciplinary dimensions of halal tourism, a clear definition of the concept is still under debate. Slamet *et al.* state that

Halal tourism is a new term found in the tourism industry. Several studies have been using various terminologies to define the term halal tourism, such as halal tourism, Islamic tourism,

and Sharia tourism (2022:2).

CrescentRating (2016) mentions that 'These terms used have had a varying focus, based on who is using the term and in which context.' Rasul (2019) indicates that this is caused by: the unfamiliarity of tourism stakeholders with the halal tourism market; ambiguity towards the concept even in academic literature, and; the broad diversity within Islamic societies, their religious norms, and other cultural factors.

While trying to reach a clear, consensual idea about the meaning of Islamic and halal tourism, most researchers do not consider Islamic law (sharia), target customers, locations of activities, products, and services offered, and travel purpose and motivations as mentioned by Battour & Ismail (2016). These authors indicate that there is currently a great challenge in the literature to identify the right terminology as well as a clear definition of the concept of halal tourism and its differences from Islamic tourism. Starting with Islamic tourism, Henderson claims that

Islamic tourism is, thus, an interesting and powerful phenomenon in which religion and tourism are inextricably linked in a close and complex relationship. It describes both human activity and commercial products which are shaped by religious principles and practices (2015:3).

While there is an undeniable religious factor involved, mainly in terms of defining clear boundaries in what is lawful and therefore halal, or not, and therefore haram, it must be clear that halal tourism is mostly not related to religious tourism in the literal meaning of the concept, but as a means of referring to the Muslim traveler's faith-based needs. The two concepts differ mainly in the core motivation of travellers as stated by Heesup *et al.* (2019). Halal tourism can also be called Muslim- or halal-friendly, this can be defined as

Any tourism object or action which is permissible according to Islamic teachings to satisfy the needs of the Muslim traveler and achieve the destination's Muslim- friendliness (Battour *et al.*, 2021:2).

To conclude this section, despite there being no consensus in the current literature about the characteristics that tourism should have to be considered halal, El-

Table 1: Key Principles / Requirements for Halal Tourism

No Alcohol to be served	Conservative TV channels (Appropriate entertainment)	Gender-segregated prayer rooms
No nightclubs	Prayer rooms	Art should not depict human form
Halal food only to be served	Muslim Staff Members	Beds and toilets positioned do as not to face the direction of Meccah
No ham or pork or similar products to be served	Islamic dressing code for staff uniforms (Conservative staff dress)	Bidets in the bathroom
Male staff for single male floors	Copies of Quran in each room	Guest suitable dressing code
Female staff for women and families	Markers indicating directions of Meccah	Islamic Funding
In-house religious figures	Separate facilities (Such as gyms, swimming pools, etc.)	Hotel (And other tourism companies) Should follow <i>Zakat</i> principles
Source: Adapted from El-Gohari (2016:3-4)		

Gohary (2016:3) proposes the list of principles or key requirements that are presented in Table 1.

Current State of the Global Halal Travel and Tourism Market

With 1.9 billion potential consumers, the halal industry is one of the fastest-growing market segments worldwide. According to Dinar Standard (2021), in 2021, 1.9 billion Muslims spent 102 billion USD on global outbound travel—in other words, 11% of the global outbound travel market in that year. Major spending was reported in the Middle East, where Saudi Arabia generated 13.7 billion USD in Muslim-friendly travel, the United Arab Emirates 10 billion USD, Qatar 7.8 billion USD, and Kuwait 7 billion USD. Furthermore, despite not being a Middle Eastern country, Russia must also be mentioned, as in 2021 halal tourism produced a 5.6 billion USD impact on the country's economy, as mentioned by Salaam Gateway (2022).

In terms of international halal tourism arrivals, a growth of 22% was registered between the years of 2017 and 2019, increasing from 131 million to 160 million tourists respectively. Growth was severely affected in 2020 by the COVID-19 pandemic; in fact, in that year, only 42 million arrivals were reported, a decline of 74% compared to the record year of 2019. The decline is even more evident in 2021 with only 26 million international arrivals, a decrease of 84%. In a post-COVID-19 era, the recovery process of halal tourism is

fragile and could be disrupted by the continuing war in Ukraine, fuel price increases, and other health threats' (CrescentRating, 2022:22).

It is expected that in 2023 the global halal tourism market will recover 80% of 2019 levels, and get back to 160 million tourists in 2024, whereas the pre-pandemic estimations of 230 million tourists in 2026 will only be reached in 2028 according to the same author.

Methodology

The current research method consists of exploratory, qualitative research, based on face-to-face, in-depth interviews with various tourism economic agents from different types of businesses related to the tourism industry such as hotels, travel agencies, restaurants, and other relevant institutions. The interviewees were between 35 and 50 years old, and mostly located in the regions of Porto, Lisbon, Almada, Alentejo (Beja and Mértola) and Algarve, with 19 men and three women, out of a total of 22 interviews (Table 2).

The sample size considered adequate for qualitative studies is far from being consensual and ranges between five and 50 interviews. A number of 25–30 interviews is considered the minimum sample size in which the saturation and redundancy point is reached, after which no further data collection process is needed (Dworkin, 2012). Despite the aim to accomplish 25 interviews, a saturation point was reached after the 22nd interview, to

Table 2: Profile of Participants

Job/Role	Business Typology	Gender	City	Format	Code
Regional Promotion	Municipality Community	Male	Beja	Online Face to Face	P1
Owner	Hotel	Male	Beja	Online Face to Face	P2
Owner	Restaurant	Female	Mértola	Online Face to Face	P3
Owner	Butcher	Male	Almada	Phone Interview	P4
Halal Market Specialist (Retired)	Hotel	Male	London	Written Response	P5
Innovation Strategy and Development	Tourism Consultancy	Male	Castelo Branco	Online Face to Face	P6
Municipal Employee	Municipality	Male	Aljustrel	Written Response	P7
Owner	Hotel	Male	Guarda	Online Face to Face	P8
Executive Director	Regional Promotion Agency	Male	Alentejo	Online Face to Face	P9
Founder/Owner	Travel Agency/Tour Operator	Male	Leiria	Online Face to Face	P10
Municipal Employee	Municipality	Female	Tomar	Online Face to Face	P11
Municipal Employee	Municipality	Male	Lagos	Online Face to Face	P12
Owner	Hotel	Male	Avis	Online Face to Face	P13
Regional Promotion	Municipality Community	Male	Beja	Online Face to Face	P14
President	Portuguese Institution for Halal	Male	Lisbon	Phone Interview	P15
Municipal Employee	Municipality	Male	Lisbon	Online Face to Face	P16
Municipal Employee	Municipality	Male	Mafra	Written Response	P17
Municipal Employee	Municipality	Male	Leiria	Online Face to Face	P18
Executive Director	Regional Promotion Agency	Male	Faro	Written Response	P19
International Promotion	Regional Promotion Agency	Male	Porto	Online Face to Face	P20
International Promotion	Regional Promotion Agency	Male	Lisbon	Online Face to Face	P21
Project Manager	Portugal Tourism Management Organization	Female	Lisbon	Written Response	P22

the point where no further relevant insights were being collected. This is evidenced by Francis *et al.* (2009), who suggest that new interviews conducted without new ideas emerging is a criterion for stopping. The interview script was derived from a literature review, as shown in Table 3.

It must also be noted that from the 22 interviews performed (including two exploratory ones), 15 were conducted online, 2 via phone call and 5 provided written answers. Different methods for data collection can skew information gathering, and some suggest a

Table 3: Interview Script

Objective	Question	Adapted from
Research Tourism Agents Perceptions Towards Halal Tourism	Q1. What is your current level of awareness on halal Tourism?	Moshin <i>et al.</i> , (2020)
	Q2. What is your understanding of the Islamic and Halal rules?	Han <i>et al.</i> , (2019)
	Q3. Do you know how to offer Halal products and services?	Han <i>et al.</i> , (2019)
	Q4. Do other people/travelers have a positive attitude towards Muslim tourists?	Heesup <i>et al.</i> , (2019)
Identify the Main Challenges for Developing Halal Tourism in Portugal	Q5. Are you aware of Halal products and services in your region?	Han <i>et al.</i> , (2019)
	Q6. What can be done to enhance tourism agents understanding of halal tourism and related business opportunities?	Moshin <i>et al.</i> , (2020)
	Q7. What are the challenges associated with promoting Halal Tourism in Portugal?	Moshin <i>et al.</i> , (2020)
To develop guidelines to boost Halal Tourism in Portugal	Q8. What can be done to enhance halal tourism destination image?	Moshin <i>et al.</i> (2020)
	Q9. What are the efforts (Business Name) has done to attract Muslim tourists and what problems and solutions have you found?	Jia & Chaozhi (2019)
	Q10. What do your Muslim customers worry the most when traveling to Portugal/Your region/Business Name	Jia & Chaozhi (2019)

Source: Authors own

universal method must be used which is suitable for every participant (O'Reilly & Parker, 2012). However, the use of different interview methods, such as the ones described above, is supported by Tracy (2010) as the author defends the idea that different methods, and interview techniques, can contribute for a greater enhancement and depth of qualitative research findings. Adding to this idea, the same author indicates that this use of different approaches can offer complementary insights, and flexibility for participants.

As for the sampling method, the target for the interviews were business owners whose businesses were registered on the Halal Booking Website, in *Instituto Halal de Portugal*, or similar institutions that are relevant to the Halal Travel and Tourism Market. In addition, official institutions that regulate and promote the Portuguese market were also included in this study.

In order to translate the interview questions to Portuguese, the retro translation technique was used, in which a Portuguese and English person transcribed the script to Portuguese, both versions were then compared. Afterwards, another English person has translated the Portuguese script back to English.

Participants in this research were interviewed between the 1st of March and the 8th of May, 2023, with a duration of between 20 and 50 minutes; moreover, all participants without exception authorised the recording of the interviews. Interviews were mainly performed in an online face-to-face format using the Zoom and Google Meet applications, mainly in Portuguese, and were recorded, and afterwards transcribed to English. The transcript of these interviews was exported to the MAXQDA software for further qualitative / content analysis. A list of codes was subsequently created using this software, as a means of attributing each participant's answer to each of the research objectives. Moreover, considering the pattern of response from participants to each individual research objective, a pattern of categories was created that was later refined utilising certain information, with these being representative of each category.

To have a better understanding of Portugal's level of facilities regarding hotels for Muslim tourists, and to compare them to other destinations, netnography was

performed and used as a benchmark for comparing the performance of Portugal in terms of tourism offer in the hospitality sector with other European, Asian and North African nations. Netnography involves

specific sets of research positions and accompanying practices embedded in historical trajectories, webs of theoretical constructs, and networks of scholarship and citation; it is a particular performance of cultural research followed by specific kinds of representation of understanding' (Kozinets, 2015:1).

To perform netnography, the website *HalalBooking* was used as a means of getting insights and comparing each hotel's level of facilities that are able to meet the requirements of Muslim tourists. In the entire HalalBooking database, according to each property's description of facilities, there are 19 selection criteria for hotel filtering, mostly related to halal food, alcohol-free areas, and leisure for women and family. From these criteria, six were chosen, not only to remove all the hotels in the database that do not have a single sharia-compliant attribute but also to consider the minimum criteria that Muslim travelers would require for hotel accommodation booking, namely:

- i) halal food nearby;
- ii) alcohol-free room;
- iii) beach: mixed modest swimwear;
- iv) pool: mixed modest swimwear;
- v) wellness & spa: mixed modest swimwear;
- vi) review score — our score (good: 7+).

Halal hotels in Portugal were compared to matching hotels in 11 other countries in Asia, Europe, North America, and North Africa, with an emphasis on countries which were the best performers in their respective continents (as illustrated by Crescent Rating, 2022). From these countries, and due to cultural similarities with Portugal, five of the top 20 non-OIC destinations in the Global Muslim Travel Index (GMTI) 2022 were chosen, these being the United Kingdom, Spain, France and Germany in Europe, and the United States of America in North America. From the top 20 OIC destinations in the same report, Malaysia, Indonesia, Saudi Arabia, Turkey, Egypt, and Morocco were used as a Muslim countries with a basis for comparison.

Findings & Discussion

Level of knowledge towards halal tourism

The results suggest that tourism agents have in Portugal almost no knowledge about halal tourism. This can be further extended to the understanding of Islamic rules. Moreover, the knowledge of products and services crafted especially for this market is also scarce.

When asked about the level of knowledge related to the halal tourism market, most participants had heard about the concept but did not know how to define or work with it

We know the concept, but for now, we do not work with it (P10).

About Islamic / sharia laws, results suggest that participants have only a superficial level of knowledge regarding this topic. The majority understand that Muslim tourists have a specific set of rules related to food, travel, and faith-related needs:

We know that there are certain foods that Muslims do not consume, that they pray several times a day, that there must be spaces available for this purpose, and that there are rules for coexistence between men and women that are different from those in the West, which may force separation by gender (P7).

The results suggest that almost no participants know of any halal product or service in the country or in their region or how to offer these products:

There is nothing specific. What exists is a specific knowledge of all the agents of the detailed market (P20)

I do not know any product or service, not even at a national level (P13).

Very few participants knew of any sort of product or service and of these, nearly all were related to halal food

I learned a little while ago that there was a need in the Islamic community of Leiria and that the first halal butcher recently opened that only has this type of product and it is certified (P18).

As the tourism sector is one of the most important industry actors, the results suggest that local communities and tourists, in general, have a positive attitude towards Muslim people. Regarding prejudice towards Muslims in

the general public:

In our country, I would say no, fortunately, we live in an increasingly open community, where the number of Muslims and Hindus and other religions is increasingly common (P10).

Generally, travellers have a positive and interested attitude towards Muslim tourists. The attitude after 9/11 was warier due to increased security checks and patrols; however, this is rarely questioned and is now not seen as a threat (P6).

Such low levels of knowledge confirm findings in the report Global Muslim Travel Index by Crescent Rating (2022) which was previously discussed, where Portugal scores only three points out of a possible 100 in the ‘Stakeholder Awareness’ field.

However, Jeaheng *et al.* (2019) point out that understanding Muslim tourists’ specific needs, desires, and behaviors is essential to create any products or services for this market while assuring that best practices are applied. To conclude on this theme, the findings are in accordance with Moufakkir’s (2020) study, in which the author suggests that Islamophobia can have a profound impact on Muslim tourists’ intentions to visit a certain country and their experience while visiting the destination; moreover, it is regarding Muslim women that this becomes a bigger issue.

Main Challenges to Developing Halal Tourism in Portugal

On identifying the main challenges for developing halal tourism in Portugal, a clear pattern can be discerned. In some cases, most of the interviewees displayed a very similar perspective and pointed out the same obstacles.

All participants highlighted a severe lack of awareness by tourism agents, from all parts of the supply chain, regarding the halal tourism market as one of the main obstacles. Moreover, the participants also agreed about their uncertainty about the meaning of the halal tourism concept, finding it confusing and very hard to understand.

There is no knowledge of halal tourism, and most people do not know the concept of halal. There is still a lot of ignorance so there is not much knowledge yet formed by people because they do not know what this market is yet (P3).

The results suggest that halal tourism is not a strategic priority for the participants' businesses or for institutions that regulate and promote tourism in Portugal, with the majority not undertaking any efforts to attract this market segment. Participants mention that

halal tourism is not part of our tourism development strategy (P17).

The results suggest that this has to do with the lack of demand from this market in Portugal and other sets of priorities for tourism stakeholders

The strategy is defined for paths other than this one. For example, last year's strategy did not deal with the Israeli market, this year yes, it had to do with the numbers (P20).

The topic of halal food was thoroughly discussed and was mentioned by most interviewees as one of the biggest challenges to promoting this market in Portugal. For example, some participants suggest that this was the main reason why halal tourism has almost no significance in Portugal.

The main challenge is related to halal food. ... while the accommodation and prayer part are situations that can be overcome with little difficulty, the food part is decisive, and there must be in fact the absolute certainty that they are not committing any infraction or consuming a certain prohibited food (P14).

Hotels in Portugal have difficulty in supplying halal food to tourists even if these consumers explicitly state this demand throughout the booking process, as these businesses do not have the necessary infrastructure to cater to these consumers' needs.

The only thing hotels do not have for the most part in terms of halal food is that they have it as soon as you ask for it, or they do not have it available ... That's why the big hotel entities that we have say 'It's not available, but it can be available by request' or ... there is catering that [can] serve food for the halal community (P12).

Furthermore, results suggest that the same applies to restaurants as these mostly do not have facilities to fulfill halal food requirements, mainly related to how the meat should be processed, the materials required, and the know-how.

It's really a problem of having specific materials just to use for preparing the meat, which is not possible for us. And on the topic of prayers, that was also a question, that made no sense to us. We assume the offer of the vegetarian part, we are already prepared for that, everything regarding animal proteins is more complex, it is very complicated (P3).

Air connections from Portugal to the main inbound/outbound markets of halal tourism were also identified as a big challenge, mainly by institutional participants, as there are very few flights connecting Portugal to the Middle East, South-East Asia, or even Muslim majority African countries.

There is a big air connection problem. Improve it, help those who sell these products specifically in Portugal, and we will see that the market works immediately. We have few connections with the Middle East, we have other sultanates that do not have direct flights with Portugal, with all the delays that this entails (P9).

Certification is another obstacle mentioned, mainly by small business owners, to attract this market to their region, largely because the requirements for these certificates are hard to comply with. At a business level, the results indicate that Portugal is still at a very early stage regarding certifying businesses and their products as halal:

We can identify some businesses that managed to receive training from some entities. We are in the certification phase of the Portuguese territory, and we are training companies, who will then have to work to adapt to the halal tourism market (P1).

To conclude on this topic, the results coincide with El-Gohary's (2016) findings, who mentions that one of the main challenges for developing halal tourism worldwide, and consequently in Portugal, is the absence of a conceptualisation and definition of the meaning of halal tourism. Findings from exploring the topic of halal food and facilities, point that these attributes still lack development in Portugal. These findings are further supported by the Crescent Rating (2022) report, in which the country scored poorly on both 'Halal Dining' and 'Prayer Places.' About air connections, once again, results collected about this topic are in line with the Crescent

Rating (2022) report - under their 'Access' evaluation criteria, Portugal has a very poor score and consequently, the number of visitor arrivals is also very low.

Guidelines for future development

To develop this market in Portugal, participants point out several different paths. Interviewees suggested that tourism businesses should have special training to be able to understand what halal is and comply with it. Furthermore, interviewees also proposed increased participation in tourism fairs at an international level, and creating events related to culture, in regions whose past was influenced by Muslims.

Going beyond just the tourism industry, the results indicate that the image of Portuguese ambassadors, who are known in Muslim-majority markets. These should be used as a mean to promote Portugal in these countries:

Why not promote Portuguese tourism with someone showing what's good about us? (P6).

Many participants mentioned the effect that the Portuguese football player Cristiano Ronaldo had in the United States, namely in Times Square

We used the Ronaldo brand twice in the US to promote ourselves. We have to use our assets and our ambassadors around the world (P20).

As broadly discussed in the previous chapter, Portuguese tourism agents have little or scarce knowledge about the halal tourism market. Consequently, the results indicate that these economic agents should receive

specific training in the area (P21).

In addition, there should be

Muslim-friendly awareness campaigns (P7).

At a more international level, there should be

regular visits to the region (halal markets) to visit agents and to give product updates (P5).

One respondent suggested:

'From what I know about our territory, the perception should be given to those who work here that there is a niche and potential, but that requires adaptation' (P1).

Participation in tourism exhibitions and fairs takes place on a worldwide basis, including in Muslim-majority countries such as the United Arab Emirates, and this is

pointed out by participants as an excellent way to promote Portugal and build connections with these countries. Moreover, all institutional participants mention this as an excellent way to promote Portugal as a destination:

What we did at the time, with our efforts, we went to participate in some international tourism fairs, namely in Spain, in Dubai, and we tried to sell Portugal as a destination (P15).

Participants suggest that this effort should take place, especially in the Middle East.

Taking into account the predominant type of service in our region, where we have a market positioning that is high-end, we should work for A or A+ class clients and these are more abundant in the Middle East than in the MAGREB or sub-Saharan Africa. Our efforts have been focused on the Middle East because the idea was to attract tourists, who will bring a larger growth in income (P9).

As for the marketing and promotion of Portugal as a destination, the results show that participants indicate two main paths - promoting cultural similarities between the country and Muslim nations and, due to the lack of awareness of other markets, promoting Portugal as a destination, after which each individual region should market itself:

I will give you the example of the Israeli market, which developed a lot because there are more frequent air connections, and there is a clear cultural identification of Jewish heritage in Portugal; culture will clearly be the biggest attraction (P21).

Giving peace of mind to Muslim tourists that the products they are consuming to are halal compliant is vital. Certification of goods and services is pointed out by participants as a potential action to be taken by a business which seeks to have a significant competitive advantage over other companies:

We are still in the early stages of the certification process of accommodation and catering. We also now have a project here in a tea house also in the sense of taking advantage of the potential of this market (P9).

Despite not being an Islamic destination in essence, the interpretation of the results suggests that the absence of knowledge, data, and awareness about halal tourism

is a huge challenge for the development of this market in Portugal at all levels, and a fundamental aspect that should be worked on. These results are in accordance with Shafaei (2017) who found that the relationship between the involvement of Muslims and awareness in destinations is the strongest predictor for the involvement of travelers in the Muslim destination of Indonesia.

The awareness and knowledge of Islamic/sharia laws by destinations and businesses is of fundamental importance and crucial, not only in the process of implementing halal tourism but also for travellers who wish to see their religion-based needs fulfilled as mentioned by Battour *et al.*, (2010).

Adding to this idea, in the case of Portugal, local communities and other tourists largely have positive attitudes towards Muslim travellers. This can have a big influence on customer attraction and retention, an idea which is further supported by Han *et al.* (2019). The absence of halal products, services, and facilities for Muslim customers in Portugal is justified by participants due to the fact that there are not considerable levels of demand for these services - thus it is difficult to justify the existence of them at an economic level; therefore, travelers then look to countries such as Turkey or the United Arab Emirates where these services are more available. These findings extend to halal food that, despite being available in the capital city of Lisbon at a reasonably satisfactory level, is still not broadly available throughout the country. The unavailability of halal food is perhaps the biggest challenge Portugal faces as suggested by participants, with this evidence being further supported by Han *et al.* (2019) who indicate that the absence of halal food is a serious obstacle that Muslim tourists face in South Korea, another non-Muslim destination.

The participation and representation of Portugal in international tourism fairs and events is suggested by participants as an excellent vehicle to promote the country. Islam-related events should also be promoted within Portugal to attract foreign Muslim tourists to each region, as already happens in Mértola. These findings are in accordance with Mohsin *et al.* (2016), who point out that the Halal Expo organised in Japan in 2014 was an important step that helped the country understand the requirements and needs of Muslim tourists.

Netnographic Evaluation

Undertaking netnographic analysis with Asian countries, both Malaysia, the first-placed destination in the GMTI, and Indonesia in second place as the largest Muslim country in the world, both present good levels of services. Moreover, both countries have some of the highest scores in the 'Hotel' evaluation criteria of the *GMTI 2022* edition, with 61 points for Indonesia and 73 for Malaysia out of a possible score of 100.

Considering Turkey and Saudi Arabia, destinations that share second place overall with Indonesia in the *GMTI 2022*, two major trends can be noticed. Both nations have halal food available in all the analysed hotels and moreover, almost all properties have additional halal food services nearby. The same trend applies to alcohol; in fact, the selling of alcohol related products is forbidden in Saudi Arabia. Both Turkey and Saudi Arabia are well positioned in the *GMTI 2022* edition, with Turkey scoring 59 points and Saudi Arabia 64 out of a possible 100 in the 'Hotel' evaluation criteria.

Comparing Portugal and its neighbor, Spain, despite their very strong cultural similarities, having some of the biggest Islamic heritage in Europe, and sharing a land border, the two nations are in very different stages of development of the halal tourism market. Starting with hotels in Spain, the country generally has halal food available on the premises, and it can also be requested; plus, in all hotels on the list, there were halal food services available nearby. As for the selling of alcoholic beverages, these can be removed from guests' rooms on request. Moreover, the majority of hotels have fully segregated facilities for Muslims that can also be hired privately.

In Portugal, only seven hotels in the entire country were found which matched the Spanish criteria. Moreover, these have few or no reviews and are mostly located in the capital city of Lisbon, or in nearby towns. In addition, the country has the lowest score of all destinations previously discussed, irrespective of the continent they are located in. From all Portuguese hotels analysed, none of them had halal food on the premises, nor even by request, with businesses only mentioning that it is available in nearby restaurants / cafes / groceries. Following the trend

further, alcohol can be removed from the guests' rooms if previously requested.

Where Portugal really falls short, is the availability of prayer rooms that simply do not exist in any of the hotels analysed, and there is a clear absence of appropriate entertainment for Muslim guests, nor are there separate facilities for men and women. Adding to this idea, there are not even segregated rooms available for private hire for both men and women. As can be seen, the country has a really poor performance, and in the netnographich analysis, it is the worst destination of all those analysed, with not only the worst overall score on the *GMTI 2022*, but also the one with the lowest score on the 'Hotel' evaluation criteria, scoring only 29 points out of a possible 100. While this is two points above the European average, it is not sufficient to position Portugal for the promotion of halal tourism.

Shifting to the region of North Africa, both Morocco and Egypt, the two largest halal markets in the region, are generally well positioned with halal-friendly hotels. All hotels in both countries have fully halal food available and this can be requested. The same extends to alcohol, with it being removed from guests' room on request. Moreover, where this region really excels and differentiates itself from others is in terms of entertainment, not only for its variety and quantity, but also the fact that it is broadly available in almost all hotels and for all types of family members. In addition, the same applies to facilities - between the two countries, Morocco has the best score in the *GMTI 2022*, despite both destinations sharing 12th place, while Morocco is far ahead of Egypt in terms of the 'Hotel' evaluation criteria, scoring 53 points against only 39 for Egypt out of a possible 100.

As far as Europe and North America are concerned, despite some european countries having significant Islamic influence due to periods of occupancy throughout their history, and possessing Islamic cultural and world heritage sites, the halal performance of nations both in Europe and North America is poor. In terms of hotel facilities, they are the worst positioned regions as a whole.

In countries such as France and Germany, which possess large communities of Muslim residents within their borders, their performance is reasonable in most aspects

that make a hotel sharia-compliant. However, in relation to food, in neither nation did any of the analysed hotels have a halal restaurant; moreover, the majority of hotels do not seem to have it even if a request is made by guests, with halal food only being available in nearby restaurants. Alcohol can be removed from guests' rooms if it is requested or if the accommodation is booked via the HalalBooking website. As regards recreation facilities, in neither country did any of the hotels have separate facilities for men and women, only featuring segregated spas and swimming pools. Both Germany and France, despite having poor infrastructure, still are above the European average score of only 27 points in the 'Hotel' evaluation criteria of the *GMTI 2022* with a score of 35 and 37 points, respectively.

Moving on to the United Kingdom and the United States, two of the largest economies worldwide and biggest tourism markets, the former was ranked as the top European destination for Muslim travelers and occupies the third place worldwide in non-OIC destinations in the *GMTI 2022*. The country has good availability of halal food in all the hotels analysed; in fact, in most of them, this product is always available, or it is available if requested in advance. Furthermore, all properties had halal food services nearby. Regarding alcohol, it can be removed from guests' rooms, but it might be sold in other parts of the hotel, as per all other countries analysed. Once again, following the trend, most hotels have swimming pools or spas, which can be fully segregated with modest swimwear being broadly allowed. Despite cultural similarities, the same results are not replicated in the United States of America, with the country generally having very poor performance across all categories. The unavailability of halal food is quite universal in hotels and thus it is only served nearby. On the subject of alcohol, it can be removed from guests' rooms by previous request. Moreover, the fact that the majority of hotels do not have separate or segregated facilities for men and women clearly shows the poor performance of the country regarding available facilities for the Muslim market. As for the position on the *GMTI 2022*, the United States scored 30 points, and the United Kingdom scored 46 points (19 points above the European average of 27) out of a possible 100 on the 'Hotel' evaluation criteria.

Conclusions and Implications

The current halal tourism literature in Portugal is scarce and should be an object of study for future research, as the country has the necessary capability to develop a sustainable and competitive halal tourism market. The level of knowledge of stakeholders and tourism agents about the halal tourism market and the faith-based needs of Muslims is poor; moreover, institutions have no data or information about this market in Portugal. In the interviews, participants highlighted a range of issues:

- the lack of knowledge and information;
- the absence of a clear strategy from businesses and institutions;
- the absence of halal food and facilities;
- the lack of air connections between Portugal and halal outbound markets, and;
- problems with complying with halal certification norms and criteria

These issues constitute major problems in developing this market in the country. To conclude, further development guidelines were put forward by the respondents who suggest: utilising the image of Portuguese ambassadors, such as Cristiano Ronaldo, in Muslim-majority countries such as Saudi Arabia; improving tourism agents' level of knowledge and perceptions through training, and; participation in tourism fairs and events at both national and international level. A final suggestion is promoting Portugal in Muslim markets by using its Islamic heritage ideas for developing the attraction and better understanding of this market in Portugal.

Theoretical and Managerial Implications

The current paper contributes significant new knowledge to the halal tourism literature and brand-new insights on how this industry can be developed in a non-Muslim destination such as Portugal. New insights are added to the existing literature, mainly because it is one of the first papers, to the authors' knowledge, that studies the halal tourism market in a non-Muslim destination, from the business and institutional point of view to understand the current state of this market in Portugal. Adding to this idea, the paper also provides new, unique perspectives on how to develop the halal tourism market in a non-

Muslim country. Furthermore, the paper's conclusions can be applied to other non-Muslim destinations, mainly in Europe, where some countries have significant links to Muslim culture, history, and heritage, such as, for example, Spain or France.

Managers from many different tourism organisations and businesses, regardless of their size or areas of activity can greatly benefit from the findings of this research both for sustainable business development and in creating new strategies to attract this new and emerging market as well as differentiating between businesses. Enterprises and tourism institutions can use the findings from this research to develop market strategies to gain a competitive advantage in a very crowded tourism industry. For example, policymakers should provide training to businesses for them to be aware of the needs and requirements of Muslim tourists.

Furthermore, the need for ease of access to Muslim-friendly certification is also encouraged in this research, as it provides Muslim travellers with the confidence and peace of mind that the products and services with which they interact are halal. Moreover, the creation of air connections between Portugal and Muslim-majority countries is also highlighted, as it is a major issue in developing the market. To conclude, marketing ideas for the promotion of Portugal are also given, mainly utilizing the image of Portuguese ambassadors in Muslim countries, such as Saudi Arabia, and to promote the halal attributes of Portugal in these countries.

Limitations and Further Research

The authors of this paper acknowledge that despite following the best practices for this kind of research, the study has limitations that can be overcome in future studies. First, the current study only takes into consideration the point of view and perspectives of businesses and official tourism institutions. As a result, it does not take individual business problems into consideration but rather the tourism sector as a whole (demand side of the market). Secondly, no Muslim tourists' opinions or insights were collected, as this study only took into consideration the business perspective regarding the halal tourism market. And thirdly, further education and awareness of tourism agents regarding this market can produce a new set of

challenges and different outcomes from those collected in this paper. To conclude, different keywords and the themes which used as foundations for research, could have produced a different outcome for this study.

In order to create conditions for the future development of the halal tourism sector in Portugal, the country should first start to create and provide better quality products, services, and facilities for its current Muslim population and in and greater quantities. Moreover, this can be further extended to businesses from all sectors, as one of the main reasons that Portugal does not have a significant Muslim offer is due to the lack of products and services crafted specifically for this market segment. To conclude, future research and strategies should explore take in consideration what Muslim travellers most value in Portugal, as destination attributes can vary from region to region.

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